



No Margin, No Mission Details

PART 1: WORKSHOP

Workshop Description: During this interactive, hands-on, and highly engaging half-day workshop, participants will explore the basics of *earned income revenue generation* in a highly engaging, interactive, and informative session. As part of this unique training opportunity, nonprofit leaders and board members will gain insight into *earned income* through understanding its most fundamental principles. Several topics will be addressed including key definitions and concepts, the value of *earned income* to organizations, compelling examples, interactive exercises, and suggested action steps to pursue the topic further.

In this session, participants will:

- Understand the need to *diversify revenue* – a national perspective
- Gain knowledge about what *earned income* really is
- Learn why *earned income* is important to nonprofits
- Review examples of how other organizations have utilized *earned income* strategies and benefited from them
- Apply learning to identifying *earned income* opportunities for their own organization
- Better understand a culture of innovation: what leaders can do to ensure success
- Develop a mini *earned income* action plan with next steps, timing, and responsibilities

PART 2: BUSINESS PLAN COACHING & TECHNICAL ASSISTANCE

Who: Nonprofit Leaders and Staff at nonprofits with a promising *earned income* idea are encouraged to apply online

When:

- Online applications are due *May 15th, 2013*
- 4 organizations will be selected and notified by *May 27th, 2013*
- Business plan *coaching* and *technical assistance* will take place *June 5th-September 10th, 2013*

Where:

- Initial business plan kickoff session will be held at the sites of the participating organizations on *June 5th-6th*, to be facilitated by *No Margin, No Mission's™* consultants
- Following the onsite kickoff session, *coaching* and *technical assistance* for *business plan development* will take place via the phone and Web over a fourteen-week period

Business Planning Description: For those nonprofits that are interested and qualify, an application process will result in the selection of *four* organizations to receive *coaching* and *technical assistance* focused on the development of a *business plan* for one of their *earned income* ideas.

As part of the *business planning* process, consideration will be given to each of the following areas:

- Goals and direction for *earned income* generation

- Consideration of the various offerings that are currently owned by the nonprofit
- Development of short and long-term approaches to intellectual property utilization through sales, licensing, and other forms of revenue-generating activity
- Potential partnerships needed to support and sustain the strategy
- Two-year horizon for current and future offerings, plus short and long term implementation strategies

- Weekly one-hour phone conversations between the Consultant and lead project staff providing training, and process required for development of the business plan

- Weekly review, assessment, and feedback between the Consultant and project staff to address development of the business plan

- Several comprehensive sections to address the most critical business planning considerations:
 - Vision, Mission, Core values
 - Executive Summary
 - Offerings
 - The market
 - The industry
 - Partnership plan
 - Financial Plan - Revenue / Expense forecast
 - Marketing plan
 - Management team
 - Operating Plan
 - Risk and Mitigation Strategies

Nonprofit Business Plan Application Process

- To apply, the online application must be completed by May 15th, 2013. (*Note: We suggest you review the questions and then compose your answers in Word to paste in the survey because you cannot save your work in progress.*)
- *No Margin, No Mission, Allegany Franciscan Ministries, and Quantum Foundation* will review all applications and select four nonprofits for business plan *coaching* and *technical assistance*.
- Arrangements will be made with the four selected nonprofits to meet the two days following the *Earned Income Training* (on June 5th-6th, 2013) to initiate the *coaching* and *technical assistance* phase of work.

ABOUT NO MARGIN, NO MISSION™



This workshop and business planning initiative will be provided by *No Margin, No Mission™*, a social enterprise and national consulting practice that helps organizations with a social mission increase revenue, expand impact, and build a lasting future through entrepreneurial thinking and business strategy.

The workshop presenters and business planning consultants are:



Larry Clark, Managing Partner & Principal, *No Margin, No Mission™*.

Mr. Clark is nationally recognized as a cutting-edge thinker and innovative leader through his extensive work in philanthropy and with health and human service organizations. As a pioneer in the social innovation movement and a true social entrepreneur, he has worked with hundreds of organizations to help them diversify revenue, expand mission impact, and build a lasting future.



Michael Oxman, Managing Partner and Principal, *No Margin, No Mission™*.

Mr. Oxman is an entrepreneur & business leader whose belief in the power of innovation and creativity has helped transform nonprofit organizations across the country. With extensive experience in both for-profit and nonprofit entrepreneurial ventures, he has earned respect as a subject-matter expert, consultant, and speaker on earned income generation, business planning, organizational growth, plus brand and marketing strategy for nonprofits.