Community Based Organization Resource Guide

BROOKLYN COMMUNITIES COLLABORATIVE

Table of Contents

About Brooklyn Communities Collaborative 3
About This Guide 3
Fundraising 4
  Overview 4
    Free Resources 4
    Government Funding 5
    Paid Resources 6
Data Tracking and Analytics 8
  Overview 8
  Data Collection Methods 8
  Data Tracking 8
  Suggestions For Managing Data In Five Key Areas: 8
  Free Resources and Technical Assistance Options 9
  Paid Resources and Technical Assistance Options 9
Human Resources 11
  Overview 11
  Additional Considerations 11
    Free Resources 11
    Paid Resources 12
General Support 13
  New York City Specific Support 13
    Free Resources 14
    Paid Resources 15
Contact Information 16
References 17

About Brooklyn Communities Collaborative

Brooklyn Communities Collaborative (BCC) envisions a Brooklyn where all communities are healthy, economically sound, culturally vibrant, and civically engaged. Our mission is to promote health equity in Brooklyn neighborhoods. Working across silos, BCC empowers communities and engages partners to develop and implement innovative strategies that address complex systemic challenges.

BCC's *Strengthening Communities* program mobilizes a strategic network of community partners dedicated to achieving health and wealth equity in Brooklyn. BCC convenes community leaders, organizations, and policymakers to identify and address some of the most pressing issues facing the borough, while fostering meaningful partnerships and working relationships.

Our *Strengthening Communities* program provides financial and technical support, acts as a bridge to a network of community-based care management providers, fosters meaningful partnerships to advance racial and health equity, and models participatory grantmaking to shift power and influence to communities.

About This Guide

BCC surveyed and interviewed partner community based organizations (CBO) to identify common areas of need. Based on CBO feedback and industry research, this guide highlights free and paid resources to support those areas, including fundraising, data tracking, human resources, and general support.

This resource can be used as a comprehensive syllabus for staff professional development or capacity building, or as individual resources to address high-priority needs and challenges as they arise.

Please note: *This Guide is meant to be a resource only. BCC does not endorse or vouch for the truthfulness, accuracy or reliability of any of the information or services provided by the organizations and resources listed in this Guide.*

Fundraising

Overview

- Nonprofit fundraising is the process of soliciting monetary and in-kind contributions to support a cause, nonprofit, or charitable organization. It is the process of asking for donations from individuals, businesses, foundations, and government agencies. Nonprofits rely on donations to fund projects, supplies, campaigns, and everyday expenses, such as payroll and utilities. (*What Is Nonprofit Fundraising?*, 2022)
- Grant Prospecting: Researching and identifying appropriate funding sources**:** Grant prospect research essentially consists of two major practices: researching various foundations' grant cycles and giving histories, and managing your organization's applications for each foundation. (The Basics of Grant and Prospect Research | Articles and How-Tos, 2014)
- Grant writing: Grant writing is the process of applying for funding provided by a private, corporate, or government grant maker. In general, grant proposals can ask for financial or in-kind support for a nonprofit organization. While a bulk of grant writing consists of crafting a compelling grant proposal, grant writing also requires researching possible grants, connecting with funders, maintaining grant calendars, managing active grant proposals, and reporting on how accepted grants were used. (Grants Plus, 2022)

Free Resources

- Nonprofit HelpDesk: The NonProfit HelpDesk helps staff, board members, and volunteers of small and emerging nonprofits to advance their organizations by solving problems and driving performance in different areas of management and operations.
    - Mailing list - Click here to sign up for their mailing list.
    - Free Nonprofit Workshops on everything from NYC Discretionary Funding to Executive Coaching to Grant Writing

- National Council of Nonprofits: Grant Research Tools: Provides a list of free and paid resources for grant research and a downloadable chart that compares them. CBOs can use the chart to determine which resources, if any, would work best for them. (National Council of Nonprofits, 2021)
    - Regional Associations of Grantmakers
    - GrantAdvisor, an anonymous review site of foundations
    - Candid: Funding Information Network locations

- Greater NY Analysts Corps: Greater NY's Analyst Corps matches nonprofit organizations with early career finance professionals to work together on thoughtfully-scoped, high-priority data analysis, financial modeling, and strategic communications projects that address key business questions. Sample pro bono support projects can be viewed here.

- Grants Plus: Non-Profit Grant writing support
    - Professional Grant Writing Tips
    - Guides and Access to archived webinars

- Guidance on the structure and content of grant applications:
    - Components of The Grantsmanship Center Model:
        - Summary (goes at the beginning but is written last)
        - Introduction to the Applicant Organization
        - Problem
        - Outcomes
        - Methods
        - Evaluation
        - Future Support
        - Budget

Government Funding

- NYC Discretionary and Capital Funding Process: explains the procedures and timeline for the City Council Discretionary Funding process, as well as the required documents for PASSPort, the NYC Procurement and Sourcing Solutions Portal.
    - PASSPort is the City of New York's end-to-end digital procurement platform, manages every stage of the procurement process from vendor sourcing – who we purchase goods and services from (that's you – the vendor) to releasing and responding to solicitations (referred to as "RFx" in the system), and contract award, development, registration, and management.
    - NYC Mayor's Office of Contract Services: landing page for all discretionary contract information. Sign up for the newsletter here for updates.

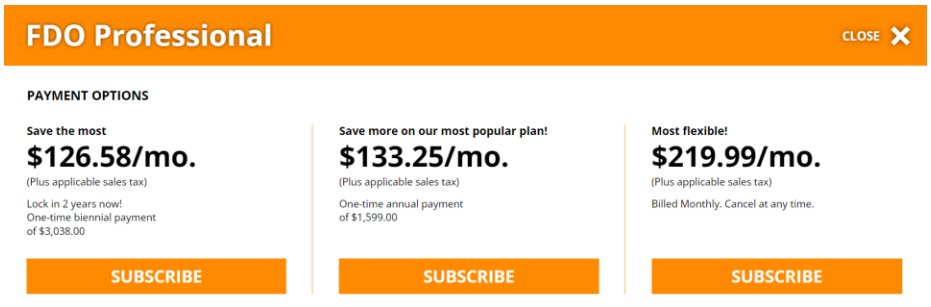
- New York Statewide Financial System manages the enterprise financial system that supports the business of New York State government and supports the work of:
        - New York State agencies
        - Control agencies, including the Division of the Budget and the Office of the State Comptroller
        - The State Legislature
        - Vendors doing business with New York State
        - The general public

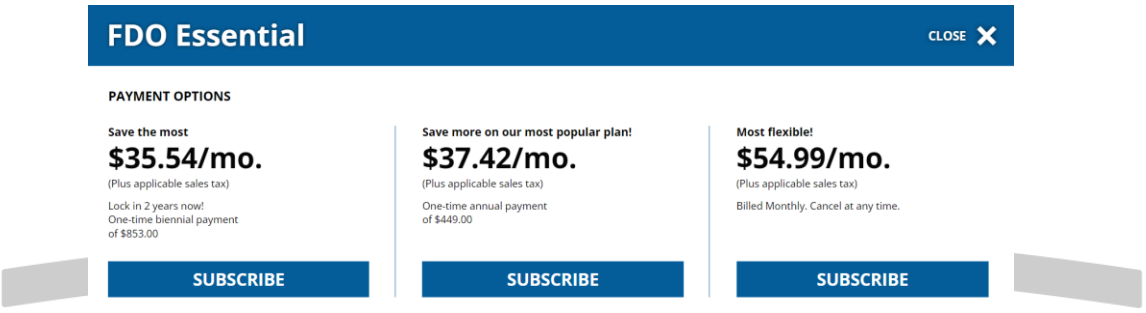
    - Grants Gateway Videos to help users navigate the NYSFS.
        - Grants Gateway Team Email: grantsgateway@its.ny.gov

- Grants.gov: federal funding workspace with resources and funding opportunities for government-funded projects. Various free resources and how-to webinars to help users navigate the system and locate funding opportunities.
    - How to Apply for a Federal Funding Opportunity on Grants.gov
    - How to Determine Eligibility for Federal Funding Opportunities
    - Tips for Proofreading Your Next Grant Application

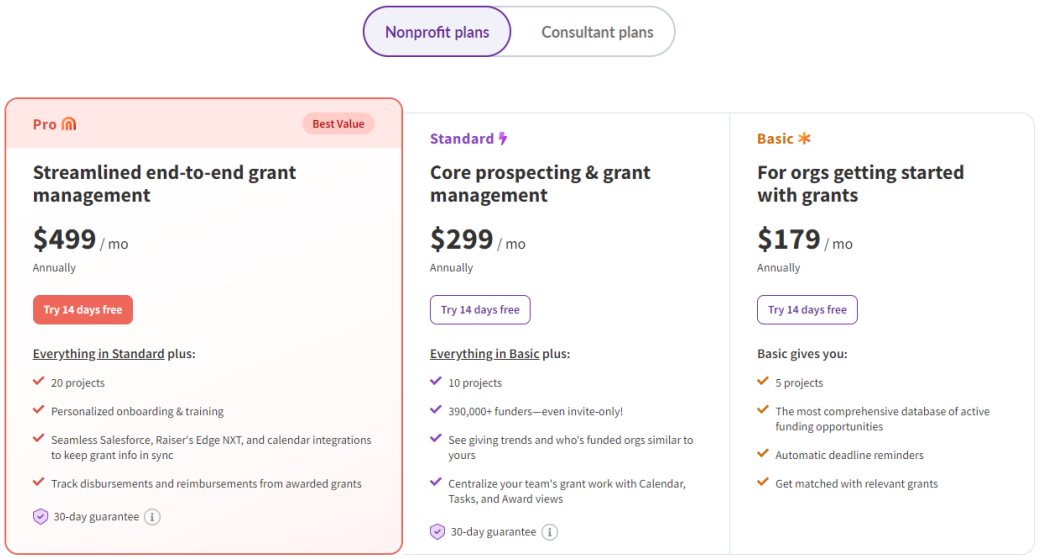
Paid Resources

- Grant Station offers nonprofit organizations, educational institutions, and government agencies the opportunity to identify potential funding sources for their programs or projects as well as resources to mentor these organizations through the grant-seeking process.
    - Video information on GrantStation services.
    - GrantStation Membership:
        - One Quarter: $219 (good for short-term funding needs)
        - One Year: $699
        - Two Years: $1,258 (save 10%)
        - Discounted membership through Tech Soup
- Grant Hub: 30% discount through TechSoup
- Candid Foundation Directory: Access to thousands of grantmaker profiles.





- Instrumentl: Grant prospecting and research tool with tracking and report features:
    - Discover funders and grants
    - Research and identify good fit funders
    - Track and manage grant opportunities
    - Measure and report grant outcomes
    - Free 14-day trial available
    - Pricing Options



- The Grantsmanship Center: training and publications that help organizations plan solid programs, write logical, compelling grant proposals, secure and manage grants, and create earned income opportunities.
    - Online and in-person training programs price points from $545- $1495

- The Basics of Grant and Prospect Research: offers software and technical recommendations to support grant prospecting and writing (Techsoup, 2014)

Data Tracking and Analytics

Overview

Nonprofits use data to help them design and implement projects, share information with donors and volunteers, and raise funds. Data allows nonprofits to track progress over time and see which programs are working — or not.

- **Qualitative data** is descriptive data that cannot be assigned a numerical value. Donor names, whether or not someone attended an event, and anecdotal survey responses are all examples of qualitative data. Examples of qualitative data in action include list emails that refer to your donors by their first name; an event for donors residing in a specific town; or ads recruiting volunteers who are interested in a specific part of your mission.
- **Quantitative data** is assigned numerical values. Revenues, conversion rates, website visits, and the number of donors you acquire in a certain time frame are all quantifiable data points. Qualitative and quantitative data work together to form a comprehensive picture of your donors, volunteers, and supporters. (Big Sea, 2023)

Data Collection Methods

- Google Forms and Surveys are some of the easiest methods of data collection. The form responses can be downloaded as PDFs or automatically captured in a spreadsheet.
- Website forms can also be used to collect data via a website design program like Wix or Squarespace but may need to be integrated with other applications like Salesforce or Mailchimp to store the data. Wix for nonprofits is offered at a discount through Tech Soup.
- Screening: Data screening is a method used to analyze and filter data based on specific criteria or conditions. It involves the process of retrieving and sorting data, selecting relevant files, and removing unnecessary data based on relevancy. The goal of data screening is to improve efficiency and accuracy in data analysis and decision-making processes. (SciSpace, 2023)

Data Tracking

- Outputs are the data points that represent the concrete results of your organization's work, i.e. items distributed or families impacted.
- Outcomes represent the changes brought about by the outputs your organization produced, i.e. percentage of clients who report improvement in health indicators.
- Impact demonstrates how your organization is making systemic, lasting change through its outputs and outcomes, measurable borough-wide changes in health conditions. (Bonterra, 2021)
- Helpful example for 1115 Medicaid Waiver

Suggestions For Managing Data In Five Key Areas:

- Collecting Data
    - Have organizational leaders signal to staff that performance is a top priority.
    - Seek input on which measures to track from a range of stakeholders, including program participants.
    - Obtain periodic feedback from participants about how well the service is delivered.

- Analyzing Data
  - Identify one staff member to lead data tracking and analysis.
  - Compare program outcomes broken out by demographic characteristics, including race and ethnicity, to learn how different groups of participants are experiencing the program.
  - Compare performance results over time to spot trends.
  - Invite program participants to suggest service improvements.
- Using Performance Findings
  - Use performance data internally to learn and improve.
  - Don't turn performance presentations into a "gotcha" exercise, which may lead staff to fudge data to avoid penalties.
  - Recognize team members — through awards or monetary rewards — responsible for strong performance results.
- Presentation
  - Clearly define performance indicators to avoid any confusion about what is being measured.
  - Don't hide bad news; instead, identify plans to correct the problem.
  - Include stories that explain the meaning and value of the data being shared.
- Dissemination
  - Develop regular scorecards on program performance and share with staff and public officials.
  - Ensure program managers have ready access to up-to-date performance data. (The Annie E. Casey Foundation, 2022)

Free Resources and Technical Assistance Options

- Free Budget templates from Smartsheet with a free 30-day trial.
- Free budget templates from Charity Charge
- Global Giving: Requires email sign-up
- Recording Constituent Demographics (Age, Race, Ethnicity, Gender, Income, Zip code, Educational level completed, etc). Sample Jotform template here.
- Microsoft Inventory Templates
- Free Google Sheets Inventory Templates: Requires email sign-up for download
- Performance and Growth Metrics
- How to Video for creating Google forms
- Free Google Sheets templates
- Accountable Health Communities Model screening tool for Medicaid waiver (Centers for Medicare & Medicaid Services, n.d.)
- Free Microsoft Excel (with subscription) training. Discounted subscription through Tech Soup.
- Free Excel Courses
- Free Udemy Excel Courses
- DonorBox offers a free and paid option. See pricing tiers.

Paid Resources and Technical Assistance Options

- Udemy offers personal or business training plans, both of which include free demos.
- Tech Soup reduced cost training. View the full course catalog here.
- Little Green Light is an affordable database option with tiers of pricing. Discounted subscription available through Tech Soup
  - Import & Export Data

    - Manage Constituents, Lists & Contacts
    - Track all communications (mailings, emails, meetings) and manage a calendar of tasks
    - Built-In & Custom Reporting
    - Donor/Fundraising Management
    - Acknowledgments/Receipts
    - Built-in integrations with common software programs (email, scheduling, etc.)
    - Generate Customized Mailings
    - Produce mail-merge letters, labels, and envelopes and track receipt
- Salesforce for nonprofits: offers reduced cost Salesforce account with cloud integration that users can leverage to connect various apps to Salesforce.
    - Pricing Guide
- DonorBox offers a free and paid option. See pricing tiers.
- Sortly NonProfit Inventory Management offers a free trial (requires email sign-up) and tiered pricing.
- Intuit (Quickbooks) via Techsoup: reduced pricing for nonprofits.
- Jotform has a free starter account option and several pricing tiers.
    - Jotform pricing tiers

Human Resources

Overview

HR for nonprofits includes recruiting talent, compensating them, creating strategies to retain them, and developing nonprofit employment policies that create a safe and productive workplace for them. Many nonprofits also require volunteers, whose administration also falls under the responsibility of the HR department.

Nonprofit HR managers and teams are also tasked with keeping your organization compliant with local, regional, and federal laws, as well as the internal policies that govern your day-to-day activities.
And because HR is usually the most knowledgeable department when it comes to the rules and regulations for your organization, it becomes the place employees and volunteers can go to get help with the concerns they may have about their role, team, or the organization overall. (Keela, 2021)

There are two prominent roles of a nonprofit human resource (HR) department. The first is to pay the organization's taxes and file necessary IRS paperwork. The second is to make sure payroll is paid on time, and all insurance coverage and benefits are in working order for the staff. Finally, HR is responsible for hiring, training, and evaluating staff and volunteers. (Donorbox, n.d.)

Nonprofit HR professionals will typically focus on:

- Recruiting and onboarding new hires
- Handling employee wages and employee retention strategies
- Creating and maintaining employment policies that foster a healthy work environment
- If applicable, the onboarding and management of volunteers (Obsidian HR, 2023)

Included with the above HR tasks, are accounting and finance duties, such as managing records, reporting financial information, and complying with regulations (NetSuite, 2023). Specific tasks or requirements include accounting, audits and reviews, taxes, nonprofit compliance, and insurance.

Additional Considerations

- A Memorandum of Understanding (MOU) is an agreement between two parties and may be required when establishing clear working agreements with program administration or between agencies. See these helpful MOU Guidelines for NPOs.
- Data Sharing and Cybersecurity:
    - Cybersecurity Strategies for Nonprofit Websites
    - Top Ten Cybersecurity Tips for Nonprofits: Managing your technical and legal risks

Free Resources

- Through NYCON staff and its partners, nonprofits now have access to timely communication to answer basic questions and tackle routine personnel issues, to more detailed solutions to trickier situations, personnel policy development, and more. Candace at NYCON can help you decide; contact her at 518-434-9194, ext. 130, or cshumpis@nycon.org. (NYCON (New York Council of Nonprofits), n.d.)

- Employee Handbooks
    - Nonprofit handbook template
    - Sample handbook from NYC.gov
    - Guidance on what to exclude or avoid in handbooks.
- Sample Memorandum of Understanding (City Agency)
- Best Practices
- Employee Evaluation guidelines from HR experts
    - Sample Evaluation forms:
        - CEO Evaluation Form
        - Team Member Performance Review Template
- Required Sexual Harassment Prevention Training (NYC) in multiple languages
- New York Compliance Training: Employment Law Essentials
- Administration and Financial Management
    - 990 Requirements
    - An Annual Financial Review can range from $1500-$5000

Paid Resources

- Lawyers Alliance Recorded Webinars for Nonprofits
- Lawyers Alliance Live Events
- United Way Shared Services HR resources and Service Menu ($2000)
- Academy to Innovate HR: Offers HR courses.
    - HR Manager Certificate Program

General Support

These resources can be used to support the priority areas addressed above as well as many other typical areas CBOs will encounter in their work. For a comprehensive list of all resources, please see the references section at the end of this document.

Tech Soup supports nonprofits, charities, and libraries by providing access to donations and discounts on software, hardware, and services from major brands.

- Free Digital Assessment Tool identifies CBO's needs and the best tools and software to help achieve its goals.
- Courses for Nonprofits at discounted rates.

New York City Specific Support

- NYC Nonprofits Home Page offers information for nonprofits looking to do business with the City, as well as important resources for our contracted providers:
    - NYC Funding Opportunities: Learn more about available funding opportunities and how to apply, including City Council Discretionary Funding information and resources.
    - NYC Funded Providers: Access citywide policies and procedures, including the City's Cost Manual and the Indirect Cost Rate Funding Initiative.
    - Resources: Access training opportunities, educational materials, recruiting tools, and cost savings that support nonprofit businesses. You can also learn the basics of New York City contracting.
- NYC Nonprofit Management Assistance from NYC.gov
- Unite NYC is a coordinated care network of health and social service organizations. Partners in the network are connected through Unite Us' shared technology platform, which enables them to send and receive electronic referrals, address people's social needs, and improve health across communities.
- Networking events with Nonprofit NY.
- News and Events: Brooklyn.Org
- Non-Profit Assistance from NYC for common topics:
    - Credit and cash flow issues
    - Capital projects
    - Existing City contracts
    - Fundraising
    - Legal concerns
    - Board development
    - Financial management and more
- New York State Charities Bureau
    - FAQs
    - Resources
- CC23 Consulting
    - Research and identify the free or paid resources that would best support the specific CBO's needs and facilitate the process of implementation
    - Provide templates for documents (handbooks, manuals, hire letters, training resources, evaluations, performance improvement plans, etc.) and review existing templates and procedures to provide feedback and revisions where needed.
    - Answer on-demand questions via email or virtual meetings.

- Nonprofit Resource Hub
    - Ask the Expert: Submit questions on demand (subscription required)

- The 5 Steps You Need for Strong Nonprofit Communication (Getting Attention, 2023)
- Twelve Goals for Nonprofit Communications Teams (Nonprofit Marketing Guide, 2017)
- National CLAS Standards National Standards for Culturally and Linguistically Appropriate Services (CLAS) in Health and Health Care (U.S. Department of Health & Human Services, n.d.)

Free Resources

- Important IRS Guidance for Nonprofits
- Lawyers Alliance: topic-based pro bono support with a one-time membership fee
    - Online: Get legal assistance for a non-profit organization.
    - By Phone: Call 311 or 212-NEW-YORK (212-639-9675) for help.
- Tech Soup Articles and How-tos for common issues and questions
- National Council of Nonprofits
    - Administration and Financial Management: Resources on budgeting, business planning, compliance, filing state and federal forms, finance, strategic planning, tax issues, and much more.
    - Read about Diversity, Equity, and Inclusion: Articles and resources on DE&I issues related to accessibility, boards of directors, communications, culture, employment and hiring, and more.
    - Read about Employment & HR: Articles and resources on employee compensation, classifying workers correctly, managing employees, remote work, volunteers, and more.
    - Read about Ethics & Accountability: Articles and resources on conflicts of interest, governance policies, ethical fundraising, ethical leadership, and more.
    - Read about Fundraising and Resource Development: Articles and resources on fundraising, corporate sponsorship, compliance with charitable solicitation registration laws, and more.
    - Read about Governance & Leadership: Articles and resources on board recruitment and engagement, governance policies, organizational self-assessments, and more.
    - Read about How to Start a Nonprofit: Five-step guide including questions to ask before starting a nonprofit, federal and state filings, policies and procedures that you may want your new nonprofit to have in place, and ongoing compliance.
    - Read about Marketing and Communications: Articles and resources on branding, communications, digital accessibility, social media, and more.

Paid Resources

- New York State Council of Nonprofits
  - Join or Renew membership

2024 Membership Dues
based on annual operating budget

Under $25,000	$60.00
$25,000+ to $50,000	$80.00
$50,000+ to $500,000	$130.00
$500,000+ to $1 Million	$160.00
$1 Million+ to $2 Million	$225.00
$2 Million+ to $3 Million	$325.00
$3 Million+ to $5 Million	$425.00
$5 Million+ to $7 Million	$550.00
$7 Million+ to $10 Million	$600.00
$10 Million+	$700.00

- NYCON Events
- NonProfit NYC
- Knowledge Center information database. Ex: apply filters "Human Resources" and "Webinars" to see a list of available resources
- Nonprofit New York Strategic Health Benefits Planning Forum
- Referral Center for free and reduced-cost training and support
- Gusto: Helps growing businesses onboard, pay, insure, and support with payroll, benefits, and more.
- Mineral HR:
- Provides support with compliance and employee training
- Weekly newsletter that addresses common questions and topics
- Free access via NYCON if you use their services for insurance
- Change Impact Consulting: Manage Human Resources as an outsourced partner (payroll, benefits, employee support, and office management). They also have a professional development component.
- Capacity Foundation: Capacity Foundation is a project of the NYC Capacity Building Collaborative and a database of consultants and capacity building providers that have worked with the Collaborative's 350+ grantees and/or foundation members.
- Database of consultants and providers with experience supporting grassroots organizing in NYC
- Select "Human Resources" to see a list of verified consultants

Contact Information

Thank you for taking the time to access our CBO Resource Manual. For more information contact:

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