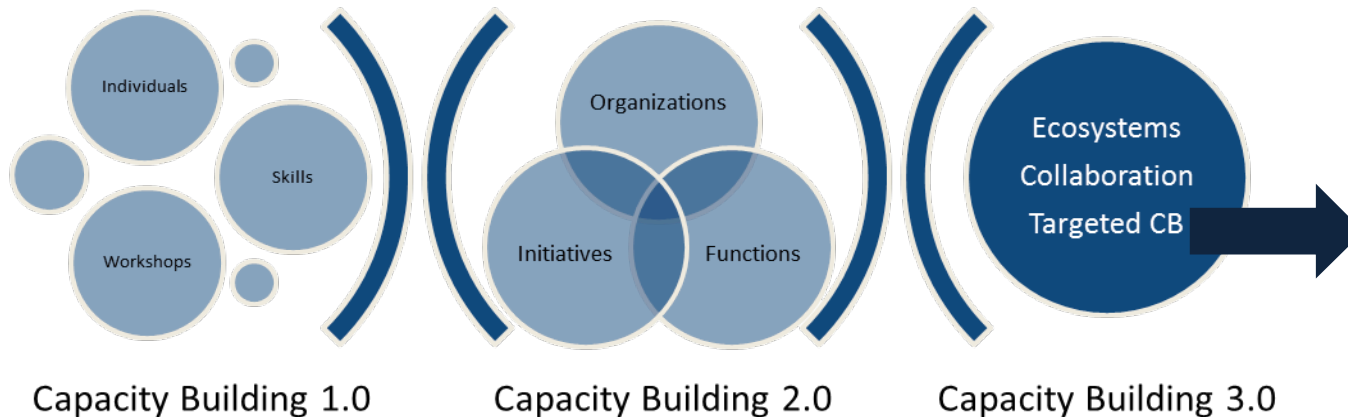




Handouts for “Implementing Capacity Building 3.0”

New Jersey Conference for the Social Sector

May 19, 2015



Step 1: Who You Are, Who You Want to Be

- Determine your organization’s role and aspirations

Step 2: Lifecycle Stage

- Assess your organization’s lifecycle

Step 3: Priority Capacity Strengths and Challenges

- Assess your organization’s capacity needs

Step 4: Identifying the Change Agents

- Determine who needs to change

Step 5: What do the Change Agents Need?

- Determine whether the individuals or group are “ready to go” or “need to get ready”

Step 6: What are the Available Resources to Build Capacity?

- Determine a cost-effective model for supporting capacity building

Philadelphia

2 Penn Center, 1500 JFK Blvd., Suite 1910
Philadelphia, PA 19102
215-568-0399

New York

31 West 27th Street, 4th Floor
New York, NY 10001
212-949-0990

San Francisco

One Sansome Street, 35th Floor
San Francisco, CA 94104
415-439-8368

www.tccgrp.com

GROUP MEMORY – STEPS 1, 2, & 3

Notes to take back to your organization

Step 1: Who You Are and Who You Want to Be

Right now we are a _____ (Micro, Macro, Hybrid) organization.

Which community partners do you feel you could leverage more to have greater impact? _____

In the past two years we have (choose all that apply):

- ☐ Grown significantly – increasing the overall budget, staff and/or volunteers at the organization (significant = 20%)
- ☐ Worked hard to stabilize and sustain our current work
- ☐ Weathered challenging budget shortfalls and experienced a decrease in revenue
- ☐ Not sure

Looking forward in the next two years we plan on (choose all that apply):

- ☐ Growing significantly
- ☐ Sustaining our current capacity
- ☐ Adjusting our programming to meet our revenue realities

Indicate *any aspirations to change* either your program or business model:

Step 2: Lifecycle Stage

Our organization is in the _____ (core program development, infrastructure development, impact expansion) stage of our lifecycle.

Step 3: Potential Capacity Building Targets

List the different needs, activities, or objectives that surface during the workshop:

CAPACITY MATRIX

ASSESSING LIFECYCLE STATE AND CAPACITY NEEDS

	Core Program	Infrastructure Development	Impact Expansion	
Capacity Needs	Leadership	Internal leadership and vision to sustain and grow program model	Internal leadership to sustain and grow business model	Scalable models for community impact and system change
	Adaptive	Needs assessment and ongoing evaluation (R&D) to sustain and grow	Organizational assessment for sustainability and business planning for independent resource generation for growth	Evaluation, planning, and process implementation for community alliances, collaborations, and system reform efforts
	Management	Strong program management and implementation for sustainability and growth	HR and infrastructure management and performance measurement for sustainability and growth	Alliance and partner management
	Technical	Program delivery, resources and tools for sustainability and growth	Operational and administrative facilities; skills and tools for sustainability and growth	Relationships, networks, and resources

Your Organization's Feedback Sheet

THOUGHT SHEET - STEP 3 - POTENTIAL CAPACITY BUILDING TARGETS

Based on your experience and the CCAT recommendations, what do you think is most needed in your organization right now? Write down the different needs and potential capacity building activities you think are most important.

Leadership Capacity Needs and Potential Activities

The ability of all organizational leaders to create and sustain the vision, inspire, model, prioritize, make decisions, provide direction and innovate, all in an effort to achieve the mission

Adaptive Capacity Needs and Potential Activities

The ability to monitor, assess, respond to and create internal and external changes

Management Capacity Needs and Potential Activities

The ability to ensure the effective and efficient use of resources

Technical Capacity Needs and Potential Activities

The ability to implement all of the key organizational and programmatic functions

Culture Needs and Potential Activities

Elements that foster unity, energize, and empower staff

GROUP MEMORY – STEP 4 & 5 - RACI, CHANGE AGENTS, & “READY, SET, GO”

Capacity Building Target:	Which best describes each change agent's current needs along the Ready/Set/Go continuum? What do they need to be successful?			
	Needs to get READY		Needs to get SET	Needs support to GO
Roles/Names	Does not know how – needs more awareness and knowledge.	Does not want to – lacks motivation or may require a shift in attitude.	Does not have the instructions, tools, systems, or resources.	Does not have the practice or confidence. Is ready, and set, but needs support to get to action.
	Resulting actions are focused on INFORMING + EDUCATING	Resulting actions are focused on COUNSELING + DIRECTING	Resulting Actions are focused on INSTRUCTING + RESOURCING	Resulting actions are focused on MENTORING, COACHING, + SUPPORTING
Responsible <i>The person(s) assigned to do the work:</i>				
Accountable <i>The person(s) who makes the final decision and has the ultimate ownership:</i>				
Consult <i>The person(s) who must be consulted before a decision or action is take:</i>	Who are they? What are the key questions you will ask them?			
Inform <i>The person(s) who must be informed of a decision or action:</i>	Who are they? What are the key messages? Who are the key messengers?			

GROUP MEMORY – CLINIC GUIDE

WORK INDEPENDENTLY TO COMPLETE THE FOLLOWING QUESTIONS, THEN ASK THE SAME QUESTIONS OF A COLLEAGUE AND SEE WHAT YOU CAN LEARN FROM THEIR APPROACH.

1. WHAT CAPACITY ARE YOU TRYING TO BUILD?

2. WHY IS THAT AN IMPORTANT AREA TO FOCUS ON FOR YOUR ORGANIZATION?

3. WHO ARE THE CHANGE AGENTS AND WHERE ARE THEY ON THE READY/SET/GO CONTINUUM?

4. WHAT ARE THE KEY THINGS THEY WILL NEED TO SUCCEED?

5. WHAT QUESTIONS DO YOU HAVE ABOUT BUILDING THIS CAPACITY?