

Technical Assistance/Consulting Menu

Propel takes a collaborative approach in our consulting and technical assistance, greatly valuing the perspectives and knowledge of organizational leaders. We will ask to work closely with a team of 3-5 from the organization to inform outcomes, champion the process within the organization, and provide input and insight into content produced. This team will have planning and debrief meetings with Propel and keep the rest of the organization informed of progress and updates. Exact time commitments and suggestions of participants will be determined before commencing a project.

Organizations will be able to access, at no cost, up to 20 hours of consulting/TA services from the following topic areas:

Strategic Planning

- **Facilitated Strategy Retreat:** Key organizational leaders will participate in a facilitated conversation of approximately 3-4 hours focused on the organization's strategic impact. This could include setting up an approach to reprioritize strategic goals, a visioning session, mission/vision/values review, or assessing the organization's current state using a series of internal and external assessments. The specific topic will be determined during a planning meeting prior to the facilitated conversation and Propel will provide the retreat notes following the session.
- **Work Planning:** Developing an operational work plan is key to putting your strategic plan into action. Propel will facilitate key staff in identifying the specific action steps needed to achieve each strategy and mapping those steps out, as well as who will lead those steps, over the course of an annual work plan.

Financial Planning Services

- **Financial Analysis & Planning** – Understanding an organization's financial business model can help it better plan and prepare for the future. Using Propel's financial trend analysis tool, Propel's consultants will work with organizations to understand the financial trends of the past and use those to help inform the development of multi-year projections so organizations can better understand their financial outlook and plan for the future.
- **Scenario Planning** – Propel consultants will facilitate a process to help an organization identify the three top financial scenarios to consider for its future and

then develop multi-year financial projections for each of those scenarios. This process helps an organization understand the implications of each scenario and identify key decision points that would put a scenario into action. This process includes a final presentation (to board and/or key staff) and facilitated discussion on next steps. Scenario planning can be a stand-alone process or is incorporated into other services such as strategic planning, facilitated retreat, restructuring support, or overall financial planning.

- **Mission Money Matrix** - Propel facilitates an assessment for organizations considering reducing or restructuring their programs and services, which can be a stand-alone item or part of a larger restructuring client engagement. This Mission Money Matrix assesses an organization's programs based on fit with mission and impact on revenue. The results can inform leaders about which programs to keep, change, or eliminate.
- **Analysis of Earned Income Streams** - Propel supports organizations with more targeted profitability analysis of specific earned income streams (e.g., ticketed events, classes, rentals, etc.) if capacity for this analysis does not exist already. Propel will then facilitate a conversation to examine how profitability of these streams relates to mission alignment, ultimately helping the organization inform future decision making around how to increase mission impact while improving financial performance.
- **Exploring New Earned Income Ideas** - Many organizations are exploring new or additional earned income strategies to help stabilize their organizations. Through a facilitated session, Propel consultants will support organizations in exploring and brainstorming potential earned income strategies. As a result of this facilitated session, organizations will leave with a clearer understanding of ideas they could continue exploring and potentially developing.

Board Development

The board of directors plays an important role in governing the organization to be fiduciary and responsible stewards of the organization's resources, both financial and non-financial. We will explore the opportunities for strengthening the board of directors and carry out the necessary activities which may include one or more of the following:

- Board self-assessment
- Customized training and facilitated sessions for your board

- Board tune-ups: bylaws updates, committee charters, board work plans
- Facilitating challenging conversations
- Board Chair/ED coaching and TA
- Board Treasurer coaching and TA

Infrastructure & Capacity Planning Support

- **Organization Assessment:** Using Propel's organizational assessment, input provided by organizational leaders will inform a plan identifying priorities for developing and/or strengthening its infrastructure and structure to support programs and operations. Upon completion of the assessment, Propel will meet with the client organization to discuss the findings and recommendations for capacity-building plan.
- **Succession Planning:** Propel will facilitate organizations in completing an emergency succession plan for key leader(s) and leadership development plans to support those identified to serve in interim roles if needed. The resulting documents help leaders and board members sleep better at night and provide a strong foundation for long-term succession planning.
- **Data and Evaluation:** Data is instrumental to evaluating the effectiveness of programs and inform modifications to better meet the needs of participants. Propel will guide nonprofit organizations in gathering and analyzing the appropriate data sets to ensure the alignment of community needs, activities, outcomes, and goals.
- **Logic Model Development:** Delivering effective and impactful programs requires planning and evaluation strategies that are aligned to the mission and organizational goals. We will gather input and insight from organizational leaders to develop logic models for up to two programs, which document needs being addressed, activities, outcomes and goals.

Other Topics

Propel can provide consulting support/technical assistance on other topics as needed, based on the capacity and expertise of available staff.