



## Nonprofit Organizational Assessment 2.0 Certification Training Program

*The Nonprofit Management Fund is seeking experienced consultants interested in applying for enrollment in its accelerated consultant training program, Organization Assessment 2.0 (OA2).*

The Nonprofit Management Fund and Portland State University are partnering to create a skilled cadre of organizational assessors. Successful program completion earns a University certificate in nonprofit organizational assessment as part of the accelerated training.

*You won't just **learn** about assessment, you will **lead** an organizational assessment.*

### Program Background

#### Nonprofit Organizational Assessment 2.0 (OA2)

#### Who is sponsoring this initiative?

This initiative is sponsored by a Milwaukee-Portland collaboration of experienced funders, practitioners, and academics specializing in nonprofit management. The partners include The Nonprofit Management Fund, Management Cornerstones, Murn & Associates LLC, BDP & Associates, and Portland State University's Institute for Nonprofit Management; with support from the Marquette University Trinity Fellows and PSU Hatfield School of Government Center for Public Service.

#### What is our goal?

To advance the practice of organizational assessment for the purpose of empowering nonprofits to understand their organizational strengths and limitations. Through the assessment, the consultant identifies strategies to assist in the advancement of the nonprofit. Another goal is to offer the funding community a credible means of viewing the organization's capacity beyond program funding requests.

#### Is this program right for you?

This hands-on learning opportunity is built upon a framework rooted in 12+ years of experience in Milwaukee, with a university-community collaboration. Applying a variety of assessment lenses, including cultural norms, equity, appreciative inquiry and nonprofit lifecycles is a key component of this rigorous program. This training expands the tools and

skills of consultants who conduct organizational assessment with diverse nonprofit communities.

**This program is right for you if you:**

- seek to enhance your **analytic and** assessment skills;
- are interested in joining a learning community with peers;
- desire to add a new service to your consulting repertoire; and
- have at least 3-5 years of nonprofit consulting experience in the Greater Milwaukee area.

**By the end of the program, consultants will be able to:**

- Operate as a **consultant** with a generalist skill set for OA2 assessments in the following 10 areas:
  - Governance & Structure
  - Leadership & Organizational Culture
  - Organizational Planning & Strategy
  - Human Talent & Volunteer Program Management
  - Accountability & Transparency
  - Financial Health
  - Fiscal Management & Resource Development
  - Communications
  - Program & Services: Planning, Administration and Evaluation
  - Advocacy & Lobbying
- Interview key stakeholders, analyze key nonprofit organizational documents, conduct online surveys, apply schema charting, assemble information from multiple sources into an empowering report checklist.
- Independently lead, implement, and successfully conduct an assessment and present a report on the organizational assessment results.
- Celebrate a nonprofit's capacity strengths, gaps and challenges and provide appropriate recommendations that will advance results-oriented improvements.

**Program Details & Information**

**Timeline: January – April, 2022**

- Attend 12-15 training sessions (full and half days) in person and virtual
- Personalized one-on-one coaching
- Guides, materials, and additional resources provided
- Classes taught by experienced consultants and trainers with subject matter expertise
- Nonprofit Organizational Assessment certificate awarded from Portland State University
- Organizational assessment practicum implemented with local nonprofit organization

**Features of the training program include:**

- Hybrid training modules

- Paid enrollment for certification in Life Cycle Consulting
- Self-study training components
- Post training cohort learning community

### **Certification Program Selection Criteria:**

- Minimum of 3-5 years of nonprofit consulting experience, including work in the Greater Milwaukee area.
- Available to provide organizational assessment consulting services in the Greater Milwaukee area, upon completion of the training.
- Strong analytic skills with a proficiency towards attention to details.
- Exceptional verbal and written presentation skills.
- Commitment to learn more about and continue consulting with nonprofits.
- Experience working with diverse populations and organizations.

### **Certification Program Fee:**

The training certification program fee is \$3,000 (a \$10,000 value) per participant, which can be paid in installments. Trainees will be paid a \$1,500 stipend during the assessment practicum component of the training for implementation of an organizational assessment with a local nonprofit.

### **Application Process Details**

Interested consultants must submit a 1-2 page letter of interest detailing:

- why you are interested in the training;
- describing how you meet the selection criteria (located above);
- and a brief biography of your nonprofit consulting experience.

The deadline for submission is **October 29, 2021**. An invitation to interview will be sent to selected candidates in early November.

Email your application information to [nmfundadvisor@gmail.com](mailto:nmfundadvisor@gmail.com) by the deadline, October 29<sup>th</sup>, 2021. Please include your last name and the words "LOI for OA2" in the subject line.

Questions? Contact Denise Patton, Project Manager, [bpuckettpa@aol.com](mailto:bpuckettpa@aol.com)