

Planning for Successful Capacity Building

April 24, 2013

Justin Piff, Project Manager
Stephanie Lerner, Project Coordinator



OMG Center for Collaborative Learning

Evaluation, Strategic Research & Planning, Philanthropy & Capacity Building



Workshop Goals

- Develop an understanding of capacity building and its benefits
- Increase ability to plan for successful capacity building projects
- Increase ability to articulate capacity building plans
- Develop an understanding of how to evaluate capacity building initiatives

Workshop Agenda

- Overview: Capacity Building and the Pew Fund Capacity Building Program
- Project Planning
- Assessing Capacity Building Efforts
- (Break)
- Writing a Good Proposal
- Group exercise

What is Nonprofit Capacity Building?



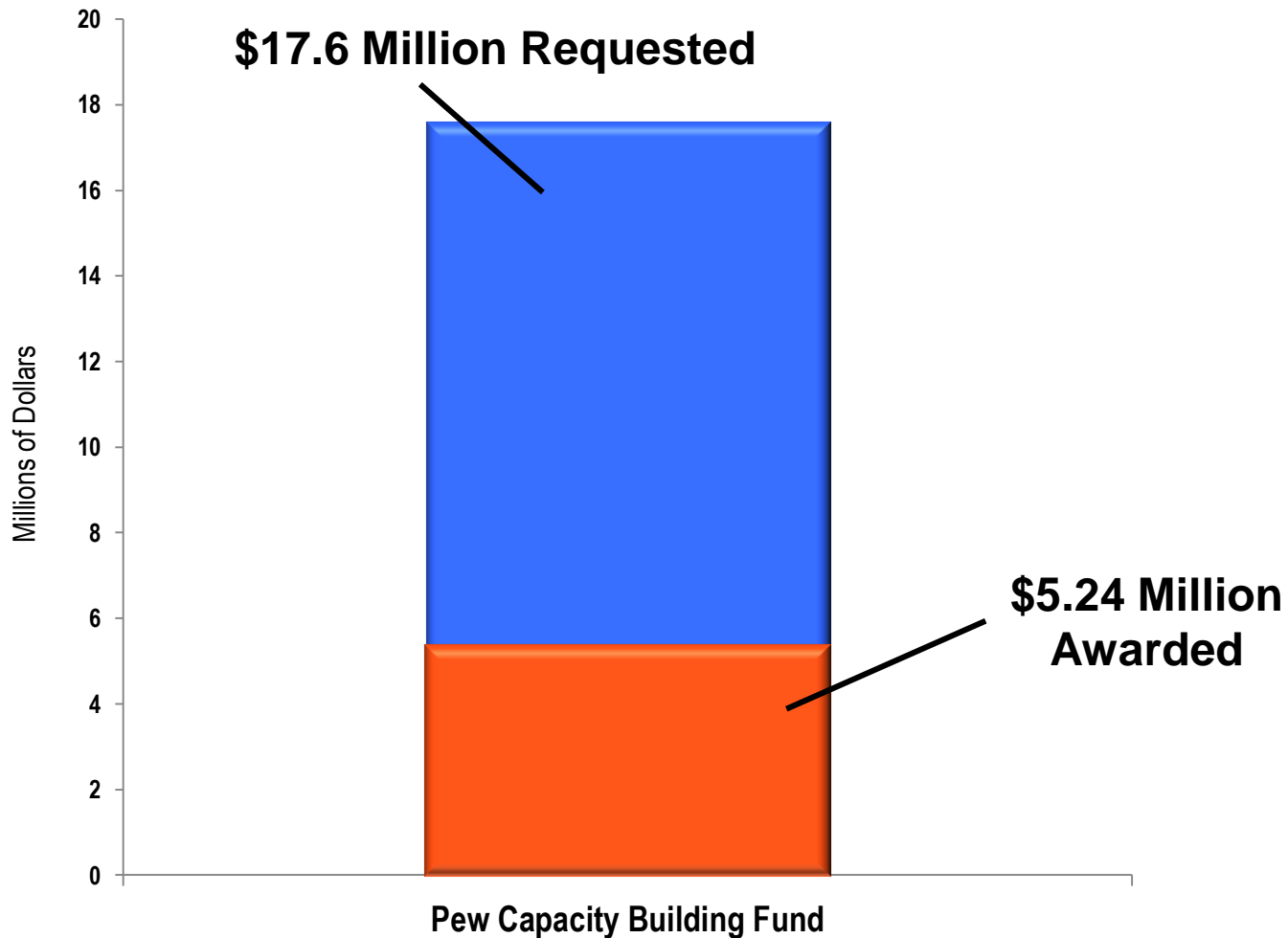
“Actions that improve nonprofit effectiveness” — Barbara Blumenthal, *Investing in Capacity Building*

“The ability of nonprofit organizations to fulfill their missions in an effective manner.” — Urban Institute

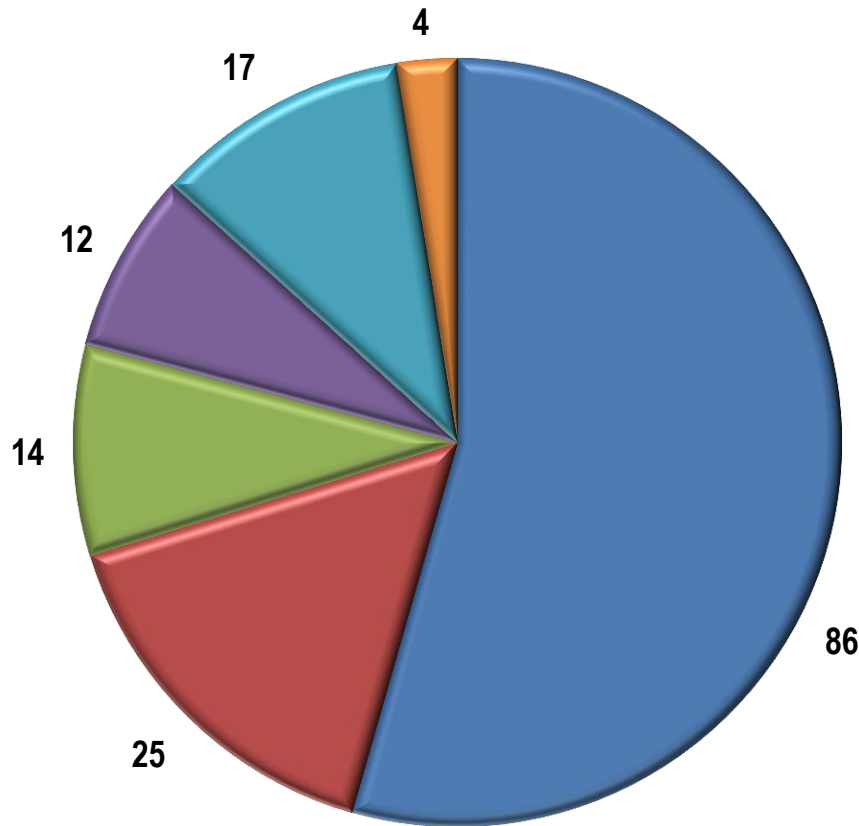
Pew Fund Capacity Building Program

- Available exclusively to Pew Fund grantees
- Began in 2006
- 2 Award cycles each year (Spring, Fall)
 - 6 funding categories
 - Letter of Inquiry
 - Proposal
- 12-month awards
- Interim financial and final financial and narrative reporting

Awards vs. Requests: 2006-2012



Awards: 2006-2012



Total: 158 Awards

- Management Information Systems
- Evaluation and Outcomes Systems
- Financial Management and Planning
- New Program Planning and Development
- Leadership Succession and Next-tier Leadership Development
- Strategic Planning and Organizational Alignment

MIS Design and Development

Horizon House

To upgrade computer hardware to support its transition to an electronic health record system

MANNA

To merge two database systems into one comprehensive constituent management system for volunteer tracking, donor and grant management, and event management

Financial Management and Planning

Easter Seals of Southeastern Pennsylvania

To upgrade its financial management and accounting system for integration with its client database

The Crime Victims' Center of Chester County, Inc.

To purchase hardware and accounting software for improved financial management

Evaluation and Outcomes System Development

Lutheran Settlement House

To enhance evaluation capacity by upgrading Efforts to Outcomes software, training staff, and developing new evaluation procedures

ESF Dream Camp Foundation

To develop an organization-wide evaluation plan and create a system for continuous outcomes tracking

Leadership Succession and Next-tier Leadership Development

The Food Trust

To strengthen human resources infrastructure by developing the organization's future leaders and succession planning for its executive team

Congreso de Latinos Unidos

To build the capacity of its leadership through skill-building of executive cabinet members and facilitating the function of the newly-formed cabinet

New Program Planning and Development

Family Service Association of Bucks County

To create a single entry point for Bucks County's homeless individuals and develop a standardized process for client assessment, referral, and placement into specialized programs

Interim House

To integrate *Dialectical Behavioral Therapy (DBT)* into the agency's clinical practices. Therapists and supervisors will attend training in DBT concepts and techniques, and offer new DBT groups for clients.

Strategy Development & Organizational Alignment

Golden Slipper Center for Seniors

To develop an actionable strategic plan that identifies future service models and opportunities for improving core capacities

Surrey Services for Seniors

To integrate operations resulting from a recent merger

Additional capacity building supports

Technical Assistance

- LOI and proposal feedback
- Resource sharing
- Coaching/troubleshooting

2-3 Workshops per year

- 18 Workshops since 2006
- 582 participants



Project Planning



What makes for a
good project?

Project Planning

Identifying an appropriate project.



Project Planning: Team

- Utilize a mix of senior, mid-, and front-line staff
- Identify a designated “worrier”
- Establish expectations and roles up front
- Select appropriate consultant(s)

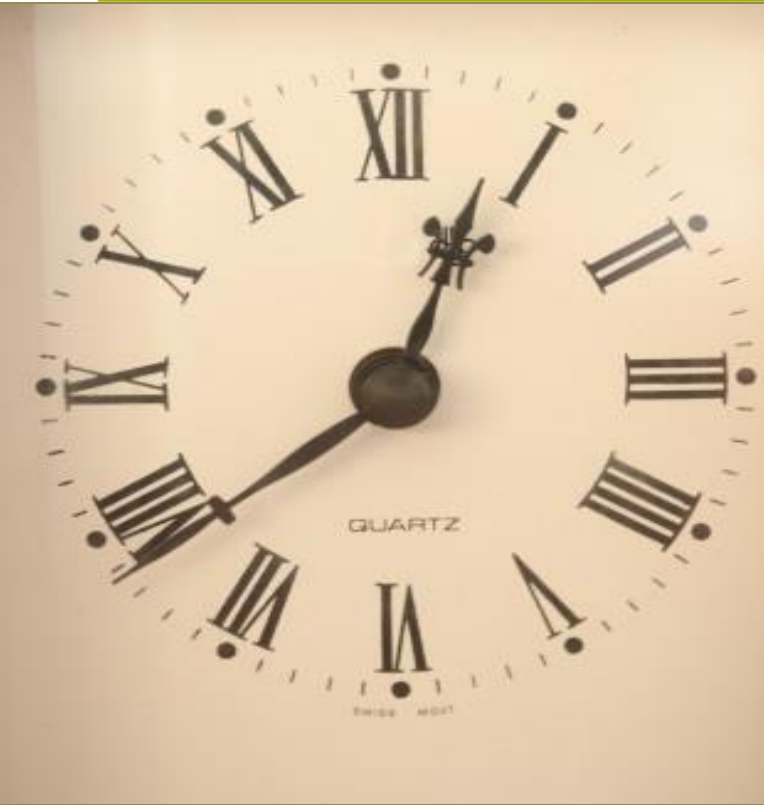


Project Planning: **Consultants**

- Determine the expertise needed on project
- Interview and select a consultant early on
- Should provide help with work plan and budget



Project Planning: **Work Plan**



- Should be realistic, balanced
- Allow enough time to plan, assemble team, do any discovery research, hire a consultant, etc.
- Except delays

Project Planning: Budget

- Should reflect “true” costs
- Include staff time & benefits
(no more than 15% of total project)
- Use estimates, when necessary
- Identify additional sources of revenue
- Demonstrate that you have “skin in the game”



Project Planning: Outcomes

- Identify expected outcomes when you identify your project
- What's the ultimate ***end goal***?
- How does the project alleviate the “problem”?
- Identify the project's ***impact on clients***



Planning: Common Challenges

- Selecting discrete, focused projects
- Making the case for *this* project at *this* point in time
- Connecting project outcomes to the “problem”
- Demonstrating how the project will benefit the organization and clients
- Budgeting for staff time



Implementation: Common Challenges

- Staff turnover
- Underestimating technology needs
- Meeting competing demands



Assessing Capacity Building Efforts

- What are the outputs?
- What impact do you expect to see in the short and long term?
- How will you measure this impact?
- How can evaluation of this project be incorporated into pre-existing evaluation efforts?

Demonstrating Impact

Alzheimer's Association Delaware Valley Chapter

Purchased new laptop and desktop computers and LCD projectors. The organization was able to use this technology to provide **199 new educational programs to 5,545 individuals** with and families of those stricken by the disease by the close of the award period. These programs have helped people gain access to medical care, and support networks resulting in better client care.

Demonstrating Impact

Women Against Abuse

Used funds to redesign the organization's website. Prior to the redesign, an average of **8.23 donors** gave an average of **\$1,134** in donations per month. Following the changes to the website, an average of **17.63 donors** gave an average of **\$3,261** in donations via the website. WAA notes that it is increasing its sustainability to delivery ongoing services to its client base.



ACTIVITY

Assessment Activity

Project Goal: To streamline data collection systems and enhance reporting capabilities in order to improve decision making for service delivery

- What outputs would you expect to see?
- What outcomes would you expect to see?
 - How would you measure these?

Assessment Activity

Project Goal: To increase leadership capacity by developing mid-level managers and creating a succession plan for the organization's senior leaders.

- What outputs would you expect to see?
- What outcomes would you expect to see?
 - How would you measure these?

Assessment Activity

Project Goal: To upgrade development and fundraising software to increase funding and improve financial planning and management.

- What outputs would you expect to see?
- What outcomes would you expect to see?
 - How would you measure these?



BREAK

Project Planning

What makes a proposal “good”?



Writing a Good Proposal

- Demonstrates planning
- “Sells” the need and benefit of the project
- Clearly articulates outcomes for the organization and clients
- Gives reviewers confidence that the work can be done well, on time, and within budget
- Is organized and well written



PEER LEARNING

Questions



Contact

Justin Piff

Project Manager

justin@omgcenter.org

215-732-2200 x. 269

Stephanie Lerner

Project Coordinator

stephanie@omgcenter.org

215-732-2200 x.225

For more information about the Pew Fund Capacity Building Program and additional resources:

www.omgcenter.org/pew-fund

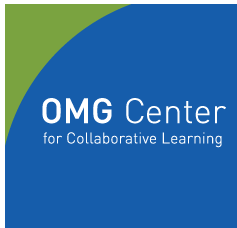
Connect with OMG



“Follow” us on Twitter: **@OMG_Impact**



“Like” us on Facebook



Sign Up for OMG News at

www.omgcenter.org

