**Navigating the ECBO Organizational Lifecycle:**
**Planning, Networking and Partnerships, and Fundraising**

In the nonprofit landscape, ethnic community-based organizations (ECBOs) play a unique role: they serve as hubs of information and community orientation for newcomer communities, provide direct services addressing specific needs, and foster a sense of belonging and resilience within their communities. Like other nonprofits, to be successful and sustainable, ECBOs must develop and carry out effective practices in three core areas of nonprofit management: **strategic planning, robust networking and partnerships, and effective fundraising.** As ECBOs navigate the various stages of the organizational lifecycle—from inception and growth to maturity and renewal—it is important that they understand what is needed in each of these core areas. Using the model *the Five Life Stages of Nonprofit Organizations*, created by Judith Sharken Simon,[1] this guide highlights actions an ECBO can take related to strategic planning, networking, partnership, and fundraising at each stage of the organizational life cycle. The pace of navigating these stages varies from organization to organization; ongoing monitoring and evaluation of your planning, networking, and fundraising efforts is key for organizational sustainability across the stages.

| **Stage 1: Imagine and Inspire**<br>*Can this dream be realized?* In Stage 1, your ECBO's focus is primarily on shaping the vision and setting the groundwork for future activities. | | |
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| **Strategic Planning** | **Robust Networking and Partnerships** | **Effective Fundraising** |
| At this stage, planning for the future should focus on understanding the needs of your community and the landscape of other nonprofits and community associations. If you are a one person organization, you will need a small team to plan with you and begin to shape a vision. Key planning questions to ask at this stage are:<br>● **Community needs:** What are the most important needs of the community that no other organization is meeting? | At this stage, networking with other nonprofits and community organizations helps an emerging ECBO identify its niche. Brainstorm a list of local community and nonprofit leaders to contact. Ask your friends and champions for their contacts. Here are other suggested networking activities for this stage:<br>1. **Engage** directly with the community to understand their needs and aspirations to shape the | At this stage, the goal of fundraising is to start planning for some costs and potential revenues for the organization's startup and further development. Some strategies include:<br>1. **Research** the startup costs of an ECBO and how other ECBOs in your region or working for similar causes are funded.<br>2. **List** potential funders and start attending some of their public |

[1] Sharken Simon, J. (2001). *The five life stages of nonprofit organizations: Where you are, where you're going, and what to expect when you get there*. Fieldstone Alliance.

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| • **Need for a new organization:** Is there a need for a new organization? Do we want to pursue creating a formal nonprofit organization? If so, what would be the mission and purpose of the organization?<br>• **Vision for a new organization:** What is our long-term vision for how we want to serve the community? Can we secure strong community support for the vision? | organization's goals and programs.<br>2. **Establish** connections with community leaders who can advocate for and legitimize the organization's mission.<br>3. **Assemble** a diverse team that brings different skills, perspectives, and community connections to the table.<br>4. **Make** connections with other ECBOs working for similar populations to learn about their journey. | events.<br>3. **Seek** support or training for nonprofit fundraising and grant writing. |
| **Stage 2: Found and Frame**<br>*How can we realize this dream?* In Stage 2, your ECBO moves beyond initial inspiration to establish its foundational structures and start formal operations. This phase is critical for setting up robust systems and gaining the traction and community support needed for long-term sustainability. | | |
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| Once your team makes the decision to form a new ECBO, strategic planning is needed to focus on how you will begin implementing the mission and what resources you will need. Key planning questions to ask at this stage are:<br>• Who will be the founding board members of the organization?<br>• Where do we start? What activities can we begin to organize with volunteers?<br>• As we seek funding support to grow, what programs and activities should we prioritize? | At this stage, you should put your energy into reaching out to diverse stakeholders to explore how they can concretely support your ECBO in this startup phase:<br>1. **Approach** local universities or schools for research, resources, interns, and volunteers who can support the organization's development.<br>2. **Connect** with established nonprofits, ECBOs, and resettlement agencies for mentorship and guidance. They can offer valuable insights and | At this stage, your fundraising efforts should focus on identifying your long-term funding needs and fundraising strategies, and identifying short-term prospects for startup:<br>1. **Create** a preliminary fundraising strategy that identifies diverse sources of income (e.g., grants, donations, income-generating activities).<br>2. **Online fundraising campaigns** can be a great way to start getting small, unrestricted funding to cover the basic costs of state |

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| ● What financial and human resources will we need to get started? What other capacity will we need to build to be successful?<br>● What partnerships can we explore at this stage to help us with in-kind support?<br>● What policies and procedures do we want to put in place?<br>● How will we communicate with partners about our progress? | share useful resources. Understanding what already exists in the community will help you find unique focuses and connect with potential future funders.<br>3. **Attend** local refugee forums or other coalition meetings to understand others' work in the community, learn about collaborative projects happening in your region, and meet with inspired leaders. Introduce your newly established ECBO to the larger community as soon as you can.<br>4. **Start conversations** with local government agencies to explore potential support or endorsement and with cultural and faith-based/inspired organizations to enhance outreach and program delivery within tightly knit communities. | registration and 501(c)(3) application.<br>3. **Seek** corporate sponsorships for specific projects or events. Corporations are often willing to fund initiatives that align with their corporate social responsibility objectives.<br>4. **Designate** a fundraising team and apply for different grants from local and community foundations, larger foundations, and government grants such as the Office of Refugee Resettlement's Ethnic Community Self-Help grant. |
| **Stage 3: Ground and Grow**<br>*How can we build on what we have established?* In Stage 3, your ECBO now needs a more detailed plan that lays out your goals and objectives for the next few years. | | |
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| Now you need a more detailed plan that lays out your goals and objectives for the next few years. Key planning questions to ask at this stage are: | At this stage, your ECBO has likely developed some close partners and has working relationships with a growing network of organizations. The goals now | At this stage, your ECBO has likely raised startup funds for projects and has hired your first staff. You are beginning to build a track record of success and need to start telling your story to raise the general |

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| • What programs and activities are we doing well and should we invest in growing?<br>• Are there things we don't do well and should leave to others?<br>• Are there strategies to accomplish our mission that we should be pursuing?<br>• How should we expand or deepen our partnerships?<br>• What level of resources—financial, human, operational—will we need to grow?<br>• Do we anticipate any changes in the environment related to funding, policy, or community demographics that we need to consider as we plan? A Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis will help facilitate these conversations.<br>• What do we want our ECBO to look like five years from now? | might be to broaden your networks and deepen your existing relationships:<br><br>1. **Explore** partnerships with government and private sectors to access new resources (e.g., funding, technology, and expertise).<br>2. **Collaborate** with other organizations to tackle larger issues or projects that no single organization can address alone.<br>3. **Reach out** to organizations and networks beyond the local community to share resources and learnings and expand impact.<br>4. **Participate** in conferences and workshops to establish your ECBO as a thought leader in the field and to learn from peers.<br>5. **Develop** an alumni network of past participants in your programs and volunteers who can advocate for the organization's work, contribute expertise, and support fundraising efforts. | operating support you need to grow:<br><br>1. **Use** data and success stories to engage donors, showing the direct impact of their contributions through regular updates and impact reports.<br>2. **Secure** general operating support to continue improving your organizational infrastructure and operation systems to meet your organizational needs while growing.<br>3. **Create** a communication and development position to share stories of your community and organization with supporters, donors, and funders through newsletters and social media posts.<br>4. **Seek** multi-year funding commitments from key donors and foundations to ensure financial stability and enable long-term planning.<br>5. **Launch** annual fundraising events or campaigns to involve the community members you serve in supporting your ECBO. |
| **Stage 4: Produce and Sustain**<br>*How can we sustain the momentum?* In Stage 4, your ECBO should focus on identifying what is needed to sustain and deepen its impact. | | |
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| A strategic plan for an organization at this stage focuses on identifying what is needed to sustain and deepen its impact. Key planning questions to ask are: | As an organization matures, the goals of networking and partnerships change. An ECBO at this stage is likely to have well-developed networks and established | Through the growth stage, your ECBO likely established strong relationships with foundation and government funders. At this stage, your ECBO will need to develop |

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| • What is our organization known for? How do different stakeholders see our value and what we contribute to the community?<br>• What expectations do the community members we serve have for us? Are we meeting those expectations?<br>• How can our collaborative relationships be enhanced?<br>• What long-term trends (funding, policy, demographics) might impact our work, and how can we be prepared to respond to them?<br>• How diverse are our funding sources? Are we too dependent on a single type of funding source or category of funding?<br>• How do our current management systems and structures need to be strengthened to support growth or expansion?<br>• Do we have the range of staff skills and experience we need for growth and expansion?<br>• Does our current Board structure and composition meet our needs for direction and oversight as we grow and expand?<br>• Are our data management and reporting systems working well?<br>• When will we do an organizational assessment? | partnerships. The goals for networking and partnerships at this stage may be to:<br><br>1. **Take on** leadership roles in coalitions and networks to shape sector-wide agendas and policies, leveraging the organization's experience and reputation.<br>2. **Join** local and national networks and build relationships with peer organizations around the country to play a role in developing the field, including offering peer mentoring to newer organizations.<br>3. **Establish** new relationships for professional development of staff and board members aligning with leadership succession goals.<br>4. **Seek** input from established partners on your impact in the community and on the way you collaborate with others as a part of the strategic planning process. This is also a great opportunity to strengthen trusted relationships with your partners.<br>5. **Explore** capacity-building support (e.g., training, coaching, consultation) to evaluate internal practices for leader sustainability and develop a succession plan for your ECBO. | strategies and systems for diversifying funding sources:<br><br>1. **Set up** a donor management system, including personalized communications, to increase revenue from individual donors.<br>2. **Organize** donor and volunteer recognition events, as well as impact reporting.<br>3. **Strengthen** relationships with long-term funders, including local and community foundations, to continue receiving their support. Your funders may connect you with additional funders through their own networks.<br>4. **Consider** being a fiscal lead for larger grant applications, supporting other smaller organizations to bring impacts in the community.<br>5. **Host** additional fundraising events to celebrate key milestones and anniversaries and to continue building strong relationships with supporters and community members.<br>6. **Create** an evolving reserve fund (ideally for six months' operational costs) to prepare for any urgent needs for unrestricted operating funds.<br>7. **Seek** funding for organizational capacity building. This includes funding to cover the costs of developing a succession plan for the ECBO. |

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| | | 8. **Explore** strategies for earned income or revenue generation, such as charging for translation/ interpretation services or running a café or catering business. |
| **Stage 5: Review and Renew**<br>*How do we stay relevant, viable, and responsive to the community?* In Stage 5, your ECBO should focus on evaluating impact, identifying areas for innovation, and adapting to changing community needs and environmental factors. Often, the need to renew is brought on by leadership and staffing changes, as well as decline in some aspects of the work and organization. | | |
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| A critical time for planning is when a well-established organization that has been successful in its programmatic work faces a leadership transition or shifts its priorities and missions. This stage may require several strategic planning sessions among the Board and staff to reflect on the organization's mission and strategic priorities. Key planning questions to ask at this stage are:<br><br>● How has the community we serve progressed since we started? How can our ECBO support the community where it is now to help it continue to progress?<br>● What aspects of our programmatic work and organization continue to be successful, and what aspects have been declining? What aspects of our programmatic work and organization need to be redesigned and revitalized? | An ECBO at this stage may also need to re-evaluate its partnerships and consider new networks and partners for a refreshed approach:<br><br>1. **Establish** strong feedback loops with stakeholders, including community members, staff, and volunteers, for insights and suggestions. Partnerships with local universities may help you conduct thorough evaluations and organizational assessment to plan for the future of your ECBO and the community it serves.<br>2. **Enhance** engagement with different sectors (technology, health care, education) to explore new trends, tools, and methodologies that could be integrated into the organization's operations.<br>3. **Strengthen** alliances focused on | This stage brings opportunities to try out new fundraising ideas and approaches. Because this stage likely involves updating mission and programs or going in new directions, it is important to align fundraising with any of these changes.<br><br>1. **Review** and innovate fundraising strategies to align with updated programming and current donor interests.<br>2. **Develop** or expand legacy giving programs, encouraging long-term commitments from donors through bequests and other planned gifts.<br>3. **Seek grants to support sabbaticals** for key leaders. Sabbaticals provide opportunities to assess operational functioning and increase organizational capacity as the leadership team shares and understands the work in new ways. |

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| • How do our partners view us now, and what new ideas and perspectives can they bring to our work?<br>• Which core elements of our mission and values should we continue to uphold, and which should be changed to reflect new directions?<br>• What can the executive and Board leadership do to be successful in renewing the organization? | policy advocacy to influence legislation and public policy relevant to the community's needs.<br>4. **Continue** building strong relationships with other ECBOs and learning from their leaders, especially those who have been through the "renewal" stage with their organizations. | |

**Relevant Resources**

- Switchboard Webinar: **Planning For ECBO Sustainability: Strategies And Considerations For The Future Of The Organization**
- Switchboard Toolkit**: Developing Your Board To Advance Your Organization's Mission**
- Switchboard eLearning Course**: Introduction to Theories of Change**
- Switchboard Info Guide: **Getting Started With Fundraising: Guidance for ECBOs**
- Switchboard eLearning Course: **Introduction to M&E and Evidence-Based Programs**
- Switchboard Blog: **ECBO Leaders Share Accomplishments And Challenges In Their First Community Of Practice Meeting**