

Sample Consulting Project

Nonprofit Organization

- InStep Consulting LLC provided an **organizational assessment and Board development training** for a community and economic development organization.
- The goal of the organizational assessment and training was to help staff and Board members define their respective roles and responsibilities and identify strategic fundraising goals and objectives.
- In the first phase of this engagement, InStep conducted interviews and surveys with Board and staff members to determine organizational issues and individual expectations for the Annual Board Retreat. A summary report was created and distributed to the cadre of facilitators also contracted to provide training at the Retreat.
- InStep staff convened a conference call with facilitators to review results from the initial assessment to ensure that all training would align with organizational goals and expectations.
- In the second phase, InStep staff customized and facilitated a 1.5-hour workshop (*Fundraising: The Board Members Role in Resource Development*) for Board and staff members at the Annual Retreat. A key component of the workshop was a series of action plans that prompted participants to reflect upon current and future funding strategies across multiple tiers (e.g., Individuals, Foundations, Corporations, Government).
- InStep also designed the evaluation form to gauge participant reactions to all presenters, training content and overall satisfaction with retreat.
- InStep Consulting conducted three- and six-month follow-up interviews with Board members to indicate the level to which the training enhanced their skills and knowledge of topics presented, and to measure the impact training had on Board member participation and staff relations.
- The engagement concluded with a final report outlining conclusions and recommendations for additional Board and staff training and organizational technical assistance.