



**BAYER CENTER FOR  
NONPROFIT MANAGEMENT**

**BNY MELLON READY TO COMPETE**  
***HR and Finance Capacity Cohort Program***  
*at the Bayer Center for Nonprofit Management*  
*at Robert Morris University*

**About the Bayer Center for Nonprofit Management (BCNM) at Robert Morris University**

In 18 years of service to the nonprofit community, BCNM has completed over 2,000 consulting engagements and educated over 10,500 students. Our consulting clients include human services, arts, faith-based, community development, environmental and education organizations with budgets ranging from \$100,000 or less to more than \$50,000,000. Our intensive, customized management, governance, and financial consulting services are designed to educate leaders and have resulted in:

- Higher functioning governing boards
- Enhanced financial planning and management
- Increased partnerships and strategic alliances
- More effective approaches to fundraising
- Better informed, evidence-based decisions for future directions
- More capable nonprofit leaders and organizations
- Effective management information systems
- A strategic approach to decision-making

In short, at the Bayer Center, we work with you: To provide effective and practical management and governance tools, information, education and research that strengthen nonprofit missions and multiply all investments of time, talent and money in regional nonprofit organizations.

**Program Overview**

In 2018, BNY Mellon Foundation of Southwestern Pennsylvania joined BCNM in partnership to launch the *Ready to Compete* Program. The BNY Mellon Ready to Compete project helps build a stronger future for our regional nonprofit community. Ready to Compete will address two key areas of nonprofit management – financial and human resource (HR) management – with the goal of equipping participant organizations with specific solutions to their most urgent challenges in these areas.

A thoughtful application and selection process will ensure selection of organizations to create a cohort ready to make full use of the expertise offered. Once accepted into the program, participants can expect a process that will include:

1. Each agency in the cohort will begin by completing a comprehensive HR or Finance assessment and be provided consulting support to analyze the findings of the assessment. Consultants will work carefully to identify the most significant challenges and put the right tools and team to work.
2. One or two urgent issues will be identified and resolved by our consulting team.
3. The product of each engagement will be a roadmap of the particular issues facing the agency, ordered in priority, and a concrete solution to one or two of the most urgent.

4. Since we also believe in peer learning to lessen the isolation endemic to small organizations, each cohort will convene twice to share their lessons learned and to forge relationships.

Possible issues in finance may include:

- Better management of cash flow
- Creating necessary internal controls
- Assessing financial risks and equipping the board to provide proper oversight
- Developing a cost-centered budget
- Working with board and staff to review annual audits and 990s

Possible issues in HR may include:

- Developing a performance management system that fosters values and culture
- Writing job descriptions, screening and interview guidelines
- Compensation studies
- Guidance to boards facing executive transition

The outcome of this investment will be 25 more capable, stable organizations that are equipped to deliver high quality services because their internal house is in better order. In short, this program will help to insure that these local agencies are **Ready to Compete!** Participating organizations will establish a “leadership team” that includes three to four (3 - 4) people, a combination of staff and board members. The ideal team would be two (2) staff (and/or a volunteer) and two (2) board members. Members of this leadership team are expected to attend meetings and trainings, to meet with consultants, and fully invest in the success of the project. Thanks to the generosity of BNY Mellon, the cost of these engagements valued at \$6,500 are just \$500 per organization.

## Program Guidelines

### A. Eligibility Requirements

Eligible organizations must meet the following criteria to be considered for funding:

1. Organization must be an incorporated, nonprofit entity, eligible for exemption from Federal Income Tax under the provisions of the U.S. Internal Revenue Service Code 501(c)(3) or have a sponsor organization with nonprofit status
2. Organization, or its sponsoring organization, must have a board of directors with governing, legal and fiduciary responsibilities
3. Organization, or its sponsoring organization, must have a charter and by-laws that clearly define its mission
4. Organization must have been in operation for at least 12 months
5. Organization must have an Executive Director (or equivalent position). This position must be at least a half-time, paid position
6. Organization’s internal fiscal management policies must meet accepted Pennsylvania Institute of Certified Public Accounts standards and conform to generally accepted accounting principles

### B. Evaluation Criteria

Submitted proposals will be evaluated and ranked by a panel of Bayer Center employees and volunteers based on the following criteria:

#### *Honest Assessment*

- **How are administrative** challenges in finance and HR identified at your organization?
- Does your organization have a history of being proactive in making necessary change?

- Are both staff and board involved in identifying problems and building solutions?
- Does your organization usually complete what it starts?

*Ability to Fully Engage in Project*

- Does your organization have the people and time to dedicate to the Finance or HR work required to successfully complete this program by 30 June 2019?
- Will your organization’s Leadership Team commit to attending the two cohort meetings as well as working with your consultant to complete the one or two projects mutually determined after the assessment?
- Is there appetite for improved finance or HR at your organization that will result in improved practice if the right solution is built?

**Program Timeline**

<b>Date/Time</b>	<b>Task</b>
November 26, 2018	BNY Mellon Ready to Compete applications are released
December 17, 2018 by 4:00pm	Deadline for BCNM to receive BNY Mellon Ready to Compete applications, including all attachments and certifications.
December 17, 2018 – January 9, 2019	BCNM employees and volunteers review and evaluate the applications, using specified evaluation criteria.
January 9, 2019	BCNM notifies applicants about acceptance into the BNY Mellon Ready to Compete Capacity Cohort Program.
January – February 2019	Cohort Kickoff Meeting
February 2019	BCNM and nonprofit collaboratively complete HR or Finance Assessment, including on-site interview
March – May 2019	BCNM completes custom consulting engagements with each nonprofit member of the HR and Finance Cohorts. Each nonprofit will receive at least one custom consulting engagement based on items prioritized through the assessment process.
June 2019	Cohort Celebration

## PROGRAM APPLICATION

### Section One – Applicant Contact

Organization:

Address:

City/State/Zip:

Web Page:

Executive Director/CEO:

Email and Phone of ED/CEO:

Please identify a staff member within your organization who will serve as the primary point of contact for the duration of this project.

Key Contact Person:

Title:

Email and Phone:

### Section Two – Background Information & Organizational Overview

Year Founded:

Date Received Nonprofit Status:

Federal EIN:

Fiscal Year – From:

To:

Number of Full-Time Staff:

Number of Part-Time Staff:

Number of Volunteers:

Number of Board Members:

Annual Budget:

1. What is the Mission or purpose of your organization?

2. Briefly, what are your major programs, activities, or services?

3. **Leadership Team:** Provide the names, titles and contact information for the two staff persons and two board members who will directly work on the HR or Finance capacity cohort project. Please provide alternative phone numbers and emails where available and appropriate.

*Note: At least one Leadership Team member must be a senior staff person. If the organization doesn't have a second staff member, a volunteer or additional board member may serve as a member of the Leadership Team.*

	Name	Title	Phone	Email
Staff Person				
Staff Person				
Board Member				
Board Member				

4. **Leadership Continuity:** Do you anticipate significant changes in your organization's staff or board leadership within the next twelve months? If yes, please explain.

5. **Financial Stability:** Do you anticipate significant changes in your revenues or expenses in the next twelve months? If yes, please explain.

### Section Three – Project Detail

Please answer the following questions in the space provided:

1. Is your organization primarily interested in participating in the HR or Finance Capacity Cohort?  
HR                      Finance
2. How might you anticipate this capacity cohort program to assist in stabilizing, sustaining or growing your organization? Be specific about the HR or finance change(s) you hope may occur within your organization as a result of the capacity building project and the respective roles of board and staff in enabling the change to take place.
3. How will you manage the added work resulting from participating in this time-intensive capacity cohort program (e.g. attending additional meetings, developing planning documents, etc.)?

## Section Four – Checklist

### 1. Required Attachments:

- Copy of your By-laws
- Tax Exempt letter from the IRS
- A two-page narrative describing your organization's history and current programming
- Board List – including name and board position(s)
- Financial reports from last three (3) board meetings
- Organizational chart
- Current annual budget
- Most recently completed audited financial statements. If an audit isn't available, please provide most recent year-end financial statements and a copy of the most recently completed 990 or extension to file a 990
- Most recent year-to-date actual financial statements

### 2. Deadline and Submission Information:

- Please do not bind the application; a staple or binder clip will be sufficient.
- If you have any questions or need assistance regarding the application process, please feel free to contact Evie Gardner ([gardnere@rmu.edu](mailto:gardnere@rmu.edu), 412-397-6004) or Carrie Richards ([richardsc@rmu.edu](mailto:richardsc@rmu.edu), 412-397-6008).
- Applicants shall submit a copy of the application and attachments via hard copy to the address listed below, or via email to [bcnm@rmu.edu](mailto:bcnm@rmu.edu). **Capacity Building Applications must be received via email ([bcnm@rmu.edu](mailto:bcnm@rmu.edu)) or in the Bayer Center office by 4:00pm on Monday, December 17, 2018.**

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