

Department of Hawaiian Home Lands

**Overview: Community Development
Grants and Native Hawaiian
Development Program Plan**

June 2025

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Island Plans
Regional, 20-year timeframe

Tier 3
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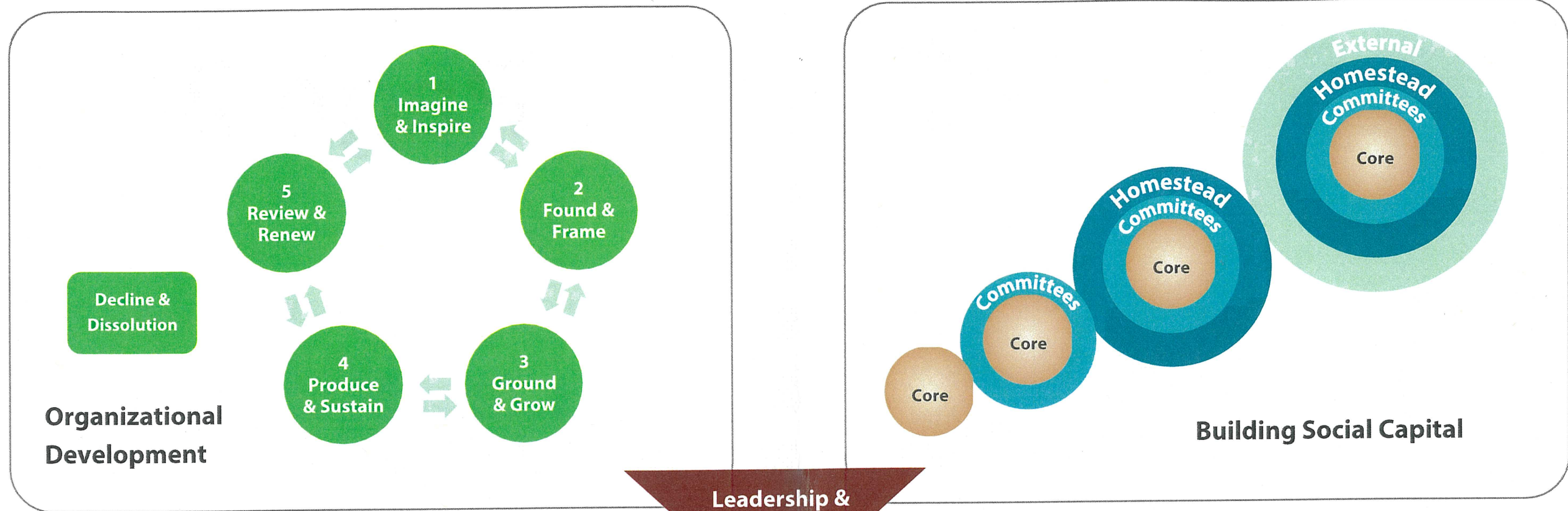
Funding
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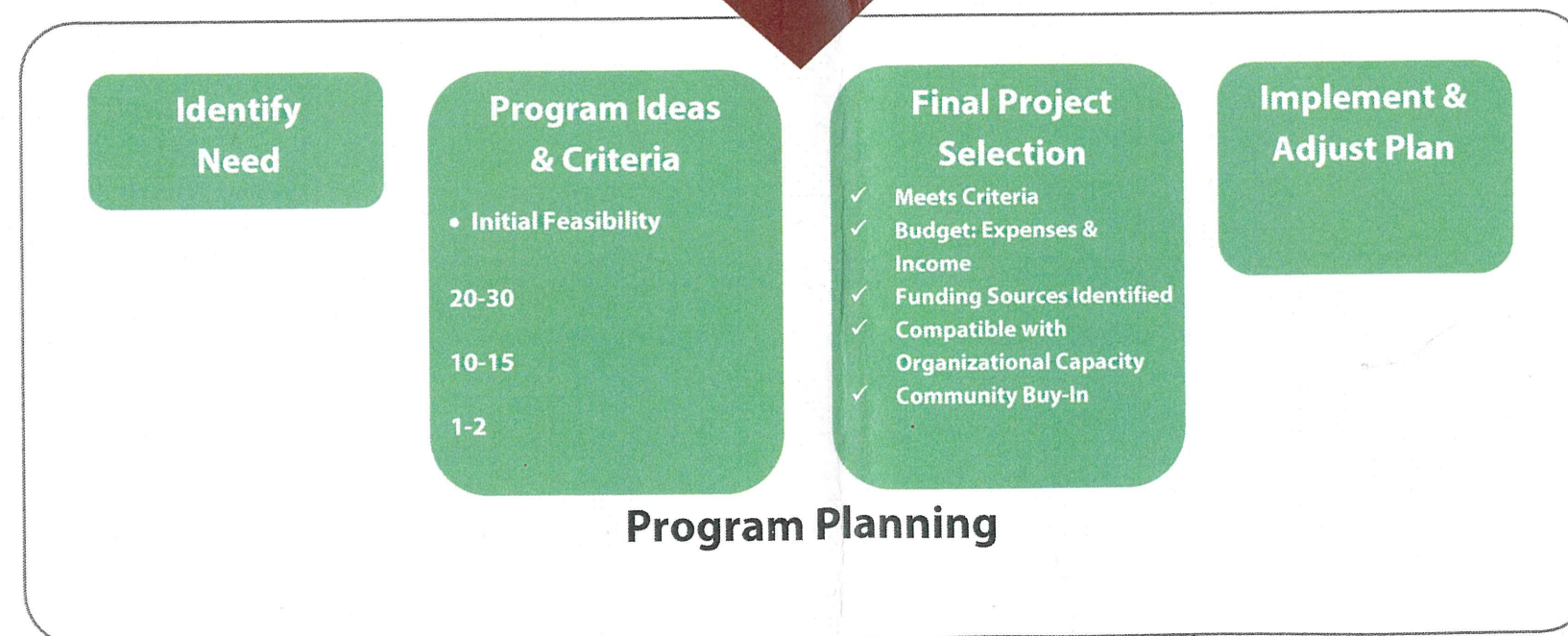
Evaluation Program

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Source: "The Five Life Stages of Non-Profit Organizations" by Judith Sharen Simon with J. Terence Donovan

**COMMUNITY
VISION**



- ✓ All activities are rooted in community vision
- ✓ Good programs/projects build social capital and develop strong organizations
- ✓ Programs/projects should be selected based on community support and organizational capacity

Grant Application Package Checklist

The following items must be included in your grant application package. These items should be assembled in the order as they appear on this checklist. If you have additional materials you would like to submit, please add them at the end of your grant application package.

Checklist for Applicant

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About Fiscal Sponsorship

(Excerpted from the Tides Foundation website: <http://www.tides.org/i-want-to/turn-my-vision-ideas-into-a-nonprofit-project/> and the National Council of Nonprofits website: <http://www.councilofnonprofits.org/resources/resources-topic/fundraising/fiscal-sponsors>)

Fiscal sponsorship is a cost-effective way to implement new programs, bring together groups to collaborate on an issue, and test new approaches to social change. Fiscal sponsorship is a common mechanism used in the nonprofit sector that enables individuals and organizations to start new programs without establishing a new, separate nonprofit organization. These fiscally sponsored projects get their charitable status from their fiscal sponsor.

1. What is a 501(c)(3) nonprofit organization?

The term 501(c) refers to a subsection of the United States Internal Revenue Code that lists the types of nonprofit organizations exempt from certain federal taxes. Section 501(c)(3) is one of the tax law provisions granting exemption from the federal income tax to nonprofit organizations that exist for religious, charitable, scientific, literary, or educational purposes, among others. See the IRS's website for more information on the designation of charitable organizations.

2. What is fiscal sponsorship?

Fiscal sponsorship is a practice that has evolved as an effective and efficient means of starting new charitable initiatives, delivering public services, and seeding social movements. Fiscal sponsors are nonprofits that enable the movement of resources from funders and donors to projects, activities, ideas, and organizations that share the fiscal sponsor's mission. Fiscal sponsorship provides a legal framework to our projects. Typically the sponsored organization seeks out a fiscal sponsor that has a similar or consistent mission. There are some charitable nonprofits that actually have as part of their mission to serve as fiscal sponsors -- they may even refer to themselves as "incubators" of other nonprofit programs.

3. What Does the Fiscal Sponsor Do?

The role of the fiscal sponsor can include performing many different administrative functions on behalf of the sponsored group, including taking on the responsibility of receiving and administering charitable contributions *on behalf of* the sponsored organization. Since the donations are made directly to the fiscal sponsor, which then provides funds to the sponsored program, this arrangement enables donors to -- in essence -- make tax-deductible contributions to support the activities of the sponsored organization. In many sponsorships the fiscal sponsor charges an administrative fee for its services, usually a percentage of the budget of the sponsored organization or program. Although this arrangement appears to be a "run-around" of tax regulations that provide donors a deduction for their charitable gifts, in actuality the IRS has blessed the function of fiscal sponsors, as long as the fiscal sponsor retains the right to voluntarily determine how to use the funds that the donor contributes.

3. Why choose fiscal sponsorship?

Establishing an independent 501(c)(3) is expensive—in fact, the process can cost upwards of \$100,000. Being fiscally sponsored is extremely cost effective and saving money is important, particularly for organizations that are just emerging, testing new approaches to difficult social problems, run entirely by volunteers, or working in issue areas where funding is scarce. In fact, in an environment where funding for all nonprofits is on the decline, it is important to emerging organizations not to compete with other organizations for limited funds. Fiscal sponsorship is an efficient, economic way to reduce the cost of running an organization and still maintain the integrity of the organization's purpose.

Fundamentally, fiscal sponsorship allows a program or organization that does not yet qualify as a recipient of deductible contributions to raise funds for its operations that will be tax-deductible to donors. (As background: Donors are not able to receive a deduction for a contribution to a nonprofit that is not recognized as tax-exempt. See IRS Publication 557. Additionally, the guidelines of most private foundations explicitly require grantees to be recognized as tax-exempt by the IRS. Consequently, groups that are not formally recognized by the IRS as tax-exempt may not be eligible for certain contributions.) Having a fiscal sponsor can benefit a group that is not tax-exempt by providing a pathway for it to receive funding.

Fiscal sponsorship can be used by newly formed charitable organizations that have the need to raise money right away, before they are recognized as tax-exempt by the IRS. Fiscal sponsorship might be chosen by a newly formed nonprofit that seeks to test-drive its ideas, or operate less formally than what is required of groups that make the commitment to apply for tax-exempt recognition from the IRS.

Some organizations remain in a fiscal sponsorship relationship for a long time, deciding that their mission can be achieved in that structure without the need to be recognized by the IRS as an independent tax-exempt entity.

Finally, some organizations - including those that are tax-exempt - find that utilizing a fiscal sponsor to outsource administrative responsibilities, whether back-office tasks, or those relating to fundraising and disbursement of funds, is the right business model for them.

How Does Fiscal Sponsorship Work for Fundraising?

A newly formed nonprofit finds another nonprofit (one that is already tax-exempt and generally has a similar mission) that agrees to accept the administrative responsibility of receiving charitable gifts on behalf of the sponsored organization. The fiscal sponsor must first determine that serving as a fiscal sponsor is consistent with its mission (and does not jeopardize its own tax-exempt status). The sponsored organization arranges with the fiscal sponsor to receive grants or contributions on its behalf. This arrangement allows the sponsored organization to solicit contributions to support its programs, with the understanding that the donation will be made *to the fiscal sponsor*, not to the sponsored program/organization directly. Since the fiscal sponsor is tax-exempt, the donor's contribution will qualify as a deductible contribution.

Using a fiscal sponsor satisfies IRS requirements as long as the fiscal sponsor maintains the right to decide, at its own discretion, how it will use the contribution, and in fact uses it consistently with its own tax-exempt status. Generally there is no question but that the sponsor will grant the contribution (minus an administrative fee if one applies) to the sponsored organization - but it could decide to use the funds elsewhere. Maintaining such control over the donated funds is a requirement of a legitimate fiscal sponsor arrangement.

Practice Tips

Fiscal sponsorships should be memorialized in a **written agreement** between the fiscal sponsor and the sponsored organization. The agreement should specify that the fiscal sponsor is responsible for all legal compliance relating to receiving, reporting, and acknowledging charitable donations, and also describe the administrative fee that the sponsored organization will provide to its fiscal sponsor.

Looking for a Fiscal Sponsor?

- [An Introduction to Fiscal Sponsorships](#) authored by Pro Bono Partnership
- If your organization is considering becoming a fiscal sponsor, try searching the [Fiscal Sponsor Directory](#). Willing to serve as a fiscal sponsor? Sign up through the [Directory](#).
- Several organizations with experience serving as fiscal sponsors include: [The Trust for Conservation Innovation](#) (sponsors environmental projects); [Fractured Atlas](#) (sponsors artists and art organizations); [Visions Made Viable](#) (incubator for a wide variety of domestic and international projects and programs, many of them faith-based); [Social and Environmental Entrepreneurs](#) (sponsors programs focusing on social justice and ecological restoration).
- [Tides](#) offers a comprehensive fiscal sponsorship program for hundreds of projects around the world.

Fiscal Sponsor Tips and Tools

- [Read about recommended best practices for fiscal sponsors](#) developed by the National Network of Fiscal Sponsors.
- Read [what should be included in a memorandum of understanding](#) between a fiscal sponsor and the sponsored organization: *On Comprehensive Fiscal Sponsorship* by Joshua Sattely, Third Sector New England (2009) (see page 5).
- Read a respected text on fiscal sponsorship, [Fiscal Sponsorship: Six Ways to Do it Right](#), by Greg Colvin, Esq. The book describes six models of sponsorship that have been approved and accepted by the IRS.
- A blog post by NonprofitLaw Blog author Gene Tagaki, Esq. offers helpful advice about what to avoid when engaging in fiscal sponsor relationships: [Fiscal Sponsorship – Six Ways to Do it Wrong](#).
- Learn about the untapped potential of fiscal sponsorships as well as misconceptions in a report, [More than Money- Fiscal Sponsorship's Unrealized Potential](#), BTW Consultants, (May 2007).
- Take advantage of the past experiences of fiscal sponsors described in the [Fiscal Sponsorship Field Scan](#), a report based on the first-ever survey of fiscal sponsors conducted by the *Tides Foundation*, that describes the fiscal sponsorship practices of over 200 fiscal sponsor relationships (2006).

Sample

(Date)

c/o Hawaii Community Foundation
827 Fort Street
Honolulu, HI 96813-4317

Re:

Please be advised that the "Sponsoring Organization" named below, a 501(c)3 public charity, has agreed to act as "Fiscal Sponsor" for the "Sponsored Non-Profit" named above to facilitate that organization's activities and particularly its solicitation of support from _____ for the project referenced above.

We understand the requirements of a "Fiscal Sponsor," for purposes of applying for a grant from the _____ include:

1. The sponsored organization's project is compatible or consistent with our organization's mission or purpose.
2. We, as fiscal sponsor, have formally adopted the above referenced project. We have:
 - a. Reviewed the project
 - b. Passed a board resolution of the adoption of the project
 - c. Accepted responsibility to document the status and progress of the project
3. We, as fiscal sponsor, are responsible for monitoring and controlling the expenditure of grant funds in keeping with the purpose of the grant.
4. We, as fiscal sponsor, are responsible for complying with the terms of the grant.

Our Board of Directors has formally approved a resolution agreeing to be "Fiscal Sponsor" for the "Sponsored Non-Profit" organization, and has authorized the execution of this letter. A copy of that resolution, certified by our Board Secretary, is attached.

Name of "Sponsoring Organization"

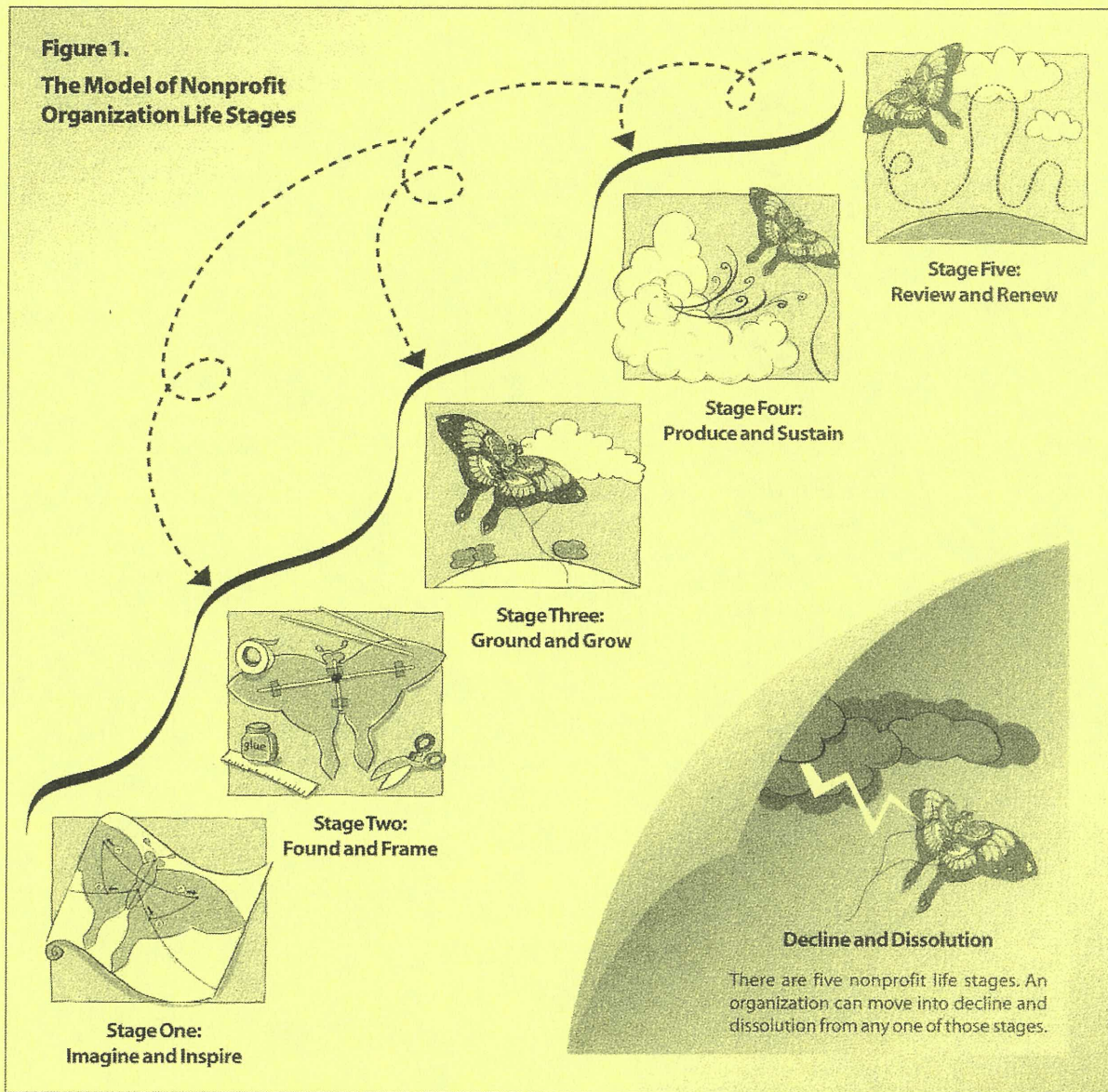
By:

Board Chair of "Sponsoring Organization"

Executive Director of "Sponsoring Organization"

cc: Chair of "Sponsored Non-Profit"

The Five Stages of Organization Development



The life stages of nonprofit organizations

The Organizational Assessment

Nonprofit organizations evolve - each evolutionary stage has its advantages and disadvantages; weaknesses and strengths

The material in this section is based on *The 5 Life Stages of Nonprofit Organizations* by Judith Sharken Simon with J. Terence Donovan.

Periodic organizational assessment is a necessary component of the program development process. Organizational assessments can help you:

- Improve services
- Project future needs
- Make good proactive decisions
- Anticipate challenges
- Alleviate stress

Please note:

Every organization is unique, yet there are patterns and similarities across nonprofit organizations. No organization will exactly mirror the stages we are outlining today. Some organizations move through their life stages more quickly than others, while some get stuck in one stage for significant periods of time. Your organization may not fit neatly into one stage or another but cross between two or more stages.

Assumptions about Nonprofit Organization Life Stages

This model is based on eight assumptions about nonprofit organizations:

1. Organizations are generally forward moving and the path and pace of the movement is predictable.
2. Organizations are multidimensional and the various dimensions interact to create a pattern unique to a particular life stage.
3. Five factors influence where an organization is at in its life cycle: age, size, growth rate of its field, social environment and its primary leader's characteristics.
4. Significant events occur at each stage and these are necessary to move an organization forward in its development.
5. There is not a predictable endpoint in organizational life.
6. There are distinct stages of an organization's life but the boundaries between the stages are not always obvious.
7. Each stage can be defined by dominant characteristics.
8. Each stage is uniquely valuable to the organization's positive development.

The 5 Life Stages

Stage One: Imagine and Inspire

This is the vision or idea stage, where the organization is not yet formalized and where imagination and inspiration abound. The primary question at this stage is, "Can this dream be realized?" This stage is characterized by lots of enthusiasm, energy, and creativity but, at this point, the organization really is merely a dream of a better world that is inspirational and worth striving for. Management is focused on the cause and the structure is informal

Stage Two: Found and Frame

This is the start-up phase of the organization, when it receives its official nonprofit status and all the activities of founding and framing an organization occur. The key question at this stage is "How are we going to pull this off?" Like Stage One, this stage is characterized by excitement and high levels of interest by many people, accompanied by the fear that formalizing the dream will result in the loss of its magic. The act of incorporating formally establishes the organization.

Stage Three: Ground and Grow

In this stage the organization is concerned with building its foundation by grounding its activities and growing the “business.” The overriding question is “How can we build this to be viable?” Organizations in this stage focus on establishing systems of accountability; however, the need for growth on multiple fronts may be overwhelming to those running the organization. The Ground and Grow stage has a mundane feel of “taking care of business”; but it also has numerous enticing intersections, choices and challenges.

Stage Four: Produce and Sustain

This is the mature phase of the organization’s life when production is at its peak and sustaining the organization is a high priority. The primary concern is “How can the momentum be sustained?” The organization is very stable, yet that same stability may make it stale as concerns for procedure slow creativity and growth. Stage Four is a productive place that, at its peak, feels a little like automatic pilot. Staff members are doing their work effectively and enthusiastically.

Stage Five: Review and Renew

In this stage the organization reinvents itself in some way, shape or form through a process of review and renewal. The primary questions are “What do we need to redesign?” “How can we do it better?” It can be a time of large or small, exciting or stressful, but always necessary, change. Proponents of chaos theory will recognize that in order for organizations to be as viable as possible, they will need to operate in modes that promote chaos and therefore create possibilities for new patterns of interaction to form. Mature nonprofits revisit one or more aspects of their organization – mission, vision, products, services, structure – sometimes changing them drastically, sometimes only making slight innovations, as they rediscover who they are and how they fit in the changing world. Relative to the scope of the modifications, organizations may cycle back to an earlier stage.

Decline and dissolution

Sometimes it happens – an organization is forced or chooses to close its doors. This stage is NOT inevitable but rather one of the routes an organization can find itself taking. An organization can face dissolution at any stage. It is not always a negative action.

***Each stage has both positive and negative aspects;
obstacles and opportunities coexist.***

Example:

Stage One: Imagine and Inspire

Positive aspects: Lots of energy and enthusiasm by its founders
 Acquires first resources to move forward
 Usually has visionary leadership
 Has volunteers

Negative aspects: Resistance to formal structure and external rules
 Lack of funding
 Lack of expertise
 Lack of experience
 Little financial support
 Little personnel support

List the positives/opportunities and challenges/obstacles for the stage assigned to your table:

Positives/opportunities of stage

Challenges/obstacles of stage

The Wilder Nonprofit Life Stages Assessment – What stage is your organization in?

Write the stage number of your organization on a piece of card stock. You will be divided into groups by stage. Each group should develop a list of things you can do to move through your stage.

Our group of organization is in stage _____

Some things we can do to move through our stage:

Summary of the Stages

Stage One: Imagine and Inspire

<i>Primary Question</i>	<i>Can this dream be realized?</i>
Governance	Not yet a concern
Staff Leadership	Entrepreneurial, visionary, no positional leader, often volunteer
Financing	Not yet a concern
Admin Systems	Not yet a concern
Staffing	Not yet a concern
Products/Services	Extremely informal or not yet a concern
Marketing	Not yet a concern
Obstacles	Fear of formalizing, lack of funding, no outside support
Opportunities	Creativity and energy of the dream, attracting new people to the dream
Duration of Stage	0-5 years

Tips for moving through Stage One

Governance	Begin seeking people who will serve on the board Review information on how to start a board Draft articles of incorporation and bylaws Secure a source of legal expertise
Staff Leadership	Find someone who has the time, energy and skills to accomplish the necessary tasks to formalize the organization
Financing	Scout potential funding sources Develop a business plan that outlines costs and revenue needed Develop a fundraising plan
Admin Systems	Identify possible admin needs; include these in the concept paper and business plan Decide where you will be housed Locate a source of accounting expertise Determine compliance requirements
Staffing	Identify short-term (one to two years) and long-term (two to four years) staffing needs Generate alternate scenarios for filling staffing needs Develop a rudimentary orientation plan for staff
Products/Services	Consider different product or service options Develop a concept paper to flesh out program ideas Identify results you want to achieve
Marketing	Create a name for the concept and test it with various audiences Generate interest and enthusiasm for the concept Verify need and potential demand in target market Use the concept paper to help “sell” the ideas Identify initial marketing and promotional needs

Stage Two: Found and Frame

<i>Primary Question</i>	<i>How are we going to pull this off?</i>
Governance	Formal governance structure created, homogeneous, small, passionate board of directors, working board
Staff Leadership	Single-minded, driven, sole decision maker, visionary, entrepreneurial, charismatic
Financing	Start-up funding granted, limited funds, no accounting systems, in-kind donations of expertise
Admin Systems	Few formal systems, a home office, small and agile
Staffing	Dedicated group of volunteers, no paid staff

Products/Services	One primary activity or a mix of varied, loosely related activities
Marketing	Word of mouth, no formal marketing
Obstacles	Fear of formalizing, reactive leadership
Opportunities	Excitement of funders, people wanting to join the organization, charismatic leader
Duration of Stage	1-2 years

Tips for moving through Stage Two

Governance	Create a formal governance structure Expand the board Offer board training on basic board roles and responsibilities
Staff Leadership	Provide a mentor or coach for the lead staff person Address the lead staff person's leadership weaknesses through skill building or hiring of additional staff
Financing	Expand the funding base Institute standard accounting practices and procedures Strategize for future financial needs
Admin Systems	Establish an office Formalize record keeping and filing
Staffing	Use volunteers effectively Recognize the dedication of volunteers Hire administrative support Consider contract or part-time staff
Products/Services	Assess and improve the quality of products and services Begin to define criteria for which activities to pursue and which to table
Marketing	Develop a fact sheet Develop contacts with volunteer recruiting sources Develop an organization identity: logo, mission, vision, values, slogan or tagline

Stage Three: Ground and Grow

<i>Primary question</i>	<i>How can we build this to be viable?</i>
Governance	Expansion of the board size, first "outsider" on board, reactive rather than strategic
Staff Leadership	First paid executive director, who is directive, unavailable, high-energy, needed both internally and externally

Financing	Greater need for financial resources, a few funder relationships established, proficient use of in-kind donations, discussion of revenue-generating schemes
Admin Systems	High need for administrative systems, first office space rented, first administrative staff hired, systems of accountability developed, technology and equipment purchased
Staffing	Paid staff hired, volunteers still critical part of staffing strategy, lack of job descriptions
Products/Services	One primary activity, refinement in program delivery, need to say “no” to program ideas due to lack of resources
Marketing	Fact sheet or first brochure developed, word of mouth still primary marketing avenue
Obstacles	Absence of systems of accountability, overwhelmed with new elements entering the organizational system, danger in remaining an isolated system
Opportunities	Sense of accomplishment, creating a flexible, innovative organization receptive to change, diversification of the agency
Duration of Stage	2-5 years

Tips for moving through Stage Three

Governance	Systematize the board recruitment process Offer board training Initiate annual board retreats to build the board’s effectiveness in its role Develop board policies and train the board to focus on its policy role
Staff Leadership	Clarify executive director’s primary roles, responsibilities, and accountabilities Ease the executive director’s responsibilities through delegation and addition of staff
Financing	Develop a multi-year budget Create a fundraising plan
Admin Systems	Hire administrative support staff Develop administrative and financial policies and procedures Incorporate automated data management systems including administrative, financial, and client data
Staffing	Purchase necessary technology and equipment Hire program staff

	Expand volunteer base
	Develop job descriptions and organization charts
	Refine volunteer management functions
Products/Services	Develop strategic plan to clarify where the organization is going with products and services and how they interrelate
	Identify client outcomes and methods for measuring and analyzing them
Marketing	Develop an organization image and promotional tools

Stage Four: Produce and Sustain

<i>Primary Question</i>	<i>How can we sustain the momentum?</i>
Governance	The governing role is in its prime, few founding board members remain, board discussions broadly focused, well-developed committees, board role is to ensure well-being and longevity of the organization, board-staff roles clearly defined, diverse composition
Staff Leadership	Well-rounded executive director, needs good delegation skills, assistant director in place, complemented by good program managers, “founder’s syndrome” may be present
Financing	Stable funding, development of an operating reserve, need for exploration of new and expanded funding sources, fundraiser position added
Admin Systems	In their prime, policies and procedures are well-developed, multiple support staff, revamping of hardware and software
Staffing	Organization size is at its peak, program managers hired, increased diversity of staff, volunteer structure self-perpetuating, volunteer coordinator hired, first staff firing may occur
Products/Services	Programs well-designed and functioning at high level, long-range program planning, core programs secure but new programs being tried, many opportunities for expansion
Marketing	Sophisticated marketing efforts, professional image, marketing plan developed, organization expands beyond word-of-mouth promotion
Obstacles	Lack of control or too much control by organizational leadership, lack of risk-taking, organizational stagnation, board unable to move to a governing role, board focuses too much on day-to-day operations

Opportunities	Feeling of security, adequate human and financial resources, new staff and board brings fresh ideas
Duration of Stage	7-30 years

Tips for moving through Stage Four

Governance	Formalize an executive director performance review process Initiate an annual or biennial board self-assessment Develop or revise the board committee structure
Staff Leadership	Implement and follow up on an executive director performance review to highlight potential areas of concern and opportunities for professional development
Financing	Develop an operating reserve Review the fundraising plan and look for areas to expand Consider hiring or contracting the fund development function
Admin Systems	Upgrade hardware and software Ensure admin staffing levels are adequate
Staffing	Increase management personnel Actively address issues arising from increased diversity of staff Ensure that volunteer recruitment and retention are tended to Hire a volunteer coordinator Obtain legal counsel if staff firing is imminent
Products/Services	Develop long-range plans for products and services Try out new program models and approaches Develop an internal system for assessing and responding to new opportunities
Marketing	Develop a marketing plan Define or reassess organization logo and image

Stage Five: Review and Renew

<i>Primary Question</i>	<i>What do we need to redesign?</i>
Governance	Turnover of board membership and leadership, development of formal linkages with other organizations, clarification of board roles and responsibilities
Staff Leadership	Founder likely to leave; change agent needed; a decisive, highly motivated individual whose strength is integrating diverse perspectives; experience and knowledge of finances required

Financing	Critical examination of funding sources, strategies, and systems; new funding sources located; growth of a development office
Admin Systems	Administrative systems revamped, centralization of many aspects of the system
Staffing	Many changes in program staff, push for internal and external collaboration, new staff hired, existing staff reassigned, volunteer system reevaluated
Products/Services	Reexamination and redefinition of activities, longstanding programs may close, collaborative programming encouraged, new products and services developed
Marketing	On hold until reorganization stabilizes, once stabilized marketing forges ahead
Obstacles	Resistance to change, isolation of the agency, too much control exercised
Opportunities	Wisdom from the past, energized and committed staff, opportunities for new partners and allies
Duration of Stage	2-5 years

Tips for moving through Stage Five

Governance	<p>Hold a board retreat to discuss and review board roles and responsibilities</p> <p>Develop or revitalize the board nominating committee</p> <p>Initiate discussion, do site visits, or bring in speakers who represent potential partners and new perspectives</p>
Staff Leadership	<p>Develop a succession plan for executive director and other key staff positions</p> <p>Initiate a development plan for the executive director</p> <p>Explore ways to focus the executive director's energies and utilize his or her strengths</p> <p>Explore the organization's finances in-depth to uncover any vulnerability</p>
Financing	<p>Expand funding sources</p> <p>Add staff to the development function.</p> <p>Analyze current funding strategies</p>
Admin Systems	<p>Revamp admin systems – equipment and structure</p> <p>Centralize key administrative functions</p>
Staffing	<p>Review organization structure</p> <p>Revamp or create a staff orientation program</p>

