

TCC Group

ORGANIZATIONAL INFORMATION

TCC Group is a twenty-nine year old management consulting firm with deep expertise in the field of designing, providing, and evaluating capacity-building services to nonprofit organizations. Their mission is to develop strategies and programs that enhance the efficiency and effectiveness of nonprofit organizations, philanthropies, and corporate citizenship programs to achieve social impact. Founded in 1980, the firm has a staff of forty-five and offices in San Francisco, Philadelphia, New York, and Chicago. Their expertise covers a vast spectrum of areas including advocacy, international development, human services, youth development, arts and culture, education, and economic development.

SERVICES

TCC provides consulting services and customized workshops on:

- * Strategic & Business Planning
- * Program Evaluation
- * Governance Assessment & Restructuring
- * Capacity Building services.

TCC has developed, managed and evaluated numerous capacity-building initiatives for philanthropic clients, including the **Ford Foundation's** Sustainable Media Organizations; the Challenge Fund for Journalism, a joint initiative of the **Ford Foundation, McCormick Foundation, and Ethics and Excellence in Journalism Foundation**; the **James Irvine Foundation's** Arts Regional Initiative and its Strengthening Organizations to Mobilize Californians Initiative; the **Pfizer Foundation's** Southern HIV/AIDS Prevention Initiative; the **Oregon Arts Commission's** capacity-building initiative to improve financial sustainability and cultural participation; and the **Hartford Foundation's** initiative to build the capacity of a cohort of multi-service agencies. TCC has also worked closely with the capacity-building sector. They have developed business plans for **CompassPoint's** Fundraising Academy for Communities of Color, for **BoardSource**, and for the **National Community Development Institute**. TCC also designed evaluation frameworks for both **NPower** and **TechSoup** to assess their programs to provide technology capacity-building. TCC was retained by the **Foundation Center** for help in developing its recent strategic plan. They are also working with the **M.J. Murdock Charitable Trust** in Vancouver, Washington, to evaluate its "Building the Capacity of Nonprofit Support Organizations" Initiative, and with the **Alliance for Nonprofit Management** on its National MSO Capacity Building Study.

TCC has developed the Core Capacity Assessment Tool (CCAT), an anonymous, confidential, on-line self-assessment of an organization's adaptive, leadership, management, and technical capacity as well as organizational culture.

TCC has been active in collecting information to understand the practices nonprofits employ to reach financial sustainability and sharing tools and knowledge to provide a framework for decision-making in today's economy. TCC's report, The Sustainability Formula, offers specific recommendations to help nonprofits in these difficult times. In addition, their Leading In Difficult Times series addresses how nonprofits, funder and corporations can balance their long-term visions for change and meet the near-term needs that are emerging.

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Nonprofit Finance Fund (NFF)

ORGANIZATIONAL INFORMATION

NFF seeks to improve the giving, getting and using of money in the social sector, creating a strong, well-capitalized and durable nonprofit sector that connects money to mission effectively. NFF has nearly 30 years of experience as a 501(c)(3) Community Development Financial Institution (CDFI).

NFF is one of the leading consulting institutions creating and providing information, tools and resources to help nonprofits and funders react and adjust to the challenges and opportunities created by the economic crisis. NFF's "Tools for Tough Times" include webinars and workshops on recession planning, linking money to mission and financial leadership, financial situation analysis and workplan, financial reporting assistance, cash flow planning, scenario planning, program profitability modeling, reports, presentation and communications coaching. NFF has offices in New York, Newark, Philadelphia, Boston, Detroit, Washington DC, and San Francisco.

SERVICES

NFF's services to **nonprofits** include financing, consulting and advice. They offer:

- Loans: NFF provides nonprofits and social enterprises with a variety of financing options, including facility loans, lines of credit and bridge loans.
- New Markets Tax Credit Loans: NFF was awarded tax credits from the US Treasury Department that they use to attract private investment for facilities in low-income communities.
- Building for the Future: this is a matching program to fund building-related costs. It attracts and uses foundation and government contributions as a financial incentive for nonprofits to create and maintain building reserves.
- Nonprofit Business Analysis: NFF provides an individual assessment of an organization's financial condition, opportunities and challenges, over a five year period.
- Workshops: focused on helping nonprofits understand connections between program priorities, organizational capacity and capital needs.
- Financial Leadership Clinic: NFF offers two-day, interactive sessions on financial literacy to groups of nonprofits from a common sector. Sessions include focused discussions and coaching.
- Systems Replacement Plan: through this plan NFF provides nonprofits with a 20-year plan to take care of their organization's facility. The plan forecasts long-term facility-related repair and replacement costs and helps organizations plan for corresponding capital needs.

To **funders**, NFF offers program-related investment advice, consulting, education and research. NFF also functions as an intermediary between nonprofits and funders, providing growth capital services, advocacy and thought leadership.

Some of their **clients and partners** include the Doris Duke Charitable Foundation, Andrew W. Mellon Foundation, Carnegie Corporation, Four Freedoms Fund, United Neighborhood Houses of New York, Ford Foundation, Kellogg Foundation, Fieldstone Alliance, New Jersey State Council on the Arts (NJSCA), Geraldine R. Dodge Foundation, Workforce Development Funders Group, Brooklyn Workforce Innovations, Mercy Center, Ballet Hispanico, Harlem School of the Arts, Lenox Hill Neighborhood House, Greater Philadelphia Coalition Against Hunger.

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Fiscal Management Associates (FMA)

ORGANIZATIONAL INFORMATION

FMA is a consulting practice helping not-for-profit organizations create and maintain effective fiscal systems. Its mission is to empower nonprofits with the knowledge and skills to successfully serve their constituents and fulfill their missions. FMA offers a range of customized fiscal management, accounting, organizational and technology consulting. In 2007 FMA led the creation of the FMA Institute that supports the professional development of leaders in the nonprofit sector.

SERVICES

FMA's offers services in the following areas:

- Accounting, Bookkeeping & Audit Preparation: FMA's financial outsourcing team services assist organizations with carrying out daily accounting tasks and provide support in the strategic financial policies of a not-for-profit.
- Budgeting, Cost Analysis & Grants Management: FMA's fiscal consulting services help nonprofits develop the tools to: Calculate costs-per-unit of services an organization delivers; Allocate costs among programs and operations; Develop effective budgets and cash flow management tools; Refine chart of accounts to most appropriately track revenues and expenses; and Design financial reports for use by management and funders.
- Defining Fiscal Staff Roles & Responsibilities: Fiscal Infrastructure Review, Financial Advisory Services, Human Resources Consulting.
- Fiscal Policies & Procedures, Internal Controls: FMA can assist an organization wishing to create a Fiscal Policies and Procedures Manual that documents key fiscal processes, outlines staff roles and responsibilities and internal control mechanisms. FMA then assists in implementing the manual, including staff orientation and training and evaluates the implementation of the manual in follow-up meetings and consultations.
- Fiscal Training & Coaching for Staff & Boards: FMA can custom-design workshops as a single event or as a component of an organization's ongoing training program. They often join organizations' management or board retreats, or provide training for grantees or program officers of foundations. Workshop topics include:
 - Scenario Planning and Decision-Making in the Current Economic Climate
 - Fiscal Management Duties of a Not-for-Profit Board of Directors
 - Preparing for the New IRS Form 990: Not-for-Profit Accountability and Transparency

- Building Blocks to an Effective Budget Process
 - Integrating Program Staff into an Organization's Fiscal Management Efforts
 - Making Life Easier by Using Your Accounting Software to its Fullest Capacity
 - Implementing Effective Fiscal Policies & Procedures
- Accounting Software: FMA helps nonprofits with the design of appropriate financial reporting systems. They offer training on the FUND E-Z accounting and financial reporting system and have three consultants who are certified QuickBooks® Pro Advisors, experts in configuring QuickBooks® to work for basic nonprofit accounting and reporting needs.

FMA can also function as an organization's "virtual" Chief Financial Officer, ensuring that financial information is produced properly and is analyzed, interpreted, and used to make decisions. FMA's financial advisory & outsourced financial management services include:

- Facilitating contract compliance by serving as Grants Manager, including vouchering and reporting as needed
- Training internal fiscal staff on not-for-profit accounting methods and use of software systems
- Attending finance committee and board of director meetings to present the organization's financial results
- Augmenting internal fiscal staff during busy or transitional periods
- Assisting with audit preparation, including OMB A-133 audits, and reviewing the auditor's draft financial statements before issuance

FMA works with nonprofits directly or through funder-supported training and technical assistance programs. Funders with whom they work include New York City Center for Charter School Excellence, New York City Department for the Aging, New York Community Trust, PROCEED, Inc., Robin Hood Foundation, After-School Corporation, Tiger Foundation, Wallace Foundation, and the San Diego Grantmakers Foundation.

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Management Assistance Group (MAG)

ORGANIZATIONAL INFORMATION

MAG is a 25-year old consulting group working exclusively with social justice organizations (nonprofits and funders). MAG identifies key trends and issues affecting the social justice sector and uses them as a starting point for the development of in-depth research projects and products, publications, and services. They are committed to sharing what they learn with the social justice sector at large.

SERVICES

MAG's services are customized to fit a client's need and include:

- **Growth and Change** (organizational assessment, organizational restructuring, leadership transition/succession, diversity audits)
- **Strategic Planning** (thinking and planning strategically; defining long-range goals/measures of success; clarifying focus, priorities, theories of change; providing ongoing coaching and assistance to leaders as they implement new plans; developing strategies to maximize the value of diversity)
- **Strengthening Management** (Clarifying roles, responsibilities, and decision-making, Building cohesion, communication, and teamwork, Restructuring staff and management, Strengthening supervision, Increasing inclusiveness and cultural competence, Enhancing budgeting and financial management)
- **Coaching and Training Leaders** (Leadership coaching for executives and managers; Executive transition assistance, with unique expertise in situations where the founder stay on after stepping down as CEO and as the new successor leads the organization; Coaching for leaders in transition; Training new managers; Customized workshops on managing people)
- **Board Development** (developing viable governance structures; conducting governance assessments; building an active, value-added board; clarifying and strengthening the board-staff relationship)
- **Leadership Transitions** (coaching for outgoing leaders to prepare for the transition and for incoming leaders to step into their new roles and establish their leadership; planning for executive transitions and helping organizations reach clarity about their strategic direction, leadership needs, and a process for negotiating the transition; assisting boards as they prepare for and monitor the transition; helping staff to work effectively with new leadership; assisting organizations in determining if it makes sense for their founder or long term leader to stay on in some significant capacity after stepping down from the top post — and in the unusual situations where it does, help plan and implement this type of transition)
- **Fundraising** (conducting development audits, training staff and board to ask for money, creating plans to build diverse and sustainable funding)
- **Creating Successful Coalitions and Collaborations** (Developing and structuring collaborations, alliances, and coalitions; Clarifying multi-stakeholder decision-making; Designing and facilitating multi-stakeholder meetings)
- **Strengthening Affiliate Networks** (designing customized capacity building programs for networks, clarifying and strengthening National-Affiliate networks)
- **Work with Funders** (designing and facilitating high-stakes, multi-stakeholder convenings; delivering customized capacity-building programs for grantees; conducting studies and research)

Clients include American Civil Liberties Union, Leadership Conference on Civil Rights, Center for Reproductive Rights, National Council of La Raza, Economic Policy Institute, Innocence Project, Clean Water Action, Natural Resources Defense Council, Forum for Youth Investment, National Network of Abortion Funds, National Gay and Lesbian Task Force, Democracy Now!, US Human Rights Network, Wisconsin Council on Children and Families, New Mexico Voices for Children, Equality Maryland, Massachusetts Budget and Policy Center, Michigan ACORN, Taller Salud, Southern Regional Council, Alabama Arise, DC Employment Justice Center, Hope House, Young Women’s Project, Common Ground Community, DC Alliance of Youth Advocates, La Clinica del Pueblo, Heifer Project International, Global Rights, Amnesty International, Network in Solidarity with the People of Guatemala, Save Darfur, Atlantic Philanthropies, The Meyer Foundation, The Moriah Fund, Ford Foundation, and the Annie E. Casey Foundation.

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Community Resource Exchange (CRE)

ORGANIZATIONAL INFORMATION

Funded in 1979, CRE uses one-to-one consulting to improve the efficiency, productivity and effectiveness of community groups so that they can focus more effectively on the needs of their communities. One-to-one consultations strengthen organizational leadership, improve systems and structures, and create new revenue streams.

SERVICES

CRE's consultants assist community groups with:

- **Operational and strategic planning** (designing strategic plans, collecting and analyzing data that can inform decision making; clarifying vision, values, and guiding principles; identifying, engaging and uniting key stakeholders- staff, Board, clients, and community members- to contribute their ideas and to assure implementation; tying program and organizational goals to realistic financial plans)
- **Strategic restructuring** (aligning mission and vision with program strategies and community need; identifying organization and governing structures; exploring potential downsizing, merger, growth and acquisition scenarios; training and preparing individuals for new roles, functions and working relationships; ensuring the maintenance of effective operations while restructuring)
- **Board development** (prioritizing work and developing effective Board committees; recruiting new members to fill key Board roles; structure Board meetings; increasing expertise to plan, raise funds, and oversee finances; evaluating performance of staff; developing feedback systems to enhance oversight and quality of programs; establishing a productive working relationship with the Executive Director)
- **Fundraising** (understanding and navigating the world of nonprofit funding; building a case for support by defining comparative advantage and demonstrating results; meshing financial planning with fundraising goals; acquiring research skills and strategies to target and approach new sources; enlisting administrative and program staff in fundraising efforts; exploring new ideas for resource development, including revenue-generating ideas, pro bono assistance and strategic partnerships)
- **Leadership development** (personal leadership issues and styles; articulating and engaging others in a vision; optimizing key relationships; empowering individuals and teams; planning and facilitating results)
- **Human resources** (evaluating staffing needs and determine appropriate staffing levels; designing organizational staffing structures that optimally meet the organization's mission and financial picture; reviewing, designing and helping implement performance management processes and tools; designing and delivering supervisory, training and professional development activities; advising and providing referrals on compensation and benefits plans; consulting on and/or developing personnel policies and systems)

- **Financial management** (analyzing program and administrative costs and developing accurate budgets and cash flow projections, integrating the budgeting process into the organization's planning and fundraising efforts, creating strategies to bring income and expenses in line and strengthening financial systems and internal controls, determining financial staffing needs and creating job descriptions, establishing sound bookkeeping and accounting procedures, assuring all charitable reporting requirements are met and payroll requirements are fulfilled)

CRE's **clients** include, among others, Arts Connection, Children's Museum Of The Arts, Legal Services of New York (LSNY) Bronx, Alliance for Women's Equality, Amethyst Women's Project, Families United For Racial And Economic Equality (FUREE), Global Action Project, Sauti Yetu Center for African Women, Senior Action in a Gay Environment (SAGE), Community HIV/AIDS Mobilization for Power (CHAMP), Comunilife (formerly known as H.I.R.E., Inc), Council On Homeless Policies And Services, Families of September 11, Inc., Jamaica Services Program For Older Adults, Love Heals, the Alison Gertz Foundation for AIDS Research, Lutheran Family Support Center (Lutheran Medical Support Center), Neighbors Helping Neighbors, Northern Manhattan Coalition For Immigrant Rights, Red Hook Initiative, Sistas' Place, St. Mark's Place Institute For Mental Health, The Dakota Group, United Community Center, Women's HIV Collaborative of NY.

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Mosaica

ORGANIZATIONAL INFORMATION

Created in 1994, Mosaica is a nonprofit organization dedicated to:

- Helping nonprofit organizations become stronger and more effective through training, individual consultation, evaluation, and development of easy-to-use "how to" guides.
- Linking the nonprofit, public, and private sectors in ways that strengthen local communities and enrich American society.
- Helping individuals and groups develop the skills to bridge racial, ethnic, and economic differences and work effectively in multicultural societies.

Mosaica has provided organizational development assistance to over 100 local, regional, and national nonprofit organizations in the U.S. and a similar number internationally. Mosaica also assists grantmakers, including foundations and grantmaking collaboratives, that serve communities of color.

SERVICES

Mosaica's services include:

- needs assessments
- organizational assessments
- strategic planning assistance
- Board development
- resource development planning and fundraising assistance
- management audits

- personnel policies reviews and revisions
- restructuring support
- assistance in improving financial management and oversight
- assistance in program design and delivery
- help in strengthening volunteer activities and increasing community involvement and community building
- capacity development in community organizing and advocacy
- program evaluation
- coalition building support

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Compasspoint

ORGANIZATIONAL INFORMATION

CompassPoint Nonprofit Services is a consulting, research, and training organization providing nonprofits with management tools, strategies, and resources to lead change in their communities. With offices in San Francisco and Silicon Valley, Compasspoint works with community-based nonprofits in executive transition, planning, boards of directors, finance systems and business planning, fundraising, and technology.

SERVICES

- Workshops / Courses: on boards & governance, communications, finance, fundraising, strategy, leadership & management, technology, volunteer management.
- Organizational & Leadership Coaching
- Peer learning opportunities: executive leadership circles, nonprofit finance professionals network, nonprofit HR network, nonprofit manager peer exchange, women executive directors of color network
- Consulting: in the areas of Executive Transitions, Nonprofit Finance, Fund Development Strategic Planning, Governance, Organizational Development and Leadership
- Conferences: on issues of importance to the nonprofit sector, and promoting skills enhancement and community building for nonprofit professionals.
- Research and publications: articles, research, books and other knowledge resources on the nonprofit sector.

In 2004, Compasspoint partnered with the Grassroots Institute for Fundraising Training (GIFT) to launch the Fundraising Academy for Communities of Color. Sessions strengthen donor development skills and also address the organizational systems and leadership culture needed to sustain good fund development and mission based work.

Compasspoint's clients and partners include, among others, Anchorage Neighborhood Housing Services, Center for Nonprofit Management, Nashville, Fannie Mae Foundation, Hawai'i Community Foundation, Lambda Legal Defense and Education Fund, Third Sector New England, California Pan-Ethnic Health Network, California Partnership to End Domestic Violence, Caring for Children and Families with Aids, Community Technology Foundation of California, Great Valley Center, Los Angeles Children's Planning Council, San Luis Obispo County Drug & Alcohol Services, Black Coalition on AIDS, Craigslist Foundation, Habitat for Humanity-San Francisco, San Francisco Department of Public Health AIDS Office, W.K. Kellogg Foundation, David & Lucile Packard Foundation, James Irvine Foundation, Evelyn & Walter Haas, Jr. Fund, and The California Endowment.

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