



# Convivir

## 2025 Board Retreat Report

January 25-26



Prepared with love  
by the brujas



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# a special note from your facilitators



To the esteemed Board of Directors,

We want to express our sincere gratitude for entrusting us with the facilitation of your annual board retreat. We recognize the significance of these spaces in setting the strategic vision and tone for the year ahead.

Thank you for allowing us to guide you through this process. As part of our commitment to you, we have compiled this report, which includes a recap of the material covered along with resources to support your next steps.

If you or your team need additional guidance or training, we hope to be a continued resource for you. Stay in touch, and keep using your magic as you move forward!

# elevator pitch cheat sheet

An elevator pitch for Convivir should quickly convey the mission, impact, and why the work matters. A strong pitch includes four key elements: (1) a **compelling hook** that highlights the focus on immigrant youth leadership, (2) a **problem statement** that underscores the challenges young immigrants face in civic engagement and belonging, (3) a **unique solution** that showcases how Convivir supports leadership development, storytelling, and community-building programs, and (4) a **call to action** that invites support, whether through funding, collaboration, or advocacy. The goal is to make an impact in 30–60 seconds, leaving the audience inspired and eager to get involved.



**Who You Are:** Introduce yourself and your role within Convivir. As a board member, your role is to support the organization’s mission and build meaningful connections with potential donors and community partners.



**What You Do:** Convivir empowers immigrant youth through leadership development, storytelling, and community-building programs. We envision an inclusive Colorado where immigrant youth are recognized as leaders and changemakers. Our values center on equity, belonging, and youth-led advocacy.



**Why People Should Care:** Convivir equips immigrant youth with the skills, confidence, and support networks they need to thrive. Our programs help youth develop leadership skills, foster civic engagement, and strengthen community connections. By investing in immigrant youth today, we are shaping a more inclusive and equitable future for all.



**Call to Action (CTA):** Invite engagement by encouraging potential donors and partners to attend an event, contribute financially, collaborate with our programs, or spread the word. Direct them to our website, social media, or newsletter to stay connected.

# functions of the Convivir board of directors

As Convivir Colorado reaches its fifth year, the Board of Directors now operates as a governing board, ensuring long-term sustainability and impact. Board members play a critical role in fundraising, outreach, advocacy, and governance to support the organization's mission and growth.

## key responsibilities

01

### fundraising & financial oversight

- Secure funding through donor engagement, grant connections, and corporate sponsorships.
- Support Convivir Colorado's financial sustainability by leveraging networks and resources.
- Ensure responsible financial stewardship by reviewing budgets and fundraising strategies.

02

### outreach & advocacy

- Act as an ambassador for Convivir Colorado, building relationships with community leaders, funders, and partners.
- Promote the organization's work by attending events, sharing impact stories, and engaging potential supporters.
- Advocate for policies and initiatives that uplift immigrant youth leadership and equity.

03

### governance & strategic oversight

- Provide strategic direction to ensure Convivir Colorado's mission remains strong.
- Oversee the Executive Director, offering guidance while respecting staff leadership.
- Uphold ethical and legal responsibilities, including policy oversight, compliance, and risk management.

# board members support, not manage

As a governing board, Convivir Board of Directors provides strategic oversight rather than managing daily operations. Understanding the distinction between governance (board responsibilities) and management (staff responsibilities) ensures clarity in decision-making and effectiveness in leadership.

## governance

### Sets Vision & Strategic Direction

- Defines long-term goals and priorities.
- Monitors impact and ensures alignment with the mission.

### Ensures Financial Health & Fundraising

- Approves budgets and financial policies.
- Supports fundraising by cultivating donors and securing partnerships.

### Hires & Evaluates the Executive Director

- Provides guidance and accountability without managing daily tasks.
- Conducts annual evaluations to support leadership growth.

### Oversees Policies & Compliance

- Ensures legal and ethical integrity.
- Approves organizational policies but does not implement them.

### Advocates for Convivir

- Represents the organization in the community and with funders.
- Promotes Convivir's mission through networking and outreach.

## management

### Implements the Board's Strategic Plan

- Translates big-picture goals into actionable programs.
- Adjusts operations based on needs and community feedback.

### Manages Programs & Staff

- Develops and runs youth leadership initiatives.
- Recruits, hires, and supervises employees.

### Executes Fundraising & Marketing

- Writes grant applications and fundraising campaigns.
- Manages donor relations and marketing strategies.

### Handles Financial & Administrative Duties

- Prepares budgets and financial reports for board approval.
- Ensures operational compliance with policies set by the board.

### Engages with Community Partners & Participants

- Works directly with immigrant youth, families, and stakeholders.
- Collaborates with schools, funders, and nonprofit allies.

# scenario planning notes

## DACA Ends

- 1) What are the immediate next steps?
  - Have legal support at the ready for CEO and other impacted staff
  - Have supports in place for students (i.e. resources, counsel recs, etc.)
  - Identify potential interim CEO and review hiring process for quick changes in command
- 2) How does the board provide support?
  - Build network of legal support
  - Oversee hiring changes (if needed)
  - Provide support to staff

## 501-c3 Status Under Threat

- 1) What are the immediate next steps?
  - Review external comms for compliance with executive orders
  - Identify and secure additional revenue streams to complement grant funding
- 2) How does the board provide support?
  - Audit communications and provide recommendations
  - Outreach to potential funding sources
  - Advise staff in becoming independent organization, if necessary

## Plyler v. Doe Targeted

- 1) What are the immediate next steps?
  - Identify programming opportunities outside of school networks
  - Have resources ready for impacted students
- 2) How does the board provide support?
  - Collect resources and support staff as needed

## Identifying Data is Targetted

- 1) What are the immediate next steps?
  - Audit data for unnecessary information
  - Move data to secured server
  - Provide informed consent forms for future data collection
- 2) How does the board provide support?
  - Support staff with audit and data transfer, if necessary
  - Draft and approve informed consent with destruction clause for staff





**proposed**  
**strategic plan**

# **strengthening governance, partnerships, & financial sustainability**

This strategic plan outlines key priorities and actions to guide Convivir's Board of Directors in enhancing governance oversight, expanding community partnerships, and securing financial sustainability.

Through a structured approach to policy audits, relationship-building, and diversified fundraising, this plan serves as a roadmap for long-term impact and organizational growth.



# governance

**Strategic Direction:** The Convivir Board is committed to strengthening its governance role by providing oversight and strategic guidance to the staff. The board will ensure policies and practices align with the organization’s mission, operational needs, and best practices in nonprofit governance.

**Key Goal:** Conduct a comprehensive audit of Convivir’s existing policies and documents to enhance clarity, consistency, and compliance across key organizational functions. This review will ensure that staff has the necessary frameworks to operate effectively and that governance structures support long-term sustainability.

## **Audit Focus Areas:**

- **Marketing & Communications:** Review branding guidelines, messaging consistency, social media policies, and public relations protocols.
- **Financial Policies:** Assess budgeting processes, financial reporting, internal controls, and fiscal accountability measures.
- **Fundraising Efforts:** Examine donor engagement strategies, grant management procedures, and ethical fundraising standards.
- **Staff & Student Safety:** Ensure policies address workplace safety, risk management, reporting procedures, and emergency protocols.
- **Data Protection & Privacy:** Evaluate how Convivir safeguards sensitive information, including student and donor data, in compliance with legal and ethical standards.

## **Next Steps:**

1. Establish a board-led working group to oversee the audit process.
2. Collaborate with staff to gather and review existing policies.
3. Identify gaps and areas for improvement.
4. Develop recommendations and an implementation plan to strengthen governance and operational alignment.

The governance audit will take place over March - September 2024, with planning in March-April, policy review in May-July, and recommendations finalized by September.

# community partnerships

**Strategic Direction:** The Convivir Board will play a pivotal role in expanding the organization's reach by cultivating funding partnerships, engaging high-impact sponsors, and fostering relationships with key stakeholders. By strengthening these connections, the board will support Convivir's long-term sustainability and growth.

**Key Goal:** Enhance board members' capacity to identify, engage, and secure partnerships with funders, sponsors, and influential supporters while refining their ability to effectively communicate Convivir's mission and impact.

## Focus Areas for Growth:

- **Funding & Sponsorship Development:** Proactively seek and cultivate relationships with foundations, corporate sponsors, and major donors.
- **Board Member Engagement:** Equip new and existing board members with clear, mission-aligned messaging and expectations for partnership cultivation.
- **Outreach & Pitching Skills:** Implement training and practice opportunities to help board members confidently pitch Convivir to potential funders and community partners.
- **Integration of New Language:** Ensure that all outreach efforts align with updated messaging from governance audits and recommendations.

## Next Steps:

1. Develop a list of target funding partners and sponsors.
2. Host a board training session on effective outreach, networking, and pitching.
3. Provide ongoing support and resources for board members to strengthen external engagement.
4. Track and assess outreach efforts to refine strategies over time.

This initiative will take place over April - December 2024, with training in April-May, outreach beginning in June, and continuous refinement through year-end.

# financial sustainability

**Strategic Direction:** The Convivir Board is committed to strengthening the organization's financial health by diversifying fundraising efforts and establishing a structured, board-driven approach to resource development.

**Key Goal:** Expand and stabilize revenue streams through diversified fundraising initiatives, board-led campaigns, and a formalized fundraising framework to ensure long-term sustainability.

## **Focus Areas for Growth:**

- **Fundraising Diversification:** Explore and implement new revenue-generating activities, such as board-led events, peer-to-peer fundraising campaigns, and recurring donor programs.
- **Board-Led Fundraising Initiatives:** Plan and execute at least one major board-driven fundraising event or campaign annually.
- **Asset Mapping & Funding Strategy:** Identify potential funding sources, including grants, corporate sponsorships, and individual major donors.
- **Fundraising Structure & Processes:** Develop a standardized fundraising approach, including outreach emails, mailers, sponsorship decks, and stewardship strategies to maintain donor relationships.

## **Next Steps:**

1. Conduct an asset mapping session to identify funding opportunities.
2. Establish a working group to develop a board-led fundraising event or campaign.
3. Draft a fundraising framework outlining outreach strategies and donor engagement plans.
4. Provide training for board members on fundraising best practices.

This initiative will take place over March - December 2024, with asset mapping in March-April, event/campaign planning in May-July, and execution and refinement in August-December.





thank you.



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