



CAPACITY BUILDING ENGAGEMENT

Ensuring a Strong, Durable and Capable Nonprofit

We've all had those moments when you're visiting a restaurant and as you sit at the table, you realize it has a "wobble:" one or more legs are out of whack. At best the glasses might spill over; at worst, one leg is about to give out altogether. In the Nonprofits Lifecycle™ capacity building model, that table is your nonprofit - the tabletop includes your programs, your brand, your community impact. Atop the table rests a beautiful vase of red roses, which represents your mission and vision. Each leg symbolizes a vital part of your infrastructure: governance, management, financial health, and systems.

When all these areas are organizationally sound and in harmony, and when there is a solid tabletop of programs, the nonprofit can serve its clients and affect change at its highest level. But when one or more of the legs are wobbly or weak, or the tabletop itself becomes too top heavy, it's crucial to have strategies in place to address these challenges. By focusing on the capacities of a nonprofit, we can help recognize strengths and ensure they are sustained. We can also note limitations and bolster them well before the stability of the organization is endangered... and the roses end up on the floor.

Fitting nonprofits of all different size, age or type, a Nonprofit Lifecycles Capacity Assessment conducted by Heidi Holtz, a Certified Lifecycles Capacity Consultant, helps you understand what is working now, and what might need to change for the future. This process may be used in short and long-term planning, leadership transitions, board and staff development, etc.

This engagement is a combination of facilitated workshops, consulting, foundational videos, and access to the online version of the Nonprofit Lifecycles Self-Assessment.

On Your Own:

- **Video "Introduction to Nonprofit Lifecycles™" (20 minutes)**
 - Why is understanding organizational capacity important?
 - The importance of a diagnostic, depersonalized approach.
 - Organizational development stages for nonprofits in each capacity area.
 - Challenges to moving into and out of the developmental stages.

- **Video “ Developing the evidence:” (15 minutes)**
 - What questions will be asked?
 - How to gather the evidence?
 - Review basic nonprofit documentation, legal and financial materials, and policies for management and governance.

- **Survey: The Nonprofit Lifecycles™ Self-Assessment (approximately 30 minutes)**

Facilitated Workshop One: Interpreting YOUR Nonprofit Lifecycles™ Self-Assessment (2-hours)

Your facilitator will analyze the assessment results and walk through building consensus for each capacity area, based upon the evidence. We will “meet you where you are:” the assessment provides a starting point for crucial conversations about sustainability and/or change. We’ll also focus on how to view organizational capacity through the lens of diversity, equity and inclusion. The result will be a visual representation, with supported evidence, as to the organizational capacity of your programs, your “table legs,” and your organization overall.

Facilitated Workshop Two: What’s Next? (2-hours)

Now that you’ve diagnosed your current starting point, the facilitator will work with your team as you identify which actions areas should be further explored to grow your capacity. Based upon your specific assessment, this conversation will identify low hanging fruit as well as pie in the sky ideas. Each organization is different - the solutions, and tactics, will therefore differ. Sample action steps might include how to diversify revenue, developing employee policies, growing your board, improving compliance in systems and policies, etc.

Facilitated Workshop Three: Check-in (1 hours)

We will return 9-12 months after the work plan has been completed for a check-in. At this session, we will do a “refresh” assessment by talking through the current picture and determining what has changed in the intervening time. This will help your team and board celebrate successes, adjust for the inevitable changes that can occur, and continue your capacity growth.

Capacity Building Workshop Series includes:

- Access to two training videos.
- Access to the Nonprofit Lifecycles™ Self-Assessment survey instrument
- Two interactive group workshops of 2 hours each.
- Handouts, materials, and resource lists
- Written assessment which identifies capacity placements, evidence, and opportunities for growth/sustainability.
- Written summary of proposed action areas as part of an initial 12-18 month work plan.
- Written “refresh” assessment on the one-year anniversary of the work plan, updating capacity placements.

Cost: \$5,000 - 6,500