APPLICATION

ORGANIZATION APPLICATION FOR REINHOLD FOUNDATION NONPROFIT LEADERSHIP DEVELOPMENT AND CAPACITY BUILDING TRAINING PROGRAMS IN 2022

Through its Leadership Development and Capacity Building Initiative, the Paul & Klare Reinhold Foundation focuses on strengthening the nonprofit sector by strengthening the leadership and capacity of nonprofit organizations that serve Clay County. Any 501(c)(3) nonprofit organization that provides services to Clay County residents is eligible to apply.

***Please complete sections 1 through 4 on the following pages. The Deadline for applications is Wednesday, November 17, 2021.***

Section 1: Contact and Organization Information

1. Name and mailing address of organization:

2. Employer Identification Number:

3. Contact person and title:

4. Email address and phone number of contact:

5. How do you impact the residents of Clay County? (In 200 words or less, please tell us your

 organization’s “story”—who you are, why you exist, and how you impact the community.)

6. How many full-time paid staff do you have? How many part-time paid staff do you have?

7. How many regular volunteers do you have?

8. Have you read the **attached curriculums and objectives** for the workshops your organization is

 requesting to attend?

9. Please provide the names and business titles of your Board of Directors.

Section 2: Financial and 501(c) (3) Charity Information

10. If you have never submitted a copy of your IRS 501(c) (3) Exemption Letter to the Paul & Klare

 Reinhold Foundation, please attach a copy with this application.

11. Please attach a copy of your most recent financial statement (statement of income and

 expenditures). If your most recent financial statement is included on pages 9-11 of your Form

 990 tax return and it is available for review on guidestar.org, you do not need to attach a copy with

 this application.

Section 3: Application Worksheet for 2022 Programs

The Paul & Klare Reinhold Foundation is offering seven nonprofit training programs in 2022. At this time, all workshops are being scheduled as in-person training that will take place at the Holiday Inn on Wells Road in Orange Park. This is subject to change. The program curriculums are designed and taught by faculty from the Edyth Bush Institute for Philanthropy & Nonprofit Leadership at Rollins College. The Reinhold Foundation is underwriting all costs of training; thus, there are no tuition expenses for selected participating organizations.

***Your organization may request to participate in more than one training program listed below.***

Section 3 APPLICATION WORKSHEET (Please see attached curriculums and objectives)

Is your organization requesting to attend *Building an Annual Fund*? (This program is 12 total hours of instruction and selected individuals must be committed to attending both days of training.)

1. Yes \_\_ or No \_\_
2. If yes, please provide the names of the members (no more than four) your organization is requesting to send to *Building an Annual Fund*, each member’s title and role within the organization, and the length of time they have been involved with the organization.

|  |  |  |  |
| --- | --- | --- | --- |
|  | ***Name*** | ***Position*** | ***How long at the organization*** |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |

1. What are your organization’s expectations and what do you hope to learn from attending *Building an Annual Fund* if selected to attend?

Is your organization requesting to attend *Leveraging Data to Boost your Fundraising Program*? (This workshop is 6 total hours of instruction. Selected individuals must be committed to attending the full day of training.)

1. Yes \_\_ or No \_\_
2. If yes, please provide the names of the members (no more than four) your organization is requesting to send to *Leveraging Data to Boost your Fundraising Program*, each member’s title and role within the organization, and the length of time they have been involved with the organization.

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| --- | --- | --- | --- |
|  | ***Name*** | ***Position*** | ***How long at the organization*** |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |

1. What are your organization’s expectations and what do you hope to learn from attending *Leveraging Data to Boost your Fundraising Program* if selected to attend?

Is your organization requesting to attend *Fundraising and Generational Differences*? (This is a three-hour workshop.)

1. Yes \_\_ or No \_\_
2. If yes, please provide the names of the members (no more than four) your organization is requesting to send to *Fundraising and Generational Differences*, each member’s title and role within the organization, and the length of time they have been involved with the organization.

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| --- | --- | --- | --- |
|  | ***Name*** | ***Position*** | ***How long at the organization*** |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |

1. What are your organization’s expectations and what do you hope to learn from attending *Fundraising and Generational Differences* if selected to attend?

Is your organization requesting to attend *Conducting a Digital Audit*? (This is a three-hour workshop.)

1. Yes \_\_ or No \_\_
2. If yes, please provide the names of the members (no more than four) your organization is requesting to send to *Conducting a Digital Audit*, each member’s title and role within the organization, and the length of time they have been involved with the organization.

|  |  |  |  |
| --- | --- | --- | --- |
|  | ***Name*** | ***Position*** | ***How long at the organization*** |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |

1. What are your organization’s expectations and what do you hope to learn from attending *Conducting a Digital Audit* if selected to attend?

Is your organization requesting to attend *Planned Giving: Gifts for a Lifetime*? (This program is 12 total hours of instruction and selected individuals must be committed to attending both days of training.)

1. Yes \_\_ or No \_\_
2. If yes, please provide the names of the members (no more than four) your organization is requesting to send to *Planned Giving: Gifts for a Lifetime*, each member’s title and role within the organization, and the length of time they have been involved with the organization.

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| --- | --- | --- | --- |
|  | ***Name*** | ***Position*** | ***How long at the organization*** |
| 1. |  |  |  |
| 2. |  |  |  |
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| 4. |  |  |  |

1. What are your organization’s expectations and what do you hope to learn from attending *Planned Giving: Gifts for a Lifetime* if selected to attend?

Is your organization requesting to attend *Nonprofit Management Essentials*? (This program is 12 total hours of instruction and selected individuals must be committed to attending both days of training.)

1. Yes \_\_ or No \_\_
2. If yes, please provide the names of the members (no more than four) your organization is requesting to send to *Nonprofit Management Essentials*, each member’s title and role within the organization, and the length of time they have been involved with the organization.

|  |  |  |  |
| --- | --- | --- | --- |
|  | ***Name*** | ***Position*** | ***How long at the organization*** |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |

1. What are your organization’s expectations and what do you hope to learn from attending *Nonprofit Management Essentials* if selected to attend?

Is your organization requesting to attend *The Importance of Strategy in our Post Pandemic World*? (This workshop is 6 total hours of instruction. Selected individuals must be committed to attending the full day of training.)

1. Yes \_\_ or No \_\_
2. If yes, please provide the names of the members (no more than four) your organization is requesting to send to *The Importance of Strategy in our Post Pandemic World*, each member’s title and role within the organization, and the length of time they have been involved with the organization.

|  |  |  |  |
| --- | --- | --- | --- |
|  | ***Name*** | ***Position*** | ***How long at the organization*** |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |

1. What are your organization’s expectations and what do you hope to learn from attending *The Importance of Strategy in our Post Pandemic World* if selected to attend?

Notice: All listed workshops and dates are tentative. The Foundation will make grant decisions in December. Applying organizations will be notified of the status of their application by December 31st.

**Section 4: Signatures**

|  |
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| By signing you certify that the organization is tax-exempt under section 501 (c) (3) of the Internal Revenue Code, in good standing, and that the information you provided in this application is true to the best of your knowledge and belief. |
| Signature of person preparing application:  | Date:  |
| Signature of CEO, President, or Chairman: | Date: |

Please email\* or mail one unstapled copy of the application to:

Amy Parker, Executive Director

The Paul E. & Klare N. Reinhold Foundation, Inc.

1845 Town Center Blvd, Suite 105,

 Fleming Island, FL 32003

 Phone: 904-269-5857 ext. 404

 aparker@reinhold.net

\*If you submit your application by email, please call Amy to confirm receipt.

**The Deadline for applications is Wednesday, November 17, 2021.**

***(Note: This is an attachment for your reference and does not need to be returned with your completed application.)***

**CURRICULUMS AND OBJECTIVES**

**2022 REINHOLD FOUNDATION NONPROFIT LEADERSHIP DEVELOPMENT AND**

**CAPACITY BUILDING TRAINING PROGRAMS**

*Through its Leadership Development and Capacity Building Initiative, the Paul & Klare Reinhold Foundation focuses on strengthening the nonprofit sector by strengthening the leadership and capacity of nonprofit organizations that serve Clay County. Any 501(c)(3) nonprofit organization that provides services to Clay County residents is eligible to apply.*

The Paul & Klare Reinhold Foundation is offering seven nonprofit training curriculums in 2022 (see details below). At this time, all workshops are being scheduled as in-person training that will take place at the Holiday Inn on Wells Road in Orange Park. This is subject to change. The program curriculums are designed and taught by faculty from the Edyth Bush Institute for Philanthropy & Nonprofit Leadership at Rollins College. The Reinhold Foundation is underwriting all costs of training; thus, there are no tuition expenses for selected participating organizations.

In addition, the Paul & Klare Reinhold Foundation is offering a special incentive to organizations that participate in a training program. Organizations can earn “participation gifts” of $200 per person for completion of *Building and Annual Fund* (12 total hours); $100 per person for completion of *Leveraging Data to Boost your Fundraising Program* (6 total hours); $50 per person for completion of *Fundraising and Generational Differences* (3 total hours); $50 per person for completion of *Conducting a Digital Audit* (3 total hours); $200 per person for completion of *Planned Giving: Gifts of a Lifetime* (12 total hours); $200 per person for completion of *Nonprofit Management Essentials* (12 total hours); and $100 per person for completion of *The Importance of Strategy in our Post-Pandemic World* (6 total hours). Participation gifts are paid to the organization and must be used for one or more of the exempt purposes set forth in Internal Revenue Code Section 501 (c)(3).

Organizations may request to participate in more than one training program. ***The deadline for applications is Wednesday, November 17, 2021. Late applications will not be accepted.*** Detailed information about the training classes are included below.

***Building an Annual Fund***

**Dates and time: January 19 & 20, 2022, 9:00 a.m. to 4:00 p.m. both days (12 hours of instruction)**

*Intended Audience: Fundraising and development professionals, managers, and aspiring leaders*

In today's environment, where a pandemic makes funding challenging, unrestricted donations are more important than ever. This is in your annual fund! In this highly interactive workshop, you will learn strategies to start and sustain an annual fund campaign. Creating a successful process will generate reliable unrestricted income, develop a base of loyal donors, and position your organization for higher level giving. The annual fund is primarily designed to acquire, renew, and grow financial support primarily from individual donors.  This workshop addresses beginning to intermediate level instruction. Seasoned fundraising professionals may see this as a refresher course.

**Learning Objectives:**

* Understand the purposes and goals of the Annual Fund.
* Emerge with strategies to strengthen your case for support.
* Recognize the role of social media to enhance your Fund.
* Capture ways to minimize donor attrition through effective stewardship.
* Learn significant steps in setting fundraising goals and evaluating results.

**Participation Gift eligibility for Building an Annual Fund:** $200 per person (Individuals must complete both days of training above for their organization to be eligible for the Reinhold Foundation’s $200 gift. No partial gifts for a single day attendance or half day attendance will be provided).

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***Leveraging Data to Boost your Fundraising Program***

**Date and time: January 27, 2022, 9:00 a.m. to 4:00 p.m. (6 hours of instruction)**

*Intended Audience: Fundraising and development professionals, program specialists, and board members*

One of the most important assets in your fundraising office is your donor relationship management names addresses and lists of gifts. It is a tool for facilitating, informing and driving every part of your organization’s fundraising program – if used right.  In this course we will examine why well-functioning Constituent Relationship Management (CRM) can make or break your fundraising program. And, how to effectively involve people, process and technology to work in alignment. We will discuss strategies for using CRM systems effectively and getting the most out of your current platform.

**Learning Objectives:**

* Discover and balance your team’s data and program needs.
* Develop an understanding of what strong data management should look like in our programs.
* Understand how CRM technology supports organizational goals.
* Learn critical steps for accessing your current CRM system.
* Ensure you leave with an action plan to enhance your information management practices.

**Participation Gift eligibility for Leveraging Data:** $100 per person (Individuals must complete the full day of training for their organization to be eligible for the Reinhold Foundation’s $100 gift.)

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***Fundraising and Generational Differences***

**Date and time: February 10, 2022, 9:00 a.m. to 12:00 p.m. (3 hours of instruction)**

*Intended Audience: Fundraising and development professionals, senior leaders, and board members*

Most organizations struggle to address the "generational crises." For nonprofit organizations, questions and concerns revolve around next generation philanthropy. Who are these "next gen" donors and how do nonprofits reach this young donor base while engaging current givers? Join us for this half-day workshop and learn how to position your organization to be ready to engage with all generations.

**Learning Objectives:**

* Learn how to assess your communication platforms to capture effectiveness for multigenerational donors.
* Understand how to leverage fundraising channels and strategies to reach multiple generations.
* Explore how to appeal to multigenerational volunteer and giving preferences.

**Participation Gift eligibility for Generational Differences:** $50 per person (Individuals must complete the three-hour training for their organization to be eligible for the Reinhold Foundation’s $50 gift.)

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***Conducting a Digital Audit***

**Date and time: February 10, 2022, 1:00 p.m. to 4:00 p.m. (3 hours of instruction)**

*Intended Audience: Marketing & social media professionals, senior leaders, and program specialists*

As the world increasingly transitions to 'virtual' operations, it is important for nonprofits to evolve in their digital communication efforts. This interactive session will help participants evaluate their digital communication efforts, both internal and external and, will provide strategies for improving your organization's digital portfolio. The session will involve some pre-work and analysis.

**Learning Objectives:**

* Receive a detailed understanding of the digital audit process.
* Understand content within a digital audit.
* Learn strategies for enhancing digital communication efforts.
* Create a digital strategy for your organization.

**Participation Gift eligibility for Digital Audit:** $50 per person (Individuals must complete the three-hour training for their organization to be eligible for the Reinhold Foundation’s $50 gift.)

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***Planned Giving - Gifts for a Lifetime***

**Dates and time: February 23 & 24, 2022, 9:00 a.m. to 4:00 p.m. both days (12 hours of instruction)**

*Intended Audience: Fundraising and development professionals, senior leaders, and board members*

Developing a robust planned giving program is crucial to the financial stability of any nonprofit.  This course will introduce you to the concepts and actual practice of planned giving from a former front-line planned giving fundraiser. You will learn fundamentals of planned giving: what it is, how it works, how to implement strategies and how it can impact your organization and career.

**Learning Objectives:**

* Receive a solid comprehension of numerous planned giving opportunities such as bequests, charitable gift annuities, life insurance, retirement plans and charitable trusts.
* Understand the donor benefits for making a planned gift.
* Capture a fundamental grounding in tax and regulatory implications of planned gifts.
* Learn strategies to begin organizational readiness for a planning giving program.

**Participation Gift eligibility for Planned Giving:** $200 per person (Individuals must complete both days of training above for their organization to be eligible for the Reinhold Foundation’s $200 gift. No partial gifts for a single day attendance or half day attendance will be provided).

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***Nonprofit Management Essentials***

**Dates and time: March 9 & 10, 2022, 9:00 a.m. to 4:00 p.m. both days (12 hours of instruction)**

*Intended Audience: Seniors leaders, board members, and aspiring leaders*

This workshop covers nonprofit management best practices with a goal of creating a sustainable organization. Funders look for proper accounting procedures, internal controls, a strong and active board of directors, consistent program evaluation and mission-based strategic planning. Participants work through the steps necessary to ensure their organizations have a strong foundation in order to be prepared to fundraise.

**Learning Objectives:**

* Learn the 4 basic functions of management and how they can create optimum success for all.
* Learn how the case for support, plus mission and value statements guide the organizational work.
* Understand how sound planning and follow-through make the organization more ‘strategic’.
* Understand the basics of creating strong and diversified fundraising success.
* Capture the role of the board of directors. Learn how to utilize board members well.
* Internalize the importance of data management and the evaluation of overall performance.

**Participation Gift eligibility for Nonprofit Management Essentials:** $200 per person (Individuals must complete both days of training above for their organization to be eligible for the Reinhold Foundation’s $200 gift. No partial gifts for a single day attendance or half day attendance will be provided).

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***The Importance of Strategic Planning in our Post-Pandemic World***

**Date and time: March 31, 2022, 9:00 a.m. to 4:00 p.m. (6 hours of instruction)**

*Intended Audience: Senior leaders, board members, and key stakeholders*

Strategic planning requires leaders to intentionally choose their desired future and develop a documented approach to achieve that vision. Learn to excite your team by understanding how to create or alter your existing plan with an eye towards maximizing revenue and resources in this new economic environment.

**Learning Objectives:**

* Essential steps of the planning process and the importance of achieving your goals.
* Understand the role of CEO, board of directors and staff in plan creation and execution.
* Internalize the importance of stakeholders’ input.
* Grasp how to create measurable objectives and action steps to achieve your desired future.
* Absorb specific benefits of strategic planning, such as:
* Use as a management tool.
* Clear direction for the organization.
* Improved service delivery and client interaction.
* Increased community participation.
* Effective and focused fundraising.

**Participation Gift eligibility for Post-Pandemic Strategy:** $100 per person (Individuals must complete the full day of training for their organization to be eligible for the Reinhold Foundation’s $100 gift.)

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Notice: All above listed workshops and dates are tentative. The Trustees will make final decisions in December based on the status of the completed applications.

Questions should be directed to Amy Parker at 269-5857 ext. 404 or aparker(at)reinhold.net.

**The deadline for applications is Wednesday, November 17, 2021.**