



Helping HandUp OC, Inc. Develop Capacity and Focus

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EXECUTIVE SUMMARY

In July-August 2019, the O’Neill School of Public and Environmental Affairs from Indiana University (IU), in partnership with the Indiana University Center for Rural Engagement (CRE), collaborated with HandUp OC, Inc. to provide professional nonprofit consultation. HandUp OC, Inc. is a nonprofit organization located in Paoli, Indiana that operates in the Orange County area. HandUp OC was established in 2015 with the general purpose of engaging the local community and focusing on issues such as poverty, community involvement, and substance abuse.

HandUp OC has done substantial work for the residents of Paoli and Orange County, providing programming opportunities that not only meet community needs but also build resident engagement. These programs have taken the form of a Community Clothes Closet, a Community Garden, and a recurring Picnic at the Park event. HandUp OC exemplifies considerable passion, drive, and commitment to the community members it serves.

However, HandUp OC is at a crossroads as it determines its future. The organization’s current composition largely relies on the work of its executive director and a committed, but small, group of individual board members and partners willing to lend the organization their time and expertise. Moreover, HandUp OC has a largely informal operational structure, a limited budget, and its network of partners is relatively small; as was stated during a site visit, “it’s the same group of people doing all the work.”

O’Neill’s advisory group of students analyzed HandUp OC’s current status and goals for the future, and provided seven recommendations, focused on four main areas:

- Capacity Building
- Stakeholder Analysis
- Survey Design and Implementation
- Building Consideration of 205 W. Main St.

First, the team addressed three components related to **capacity building**, starting with identifying a need to update the current mission statement, which is somewhat unclear and inconsistent with other HandUp OC documents. The team recommended that the organization clarify and focus its mission and gave multiple examples of effective mission statements. Currently, the team has also recommended adopting bylaws, which they have drafted, to guide the structure of the board and organization. Recommendations to

Seven Recommendations for HandUp OC

1. Update HandUp OC’s mission statement
2. Adopt bylaws for HandUp OC
3. Restructure HandUp OC’s board composition
4. Harness existing passion to expand HandUp OC’s coalition
5. Conduct a focus group to obtain stakeholder input
6. Conduct ongoing programming surveys
7. Do not proceed with the acquisition of the church at this time

diversify the membership of the board and assess the expertise and experience of current and potential stakeholders to add to the board are also included.

Second, the team provided a comprehensive **stakeholder analysis** per the request of HandUp OC leadership, to understand how to strategically reach more individuals of power and influence in the community. Included is an analysis of current HandUp OC stakeholders by organization type, as well as an analysis of potential stakeholders, to better assess the prospects of expanding the coalition. The team concluded that HandUp OC should harness its existing passion to expand and diversify its coalition. The strategies recommended include identifying potential stakeholders, determining how they fit into the coalition, and converting them into actual stakeholders with specific roles.

Third, a plan is provided for **survey design and implementation** to assess which of the current programs are of value to the community and in what areas the organization should focus their future efforts. The team recommended two surveys: a community preferences assessment delivered via a focus group to better ascertain future activities, and a program evaluation to assess current programming effectiveness. The report includes drafted sample survey tools, recommendations for implementation, and suggestions for data analysis for HandUp OC to utilize.

Finally, HandUp OC requested that the team assess and recommend the feasibility of **acquiring a vacant church building** to host their organization. Recently, HandUp OC was offered the ownership of the former Methodist Church at 205 W. Main St. in the center of Paoli. After careful review, the team advised HandUp OC not to proceed with acquiring the church building at this time due to the key observations of poor building conditions, current finances, and limited resources. It is strongly advised that the organization focus their efforts on strengthening their foundational elements related to people, resources, and programming.

The following report provides more detailed analysis and the reasoning for each of the seven recommendations. The appendices include several resources, templates, and guides to further explain recommendations and assist in the implementation of the action items.

INTRODUCTION

Paoli and Orange County are like many cities and counties in rural Indiana, with similar opportunities and challenges. As examples, Orange County residents have lower than state average median household income, higher rates of obesity, lower rates of educational attainment, and have been significantly impacted by the opioid [crisis](#)¹. That said, residents of Paoli and Orange County take significant pride in the community and are committed to addressing these concerns.

HandUp OC has several partners in the community, ideas for new programming, and a long-term vision, however, it could use additional assistance to determine both internal and external next steps. HandUp OC was also recently offered an abandoned former church building at 205 W. Main St., but assuming ownership of this building and bringing it up to usable status would require considerable renovation.

IU O'Neill School of Public and Environmental Affairs Master of Public Affairs (MPA) students partnered with HandUp OC to help the organization assess its current internal structure, external partnerships, programming, and feasibility of receiving the 205 W. Main St. church building. To do so, students researched existing community data, reviewed HandUp OC's organizational documents, conducted a site visit to Paoli where they toured the church, held meetings with HandUp OC and other community partners, and reviewed local resources. As a result of this work, they offered seven recommendations to help HandUp OC take next steps.

This document provides an overview of this assessment and these recommendations. In conducting this analysis, the team recognizes the significant contributions HandUp OC has already made to improve the lives of Paoli and Orange County residents. The following recommendations build from these assets to help HandUp OC expand its capacity to serve the community. The recommendations fall into four categories: capacity building, stakeholder analysis, survey design and implementation, and building consideration of 205 W. Main St., the abandoned Methodist Church in the center of Paoli.

In each category, the team provided an analysis of the current status of HandUp OC as well as the steps which the organization might take to further enhance its capacity to address the needs of Paoli residents, and build and sustain community engagement. Relevant data and other information are presented as background, and final recommendations are both **HIGHLIGHTED IN RED** and provided in a subsequent Implementation Action Plan found in [Appendix 1](#) for ease of use and future reference. Additional tools and resources developed for HandUp OC are referenced throughout the document and provided as attachments in the appendices.

¹ Center for Rural Engagement, Indiana University. (2017). Orange County Community Profile.

CAPACITY BUILDING

Capacity building enables nonprofit organizations and leaders to develop skills and competencies that can make them more effective and sustainable, to better serve their target populations and overcome barriers in their communities. Capacity building addresses the current needs of an organization and prepares an organization to fulfill its mission for the future. Capacity building can be interpreted in several different ways. For this report, capacity building addresses the concepts of people, programming and resources.

For HandUp OC, capacity must be built within the organization before considering additional projects of a stakeholder analysis, community surveys, and a building assessment to host programming and services. The following are the immediate needs identified to establish a foundation for further organizational development:

1. Mission Statement Refinement
2. Bylaws Updates
3. Board Member Development

Mission, Vision, Values, Goals

The vision and mission are the roadmap for a nonprofit organization. These statements ensure everyone—including those internal to the organization as well as external partners and the community—knows and understands where an organization is headed. The mission should be established in the very beginning of the process, with the vision and values to follow. Without a clear mission, buy-in is incredibly difficult both within the organization and with external audiences. There is also a risk of different expectations among all individuals.

The following are common definitions to guide the development for HandUp OC:

Statement	Definition
Mission	Statement of purpose and reason why organization exists
Vision	Vivid image of the future you seek to create
Values	Outline of guiding concepts, beliefs, and/or principles
Goals	Directions to pursue with respect to the strategic issues

The **mission statement** is the foundation of every nonprofit organization. Consider the mission statement as the rationale for why the organization exists, not only what the organization does. It is a best practice to keep the mission statement short, succinct, and descriptive of the ultimate

result the organization is trying to achieve². Some mission statements include how the organization plans to achieve the desired result. Effective mission statements include the most important values determined by the organization and are achievable and realistic³. Other components featured in this report build from a strong mission statement.

While it is recommended that organizations start with forming the mission statement, the **vision statement** is also essential for aligning expectations for the future of the organization. Internal vision statements describe the ideal future for the organization while external vision statements illustrate a future for the society or community.

Equally as important is identifying the core **values** that guide an organization’s mission and all related activities. Organizations sometimes identify their values before or during the process of creating their mission. Organizational **goals** help define what the organizational services and activities aim to accomplish for its target population. An effective practice is creating S.M.A.R.T. goals that are Specific, Measurable, Achievable, Relevant, and Time-Related⁴.

HandUp OC’s Current Mission Statement

Currently, HandUp OC has two different mission statements published in organizational materials. The bold sections below highlight the variance in the mission statements located on the organization’s Facebook page and its Articles of Incorporation:

Materials	Mission Statements
Facebook	To empower citizens of OC to create better lives for themselves, their families, and each other by improving community health, connection, and life skills.
Articles of Incorporation	HandUp OC, Inc. organized to provide education and skills in growing and harvesting food, as well as collecting and distributing recycled clothing and household goods , is organized exclusively for charitable purposes under section 501(C)(3) of the internal revenue code, or corresponding section of any future tax code.

The Facebook mission statement may lead the organization to lose their focus, resulting in the pursuit of programs outside of their expertise and current resources. It may also hinder the credibility and potential expertise the organization and its leaders could build in the community. By focusing the mission statement on the organization’s intended purpose, HandUp OC will be more prepared to pursue opportunities related to its programming, people, and resources.

² Allison, M. and Jude, K. (2015). *Strategic Planning for Nonprofit Organizations: A Practical Guide for Dynamic Times*, John Wiley & Sons, Inc.

³ Worth, M. J. (2019) *Nonprofit Management Principles and Practice Fifth Edition*. Thousand Oaks, California: CQ Press, an Imprint of SAGE Publications, Inc.

⁴ <https://www.projectmanager.com/blog/how-to-create-smart-goals>

There is an inconsistency in both mission statements in HandUp OC materials as well as in the way each one explains the organization's purpose. There should be one consistent mission statement in all programming efforts, visual materials, and verbal descriptions to reinforce purpose and raise awareness of the organization and its programs.

Suggestions for Enhancing the Mission Statement

According to Board Source, an online leadership resource for nonprofit boards, there are nine characteristics⁵ that will help develop a compelling mission statement (or which can be used to revise a current mission statement). These nine characteristics, which can be found in [Appendix 2](#), help to engage larger external audiences by ensuring a mission statement is memorable and inspires involvement. They will also help align the internal organization in order to make decisions on fundraising strategies and new projects, as well as to sustain the public's support and confidence.

The following are examples of effective mission statements from organizations that have similar programming or are in proximity to HandUp OC. These examples 1) provide a clear and concise sense of mission, and 2) answer why and how the organization will achieve its desired outcomes or purpose (and sometimes also answer what and where). These examples include several of the nine characteristics of an effective mission statement:

- **Big Brothers and Big Sisters** provides children facing adversity with strong and enduring, professionally-supported one-to-one relationships that change their lives for the better, forever. www.bbbs.org
- **Blessings in a Backpack** mobilizes communities, individuals, and resources to provide food on the weekends for elementary school children across America who might otherwise go hungry. www.blessingsinabackpack.org/about/how-it-works/
- **Hoosier Hills Food Bank** collects, stores and distributes food to nonprofit agencies that feed the hungry in Brown, Lawrence, Orange, Owen, Martin and Monroe counties in Indiana. www.hhfoodbank.org/

There are common practices and structures that can help an organization and its leaders develop or update the mission statement. For example, many mission statements start with an action indicating what they are going to do that will lead into a desired outcome: "We will [insert action] in order to achieve [insert outcome]." This can also be written as: "The organization will achieve [insert outcome] by [insert action]"

It is important to build or refine the mission statement with internal staff, board members, and key stakeholders to encourage buy-in and alignment. An effective mission statement motivates the current internal staff and external stakeholders. It can also serve as a strategy to attract new individuals and expand the organization's current network.

⁵ Board Source 2016: <https://boardsource.org/mission-statement-characteristics/>

To simplify this process, the organization's leadership and board members might respond to the following four questions to inform the mission statement:

- What is the purpose of the organization, and what does it hope to accomplish?
- How does it go about accomplishing this purpose?
- Who or what cause do you focus on?
- What values or beliefs guide your organization?

Once the board and leadership have finalized the mission statement, all references to the same statement should be consistently listed in all internal and external materials, such as the articles of incorporation, bylaws, social media, grant applications, and promotional materials. All programs, services, and future opportunities should align to the new or updated mission statement of HandUp OC. This mission statement will also guide decision-making and ensure all future actions will support HandUp OC in achieving its desired immediate outcomes and long-term vision for the community.

Recommendation #1: Update HandUp OC's mission statement

Given the current state of the organization's mission statement and the importance of the mission statement in building the organization's capacity for future development, **HandUp OC should pursue one of the three alternative paths as an immediate next step:**

- 1) **Create a new mission statement** to replace the current statements. Consider identifying values to accompany the new mission statement.
- 2) **Keep one of the current mission statements and add S.M.A.R.T. goals** aligned to the target populations and services.
- 3) **Refine the current mission statement** using components of the existing mission statements to ensure consistency and alignment to the organization's purpose.

Bylaws

Bylaws are the necessary policies to determine how a board will operate, and they may be thought of as the constitution of HandUp OC. Bylaws serve many purposes for the management and sustainability of a nonprofit organization, which include:

- Setting forth a clear purpose of the organization
- Providing consistency across time
- Establishing procedures for decision making
- Reducing potential conflict among members

HandUp OC's Current Bylaws

Bylaws were not formally required upon registration to become a nonprofit organization as HandUp OC filed using the 1023-EZ form. However, looking toward the future, the organization may want to file a 1023 form. If this is the case, the organization must submit bylaws. HandUp OC has started but not completed the bylaws process. The document, which was put on hold, is a 17-page template which includes many unnecessary details and confusing legal terminology. HandUp OC communicated interest in bylaw assistance.

Suggestions for Enhancing the Bylaws

While bylaws can seem overwhelming and often use technical terminology, there are essential sections to define and clarify to guide the structure of the board. Based on an assessment of the draft bylaws of HandUp OC, the adopted bylaws should include at a minimum: the standardization of the mission statement, the size and makeup of the board (including the number of board members, officers, terms and term limits), establishment of conflict of interest policies, and adoption of an advisory committee. Bylaws should also include regulations and standardization of board meetings, including their required frequency, the quorum, and board voting for officer positions and official organizational decisions.

Recommendation #2: Adopt bylaws for HandUp OC

[Appendix 3](#) includes recommended bylaw language which can be edited and voted upon by the board. While most of the document is fairly standard, the areas **highlighted in yellow** are those where new decisions must be made. In order to pass these new bylaws, they must be 1) initially decided on, 2) presented at a board meeting, and 3) voted upon.

Major areas addressed in the bylaws include:

- **Mission statement:** As explained above, the bylaws must include the updated mission statement in Article 2 - Purpose. This statement should be consistent with all other foundational and promotional documentation.
- **Board composition:** Article 5 - Board of Directors includes the size of the board, description of officers, and their terms/limits. The recommended size is between five and 15 members for optimal decision-making and community representation. Additionally, it is recommended that there be an odd number of board members to avoid voting ties. The next section explains how to diversify the makeup of the board to ensure individuals are positioned to offer their expertise and experiences as aligned to the mission.
- **Term duration and limits:** The draft bylaws stated that members serve for three-year terms with a maximum of 10 consecutive terms. However, it was also stated that no member could serve more than 20 years in total. The recommendation is to keep the term for three years, change to three consecutive terms, and adjust to a maximum total service of 18 years. After nine years of service, a board member would be required to sit out for three years before serving a potential three additional terms. The purpose of this limitation is to ensure that board membership is regularly changing to reflect the

community and changing circumstances. Further, it is recommended that the terms are staggered so that the terms of every board member do not end at the same time.

- **Conflict of interest policy:** This is a requirement of a tax-exempt nonprofit because individual board members cannot personally benefit from the organization. For example, executive directors should generally not participate as voting members on the board if they are paid staff.
- **Advisory committee:** A final recommendation for HandUp OC is to adopt bylaws that include provisions for an advisory committee. As the organization grows, there may be a need for additional committees to advise on particular aspects of the organization, such as fundraising or programming. An advisory committee usually consists of individuals who are not members of the board but have an interest in the outcomes of the organization. These could be youth, government officials, or representatives from other organizations who may not have the time or inclination to serve on the board itself. Such a committee would have fewer responsibilities and obligations, but still be able to contribute to the direction of HandUp OC.

The Board of Directors: Responsibilities, Duties, and Expectations

The board of directors is the governing body of a nonprofit organization in place to direct and sustain the organizational affairs. The board of directors is guided by the mission, defined by the bylaws, composed of key stakeholders, and operates effectively through the fulfillment of responsibilities, duties, and expectations.

To understand who to recruit as board members, it is important to look into the definitions of a board and what it means to serve on a board. By understanding the responsibilities, duties, and expectations of the board, one can clearly identify the demographics, skills, behaviors, and attributes necessary for potential board members (key stakeholders). Board recruits must be able to understand and commit to these definitions.

Responsibilities

Statement	Definition
Legal	Responsibility to fulfill the mission as defined by the nonprofit corporation law, provisions imposed by state statutes, federal laws, legal documents, articles of incorporation, and bylaws
Fiduciary	Responsibility to benefit the public as defined by the nature of nonprofits and service

Duties

Statement	Definition
Duty of Obedience	Faithful to the mission, consistent with the goals and laws
Duty of Care	Exercises reasonable care by staying informed, participating in decisions, and acting in good faith when making decisions
Duty of Loyalty	Places interests of the organization first

Expectations

Statement	Definition
Mission	Define and advance the organization's mission
Resources	Ensure, develop, and conserve the organization's resources (funds, property, human resources)
Oversight	Provide oversight of management, ensure assessment of organization
Outreach	Engage in outreach as a bridge and buffer between organizations and stakeholders (clients, members, the communities it serves, regulators, donors, the public)

HandUp OC's Current Board of Directors

HandUp OC currently has a five-person board composed of a chair, vice-chair, treasurer, secretary, and an additional member. The board is relatively diverse in age and has interest in including youth older than 13 to add representation of the younger generation within the community. The board is mainly composed of women and only one male, and currently represents the racial and ethnic demographics of the community. It should be noted that as the demographics of the community change, board membership should reflect changing diversity trends.

The HandUp OC board of directors presents somewhat limited diversity of expertise and community connections. The skills provided by the current board are centralized around health and wellness (3 board members), communication (1 board member), and tourism (1 board member). While this expertise is valuable, it does not represent the available skill set of the entire community or meet all the needs of the organization. The organization has stated concerns about this composition through informal interviews. HandUp OC has expressed a need for a treasurer with financial skills, interest in a lawyer, and a desire for more people to serve on the board. However, the organization has experienced challenges in identifying and recruiting stakeholders with such attributes.

Suggestions for Enhancing the Board and Fulfilling Roles

The board can both enhance membership and ensure the fulfillment of board responsibilities, duties, and expectations by diversifying its composition. The organization must look for strong leaders who bring new insights to the table. A new, revitalized board can be composed by recruiting new and diverse stakeholders with differing demographics, expertise, skills and attributes, resources, and connections. As is often stated, a group is more effective than an individual. By bringing together a number of individual strengths, a truly effective team can be created. As stated by the National Charities Information Bureau, “all human beings are a combination of strengths and weaknesses [and] a good board blends imperfect human beings into an effective working team.”

For this reason, it is essential to analyze and act upon board composition. An organization must consider the following questions:

- Who should be on the board now? Who should be on the board in the future?
- What do current members contribute? What contributions are missing?
- Who are potential board members (key stakeholders) that could fill those gaps and needs?

Recommendation #3: Restructure HandUp OC’s board composition

HandUp OC can implement this recommendation by converting essential stakeholders into effective board members by following these steps:

Step 1: Evaluate the current board to identify strengths and gaps

Based on the limited knowledge and interaction with board members, the O’Neill students believe it is important for the current board of HandUp OC to conduct a self-assessment. This will allow HandUp OC to visualize the essential qualities of board members and those that may be missing.

By devoting a board meeting to the discussion of board composition, the board will begin to analytically think about what it means to be on a board, why the board matters, and strengths and weaknesses of the board.

A good place to start is a simple board conversation to address the following questions:

- Does our board fulfill the defined responsibilities, duties, and expectations?
- Why does our board matter beyond its legal and symbolic functions?
- What is working well?
- What areas need attention or improvement?

Step 2: Identify potential stakeholders to fill gaps

After brainstorming general ideas and concepts of the board and board membership through the self-assessment, HandUp OC can identify specific areas of expertise, resources, community

connections, personal styles, additional skills, and demographics of the board.

By utilizing the Board Composition and Recruitment Matrix in [Appendix 4](#), HandUp OC board members can more easily visualize the qualities they possess, while simultaneously identifying prospective board members (stakeholders) who may possess the qualities that they do not. This compares current board member attributes to those of potential board members in order to incorporate additional diversity, providing the 'where you are,' 'where you need to be,' and 'how to get there.'

Though all represented components of diversity are important, HandUp OC should prioritize board member composition and recruitment in the following order:

1. Areas of expertise/leadership qualities, specifically administration/management, financial oversight, strategic planning
2. Community connections, specifically political, economic, religious
3. Resources, specifically money to give, access to money, access to other resources
4. Personal style, specifically available, committed, participative
5. Demographic, specifically age (younger than 18), gender (more men), race/ethnicity (future opportunities to expand diversity)

Step 3: Invite stakeholders to apply

HandUp OC had a pre-established board application form, which was not unlike a general volunteer application. An updated draft board application ([Appendix 5](#)) has been created to draw interest and understanding and ensure the highest quality of respondents to consider as future board members.

This updated board application document:

- Personally identifies prospective board members and builds them up by explaining why they received the board application
- Creates an understanding of the role of a board member by defining responsibilities, duties, and expectations
- Analyzes individual attributes: demographics, skills, behaviors, connections, and resources
- Confirms interest in and commitment to the organization

Not only does HandUp OC need to assess stakeholders, but the stakeholders must assess themselves in order to truly commit to a position on the board. Stakeholders/potential board members should consider the following questions:

- What type of experience is most fulfilling for you?
- How much time are you willing to put into board work?
- Are you willing to collaborate with others on a regular basis or would you prefer to work alone?
- Do you have the willingness and the ability to assist a nonprofit organization?

After identifying the most vital stakeholders, the application should be personally addressed and delivered to said person. This makes the stakeholder feel valued and respected. The goal is to build them up before proposing the membership.

Upon receiving applications, it is important to analyze the results with the current board. Review the attributes each individual can offer to the board, ensure they are in agreement with the definitions, assess whether their skills meet the needs of the board, and confirm they can commit to the organization and the board. If a candidate does not meet the qualifications to become a board member but does possess the desired or needed skills, consider offering them a position on the advisory committee.

In this way, HandUp OC will be linking 'energy to existing energy,' 'connecting people to people,' 'forming partnerships and collaboration,' and increasing their ability to 'come up with new and different ways to engage'— all stated goals of current key stakeholders of HandUp OC. The board's understanding of its roles, responsibilities, duties, and expectations, and the board's ability to combine individual strengths to work as a collaborative team towards shared goals will lead to a positive impact on organizational performance.

Capacity Building Section Summary

While HandUp OC has started to develop foundational documents, such as the bylaws and articles of incorporation, the current committed leaders would benefit from building their capacity in three key areas: creating a focused mission statement, adopting bylaws, and diversifying the board composition. This will help the organization achieve both short-term and long-term success in areas such as expanding its stakeholders, identifying the value of its programming, and acquiring new building space.

STAKEHOLDER ANALYSIS

As a component of this project, HandUp OC requested a comprehensive stakeholder analysis to expand its current network and engage more individuals in the community. But before examining this analysis, it is worthwhile to briefly explore the idea of stakeholders and related concepts.

What is a stakeholder?

For our purposes, a **stakeholder** is a person or group that has the *power* to positively impact HandUp OC or has a clearly identified *interest* in HandUp OC programming.

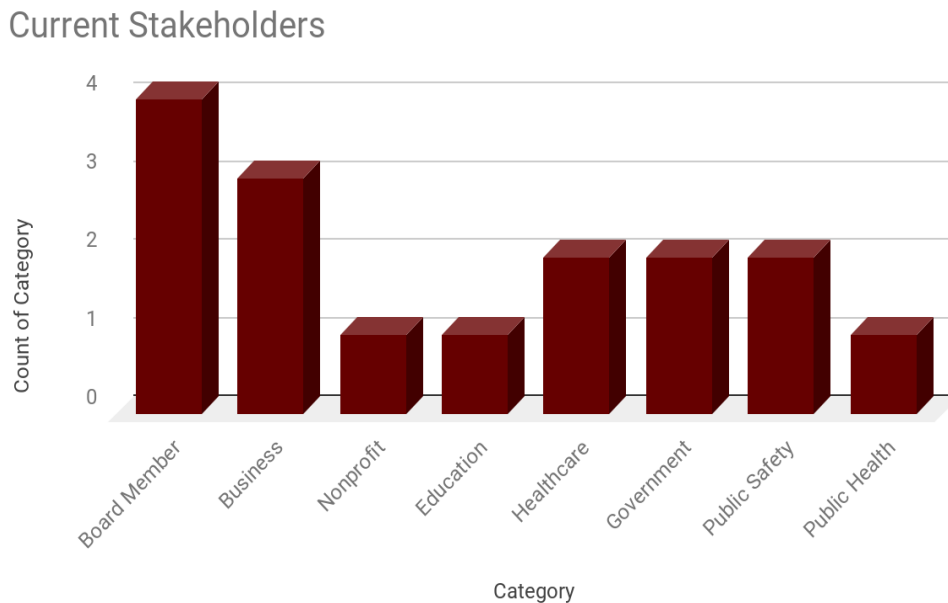
Power in this context is the ability to connect HandUp OC to one of three important channels: funding, community influence, or public awareness.

Interest in this context is anyone who supports the mission, vision, values, or goals of HandUp OC, or could directly benefit from HandUp OC services.

Who are HandUp OC's current stakeholders?

There are a few different ways to approach the question of who comprises HandUp OC's current stakeholders. After meeting with the executive director, other board members, and local community members, several individuals and entities were identified who have had some involvement with the organization. The types of stakeholders involved are plotted on the bar chart in Figure 2.1.

Fig 2.1: Bar Chart of Current Stakeholders



From this chart, two observations become readily apparent.

Observation 1: The existing coalition of HandUp OC stakeholders is small.

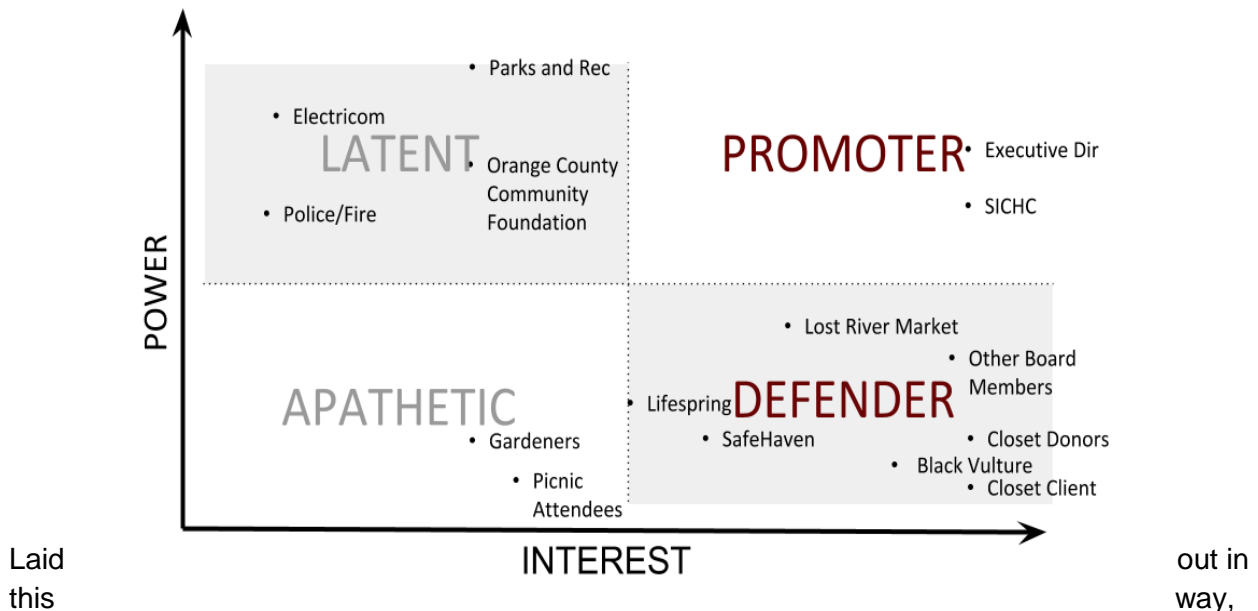
While the size may not be surprising since the organization is relatively new, HandUp OC may be entering a phase of its life cycle where its small size emerges as a threat. This could manifest itself in two ways: either it prevents the group from being able to take on new projects for which the community has a need, or new projects stretch the existing coalition too thin and the momentum of the group is stunted.

Observation 2: The existing coalition is narrowly constructed.

The vast majority of the existing coalition is some form of an internal stakeholder. For example, they are board members, they help maintain the garden, and they give or receive clothes from the clothing swap. This lack of external stakeholders is one of the biggest weaknesses of the group, but—as we'll discuss later—this is also the area of greatest opportunity.

It is also instructive to plot each of the current stakeholders on a matrix that measures relative power and interest as defined in Figure 2.2. What results is four quadrants that identify which stakeholders are able to truly promote the organization in funding, influence, and awareness channels (those with high power and high interest). It also identifies those who are able to defend and advocate for the organization at the grassroots level (low power and high interest), those who have the potential to become consistent promoters, but are currently latent or only activated on a limited basis (higher power and low interest), and those who have the potential to become consistent grassroots supporters but are currently in an apathetic state (low power and low interest).⁶

Fig 2.2: Power and Interest Matrix of Current Stakeholders



⁶ Because this is based on limited understanding of the community, the stakeholder position may have over- or under-valued the power or interest of a given entity. HandUp OC should undertake this exercise on its own for a more accurate assessment.

two additional observations about the existing coalition become clear.

Observation 3: The existing coalition is passionate.

Perhaps the greatest strength of HandUp OC is that most of the existing coalition has a very high interest in their activities and potential for success. It is this passion that has sustained the organization so far, and this allowed for some early successes.

Observation 4: The existing coalition has limited power.

While there are a few entities that have provided funding, volunteers, or credibility to HandUp OC, none have done so in a large-scale way, and the majority of the coalition has very limited ability to do so. This may help explain why HandUp OC indicates that it struggles to draw attention to events like Picnic in the Park.

Taken together, these four observations demonstrate some essential strengths and opportunities for HandUp OC. Considering them jointly also yields an essential recommendation.

Recommendation #4: Harness existing passion to expand HandUp OC's coalition

Who could be HandUp OC's future stakeholders?

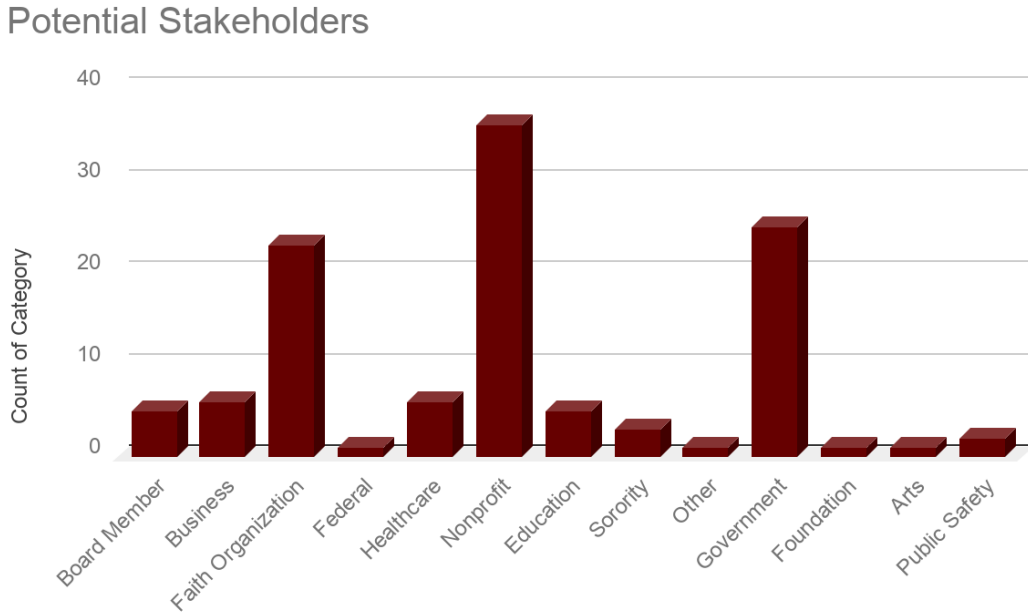
When thinking about what an expanded coalition might look like, it is not enough to simply increase quantity. Instead, it is crucial to consider how problems might be solved by a strategic approach to increasing the coalition size. For instance, if the existing coalition lacks relationships with organizations that might provide financial resources, then new members should be added that can help bridge that gap such as Hoosier Uplands⁷ or the Paoli Chamber of Commerce.⁸ Similarly, an expanded coalition could increase community influence by including government officials from both parties who have not yet been previously engaged.

Fortunately, as mentioned earlier, there is a great deal of opportunity when thinking about how to more broadly construct a coalition around HandUp OC. In talking to the board, local leaders, and searching on the internet, more than 100 local entities were discovered that could serve as potential stakeholders. Plotting them on a bar chart in Figure 2.3 shows where those opportunities might be and starts to hint at the strategic value of different sectors.

⁷ <http://www.hoosieruplands.org/>

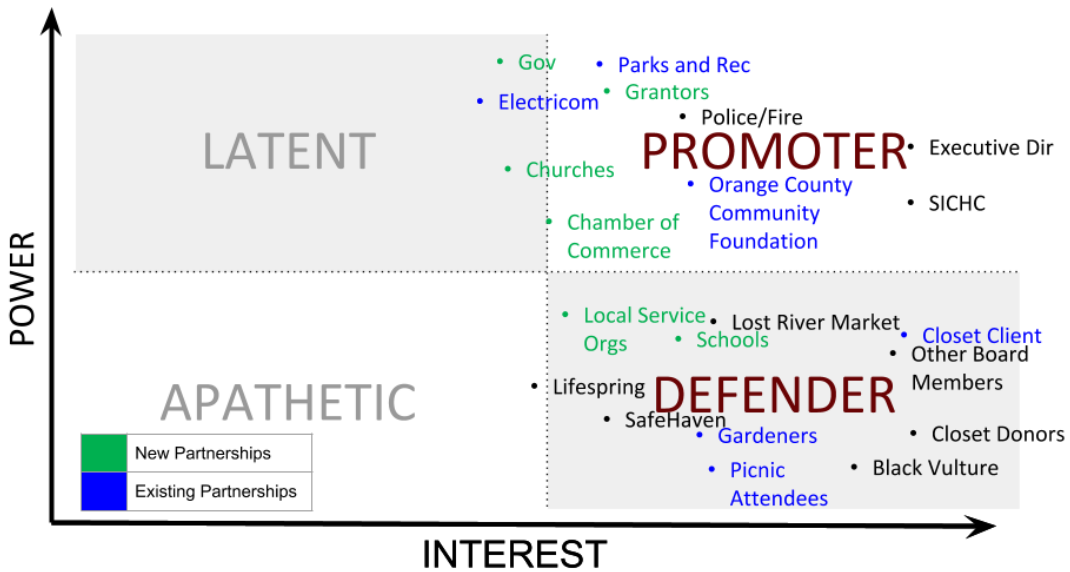
⁸ <https://paolichamberofcommerce.com/>

Fig 2.3: Bar Chart of Potential Stakeholders



The strategic value comes into much sharper focus when just a few of those stakeholders are plugged into the power and interest matrix in Figure 2.4.

Fig 2.4: Power and Interest Matrix of Potential Stakeholders



Again, it is important to note that this is only a representative idea of what a stakeholder framework could look like based on limited outsider perception of the community. The actual arrangement will depend on the real needs of the community, the willingness of potential stakeholders to become certain types of actual stakeholders, and—most importantly—the knowledge of the community possessed by the board itself. This, too, is a worthwhile exercise for the board to undertake.

How does HandUp OC actually expand its coalition?

By utilizing an expanded list of potential stakeholders and plotting them on a power and interest matrix, HandUp OC might get a better sense of how to organically expand their coalition. It might seem like an overwhelming task, especially for a small board, but completing it could yield huge dividends. That task might seem more manageable, though, with some simple organization based on stakeholder roles. Once it is completed, outreach to convert potential stakeholders into actual stakeholders should be much easier. Below is a step-by-step guide for one possible approach of undertaking this activity.

Step 1: Brainstorm a list of potential stakeholders.

This step is relatively straight forward, but the board should take care to ensure there is a level of diversity in its potential stakeholder list. Any local, regional, state, or federal organization that might conceivably provide grant funding in the areas HandUp OC works should be added. Similarly, any local or regional groups who already provide identical or similar services should be included. State and local government officials of both parties, churches of all denominations, and local businesses of all types should be given strong consideration, even if there is an assumption that they would not want to be involved. [Appendix 6](#) contains the list of over 100 potential stakeholders, which may be a useful starting point.

Step 2: Assign each potential stakeholder to one of five roles, and use that role to plot them on the matrix

Each potential stakeholder can fill one of five primary roles below, based on how HandUp OC imagines it would primarily interact with that stakeholder and what it might expect in return. Each stakeholder should be assigned to one of these primary roles (though secondary roles may also be noted). The roles and associated questions are:

Roles	Definition	Questions	Actions
Inform	The primary interaction with this stakeholder role is to routinely tell them about your programming.	<i>Are they in this role because they would benefit from HandUp OC programming?</i>	Then they probably belong in the defender quadrant.
		<i>Are they in this role because they can help get the word out about HandUp OC programming?</i>	Then they probably belong in the promoter quadrant.

Consult	The primary interaction with this stakeholder role is to ask them for advice.	<i>Are they in this role because they already work in the same, or similar, issue space as HandUp OC?</i>	Then they probably belong in the promoter or defender quadrants, depending on their existing stature and ability to provide credibility.
		<i>Are they in this role because they have organized similar programming in a different issue space, or in a different geographical location?</i>	Then they probably belong in the apathetic or latent category but are still worthwhile sources of consultation.
Involve	The primary interaction with this stakeholder role is utilizing their time (as a volunteer doing routine tasks), talent (as a volunteer doing specialized tasks), or treasure (as a monetary contributor) in a meaningful way for HandUp OC programming.	<i>Are they in this role because they might volunteer on routine tasks?</i>	Then they probably belong in the defender quadrant.
		<i>Are they in this role because they might volunteer on skilled tasks?</i>	Then they probably belong in the defender quadrant (unless their specialized skill is related to one of the channels of power, such as the ability to provide marketing, in which case they might belong in the promoter quadrant).
		<i>Are they in this role because they might donate (non-grant) money?</i>	If it is a small donation, then they probably belong in the defender quadrant. If it is a large donation, then they probably belong in the promoter quadrant.
Collaborate	The primary interaction with this stakeholder role is to partner in a way that enriches the quality of HandUp OC programming.	<i>Are they in this role because they provide grant funding?</i>	If it is a potential source of ongoing or regular funding, then they probably belong in the promoter quadrant. If it is a potential source of one-time funding, or if it isn't yet clear what grant funding they may provide, then they probably belong in the latent quadrant.
		<i>Are they in this role because they can provide some specific good or service?</i>	If it is for an immediate or ongoing good or service, then they probably belong in the promoter quadrant. Otherwise, they probably belong in the latent

			quadrant.
		<i>Are they in this role because you can partner to achieve mutual goals?</i>	Then they probably belong in the promoter quadrant.
Empower	The primary interaction with this stakeholder role is to grant them authority over some aspect of HandUp OC programming.	<i>Are they in this role because they can manage a HandUp OC program, or some aspect of programming?</i>	Then they probably belong in the promoter quadrant.
		<i>Are they in this role because they might be an effective good board member?</i>	Then they probably belong in the promoter quadrant.

Once this plotting process is completed, the resulting matrix should have good distribution across both the power and interest axes, reflecting the potential for a larger, broader, and more powerful coalition.

Step 3: Consider how each stakeholder might fit into an existing project

In addition to helping identify which quadrant a potential stakeholder might belong in, considering why each stakeholder is assigned to a specific role should also make it easier to identify specific programming with which they might be involved. This too is a worthwhile exercise that can pay huge dividends, because it helps facilitate Step 4. Figure 2.5 is an example of how HandUp OC could connect existing and potential stakeholders to the community garden.

Fig 2.5: Community Garden Potential Stakeholders

Inform	Consult	Involve	Collaborate	Empower
Lost River Market: Can the market more prominently highlight which produce in their store came from the community garden?	IU Center for Rural Engagement (CRE): Can CRE identify other successful community gardens in nearby communities in which HandUp OC can share best practices?	Court system: Can the work in the garden qualify for community service hours?	Purdue Extension Office: Can experts help teach gardening classes?	Dr. Thill: Is actively involved and oversees and manages the garden.

Step 4: Use the existing programming connection as a pretext to invite the potential stakeholder to join the coalition

Once HandUp OC understands how a potential stakeholder might connect to a specific program, such stakeholders can be approached and asked to join HandUp OC's efforts in that way. More often than not, a long-term and successful relationship will be predicated upon a specific ask and clear understanding of what is being requested. It is likely that many potential stakeholders will either decline to join the effort or will propose some other way that they may participate. In either case, this should be viewed as a success: it simultaneously helps inform others in the community about HandUp OC, and also gives a deeper understanding of the motivations of potential stakeholders in the community.

Step 5: Stakeholder maintenance

Going through these steps to help facilitate an initial organizing of potential stakeholders and then help convert many into actual stakeholders should be seen as an ongoing process. Any time a new potential stakeholder is identified, consider their role, their place on the matrix, and where they might connect with a specific program. As new needs arise, consider if any existing stakeholders—especially those in the latent or apathetic quadrants—might be moved to a new quadrant or might now connect with a program in a new way. It may also be worthwhile to revisit the roles, quadrants, and connections of both potential and actual stakeholders on a scheduled basis to ensure HandUp OC has an accurate understanding of the stakeholder environment.

<p>Stakeholder Analysis Section Summary</p>
<p><i>HandUp OC benefits from the passion of a small coalition. The organization should leverage that passion to grow their coalition into a broader and more diverse network. By adopting the strategy above, or a similar strategy, HandUp OC can better identify potential stakeholders, determine how they might fit into the coalition, and convert them into actual stakeholders with specific asks.</i></p>

SURVEY DESIGN AND IMPLEMENTATION

As a component of this project, HandUp OC requested a tool to collect feedback and data to better understand the value of its programming. First, the current programming and existing data on community needs is explored. Then, a summary is included that examines the tools developed to collect requested data, with guidance on how to use them.

Programming

Currently, HandUp OC focuses on providing three different types of programs in Paoli. Programming events and services focus on addressing poverty needs, bringing people together, and fostering a sense of community. These programs include:

- Community Garden
- Community Clothes Closet
- Picnic at the Park

The Community Garden and Community Clothes Closet started in 2015. The Community Garden has seen sporadic involvement while the Community Clothes Closet has engaged between 30-40 people per month, on average. In the last two years, the Community Clothes Closet has held a community wide “back-to-school” event to help provide clothing for families and children. In 2017, Picnic at the Park started initially as a reoccurring weekly event. Due to low attendance, HandUp OC shifted the program to a monthly event hosted in June, July, and August.

Additionally, HandUp OC has fostered informal community partnerships to assist in furthering its programming, as can be seen in partnerships with the Lost River Market and Deli, Southern Indiana Community Health Care (SICHC), and Orange County Community Foundation, to name a few. HandUp OC does not yet track program-related data.

Current Community Needs

In the last five years, the Orange County community has engaged in multiple community needs assessments. Assessments within the county and the town of Paoli have taken multiple forms such as surveys, focus groups, interviews, and town meetings. Key takeaways from these assessments were provided by each organization to help community members have a better understanding of community needs. Links to the assessments are available in the Guide to Additional Resources in [Appendix 12](#). These include:

Paoli Comprehensive Plan - 2014, Town of Paoli

A comprehensive plan focused on revitalizing land, attracting, and retaining businesses to boost economic development and growth, increase tourism attraction, and enhance overall quality of life for residents. This can be used by HandUp OC to better weigh

future planning in relation to economic activities, in light of those plans espoused by the community. Moreover, this plan can help HandUp OC evaluate any future activities related to physical location considerations.

Data Snapshot Orange County - 2016, Purdue Center for Regional Development

Created to provide local leaders, community members and organizations with data regarding population makeup, educational outcomes, poverty rates, and economic and labor market. This information can be used by HandUp OC in reviewing existing employment-related considerations, with an eye on future programming.

Orange County Community Profile - 2017, IU Center for Rural Engagement

A quick snapshot that provided facts and figures on Orange County household information, industry, educational attainment, access to technology, and health risks. These data can be used by HandUp OC in examining the needs of the community, with an eye toward future programming.

Community Health Needs Assessment - 2018, IU Health Paoli Hospital

Focused primarily on understanding factors which influenced community health concerns and needs. These data can be helpful to HandUp OC in reviewing the existing health and wellness needs of the community. This may help the organization determine future programming to address identified gaps in services.

These assessments provide HandUp OC with a deeper understanding of the community needs in Paoli in several domains. HandUp OC can begin discussion about existing community needs by listing the most pertinent identified needs based on the data in these reports, including the themes they highlight (economic, health, education, community engagement). HandUp OC can then utilize this data to explore tailoring programming that not only aligns with the organization's mission but also serves these community needs.

Monitoring Community Engagement

In order to build on these previous assessments, and to fulfill the stated desires of HandUp OC, two distinct forms of information-gathering have been identified and created. A **community preferences assessment** and **program evaluation** are tools to assist in building the capacity of HandUp OC by engaging key stakeholders and surveying the broader community.

Recommendation #5: Conduct a focus group to obtain stakeholder input

Community Preferences Assessment (Focus Group)

This type of assessment, obtained via a focus group for key, identified stakeholders, will help HandUp OC in the following ways:

- Better understand community perceptions of the organization
- Learn how to further engage the community

- Identify how HandUp OC can improve programming
- Allow for participants to offer in-depth thoughts and analysis
- Provide HandUp OC an opportunity to further develop relationships with the identified key stakeholders as it builds its internal capacity and partnerships

Using community data from the previous needs assessments, as well as data collected from a focus group of key stakeholders, HandUp OC will be able to create relevant programming and continue to improve current program offerings.

Methodology

The focus group should be conducted by a qualified, neutral third party (a potential resource to facilitate such a focus group is the [Indiana University Sustaining Hoosier Communities](#) through the [Indiana University Center for Rural Engagement](#)). The Community Preferences Assessment survey in [Appendix 7](#) has been created and can be edited by HandUp OC as needed—this can be used by a neutral facilitator to guide the focus group discussion. HandUp OC ideally should not be present for the discussion so that invited stakeholders feel they can speak candidly. Follow-up questions and probing into topics is encouraged.

The focus group session should be audio recorded after gaining consent by participants. Responses should also be written down by a designated recorder at the session and reviewed afterward to ensure accuracy.

Data Analysis and Resources

This focus group will largely provide qualitative information of use to HandUp OC. Answers to questions and the discussion generally—as recorded on paper and using the audio recording as necessary—should be compiled in written format. The goals of the assessment would be to further understand community perception of HandUp OC, discover potential gaps in programming to inform future activities, and understand effective avenues for marketing the organization’s programs.

Should further analysis of the focus group results be needed, two IU organizations may be able to provide assistance: the [IU Center for Survey Research](#) and the [Indiana Statistical Consulting Center](#). The IU Center for Survey Research provides consultation services for survey design, implementation, and collection. The [Indiana Statistical Consulting Center](#) provides advanced data analysis and statistical support. Both groups offer services to IU-affiliated organizations, nonprofits, government entities, and industry.

Recommendation #6: Conduct ongoing programming surveys

Program Evaluation (Post-Event) Survey

Program evaluation surveys help an organization evaluate current and future programming as feedback is provided directly by program participants. Survey responses also help identify and

rank program strengths and areas of potential growth. HandUp OC should administer post-event surveys when community members engage with HandUp OC programming (at the Community Clothes Closet, for example). Surveys should be provided at the conclusion of an event or interaction so that HandUp OC can assess community participation and involvement.

Methodology

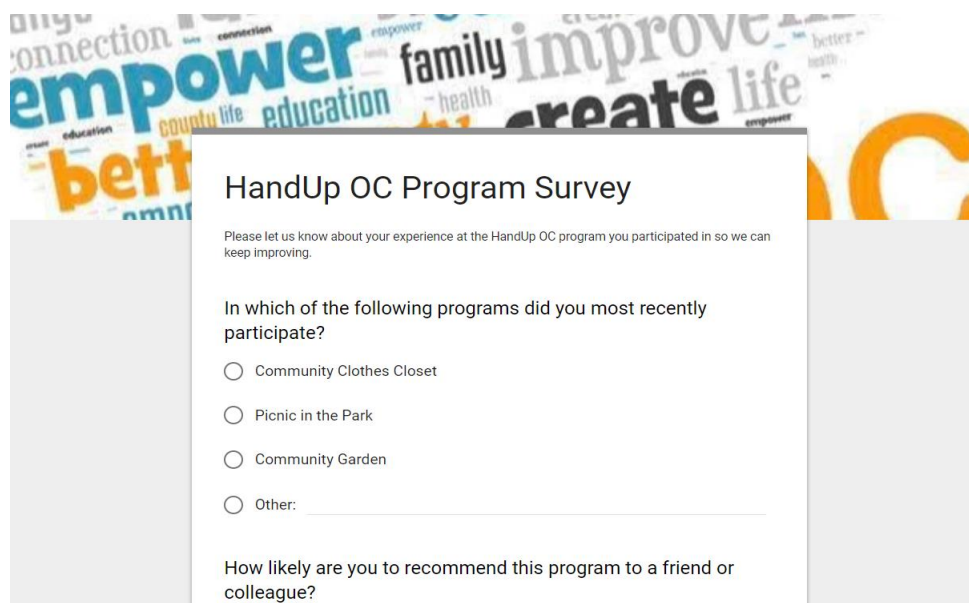
Most post-event surveying is typically completed via a web-based platform; however, IU's Center for Rural Engagement Community Profile highlights that only 55.7% of Orange County residents have access to high-speed internet. This means HandUp OC should provide a program evaluation survey through multiple platforms (web-based and paper) to ensure all community members are able to complete the survey. It is recommended that HandUp OC offer participants a paper and electronic version of the survey at all events—participants can then choose which version works best for them.

Google Forms Online Survey

A Google Forms version of the survey will be utilized to reach those who are more technologically savvy in the community. This online Google Forms survey can be accessed via mobile app or directly online, using a provided [URL](#). As we interviewed prominent members of HandUp OC, we learned anecdotally that many young people have smartphones and can access, at least periodically, internet and mobile apps. Directly following programming, the [URL](#) should be given to participants, and all participants should be encouraged to complete the short survey as soon as possible in order to receive relevant data. For example, the survey is easily available on mobile devices; HandUp OC members should encourage program participants to access the online survey by typing the provided URL into their mobile phone browser.

Image 3.1: Screenshot of the Program Evaluation Google Form

The full version can be accessed via this shortened link: <http://bit.ly/handupocsurvey>



The image shows a screenshot of a Google Form titled "HandUp OC Program Survey". The background of the form is a word cloud with terms like "empower", "family", "improve", "education", "create", "life", "better", "connection", "health", "education", "county", "life", "education", "health", "create", "life", "better", "connection", "health", "education", "county", "life", "education", "health", "create", "life", "better". The form content includes:

HandUp OC Program Survey

Please let us know about your experience at the HandUp OC program you participated in so we can keep improving.

In which of the following programs did you most recently participate?

- Community Clothes Closet
- Picnic in the Park
- Community Garden
- Other: _____

How likely are you to recommend this program to a friend or colleague?

Students have made HandUp OC a co-owner of this electronic survey so that data from the survey can be obtained.

Paper Survey

In discussion with HandUp OC members, we learned that numerous adults and senior citizens are unable to access online resources and mobile apps. This may stem from the relatively low rate of high-speed internet availability as well as generational differences in technology usage. Seniors in particular are more comfortable receiving news and updates from printed sources. In order to reach these populations, a paper version (which can be found in [Appendix 8](#)) has been created that matches the Google Form survey. This paper survey should be administered directly following programming, and event managers can specify that both the Google Form and the paper survey are available options for participants.

Administering the Program Evaluation Survey

The goal of creating both an online and paper version of the Program Evaluation survey is to ensure that HandUp OC captures responses from as many participants as possible, in the manner participants feel most comfortable responding. To do so, HandUp OC staff and volunteers can direct participants to either the online or paper versions of the survey (when feasible, participants can be directed to the online version, but staff and volunteers should have copies of paper version readily available as well).

To direct participants to the online survey, HandUp OC can prominently display the survey URL on a sign or board and provide slips of paper with the link as well, to ensure participants remember it. Verbiage like *Please take our survey to let HandUp OC know how we're doing!* <http://bit.ly/handupocsurvey> can be used on both signage and the slip of paper. Paper versions of the survey (found in [Appendix 8](#)) should also be readily available for those who would rather respond via paper; HandUp OC should keep an ongoing supply of paper survey copies at stationary programming like the Community Clothes Closet, and should be ready to hand out the survey (as well as slips of paper with the online survey URL) at events like Picnic in the Park. A dedicated box can be used to collect paper surveys, and participants can be instructed that they only need to respond via one method.

Data Analysis and Resources

Once these program evaluations have been implemented, we recommend that the client begin a data analysis process, with established time frames for data review. Data from the program evaluation surveys should be compiled throughout the year (perhaps at least quarterly), both within the "Responses" tab of the Google Form and by collating paper survey responses. Once this data is collected, we recommend the client complete a basic analysis of the data by measuring the following metrics in a spreadsheet:

- Average attendance at each program/event
- Average responses for questions with sliding 1-5 scales
- Sums of responses for “How can we improve this program?”
- Average demographic data responses

To assist HandUp OC with advanced analysis of compiled data, the IU resources mentioned previously in the Community Preferences Assessment section may be of assistance.

Survey Design and Implementation Section Summary

HandUp OC currently provides three different types of services or programs. To better understand the extent to which these are the services and programs the community wants and needs, HandUp OC would benefit from conducting a focus group to assess community preferences. To do so, HandUp OC can utilize the Community Preferences Assessment (edited as the organization deems fit), created for this purpose. Additionally, HandUp OC should evaluate its current programs by providing post-event surveys. Analyzing data collected from these activities will help the organization understand community wants and needs and improve current and future programming.

BUILDING CONSIDERATION

Background on the Methodist Church

Paoli’s first church was built in 1838 as a shared space for Methodist and Presbyterian congregations. This initial building served as the Methodist congregation’s place of worship until 1881 when the congregation grew too large. A new building was then constructed on West Main Street, close to the town square, for a price of \$2,425. As the church continued to grow, a decision was made to remodel and expand in 1923. A large addition was constructed on the back of the building that included a kitchen, dining room, classrooms, and basketball gym.

Throughout Paoli’s history, the Methodist Church has been a center of community involvement, charitable activity, and youth service. Since 1972, the building has passed through multiple hands and has not been used since 2011. The Methodist Church is part of the Paoli Historic District. In the past few years, a nonprofit group was formed to preserve the Methodist Church as the building was falling into disrepair. Recently, this nonprofit group offered to give HandUp OC the church and \$4,000 for the building.

HandUp OC asked O’Neill students for their assessment as to whether to proceed with acceptance of this church building for future organizational programming and activity. To make this evaluation, students considered several factors.

Major Observations

During the tour of the Methodist Church, there were a number of major observations. It was apparent that the building featured an extremely flexible space that would allow for a variety of uses. It was also clear that the roof has been recently replaced and is in great condition.

The Methodist Church is located in downtown Paoli, as shown in the map in Image 4.1 below. It is ideal for foot traffic with its sidewalks and central location. The church is a 15-minute walk and five-minute bike ride from the school grounds. The church would offer youth and community members a location that is accessible by foot or bicycle.

Image 4.1: Map of Downtown Paoli



The students determined that the church is in poor condition with an overall sense of abandonment. The Methodist Church will likely need a top-to-bottom rehabilitation and redevelopment of the building. Some major observations are included below and in more detail in [Appendix 9](#):

- Large holes in the gym floor
- Broken windows
- Obsolete HVAC equipment
- Dated electrical lighting and outlets
- Significant mold damage
- The lack of a sprinkler system
- A chimney requiring repointing
- A lack of ramps or elevators for handicap accessibility

The location does not seem to have dedicated parking. Nevertheless, the adjacent parcel belonging to the Church of Jesus Christ of Latter-day Saints has been used for parking in the past. In addition, the Methodist Church has on-street parking in its proximity and other parking opportunities toward the Town Square.

Key Considerations for 205 W. Main St.

There are a few key considerations for HandUp OC to keep in mind in regard to the possible acquirement of the abandoned church building. Many of these considerations reflect the previous sections regarding capacity building, stakeholder analysis, and survey design and implementation.

Does HandUp OC have sufficient resources?

Upon consideration, HandUp OC should reflect on its current partnerships and revenue streams. In order to make the church an enduring project, there would need to be a steady stream of revenue/grant funding. It will also be difficult to have long-term sustainability of the building without some form of revenue generation on-site (e.g., childcare, market rate housing, retail). Reliance on grant funding can be problematic if those revenue streams were to no longer be available.

Does HandUp OC have the right people involved?

HandUp OC should identify key stakeholders in the community, both individuals and organizations, that would have an interest in the renovation of the church and its future use. By identifying these stakeholders through a stakeholder analysis and obtaining buy-in, they will be more likely to have a vested and enduring interest in the project. Identifying the correct types of stakeholders could also lead to established partnerships with local organizations that would increase the chances of obtaining funding.

What does the community want HandUp OC to provide?

HandUp OC would need to determine what the community wants from the building. It is imperative that HandUp OC align with the needs of the community in order to maximize its

usage. Without catering to the needs of the community, usage may decline over time and leave an unmet need amongst the Paoli population.

How will the space be used?

When determining the use of the church, HandUp OC needs to keep in mind that expenses and revenues are going to vary greatly. The expenses and revenues for a community center/gym are going to be extremely different compared to the expenses and revenues of market rate housing.

Does the building renovation project align with the organization's mission and goals?

Lastly, HandUp OC should determine if taking on this project aligns with its updated mission statement and future goals. It is important that HandUp OC focus on its mission, vision, and goals in the early stages of growth to avoid being spread too thin. Identifying achievable and realistic goals early on will allow HandUp OC to hit key milestones, grow as an organization, and obtain the knowledge and structure to tackle larger projects later on.

Financial Impacts

HandUp OC has some financial constraints that need to be evaluated and analyzed prior to taking on any large-scale projects. The current programs that HandUp OC has up and running, such as the Clothing Closet, Picnic in the Park, and the Community Garden, already utilize a portion of the current finances. By taking on a new and large project, HandUp OC would not be able to further grow and expand its current programs, because it would quickly deplete its modest coffers and overextend its limited number of volunteers.

If HandUp OC decided to move forward with acquiring 205 W. Main St. in the future, it would need to raise \$1.5 million at a minimum, to renovate the building, based on estimates located in [Appendix 11](#). Such a significant project would require dedicated fundraising and partnership building. Dedicating extensive time to these tasks would take away from the organization's currently running programs.

Potential Redevelopment Alternatives

The repurposing of a church has many economic and socio-cultural benefits, which often motivate different stakeholders to join an effort to save a church.

Churches are often located in their community's downtown which, if vacant, may present negative economic impacts long-term. Redeveloped churches have added land value to the adjoining neighborhoods and can actually attract other developers to invest in the community.

From a socio-cultural perspective, if a church has historical significance to the community, then a redevelopment project would allow the community an opportunity to save and preserve their history. Secondly, a redeveloped church may become a location where new social services can be provided that were either not realized as a need for the community or had no viable venue.

Recently, HandUp OC has been offered the ownership of the Methodist Church. HandUp OC has been considering the following different uses for the church:

- A physical location and storage for the Community Closet
- A community center for Paoli's youth
- A venue for other social service providers

Based on research of different redevelopment alternatives ([Appendix 10](#)), churches have been transformed into gyms, breweries, offices, event venues, for-profit child care centers, or even market rate housing, all of which generate revenue for their owners. Other churches have been converted into offices for social services or community centers. How a church is redeveloped is largely driven by community need and feasibility.

Feasibility of Redevelopment Alternatives

The major hurdle for any redevelopment of the Methodist Church is the cost of the rehabilitation and redevelopment of the building. As discussed above, the condition of the church is very poor, and any redevelopment of the church will require a substantial initial investment.

As HandUp OC builds its own capacity and identifies its own stakeholders, it should be able to develop a coalition of stakeholders to help advocate and fundraise for a redevelopment of the church. Grants are usually awarded to projects based on collaboration across a community and the different stakeholders. [Indiana Landmarks](#) and [Hoosier Uplands](#) have provided funding to preserve historical buildings in the past and could be potential partners worth pursuing in the future.

Based on the need for a full feasibility study, using the square footage of the church and some assumptions about the operating cost and possible uses, three development scenarios for the church were created. Our renovation estimates ranged from \$1,537,200 to \$1,797,588. The actual redevelopment costs if the project proceeded in the future would depend on the uses envisioned.

To that end, to make the acquisition of the Methodist Church feasible, HandUp OC would need to generate sufficient income from the property to offset the annual operating cost of the building. The operating cost would include the utilities, insurance, property taxes if applicable, maintenance, and possibly property management. For the scenarios below, the operating cost does not include any property taxes, tax preparation costs, insurance, or capital expenses for the building. Some of these are driven by the property's valuation.

Figure 4.1 demonstrates the annual gap in the operating costs in relation to the rental income which might be generated. Any of these scenarios would lead to an annual loss for the organization.

Figure 4.1: Annual Gap in Operating Costs in Relation to Rental Income

	Scenario #1: Community Center (60%) / Market Rate Housing (40%)	Scenario #2: Community Center (60%) / Restaurant (20%) / Offices (20%)	Scenario #3: Community Center (60%) / Gym Use (20%) / Offices (20%)
Est. Renovation Cost	\$1,537,200	\$1,797,588	\$1,589,400
Est. Annual Operating Cost	\$32,000+	\$32,000+	\$30,000+
Est. Rental Income	\$27,000+	\$24,000+	\$24,000+
Est. Net Income	(\$5,000+)	(\$8,000+)	(\$6,000+)

Note: Each of the scenarios are broken down with the cost assumptions used in [Appendix 11](#).

Recommendation #7: Do not proceed with the acquisition of the church at this time

It is important for HandUp OC to follow the recommendations to build its internal capacity and evaluate its effectiveness prior to taking on any larger projects than it already has underway. Moving forward, HandUp OC needs to identify additional resources (funding sources and organizational structure), identify key stakeholders and people to target in the community, and clarify programming offerings through stakeholder outreach (surveys, focus group).

Building Consideration Section Summary

The renovation estimates for the Methodist Church range from \$1,537,200 to \$1,797,588. In addition, despite the generation of possible rental income, this would not be enough to meet operating costs. As such, HandUp OC would be operating the church at a loss. It is not recommended to proceed with the acquisition of the church at this time.

CONCLUSION

In its relatively short existence, HandUp OC has already undertaken considerable steps to help the Paoli and greater Orange County communities. Its board and staff display a determined commitment to identifying needs in the community and creating programming that not only meets those needs but builds community in the process.

IU O'Neill School of Public and Environmental Affairs Master of Public Affairs (MPA) students conducted this analysis of HandUp OC in four focus areas: capacity building, stakeholder analysis, survey design and implementation, and building consideration. In so doing, seven recommendations for future action were offered. These recommended actions can help HandUp OC build a strong foundation for future development of its programming, people, and resources.

For ease of use and reference, these recommendations can be found in the Implementation Action Plan in [Appendix 1](#); HandUp OC can refer to this as well as the templates, tools, and guides included in the appendices. HandUp OC should apply their considerable experience, expertise, and community knowledge to tailor these resources to their unique needs and interests. The Indiana University Center for Rural Engagement is also available for further research and localized resources to help in implementation.

HandUp OC has an immense amount of passion and potential, and with additional focus and intentional planning, the organization can grow and continue to fulfill its mission of community service to the people of Paoli and Orange County.

Appendix 1: Implementation Action Plan

A draft Implementation Action Plan has been developed to assist HandUp OC with prioritizing and scheduling of the seven recommendations made in this report. So that the recommendations can be implemented seamlessly alongside existing HandUp OC activities, the draft plan offers guidance for the suggested timing for each. The board should use this document to monitor implementation progress on each recommendation, but they may want to modify the described activities or timeline based on internal knowledge of what will be required.

Recommendation 1: Update HandUp OC's mission statement	
Report Section	Capacity Building
Priority	High
Timeline	Immediately (0-3 months)
Steps/Strategies Outlined in Report	HandUp OC should select one of three alternative paths to updating their mission statement: 1) Create a new mission statement, 2) Add S.M.A.R.T. goals to the current mission statement, or 3) Otherwise revise current mission statement
Tools and Resources Referenced in Report	<ul style="list-style-type: none"> • Example mission statements • Guiding questions for mission statement development • Nine characteristics of mission statements

Recommendation 2: Harness existing passion to expand HandUp OC's coalition	
Report Section	Stakeholder Analysis
Priority	High
Timeline	Immediately (0-3 months)
Steps/Strategies Outlined in Report	By identifying potential stakeholders, considering the ideal method of interaction, envisioning how they might participate in specific programming, and then approaching them with a specific request, HandUp OC can convert potential stakeholders into a broader coalition of actual stakeholders.

Tools and Resources Referenced in Report	<ul style="list-style-type: none"> • Step-by-step guide for stakeholder analysis exercises • Example power/interest matrix exercise • Sample list of potential stakeholders
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Recommendation 3: Adopt bylaws for HandUp OC

Report Section	Capacity Building
Priority	High
Timeline	Immediately (0-3 months)
Steps/Strategies Outlined in Report	Bylaws should include updated mission statement, information on board size and makeup (recommended odd number, with term limits, and consideration of creating youth advisory committee), and rules for conducting meetings
Tools and Resources Referenced in Report	<ul style="list-style-type: none"> • New draft bylaws

Recommendation 4: Restructure HandUp OC's board composition to include more diversity of expertise and community connection

Report Section	Capacity Building
Priority	Medium
Timeline	After completion of the first three recommendations (3-6 months)
Steps/Strategies Outlined in Report	Use the results of the stakeholder analysis exercises, along with the provided tools, to identify and recruit a more diverse board
Tools and Resources Referenced in Report	<ul style="list-style-type: none"> • Board Self-Assessment Tool • Board Composition and Recruitment Matrix • Update Board Application

Recommendation 5: Conduct focus group to obtain stakeholder input

Report Section	Survey Design and Implementation
Priority	Medium
Timeline	After completion of stakeholder analysis (3-6 months)
Steps/Strategies Outlined in Report	After completing the stakeholder analysis exercises, key stakeholders should be invited to participate in a focus group that helps HandUp OC determine which programming is most beneficial to the community.
Tools and Resources Referenced in Report	<ul style="list-style-type: none"> • Draft Community Preferences Assessment • IU Center for Rural Engagement may help conduct

Recommendation 6: Conduct ongoing programming survey

Report Section	Survey Design and Implementation
Priority	Medium
Timeline	Ongoing basis (implement within 6-12 months)
Steps/Strategies Outlined in Report	Conducting surveys with individuals after they interact with a HandUp OC program or participate in an event is critical to understanding how programming can be improved. Because a draft survey tool (paper and online) is provided, it could be implemented now, but priority should be on other recommendations first.
Tools and Resources Referenced in Report	<ul style="list-style-type: none"> • Draft Program Evaluation Survey (print version) • Draft Program Evaluation Survey (online version) • IU Center for Survey Research (consulting for survey design and implementation) • Indiana Statistical Consulting Center (consulting for advanced data analysis)

Recommendation 7: Do not proceed with acquisition of the church at this time

Report Section	Building Consideration
Priority	Low
Timeline	Do not proceed now, but potentially revisit after achieving other recommendations
Steps/Strategies Outlined in Report	Until HandUp OC is confident that it has the capacity to take on this sort of project or expanded programming, it should focus on implementing the first six recommendations.
Tools and Resources Referenced in Report	<ul style="list-style-type: none">• Analysis of the condition of the church• Examples of how other areas have repurposed abandoned churches• Cost estimates for different repurposing scenarios

Appendix 2: Nine Characteristics of Mission Statements



Source: Board Source 2016 <https://boardsource.org/mission-statement-characteristics/>

Appendix 3: Draft Bylaws

BYLAWS OF HANDUP OC, INCORPORATED

A NON-PROFIT, TAX EXEMPT, PUBLIC BENEFIT CORPORATION

PREAMBLE

The following Bylaws shall be subject to, and governed by, the Non-Profit Corporation Act of Indiana and the Articles of Incorporation of HandUp OC, Inc. In the event of a direct conflict between the herein contained provisions of these Bylaws and the mandatory provisions of the Non-Profit Corporation Act of Indiana, said Non-Profit Corporation Act shall be the prevailing controlling law. In the event of a direct conflict between the provisions of these Bylaws and the Articles of Incorporation of Corporation, the latter shall be controlling.

ARTICLE 1 – NAME

The legal name of the Non-Profit Corporation shall be known as HandUp OC, Incorporated, and shall herein be referred to as the "Corporation."

ARTICLE 2 – PURPOSE

The general purposes for which this Corporation has been established are as follows:

The purpose for which the Non-Profit Corporation is formed is set forth in the Articles of Incorporation.

The Corporation is established within the meaning of IRS Publication 557 Section 501(c)(3) Organization of the Internal Revenue Code of 1986, as amended (the "Code") or the corresponding section of any future federal tax code and shall be operated exclusively **to empower citizens of Orange County to create better lives for themselves, their families, and each other by improving community health, connection, and life skills education.**

In addition, this Corporation has been formed for the purpose of performing all things incidental to, or appropriate in, the foregoing specific and primary purposes. However, the Corporation shall not, except to an insubstantial degree, engage in any activity or the exercise of any powers which are not in furtherance of its primary non-profit purposes.

The Corporation shall hold and may exercise all such powers as may be conferred upon any nonprofit organization by the laws of the State of Indiana and as may be necessary or expedient for the administration of the affairs and attainment of the purposes of the Corporation. At no time and in no event shall the Corporation participate in any activities which have not been permitted

to be carried out by a Corporation exempt under Section 501(c) of the Internal Revenue Code of 1986 (the "Code").

ARTICLE 3 – OFFICES

The principal office of the Corporation shall be located at 2743 E County Road 725 S, Paoli, Indiana 47454.

The Corporation may have other such offices as the Board of Directors may determine or deem necessary, or as the affairs of the Corporation may find a need for from time to time.

ARTICLE 4 – DEDICATION OF ASSETS

The properties and assets of the Corporation are irrevocably dedicated to and for non-profit purposes only. No part of the net earnings, properties, or assets of this Corporation, on dissolution or otherwise, shall inure to the benefit of any person or any member, director, or officer of this Corporation. On liquidation or dissolution, all remaining properties and assets of the Corporation shall be distributed and paid over to an organization dedicated to non-profit purposes which has established its tax-exempt status pursuant to Section 501(c) of the Code.

ARTICLE 5 – BOARD OF DIRECTORS

General Powers and Responsibilities

The Corporation shall be governed by a Board of Directors (the "Board"), which shall have all the rights, powers, privileges and limitations of liability of directors of a non-profit corporation organized under the Non-Profit Corporation Act of Indiana. The Board shall establish policies and directives governing business and programs of the Corporation and shall delegate to the Executive Director and Corporation staff, subject to the provisions of these Bylaws, authority and responsibility to see that the policies and directives are appropriately followed.

Number and Qualifications

The Board shall have up to 15, but no fewer than 5, Board members. The number of Board members may be increased beyond 15 members or decreased to less than 5 members by the affirmative vote of a two-thirds majority of the then serving Board of Directors. A Board member need not be a resident of the State of Indiana.

In addition to the regular membership of the Board, representatives of such other organizations or individuals as the Board may deem advisable to elect shall be *Ex-Officio Board Members*, which will have the same rights and obligations, including voting power, as the other directors.

Board Compensation

The Board shall receive no compensation other than for reasonable expenses. However, provided the compensation structure complies with Sections relating to "Contracts Involving Board Members and/or Officers" as stipulated under these Bylaws, nothing in these Bylaws

shall be construed to preclude any Board member from serving the Corporation in any other capacity and receiving compensation for services rendered.

Board Elections

The Governance Committee shall present nomination for new and renewing Board members at the board meeting immediately preceding the beginning of the next fiscal year.

Recommendations from the Governance Committee shall be made known to the Board in writing before nominations are made and voted on. New and renewing Board members shall be approved by a majority of those Board members at a Board meeting at which a quorum is present.

Term of Board

All appointments to the Board shall be for a term of 3 years. No person shall serve more than 3 consecutive terms. After serving the maximum total number of consecutive years on the Board, a member may be eligible for reconsideration as a Board member after 3 years have passed since the conclusion of such Board member's service. No person shall serve more than 18 years in total.

Vacancies

A Board member elected to fill a vacancy shall be elected for the unexpired term of his or her predecessor in office.

Resignation

Each Board member shall have the right to resign at any time upon written notice thereof to the Chair of the Board, Secretary of the Board, or the Executive Director. Unless otherwise specified in the notice, the resignation shall take effect upon receipt thereof, and the acceptance of such resignation shall take effect upon receipt thereof, and the acceptance of such resignation shall not be necessary to make it effective.

Removal

The Board of Directors, by way of affirmative vote of a majority of the directors then currently in office, may remove any director with or without cause at any regular or special meeting, provided that the director to be removed has been notified in writing in the manner set forth in Article 5 – Meetings that such action would be considered at the meeting.

Meetings

The Board's regular meetings may be held at such time and place as shall be determined by the Board. The Chair of the Board or any 3 Board members may call a special meeting of the Board with 3 days' written notice provided to each member of the Board. The notice shall be served upon each Board member via hand delivery, regular mail, email, or fax. The person(s) authorized to call such special meetings of the Board may also establish the place the meeting is to be conducted, so long as it is a reasonable place to hold any special meeting of the Board.

Minutes

The Secretary shall be responsible for the recording of all minutes of each and every meeting of the Board in which business shall be transacted in such order as the Board may determine from time to time. However, in the event that the Secretary is unavailable, the Chair of the Board

shall appoint an individual to act as Secretary at the meeting. The Secretary, or the individual appointed to act as Secretary, shall prepare the minutes of the meetings, which shall be delivered to the Corporation to be placed in the minute books. A copy of the minutes shall be delivered to each Board member via either regular mail, hand delivered, emailed, or faxed within 14 business days after the close of each Board meeting.

Quorum

At each meeting of the Board of Directors or Board Committees, the presence of 51% of the then-serving Directors shall constitute a quorum for the transaction of business. If at any time the Board consists of an even number of members and a vote results in a tie, then the vote of the Chair of the Board shall be the deciding vote. The act of the majority of the Board members serving on the Board or Board Committees and present at a meeting in which there is a quorum shall be the act of the Board or Board Committees, unless otherwise provided by the Articles of Incorporation, these Bylaws, or a law specifically requiring otherwise. If a quorum is not present at a meeting, the Board members present may adjourn the meeting from time to time without further notice until a quorum shall be present. However, a Board member shall be considered present at any meeting of the Board or Board Committees if during the meeting he or she is present via telephone or web conferencing with the other Board members participating in the meeting.

Voting

Each Board member shall have only one vote.

Board Member Attendance

An elected Board Member who is absent from 3 consecutive regular meetings of the Board during a fiscal year shall be encouraged to reevaluate with the Chair of the Board his/her commitment to the Corporation. The Board may deem a Board member who has missed 3 consecutive meetings without such a reevaluation with the Chair to have resigned from the Board.

ARTICLE 6 – OFFICERS

Officers and Duties

The Board shall elect officers of the Corporation which shall include a Chair of the Board, Vice Chair, Executive Director, Secretary, Treasurer, and such other officers as the Board may designate by resolution. The same person may hold any number of offices, except that neither the Secretary nor the Treasurer may serve concurrently as the Chair of the Board or the Executive Director. In addition to the duties in accordance with this Article, officers shall conduct all other duties typically pertaining to their offices and other such duties which may be required by law, Articles of Incorporation, or by these bylaws, subject to control of the Board of Directors, and they shall perform any other such additional duties which the Board of Directors may assign to them at their discretion.

The officers will be selected by the Board at its annual meeting, and shall serve the needs of the Board, subject to all the rights, if any, of any officer who may be under a contract of

employment. Therefore, without any bias or predisposition to the rights of any officer that may be under any contract of employment, any officer may be removed with or without cause by the Board. All officers have the right to resign at any time by providing notice in writing to the Chair of the Board, Executive Director, and/or Secretary of the Corporation, without bias or predisposition to all rights, if any, of the Corporation under any contract to which said officer is a part thereof. All resignations shall become effective upon the date on which the written notice of resignation is received or at any time later as may be specified within the resignation; and unless otherwise indicated within the written notice, a stated acceptance of the resignation shall not be required to make the resignation effective.

Any and all vacancies in any office because of death, resignation, disqualification, removal, or for any other cause, shall be filled in accordance to the herein prescribed bylaws for regular appointments to such office. The compensation, if any, of the officers shall be fixed or determined by resolution of the Board of Directors.

Chair of the Board

It shall be the responsibility of the Chair of the Board, when present, to preside over all meetings of the Board of Directors and Executive Committee. The Chair of the Board is authorized to execute, in the name of the Corporation, any and all contracts or other documents which may be authorized, either generally or specifically, by the Board to be executed by the Corporation, except when required by law that the Executive Director's signature must be provided.

Vice Chair

In the absence of the Chair, or in the event of his/her inability or refusal to act, it shall then be the responsibility of the Vice Chair to perform all the duties of the Chair, and in doing so shall have all authority and powers of and shall be subject to all of the restrictions on, the Chair.

Executive Director

It shall be the responsibility of the Executive Director, in general, to supervise and conduct all activities and operations of the Corporation, subject to the control, advice and consent of the Board of Directors. The Executive Director shall keep the Board of Directors completely informed, shall freely consult with them in relation to all activities of the Corporation, and shall see that all orders and/or resolutions of the Board are carried out to the effect intended. The Board of Directors may place the Executive Director under a contract of employment where appropriate. The Executive Director shall be empowered to act, speak for, or otherwise represent the Corporation between meetings of the Board. The Executive Director shall be responsible for the hiring and firing of all personnel and shall be responsible for keeping the Board informed at all times of staff performance and for implementing any personnel policies which may be adopted and implemented by the Board. The Executive Director, at all times, is authorized to contract, receive, deposit, disburse and account for all funds of the Corporation, to execute in the name of the Corporation all contracts and other documents authorized either generally or specifically by the Board to be executed by the Corporation, and to negotiate any and all material business transactions of the Corporation.

Secretary

The Secretary, or his/her designee, shall be the custodian of all records and documents of the

Corporation, which are required to be kept at the principal office of the Corporation, and shall act as secretary at all meetings of the Board of Directors, and shall keep the minutes of all such meetings on file in hard copy or electronic format. S/he shall attend to the giving and serving of all notices of the Corporation and shall see that the seal of the Corporation, if any, is affixed to all documents, the execution of which on behalf of the Corporation under its seal is duly authorized in accordance with the provisions of these bylaws.

Treasurer

It shall be the responsibility of the Treasurer to keep and maintain, or cause to be kept and maintained, adequate and accurate accounts of all the properties and business transactions of the Corporation, including accounts of its assets, liabilities, receipts, disbursements, gains, losses, capital, retained earnings, and other matters customarily included in financial statements.

The Treasurer shall be responsible for ensuring the deposit of, or cause to be deposited, all money and other valuables as may be designated by the Board of Directors. Furthermore, the Treasurer shall disburse, or cause to be disbursed, the funds of the Corporation, as may be ordered by the Board of Directors, and shall render to the Chair of the Board, Executive Director, and directors, whenever they request it, an account of all the Treasurer's transactions as treasurer and of the financial condition of the Corporation.

The Treasurer shall give the Corporation a bond, if so requested and required by the Board of Directors, in the amount and with the surety or sureties specified by the Board for faithful performance of the duties of the Treasurer's office and for restoration to the Corporation of all its books, papers, vouchers, money and other property of every kind in the Treasurer's possession or under the Treasurer's control upon the Treasurer's death, resignation, retirement, or removal from office. The Corporation shall pay the cost of such a bond.

ARTICLE 7 – COMMITTEES

Executive Committee

The Board may appoint an Executive Committee composed of a minimum of 3 directors, one of whom shall be the Chair of the Board and another shall be either the Secretary, or the Treasurer, to serve on the Executive Committee of the Board. The Executive Committee, unless limited in a resolution of the Board, shall have and may exercise all the authority of the Board in the management of the business and affairs of the Corporation between meetings of the Board, provided, however, that the Executive Committee shall *not* have the following authority:

- Approve of any action that, pursuant to applicable Law, would also require the affirmative vote of the members of the Board if this were a membership vote.
- Fill vacancies on, or remove the members of, the Board of Directors or any committee that has the authority of the Board.
- Fix compensation of the directors serving on the Board or on any committee.
- Amend or repeal the Articles of Incorporation or bylaws or adopt new bylaws.

- Amend or repeal any resolution of the Board of Directors that by its express terms is not so amendable or repealable.
- Appoint any other committees of the Board of Directors or their members.
- Approve a plan of merger, consolidation, voluntary dissolution, bankruptcy, or reorganization; or a plan for the sale, lease, or exchange of all or considerably all of the property and assets of the Corporation otherwise than in the usual and regular course of its business; or revoke any such plan.
- Approve any self-dealing transaction, except as provided pursuant to law.
- Unless otherwise authorized by the Board of Directors, no committee shall compel the Corporation in a contract or agreement or expend Corporation funds.

The Secretary or Treasurer of the Corporation shall send to each director a summary report of the business conducted in any meeting of the Executive Committee.

Ad Hoc Committees

The Board of Directors may, by resolution adopted by a majority of the directors then in office, provided that a quorum is present, designate one or more committees to exercise a portion of the authority of the Board, to the extent of the powers specifically delegated in the resolution of the Board or in these bylaws. Each such committee shall consist of one (1) or more directors and may also include persons who are not on the Board but whom the directors believe to be reliable and competent to serve on the specific committee. However, committees exercising any authority of the Board of Directors may not have any non-director members. The Board may designate one or more alternative members of any committee who may replace any absent member at any meeting of the committee. The appointment of members or alternate members of a committee requires the vote of a majority of the directors then in office, provided that a quorum is present. However, no committee, regardless of Board resolution, may exercise the authorities described in the under Executive Committee above.

Advisory Committee

There shall exist an Advisory Committee to be made up entirely of non-members of the Board. The purpose of this Committee is to allow for the input of important stakeholders in the community that may not have the interest, wherewithal or desired expertise to serve on the Board itself. While this Committee will have no vote on official business of the Board, the members of the Advisory Committee will provide significant input into the direction of the Corporation and will have the right to attend all regular meetings of the Board and may choose to meet outside of the meetings of the Board in order to formulate independent advice.

Meetings and Actions of Committees

Meetings and actions of all committees shall be governed by, and held and taken in accordance with, the provisions of Article 5 - Board of Directors of these bylaws concerning meetings and actions of the directors, with such changes in the context of those bylaws as are necessary to substitute the committee and its members for the Board of Directors and its members, except that the time for regular meetings of committees may be determined either by resolution of the Board of Directors or by resolution of the committee. Special meetings of committees may also be called by resolution of the Board of Directors. Notice of special meetings of committees shall also be given to any and all alternate members, who shall have the right to attend all meetings

of the committee. Minutes shall be kept of each meeting of any committee and shall be filed with the Corporation records. The Board of Directors may adopt rules not consistent with the provisions of these bylaws for the governance of any committee.

ARTICLE 8 - STANDARD OF CARE

General

A director shall perform all the duties of a director, including, but not limited to, duties as a member of any committee of the Board on which the director may serve, in such a manner as the director deems to be in the best interest of the Corporation and with such care, including reasonable inquiry, as an ordinary, prudent, and reasonable person in a similar situation may exercise under similar circumstances.

Except as herein provided any person who performs the duties of a director in accordance with the above shall have no liability based upon any failure or alleged failure to discharge that person's obligations as a director, including, without limitation of the following, any actions or omissions which exceed or defeat a public or charitable purpose to which the Corporation, or assets held by it, are dedicated.

Indemnification

To the fullest extent permitted by law, the Corporation shall indemnify its "agents," as described by law, including its directors, officers, employees and volunteers, and including persons formerly occupying any such position, and their heirs, executors and administrators, against all expenses, judgments, fines, settlements, and other amounts actually and reasonably incurred by them in connection with any "proceeding," and including any action by or in the right of the Corporation, by reason of the fact that the person is or was a person as described in the Non-Profit Corporation Act. Such right of indemnification shall not be deemed exclusive of any other right to which such persons may be entitled apart from this Article.

The Corporation shall have the power to purchase and maintain insurance on behalf of any agent of the Corporation, to the fullest extent permitted by law, against any liability asserted against or incurred by the agent in such capacity or arising out of the agent's status as such, or to give other indemnification to the extent permitted by law.

CONFLICT OF INTEREST POLICY

The purpose of the Conflict of Interest Policy is to protect the Corporation's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of one of its officers or directors, or that might otherwise result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable corporations/organizations and is not intended as an exclusive statement of responsibilities.

Restriction on Interested Directors

Not more than 25% (percent) of the persons serving on the Board of Directors at any time may

be interested persons. An interested person is (1) any person currently being compensated by the Corporation for services rendered to it within the previous twelve (12) months, whether as a full-time or part-time employee, independent contractor, or otherwise, excluding any reasonable compensation paid to a director; and (2) any brother, sister, parent, ancestor, descendent, spouse, brother-in-law, sister-in-law, son-in-law, mother-in-law, or father-in-law of any such person. However, any violation of the provisions of this section shall not affect the validity or enforceability of any transaction entered into by the interested person.

Duty to Disclose

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors who are considering the proposed transaction or arrangement.

Establishing a Conflict of Interest

After the disclosure of the financial interest and all material facts, and after any discussion with the interested person, the interested person shall leave the Board meeting while the potential conflict of interest is discussed and voted upon. The remaining Board members shall decide if a conflict of interest exists.

Addressing a Conflict of Interest

In the event that the Board should establish that a proposed transaction or arrangement establishes a conflict of interest, the Board shall then proceed with the following actions:

- Any interested person may render a request or report at the Board meeting, but upon completion of said request or report the individual shall be excused while the Board discusses the information and/or material presented and then votes on the transaction or arrangement proposed involving the possible conflict of interest.
- The Chair of the Board of the Board shall, if deemed necessary and appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
- After exercising due diligence, the Board shall determine whether the Corporation can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
- If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the Board shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the best interest of the Corporation, for its own benefit, and whether it is fair and reasonable. It shall make its decision as to whether to enter into the transaction arrangement in conformity with this determination.

Violations of Conflict of Interest Policy

Should the Board have reasonable cause to believe an interested person has failed to disclose actual or possible conflicts of interest, the Board shall then inform the interested person of the basis for such belief and afford the interested person an opportunity to explain the alleged failure to disclose.

If, after hearing the interested person's explanation, and after making further investigation as may be warranted in consideration of the circumstances, the Board determines the interested person intentionally failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

Procedures and Records

All minutes of the Board Meetings, when applicable, shall contain the following information:

- The names of all the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the Board's decision as to whether a conflict of interest in fact existed.
- The names of the persons who were present for discussions and any votes relating to the transaction or arrangement, the content of the discussions, including any alternatives to the proposed transaction or arrangement, and a record of any vote taken in connection with the proceedings.

Acknowledgement of Conflict of Interest Policy

Each director, principal officer, and member of a committee with Board delegated powers shall be required to sign a statement which affirms that such person:

- Has received a copy of the conflict of interest policy;
- Has read and understands the policy;
- Has agreed to comply with the policy; and
- Understands that the Corporation is charitable, and in order to maintain its federal tax exemption, it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

Violation of Loyalty - Self-Dealing Contracts

A self-dealing contract is any contract or transaction (i) between this Corporation and one or more of its Directors, or between this Corporation and any corporation, firm, or association in which one or more of the Directors has a material financial interest ("Interested Director"), or (ii) between this Corporation and a corporation, firm, or association of which one or more of its directors are Directors of this Corporation. Said self-dealing shall not be void or voidable because such Director(s) of corporation, firm, or association are parties or because said Director(s) are present at the meeting of the Board of Directors or committee which authorizes, approves or ratifies the self-dealing contract, if:

- All material facts are fully disclosed to or otherwise known by the members of the Board and the self-dealing contract is approved by the Interested Director in good faith (without including the vote of any membership owned by said interested Director(s));
- All material facts are fully disclosed to or otherwise known by the Board of Directors or committee, and the Board of Directors or committee authorizes, approves, or ratifies the self-dealing contract in good faith—without counting the vote of the interest Director(s)—and the contract is just and reasonable as to the Corporation at the time it is authorized, approved, or ratified; or

- As to contracts not approved as provided in above sections (a) and/or (b), the person asserting the validity of the self-dealing contract sustains the burden of proving that the contract was just and reasonable as to the Corporation at the time it was authorized, approved, or ratified.

Interested Director(s) may be counted in determining the presence of a quorum at a meeting of the Board of Directors or a committee thereof, which authorizes, approves, or ratifies a contract or transaction as provided for and contained in this section.

ARTICLE 9 – EXECUTION OF CORPORATE INSTRUMENTS

Execution of Corporate Instruments

The Board of Directors may, at its discretion, determine the method and designate the signatory officer or officers, or other person or persons, to execute any corporate instrument or document, or to sign the corporate name without limitation, except when otherwise provided by law, and such execution or signature shall be binding upon the Corporation.

Unless otherwise specifically determined by the Board of Directors or otherwise required by law, formal contracts of the Corporation, promissory notes, deeds of trust, mortgages, other evidences of indebtedness of the Corporation, other corporate/organization instruments or documents, memberships in other corporations/organizations, and certificates of shares of stock owned by the Corporation shall be executed, signed, and/or endorsed by the Executive Director, Chair and Treasurer.

All checks and drafts drawn on banks or other depositories on funds to the credit of the Corporation, or in special accounts of the Corporation, shall be signed by such person or persons as the Board of Directors shall authorize to do so.

Loans and Contracts

No loans or advances shall be contracted on behalf of the Corporation and no note or other evidence of indebtedness shall be issued in its name unless and except as the specific transaction is authorized by the Board of Directors. Without the express and specific authorization of the Board, no officer or other agent of the Corporation may enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation.

ARTICLE 10 – RECORDS AND REPORTS

Maintenance and Inspection of Articles and Bylaws

The Corporation shall keep at its principal office the original or a copy of its Articles of Incorporation and bylaws as amended to date, which shall be open to inspection by the directors at all reasonable times during office hours.

Maintenance and Inspection of Federal Tax Exemption Application and Annual Information Returns

The Corporation shall keep at its principal office a copy of its federal tax exemption application

and its annual information returns for three years from their date of filing, which shall be open to public inspection and copying to the extent required by law.

Maintenance and Inspection of Other Corporate Records

The Corporation shall keep adequate and correct books and records of accounts and written minutes of the proceedings of the Board and committees of the Board. All such records shall be kept at a place or places as designated by the Board and committees of the Board, or in the absence of such designation, at the principal office of the Corporation. The minutes shall be kept in written or typed form, and other books and records shall be kept either in written or typed form or in any form capable of being converted into written, typed, or printed form. Upon leaving office, each officer, employee, or agent of the Corporation shall turn over to his or her successor or the Chair of the Board or Executive Director, in good order, such corporate/organization monies, books, records, minutes, lists, documents, contracts or other property of the Corporation as have been in the custody of such officer, employee, or agent during his or her term of office.

Every director shall have the absolute right at any reasonable time to inspect all books, records, and documents of every kind and the physical properties of the Corporation and each of its subsidiary corporations/organizations. The inspection may be made in person or by an agent or attorney and shall include the right to copy and make extracts of documents.

ARTICLE 11 – FISCAL YEAR

The fiscal year for this Corporation shall end on December 31.

ARTICLE 12 – AMENDMENTS AND REVISIONS

These bylaws may be adopted, amended, or repealed by the vote of a two-thirds (2/3) majority of the directors then in office. Such action is authorized only at a duly called and held meeting of the Board of Directors for which written notice of such meeting, setting forth the proposed bylaw revisions with explanations, therefore, is given in accordance with these bylaws. If any provision of these bylaws requires the vote of a larger portion of the Board than is otherwise required by law, that provision may not be altered, amended or repealed by that greater vote.

ARTICLE 13 – CORPORATE SEAL

The Board of Directors may adopt, use, and alter a corporate seal. The seal shall be kept at the principal office of the Corporation. Failure to affix the seal to any corporate instrument, however, shall not affect the validity of that instrument.

ARTICLE 14 – CONSTRUCTION AND DEFINITIONS

Unless the context otherwise requires, the general provisions, rules of construction, and definitions contained in the Non-Profit Corporation Act as amended from time to time shall govern the construction of these bylaws. Without limiting the generality of the foregoing, the

masculine gender includes the feminine and neuter, the singular number includes the plural and the plural number includes the singular, and the term "person" includes a Corporation as well as a natural person. If any competent court of law shall deem any portion of these bylaws invalid or inoperative, then so far as is reasonable and possible (i) the remainder of these bylaws shall be considered valid and operative, and (ii) effect shall be given to the intent manifested by the portion deemed invalid or inoperative.

CERTIFICATE OF SECRETARY

I, _____, certify that I am the current elected and acting Secretary of the benefit Corporation, and the above bylaws are the bylaws of this Corporation as adopted by the Board of Directors on _____, and that they have not been amended or modified since the above.

EXECUTED this ____ day of _____, _____ in the County of Orange in the State of Indiana.

Duly Elected Secretary, HandUp OC, Inc.

ACKNOWLEDGEMENT OF RECEIPT OF BYLAWS AND

CONFLICT OF INTEREST POLICY

I, _____, a duly elected member of the Board of Directors of HandUp OC, Inc., hereby affirm and acknowledge receipt and understanding of the Bylaws of the Corporation, including the Conflict of Interest Policy. Furthermore, I hereby agree to faithfully execute the purpose of the Corporation and refrain from prohibited activities. I understand that HandUp OC, Inc., is a tax-exempt public benefit corporation and that all activities of the Corporation must be in the interest of the public rather than any individual or association. Finally, I will advise the Directors and Executive Director of any potential conflict I may have between my personal interests and that of the Corporation.

DIRECTOR

DATE

Appendix 4: Board Composition and Recruitment Matrix

Utilize the Board Composition and Recruitment Matrix to specify the areas of expertise, resources, community connections, personal styles, additional skills, and demographics of the current board members while simultaneously identifying prospective board members (key stakeholders) who may possess the qualities that meet your needs.

Areas of Expertise/ Leadership Qualities	Number of Current Members	Number of Prospective Members (Key Stakeholders)
Administration/Management		
Early-stage Organizations/ Start-ups		
Financial Oversight		
Fundraising Government		
Investment Management		
Law		
Leadership skills/Motivator		
Marketing, Public Relations		
Physical plant (architect, engineer)		
Human Resources		
Real Estate		
Strategic Planning		
Understanding Community Needs		
Technology Other		

Resources		
Money to Give		
Access to Money		
Access to Other Resources (foundations, corporate support)		

Community Connections		
Religious Organizations		
Corporate		
Education		
Media		
Political		
Economic		
Philanthropy		
Small Business		
Social Services		
Clients/Beneficiaries of Services		
Other Identified Stakeholders		

Personal Style		
Consensus Builder		
Good Communicator		
Strategist		
Team Member		
Visionary		
Available		
Committed		

Flexible		
Participative		
Selfless		

Age		
Under 18		
19 - 34		
35 - 50		
51 - 65		
Over 65		

Gender		
Female		
Male		

Appendix 5: Updated Board Application



Governing Board Application

Dear [Insert name of potential board member],

You have received this board application because your name was discussed as a vital community member or stakeholder of Paoli, Indiana, with positive attributes and strengths that have been deemed as essential for the local nonprofit HandUp OC. We would like to take the opportunity to explore a potential new board member position with you. We hope you will take this opportunity to learn more about HandUp OC, the HandUp OC mission, and the responsibilities, duties, and expectations of the governing board. This application is just the beginning of the process in becoming a new board member. Interviews, facility tours, and board approval may also be steps of the process. Ensuring that HandUp OC is a good fit for you and you for us is crucial in quality board development and the overall success of our organization. Should you determine that you have an interest in exploring a board position with HandUp OC, please complete this application and notify Dessica Albertson at dalbertson328@gmail.com or mail to 2743 E County Road 725 S, Paoli, IN 47454. Thank you for your interest in a potential governing board position with HandUp OC. We look forward to your participation and contributions to our board!

Sincerely,

Dessica Albertson
Founder and Director
[Insert Signature]

Stori Sullivan
Board Chair
[Inset Signature]



About HandUp OC

Founded in 2015 by Dessica Albertson after seeing a need in the community, HandUp OC runs and operates in Paoli, IN. [Insert more description]

Mission

[Insert new mission statement here]

Goals

[Insert new goals here]

Vision

[Insert new vision statement here]

Programs

Clothes Closet- [description]

Picnic in the Park- [description]

Community Garden- [description]

[Insert new programs here, when applicable]

Values

[Insert new values here]

Governing Board Member Roles

Time Commitment

Board meetings are held **quarterly**. In addition, board members are asked to **actively participate** in at least one area of organizational activities throughout the year.

Responsibilities

1. **Legal** responsibility to fulfill the mission as defined by nonprofit corporation law, provisions imposed by state statutes, federal laws, legal documents articles of incorporation and bylaws
2. **Fiduciary** responsibility to benefit the public as defined by the nature of nonprofits and service

Duties

Duty of Obedience: Faithful to the mission, consistent with the goals and laws

Duty of Care: Exercises reasonable care by staying informed, participating in decisions, and acting in good faith when making decisions

Duty of Loyalty: Places interests of the organization first

Expectations

- Define and advance the organization's **mission**
- Ensure, develop, and conserve the organization's **resources** (funds, property, human resources)
- Provide **oversight** of management, ensure assessment of organization
- Engage in **outreach** as a bridge and buffer between organizations and stakeholders (clients, members, the communities it serves, regulators, donors, the public)

Questions to Consider Before Committing to a Board

- What type of experience is most fulfilling for you?
- How much time are you willing to put into board work?
- Are you willing to collaborate with others on a regular basis or would you prefer to work alone?
- Do you have the willingness and the ability to assist a nonprofit organization?

WHY SERVE?

HAVE AN IMMEDIATE AND LASTING IMPACT

GAIN EXPERTISE ON COMPLEX ISSUES

BUILD VALUABLE NETWORKS AND RELATIONSHIPS

GROW AS A LEADER THE ONLY WAY YOU CAN – THROUGH
EXPERIENCE

COMMUNITY RECOGNITION

CHANNEL CREATIVE ENERGY

THE NEED IS GREAT

IF NOT YOU, **WHO?**



Governing Board Member Application and Questionnaire

Please complete the entire form and submit to: Dessica Albertson at dalbertson328@gmail.com or mail to 2743 E County Road 725 S, Paoli, IN 47454

Personal			
First	MI	Last	
Address			
Home Phone	Work Phone	Cell Phone	Email
Employer		Title	
Employer Address			
Type of Business or Organizations			
Have you ever been convicted, plead guilty or plead no contest to a crime? (If yes, please explain).			

Education	
Institution	Degree/ Major
Institution	Degree/ Major

Experience

Please list your past and present memberships on boards, committees and organizations: (business, civic, community, fraternal, political, professional, recreational, religious and social).

Organization	Role/ Title	Date of Service
Organization	Role/ Title	Date of Service
Organization	Role/ Title	Date of Service
Organization	Role/ Title	Date of Service
Organization	Role/ Title	Date of Service
Organization	Role/ Title	Date of Service

Please list notable achievements in your service to above organizations:

Please describe your other volunteer experience:

What experience can you contribute to HandUp OC?

Board members play a key role in essential fund development of a nonprofit organization. HandUp OC looks to raise its revenue moving into the future to meet the needs of the community. What amount do you comfortably feel you can contribute through fundraising or personal giving? Please explain:

As a board member would you be able to provide HandUp OC no-cost or discounted access to any valuable services through your profession or relationships?

What is your experience with HandUp OC?

Why are you interested in serving as a HandUp OC board member?

Please mark the expertise/leadership qualities that you bring to our board:			
Administration/Management	Marketing, Public Relations	Investment Management	Strategic Planning
Early-stage Organizations/Start-ups	Physical plant (architect, engineer)	Law	Understanding Community Needs
Financial Oversight	Human Resources	Leadership Skills/Motivator	Technology
Fundraising Government	Real Estate		
Please mark the community connections that you bring to our board:			
Religious Organizations	Media	Small Business	Clients/Beneficiaries of services
Corporate	Political	Social Services	Other Identified Stakeholders
Education	Philanthropy		
Please mark the personal style or additional skills that you bring to our board:			
Consensus Builder	Team Member	Available	Participative
Good Communicator	Visionary	Committed	Selfless
Strategist	Flexible		
Other unique talents or skill sets you bring as a board member?			

Time Commitment

Board meetings are held quarterly. In addition, board members are asked to actively participate in at least one area of organizational activities throughout the year. Can you reasonably commit this amount of time?

References

Name	Relationship	Phone
Name	Relationship	Phone
Name	Relationship	Phone

Optional: Attach Resume

As a volunteer board member of HandUp OC, Inc, I agree to fulfill the role of the board and abide by the policies and procedures. I understand that I will be volunteering at my own risk. The organization, its employees, and affiliates cannot and will not assume responsibility or liability for any accident, injury, or health problems which may arise during my term on the board. I agree that all the work I do as a board member is on a volunteer basis, and I am not eligible to receive any monetary payment or reward.

Board Member Signature: _____

Date: _____

Appendix 6: Sample list of potential stakeholders

Stakeholder	Category	Website
Orange County Players (OCP)	Arts	http://ocpnc.com
Sherry Schmidt	Board Member	
ElectriCom	Business	https://electricominc.com
Lost River Market & Deli	Business	https://www.lostrivermarketanddeli.com
Paoli Peaks	Business	https://www.paolipeaks.com
The Tomato Factory	Business	
Tractor Supply Co.	Business	https://www.tractorsupply.com
Walmart	Business	https://www.walmart.com
Dessica Albertson	Executive Director	
Erin Elliot	Current Board Member	
Kara Schmidt	Current Board Member	
Katarina Koch	Current Board Member	
Stori Sullivan	Current Board Member	
Indiana University Center for Rural Engagement	Education	https://rural.indiana.edu
Oakland City University	Education	https://www.oak.edu
Paoli Junior-Senior High School	Education	http://www.paoli.k12.in.us
South Central Area Special Education Cooperative	Education	http://www.scasec.k12.in.us
Throop Elementary School	Education	http://throop.paoli.k12.in.us
Apple Chapel	Faith Organization	https://www.facebook.com/Apple-Chapel-866294343443513
Cedar Ridge Fellowship of Seventh-Day Adventist	Faith Organization	https://cedaridgein.adventistchurch.org
Central Baptist Church	Faith Organization	http://cbcpaoli.blogspot.com

Christ the King Catholic Church	Faith Organization	
Church of Christ	Faith Organization	http://www.paolichurchofchrist.org
Dogwood Community Church	Faith Organization	
Eastview Baptist Church	Faith Organization	https://www.facebook.com/paolieastviewbaptistchurch
First Presbyterian Church of Paoli	Faith Organization	https://www.facebook.com/First-Presbyterian-Church-of-Paoli-118873708197805
First United Pentecostal Church	Faith Organization	https://www.facebook.com/FirstUPCofPaoli
Friends of Jesus Fellowship	Faith Organization	
Little Mission Church	Faith Organization	
Love Never Fails United Christian Church	Faith Organization	http://loveneverfailsunitedchristian.org
Mercy Center Paoli / Gateway Ministries	Faith Organization	http://www.gatewayministriespaoli.org
Millersburg General Baptist	Faith Organization	
New Hope Baptist Church	Faith Organization	http://newhopepaoli.com
Orange County Center for Women's Ministries	Faith Organization	
Paoli Christian Church	Faith Organization	
Paoli Friends Church	Faith Organization	https://www.facebook.com/Paoli-Friends-Church-265054093606091
Paoli Mennonite Fellowship	Faith Organization	http://paolimennonite.org
Paoli United Methodist Church	Faith Organization	https://paoli-umc.com
Paoli Wesleyan Church	Faith Organization	https://www.paoliwesleyan.com
Valeene Wesleyan	Faith Organization	https://www.facebook.com/pages/category/Religious-Organization/Valeene-Wesleyan-Church-1564500100489241
Valeene Christian	Faith	https://www.facebook.com/Valeene-

	Organization	Christian-Church-121302821216534
USDA	Federal	https://www.usda.gov
Cook Foundation	Foundation	
Chambers of Commerce	Government	https://paolichamberofcommerce.com
Orange County Township Trustees	Government	http://www.co.orange.in.us/township-trustees
O'Neill Online	Government	https://speaconnect.indiana.edu/index.html
OC Health Coalition	Government	https://www.facebook.com/OCHealthCoalition/
Orange County Assessor's Office	Government	http://www.co.orange.in.us/oc-assessors
Orange County Auditor's Office	Government	http://www.co.orange.in.us/auditors
Indiana Beef Council	Government	https://www.indianabeef.org
Orange County Circuit Court	Government	http://www.co.orange.in.us/oc-circuit-court
Orange County Superior Court	Government	http://www.co.orange.in.us/superior-court
Orange County Clerk's Office	Government	http://www.co.orange.in.us/oc-clerks
Orange County Commissioners	Government	http://www.co.orange.in.us/commissioners
Orange County Community Center	Government	https://www.facebook.com/OrangeCountyCommunityCenter
Orange County Council	Government	http://www.co.orange.in.us/council
Orange County Economic Development Partnership	Government	https://ocedp.com
Orange County Emergency Management Agency	Government	
Orange County Health Department	Government	
Orange County Historical Society	Government	http://www.historicorangecounty.org
Orange County HomeGrown	Government	https://orangecountyhomegrown.org
Orange County Department of Veterans' Affairs	Government	https://www.in.gov/dva/orange.htm
Paoli Parks Department	Government	http://paoli.in.gov/parks-department
Paoli Public Library	Government	https://paoli.lib.in.us/
Orange County Recorder	Government	http://www.co.orange.in.us/recorder
Orange County Surveyor	Government	http://www.co.orange.in.us/surveyor
USPS	Government	https://www.usps.com/
Curtis Thill	Current Board Member	

American Red Cross	Healthcare	https://www.redcross.org/local/indiana/about-us/locations/southern-indiana.html
IU Health Paoli Hospital	Healthcare	https://iuhealth.org/find-locations/iu-health-paoli-hospital
Southern Indiana Community Health Care	Healthcare	www.sichc.org
Thrive OC	Healthcare	
WorkOne Paoli Express	Nonprofit	http://www.workonesouthcentral.org/68.html
Backpacks of Blessings Paoli	Nonprofit	https://www.facebook.com/Paolibackpacks/
Black Vulture Project	Nonprofit	http://blackvultureproject.org
CASA (Court Appointed Special Advocates)	Nonprofit	https://www.casaoc.org/
Center for Rural Engagement	Nonprofit	https://rural.indiana.edu
Hoosier Hills Food Bank	Nonprofit	https://www.hhfoodbank.org
Orange County Family and Social Services Administration	Government	https://www.in.gov/fssa
First Chance Center (FCC)	Nonprofit	https://firstchancecenter.com
Friends of Mineral Springs	Nonprofit	
Healing Arts Center of Southern Indiana	Nonprofit	www.healingartssi.com
Hoosier Hills PACT	Nonprofit	https://www.pactchangeslives.com/hoosier-hills-pact/
Hoosier Uplands Economic Development Corporation	Nonprofit	http://www.hoosieruplands.org
Indiana 2-1-1	Nonprofit	https://www.in211.org
Ivy Tech Community College of Indiana	Nonprofit	https://www.ivytech.edu/agriculture
LIFE Family Resource Center of Orange County	Nonprofit	https://www.facebook.com/pages/category/Community/LIFE-Family-Resource-Center-of-Orange-County-467510426704526
LifeSpring Health Systems	Nonprofit	http://www.lifespringhealthsystems.org
Lilly Endowment, Inc.	Nonprofit	https://lillyendowment.org
Living Roots	Nonprofit	http://www.livingroots.org/
Lost River Career Cooperative	Nonprofit	http://www.lostrivercareercooperative.com
Masonic Lodge 119	Nonprofit	https://www.facebook.com/pages/category/Community-Organization/Paoli-Masonic-Lodge-119-352286365544947
Neighborhood Christian Legal	Nonprofit	https://www.nclegalclinic.org
Orange County 4-H Council	Nonprofit	http://www.extension.purdue.edu/orange

Orange County Community Foundation	Nonprofit	http://occf-in.org
Orange County Habitat for Humanity	Nonprofit	https://www.habitat.org/us/paoli/orange-county-hfh
Orange County Moose Lodge No 2530	Nonprofit	https://www.facebook.com/pages/category/Community-Center/Orange-County-Moose-Lodge-2530-371340642965201
Paoli Meridian Lions Club	Nonprofit	https://www.facebook.com/PaoliMeridianLions
Paoli Ministerial Association	Nonprofit	
Paoli Senior Citizens Center	Nonprofit	
Paoli VFW Post 8302	Nonprofit	https://www.facebook.com/Paoli-VFW-337291472979878
Radius Indiana	Nonprofit	http://www.radiusindiana.com
Hoosier Uplands After School Program	Nonprofit	
Regional Opportunities Initiatives, Inc. (ROI)	Nonprofit	https://regionalsoportunityinc.org
Running Start	Nonprofit	http://www.facebook.com/paoli.k1.in.us
South Central Indiana REMC	Nonprofit	https://sciremc.com
St. Vincent Dunn Hospital	Healthcare	https://www.stvincent.org/Locations/Hospitals/Dunn
Amish community	Other	
Paoli Fire & Rescue	Public Safety	http://paoli.in.gov/fire-department
Paoli Police Department	Public Safety	http://paoli.in.gov/police
Dr. John Keesler (Indiana University)	Social Work	

Appendix 7: Community Preferences Assessment (Focus Group)



Community Preferences Assessment

This Community Preferences Assessment provides a series of draft discussion guide questions for a focus group with HandUp OC's identified key stakeholders. Such a focus group will allow HandUp OC to better obtain important information from such stakeholders, including views of the organization and thoughts on its current status and potential future. There are a series of 10 presented questions, however these can be edited by HandUp OC prior to the focus group to ensure that the most desired information is obtained.

[Note to facilitator: Please read the following introduction to focus group participants.]

HandUp OC is committed to [\[updated mission statement here\]](#). As part of this mission, our organization has created programs to meet the needs of the community and foster greater community engagement:

- **Community Clothes Closet** – where community members can swap needed clothing and household items
- **Orange County Community Garden** – where the community can grow and harvest their own food and where HandUp OC can host related programming
- **Picnic in the Park** – a summertime event where neighbors can come together to meet and celebrate Orange County

As our organization grows, we are seeking the input of valued stakeholders in determining the types of programming HandUp OC makes available to the Paoli and larger Orange County

communities. The following survey will be used to facilitate a conversation with you as key stakeholders in determining future programming for HandUp OC.

We are interested in hearing everyone’s perspectives today and encourage conversation and you to respond to the comments of others. Please also note that we greatly appreciate everyone’s candor—we are looking for your honest opinions and assessments. Note too that today’s discussion will be confidential, we will not attribute specific comments to anyone specifically when we report on today’s focus group. We greatly appreciate your participation here today.

Before we begin there are a few housekeeping notes:

[Note to facilitator: please provide information on bathroom location, any refreshments, and the expected time length of today’s focus group. Suggested time length is no longer than 1 hour. Below is a guide for facilitators, in which they can decide which questions to ask and how to structure the focus group. It is also important to obtain consent to conduct an audio recording of the group discussion from participants.]

Please start with self-introductions by all participants, including:

- Name*
- Title and organization*
- Personal background*
- Connection to HandUp OC*
- Community involvement]*

1. What are barriers to community engagement in Paoli?

[Note to facilitator: “Community engagement” here includes participation, interaction, or involvement in community programming, events, and/or volunteering. Please have participants identify and rank barriers as they perceive them. Examples of barriers include transportation issues, low internet connectivity, limited household funds, etc.]

2. If you are a participant in any local community organizations, what makes you more likely to join and/or participate?

a. As you think about satisfying volunteer experiences you’ve had, what attributes were most important?

b. If you are not a participant in community organizations, what would make you more likely to participate?

3. If you are a participant in other local community organizations, what in your experience inspires donors to give to those organizations?

4. How well known is HandUp OC in Paoli? If you asked a friend to describe HandUp OC, what would they say about the organization?

5. What do you perceive are HandUP OC's greatest strengths and assets?

6. What do you perceive are some areas of potential growth for HandUp OC?

7. Given your knowledge of Paoli, HandUp OC, and other community organizations, what kinds of new programming could HandUp OC offer that would meet community needs? Have participants create a list of their programming recommendations, and then rank their top three preferences.

[Note to facilitator: Examples include food insecurity, health, general community engagement, afterschool programming, job training, etc. Have participants write down responses before discussing as a group.]

8. What specific populations might benefit from future HandUp OC programming?

[Note to facilitator: Examples could include youth, families, seniors, justice-involved individuals, and others.]

9. Are there planned or existing activities within your organizations that could offer potential areas of partnership for future HandUp OC programming?

[Note to facilitator: An example would be a corporate employee volunteer opportunity that might align with the community garden.]

10. HandUp OC communicates with the community largely via Facebook. How effective is this communication? What other forms of communication might HandUp OC utilize?

[Note to facilitator: HandUp OC has both a [Facebook page](#) and a [Facebook group page](#). If possible, please display both so that focus group participants have a sense of how HandUp OC reaches the community.]

Thank you all for your participation today. The results of this focus group will be an enormous benefit to HandUp OC as it determines its future programming activities. If you have follow-up thoughts that you think of later this week, don't hesitate to share them with me at [\[insert contact info here\]](#).

Appendix 8: Program Evaluation (Survey)

Online version of this survey is available at: <http://bit.ly/handupocsurvey>



HandUp OC Program Survey

Please let us know about your experience at the HandUp OC program you participated in so we can keep improving.

1. In which of the following programs did you most recently participate?
 - a. Community Clothes Closet
 - b. Picnic in the Park
 - c. Community Garden
 - d. Other: _____

2. How likely are you to recommend this program to a friend or colleague?
 - 1 – Not at all likely
 - 2
 - 3
 - 4
 - 5 – Extremely likely

3. How organized was the program?
 - 1 – Not at all organized
 - 2
 - 3
 - 4
 - 5 – Extremely organized

4. How satisfied were you with the location?
 - 1 – Not at all satisfied
 - 2
 - 3
 - 4
 - 5 – Extremely satisfied

5. How helpful were the volunteers/staff?
 - 1 – Not at all helpful
 - 2
 - 3
 - 4
 - 5 – Extremely helpful

6. How did you feel about the length (in time) of the program?
- 1 – Too short
 - 2
 - 3
 - 4
 - 5 – Too long
7. How did you hear about this program?
- a. Facebook/Online
 - b. Newspaper/Print
 - c. Family/Friend
 - d. Phone Call
 - e. Referral from another organization
 - f. Radio
 - g. Church/House of Worship
 - h. Other: _____
8. How can we improve this program?
-
-
9. What is the best way to tell you about upcoming HandUp OC events?
- a. Facebook/Online
 - b. Newspaper/Print
 - c. In Person
 - d. Phone
 - e. Radio
 - f. Other: _____
10. What is your age range?
- a. Under 13
 - b. 13-17
 - c. 18-29
 - d. 30-49
 - e. 50-69
 - f. 70+
11. Do you have children?
- a. None
 - b. 1-2
 - c. 3-5
 - d. 6-10
 - e. 10+

Tell us about you!

If you want to receive further communication from HandUp OC, please complete these questions. They are completely optional.

- a. First Name: _____
- b. Last Name: _____
- c. Email: _____
- d. Phone Number: _____

Appendix 9: Condition of the Methodist Church

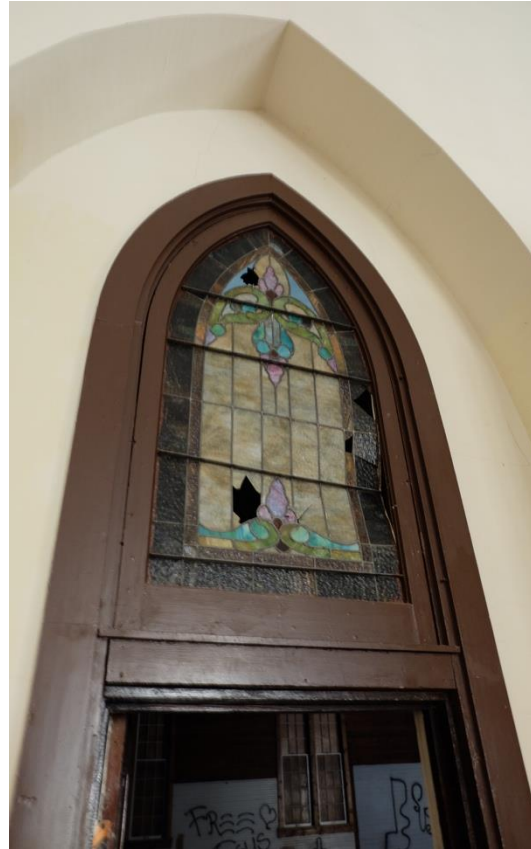
Extensive mold growth and water damage within the basement space.



The gym's floor has failed in sections. Between the original building and the 1920's addition, there appears to be an issue along the foundation adjoining the two buildings.



There is damage to the stained-glass windows throughout the church at both interior and exterior windows. If HandUp OC accepts the donation of the church in the future, the exterior stained-glass windows will need to be repaired and subsequently maintained. Currently, the exterior stained-glass windows are punctured in multiple spots, including a large overhead window on the west side of the building above an egress.



The HVAC equipment (AC chillers and heating system) are dated and should be replaced.



Appendix 10: Examples of Alternative Repurposing of Churches

Small Wonders Discovery and Learning Center Day Care | Child Care Center | Salem, OH
The former Faith Chapel Fellowship in Salem, Ohio was converted into a child care center. The church is 5,880 square feet and was built in 1945.



St. Joseph Brewery & Public House | Brewery and Restaurant | Indianapolis, IN

The 135-year old St. Joseph Catholic Church in Indianapolis was repurposed into a “sanctuary of beer” situated close to the busy Massachusetts Avenue area.



Synagogue Flats | Housing | Chicago, IL

Built in 1922, the former Agudas Achim Synagogue in Chicago stopped operating in 2008. Recently, it was renovated into residential flats and occupied in March 2019.



Church Brew Works | Brewery | Pittsburgh, PA

The former St. John the Baptist Church in Pittsburgh, Pennsylvania became a brewery. The Catholic Diocese of Pittsburgh supported the project with the caveat that the business owners must have a restaurant license.



Clementine | Event Venue | West Nashville, TN

The former West Nashville United Methodist Church serves as an event venue and hosts weddings, concerts, and other functions wishing to capture its ambiance and acoustics.



Appendix 11: Building Scenario Estimates and Assumptions

The three scenario estimates attempt to offer HandUp OC some insight as to the potential costs and risks in acquiring the Methodist Church. These estimates were conceived to provide context and framework for assessing cost.

Using [RSMMeans](#)' square foot construction models, three uses were applied within the scenarios given:

- Gym and Community Center - \$182.40 /sf
- Restaurant - \$299.06 /sf
- Housing and Office - \$153.40 /sf

The estimates assumed a 2% annual CPI (Consumer Price Index) for the utilities, maintenance and property management. For rental spaces, a 5% vacancy rate was factored in.

In developing the scenarios, a 60/40 breakdown in the layout of each scenario was used. As the Methodist Church today includes the original 1881 building and the 1923 addition, we estimated that 40% of the total square footage belongs to 1881 building and 60% to the 1923 addition.

Using the scenario's redevelopment cost as its property valuation and the average tax rate of Orange County which is 0.58% of the property valuation, an initial property tax for year one was calculated for the revenue-producing portion of a given scenario. For subsequent years, the property tax estimates were increased by 2% per year for residential space and 3% per year for commercial space.

The commercial rental rate was set at \$0.92 /sf based on a rental listing near the Walmart in Paoli. Examining Zillow apartment listings, a market rate cost of \$0.65 /sf was calculated.

Using data from the APPA,⁹ the average cost of utilities was \$2.15 /sf and the average cost of maintenance was \$1.60 /sf. Both cost models were used to estimate costs of the church. Unfortunately, the cost models may not ideally reflect Paoli itself, but again it is a valid foundation to assess cost impacts. It was assumed that renters would be responsible for their utilities cost.

Finally, property management will depend on the available companies in the Paoli area and the scope of property management needed. For the estimate, property management costs were calculated using 7.9% of the rental income projected. That calculation mirrored the business model of *Real Property Management* out of Michigan.

⁹ APPA is a Midwest consortium of facilities professionals, <https://www.appa.org/>

In analyzing the three scenarios, Scenario #1 with market rate housing would offer more income and require a lower initial redevelopment cost. Scenario #2 with a restaurant poses the largest redevelopment cost due to “build-in” requirements for such a space.

Scenario #1: Community Center (60%) / Market Rate Housing (40%)					
	Year 1	Year 2	Year 3	Year 4	Year 5
Expenses					
Acquisition	\$0	\$0	\$0	\$0	\$0
Renovation	(\$1,537,200)	\$0	\$0	\$0	\$0
Maintenance	(\$14,400)	(\$14,688)	(\$14,982)	(\$15,281)	(\$15,587)
Utilities	(\$11,610)	(\$11,842)	(\$12,079)	(\$12,321)	(\$12,567)
Property Taxes	(\$3,505)	(\$3,575)	(\$3,646)	(\$3,719)	(\$3,794)
Property Management	(\$2,621)	(\$2,673)	(\$2,727)	(\$2,781)	(\$2,837)
Total Expenses	(\$1,568,811)	(\$32,244)	(\$32,890)	(\$33,546)	(\$34,217)
Revenues					
Bequest Income	\$4,000	\$0	\$0	\$0	\$0
Rental Income	\$26,539	\$27,070	\$27,611	\$28,164	\$28,727
Total Revenues	\$30,539	\$27,070	\$27,611	\$28,164	\$28,727
Net Income	(\$1,538)	(\$5,174)	(\$5,277)	(\$5,383)	(\$5,490)
Five Year Net Income					(\$1,559,596)

Scenario #2: Community Center (60%) / Restaurant (20%) / Offices (20%)

	Year 1	Year 2	Year 3	Year 4	Year 5
Expenses					
Acquisition	\$0	\$0	\$0	\$0	\$0
Renovation	(\$1,797,588)	\$0	\$0	\$0	\$0
Maintenance	(\$14,400)	(\$14,688)	(\$14,982)	(\$15,281)	(\$15,587)
Utilities	(\$11,610)	(\$11,842)	(\$12,079)	(\$12,321)	(\$12,567)
Property Taxes	(\$3,883)	(\$3,999)	(\$4,119)	(\$4,243)	(\$4,370)
Property Management	(\$1,864)	(\$1,902)	(\$1,940)	(\$1,978)	(\$2,018)
Total Expenses	(\$1,829,345)	(\$32,431)	(\$33,120)	(\$33,823)	(\$34,542)
Revenues					
Bequest Income	\$4,000	\$0	\$0	\$0	\$0
Rental Income	\$23,598	\$24,070	\$24,551	\$25,042	\$25,543
Total Revenues	\$27,598	\$24,070	\$24,551	\$25,042	\$25,543
Net Income	(\$1,801,747)	(\$8,361)	(\$8,568)	(\$8,781)	(\$8,999)
Five Year Net Income					(\$1,836,456)

Scenario #3: Community Center (60%) / Gym Use (20%) / Offices (20%)

	Year 1	Year 2	Year 3	Year 4	Year 5
Expenses					
Acquisition	\$0	\$0	\$0	\$0	\$0
Renovation	(\$1,589,400)	\$0	\$0	\$0	\$0
Maintenance	(\$14,400)	(\$14,688)	(\$14,982)	(\$15,281)	(\$15,587)
Utilities	(\$11,610)	(\$11,842)	(\$12,079)	(\$12,321)	(\$12,567)
Property Taxes	(\$3,624)	(\$3,733)	(\$3,845)	(\$3,960)	(\$4,079)
Property Management	\$0	\$0	\$0	\$0	\$0
Total Expenses	(\$1,619,034)	(\$30,263)	(\$30,905)	(\$31,562)	(\$32,233)
Revenues					
Bequest Income	\$4,000	\$0	\$0	\$0	\$0
Rental Income	\$23,598	\$24,070	\$24,551	\$25,042	\$25,543
Total Revenues	\$27,598	\$24,070	\$24,551	\$25,042	\$25,543
Net Income	(\$1,591,436)	(\$6,193)	(\$6,354)	(\$6,519)	(\$6,689)
Five Year Net Income					(\$1,617,192)

Appendix 12: Guide to Additional Resources

Capacity Building/Board Development

Required Annual Filings in Indiana by Harbor Compliance

<https://www.harborcompliance.com/information/indiana-nonprofit-compliance>

Board Source Leading with Intent <https://leadingwithintent.org>

Paoli Community Guides

2014 Paoli Comprehensive Plan

http://planningpaoli.files.wordpress.com/2014/04/adopted_paoli_comprehensive_plan.pdf

2016 Data Snapshot Orange County

Purdue Extension & Purdue Center for Regional Development. (February 2016). *2016 Data Snapshot: Orange County*. West Lafayette, IN: Purdue University.

2017 Orange County Community Profile

Center for Rural Engagement, Indiana University. (2017). *Orange County Community Profile*. Bloomington, IN: Indiana University.

2018 Community Health Needs Assessment

https://cdn.iuhealth.org/resources/Paoli-Hospital-CHNA_2018.pdf?mtime=20181224100257

Hand Up OC Program Survey

https://docs.google.com/forms/d/e/1FAIpQLSfFxXg2_CwVagOYzNAUr-Quhv7oZbYDACeqSFR_GZQORri5oA/formResponse

Indiana University Resources

IU Center for Rural Engagement <https://rural.indiana.edu>

IU Sustaining Hoosier Communities <https://shc.indiana.edu/>

IU Center for Survey Research <https://csr.indiana.edu/>

Indiana Statistical Consulting Center <https://iscc.indiana.edu/>

Indiana State Organizations

Indiana Landmarks <https://www.indianalandmarks.org/>

Hoosier Uplands <http://www.hoosieruplands.org/>

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