



Nonprofit Capacity Building Program

Capacity building grants aim to invest in the health and sustainability of nonprofit organizations serving La Crosse County. La Crosse Area Community Foundation (LACF) has allocated \$300,000 this calendar year specifically for nonprofits who need investment in their internal infrastructure to create a more sustainable and effective organization. This year's capacity building grant opportunity will give preference to applicant organizations with missions aimed at reducing disparities for La Crosse County residents who identify with historically marginalized communities. Individual awards are expected to range from \$50,000-\$90,000 for a minimum of two consecutive years and will be paired with significant in-kind support through robust, ongoing technical assistance offered throughout the entire grant award period. This pilot grant program has limited capacity, and organizations must be invited to complete a full application. Organizations interested in applying will be required to attend an informational session (in-person) and complete a Letter of Intent to be considered.

Purpose of the Grant

La Crosse Area Community Foundation is committed to investing in our community's nonprofit sector through evolving grant programs aimed at meeting needs identified by nonprofits during several nonprofit focus groups held in early 2024. We are also committed to building a more equitable and inclusive community by uplifting opportunities for area residents to build social capital across areas of difference.

Nonprofits are a vital resource for diverse communities, expanding relationships and connecting them with essential services needed to build social capital and thrive. When the infrastructure of these organizations is strengthened, the communities they serve benefit, and our region moves closer to reducing disparities.

The specific purpose of the Nonprofit Capacity Building Program is to align financial support for both general operating and capacity building along with intense, on-going technical assistance to support nonprofits in achieving new levels of organizational strength and effectiveness.

Grantees will closely partner with La Crosse Area Community Foundation to meet defined goals and manage the tracking and reporting requirements of this grant; they'll also be asked to share lessons learned with other awardees through quarterly nonprofit networking sessions aimed to build new, trusting relationships across impact areas and organizations to help spur collaboration.

Organization Eligibility

Organizations that are eligible to apply must meet the criteria defined below. This round, award preference will be given to organizations with missions aimed at reducing disparities for La Crosse County residents who identify with historically marginalized communities.

- 501(c)3 nonprofit organization with at least 1 paid staff (full-time or part-time)
- Located in and primarily serve residents of La Crosse County
- Has been consistently operating for at least 3 years
- Filed an IRS Form 990EZ or 990 in 2023
- Participation in a 1-hour pre-application informational session
- Agreement to all Grant Awardee Requirements & Expectations listed below
- Organizations must comply with "Appendix A" of LACF's DEIB Policy

Organizations that are best suited for this opportunity will also identify with most of the indicators defined in the 'developing' column of the Nonprofit Organizational Lifecycle tool seen in Attachment A.



Eligible Use of Funds

Up to 70% of award may be utilized for ongoing operational expenses. This funding is intended to allow “breathing room” as organizations work toward capacity building efforts. A minimum of 30% of award must be dedicated to specific capacity-building activities including, but not limited to:

- **Planning Activities:** organizational assessments, strategic planning, fundraising assessment and development, communications/marketing, contingency/disaster planning, or business planning.
- **Board and Leadership Development:** May include activities such as leadership training, defining the role of the board, strengthening governance, assistance with executive transition, succession, expanding the diversity of the board and leadership, and search process.
- **Strategic Relationships:** Technical assistance/consultant support to help two or more organizations work through collaboration and strategic restructuring; positioning for merger or affiliation; or business planning for social enterprise and earned income.
- **Internal Operations:** Improvements to financial management, internal controls and chart of accounts, human resources, or volunteer management; onboarding new staff, training and technical assistance on quality improvement, or facility planning.
- **Technology Improvements:** IT capacity through upgrades to hardware and software, cybersecurity, networking, websites, and staff training to optimize the use of technology.
- **Developing New Sources for Earned Income:** Business planning, contracting, startup costs for a new program, legal services, accounting, or actuarial services.
- **Building Evaluation Capacity:** Consultants may be utilized to develop evaluation plans and train staff and board on outcome evaluation methods and metrics.
- **Evidence-Based Program Adaptation or Implementation:** Explore, modify, or adapt an existing evidence-based program or service not currently or previously offered. NOTE: Because of the small dollar amount and short duration of this grant opportunity, it is not intended for the development from scratch, or validation, of a new program or service. This opportunity is intended only for organizations to implement or adapt an existing evidence-based model that is new to the organization.

This is not an extensive list of activities that can be funded by this grant program. LACF will work with grant applicants to determine how and if their proposed activities fit within the eligible activities listed above. Applicants will be required to complete LACF’s Organizational Self-Assessment (E.D. viewpoint) and a board of directors’ organizational self-assessment in advance of submitting their LOI’s to help direct them to their areas most in need of support. Results from the assessment must substantiate the need for the capacity building goals and activities defined in their grant application.

Application Timeline

RFP announced: February 17, 2025

To discuss your project plans/application details prior to submission of an LOI, call 608-782-3223 x23 or email lauren@lacrosseareafoundation.org

Informational Session: April 7, 2025 at 9 am in LACF Conference Room
(Executive Staff Member and Executive Committee Member from the Board of Directors required to attend)

Letter of Intent Open: April 21, 2025

Letter of Intent Due: May 5, 2025



One-on-One Meeting: Scheduled individually with each applicant; no later than May 14, 2025

Full Application Opens: May 27, 2025

Technical assistance: Ongoing, schedule a time:

For system access or application support, call 608-782-3223 x29 or email ellen@lacrosseareafoundation.org

Proposals due: June 27, 2025

Applicant Interviews: June 30, 2025 – July 14, 2025

Awards announced: Week of July 28, 2025

NCBP Orientation: August 25, 2025

Grant period begins: September 1, 2025

Applying for the Grant

This process is anticipated to take 15-20 hours from start to finish, including all of the steps defined below.

Step 1: Attend the informational session. This session will be held to review this RFP with interested organizations and to answer questions. Participation by an executive board member and paid staff is mandatory for an eligible application. Register for the session by emailing: Ellen Heydon, Grants Specialist, ellen@lacrosseareafoundation.org

Step 2: Complete a Letter of Intent (LOI), must be submitted using the foundation's online grant portal including:

- How your organization's mission is uniquely positioned to help constituents build their social capital
- Copy of 2024 financial statement
- Organizational Self-Assessment from the Executive Director's Point of View
- Organizational Self-Assessment from the Board of Director's Point of View
- Summary of proposed capacity building activities with relation to the organizational assessments
- Board of Directors Questionnaire (current number on board, allowable number, quorum number, executive committee identification)

Step 3: Schedule a one-on-one meeting with Lauren to review assessment results and historical financial information, as well as discuss focus for grant application.

Step 4: *If invited to apply* begin application – All grant applications must be submitted using the foundation's online grant portal. The form will open May 27, 2025, and will close at 11:59pm on June 27, 2025. No late applications will be accepted.

Step 5: Seek technical assistance as needed throughout the process. Technical assistance and primary grant program contact: Ellen Heydon, Grants Specialist | ellen@lacrosseareafoundation.org | 608-782-3223 x29

Step 6: Submit complete application in online portal.

Step 7: Interview with evaluation committee. Interviews will be scheduled individually with each applicant. Interviews will occur between June 30, 2025 and July 14, 2025.



Letter of Intent form pdf (viewing only):

[“Click here to preview”](#)

Application form pdf (viewing only):

[“Click here to preview”](#)

Application Evaluation

The La Crosse Area Community Foundation Impact Committee oversees the foundation’s competitive grantmaking, a separately recruited committee of current and/or former nonprofit leadership/experts will evaluate all applications and make award recommendations for approval by the Board of Directors.

Applications will be evaluated utilizing the scoring rubric share. All applicants will also be invited to meet with the evaluation committee to further advocate for their organization and address any questions or concerns during the application interviews.

Grant Awardee Requirements and Expectations

Nonprofit Capacity Building Program awards include fiscal support paired with ongoing technical assistance, in-kind training opportunities, and coaching for the organization’s leadership and governing body. Organizations accepted into the Nonprofit Capacity Building Program will be required to commit to the following engagement with La Crosse Area Community Foundation:

- Participation in the Certificate of Nonprofit Leadership Development program or ongoing participation in CNLD Level 2 Cohort for at least 1 member of the organization’s paid staff
- Participation of the organization’s Board of Directors in levels 1 & 2 of LACF’s Fundamentals of Board Governance training
- Participation in a minimum of two (2) annual coaching sessions for the organization’s core leadership staff person
- Participation in annual nonprofit self-assessment and strategic review
- Completion of survey following participation in the Nonprofit Capacity Building Program
- Other technical assistance and training opportunities as identified in partnership with grantee

Organizations accepted into the Nonprofit Capacity Building Program will work with LACF staff to set performance measurements that are realistic and appropriate for the organization’s capacity building needs prior to executing the grant agreement. Final performance measure reports will be due upon completion of the grant period. Success will be defined by an organization’s ability to transcend from the ‘Developing’ column to the ‘Growth’ column in the Nonprofit Lifecycle tool.

2025 Capacity Building Program

La Crosse Community Foundation

Nonprofit Capacity Building Program Letter of Intent

Organization Name

Character Limit: 75

Project Name*

Character Limit: 100

Organization Mission

Character Limit: 250

Summary of Proposal*

Briefly summarize the proposed capacity building activities with relation to the organizational assessments.

Character Limit: 750

Social Capital*

How is your organization's mission uniquely positioned to help constituents build their social capital? For LACF's definition of social capital, [click here](#).

Things to consider: Why is social capital important to your organization? How does strong social capital across differences strengthen the work? How does having social capital inspire the future?

Character Limit: 750

Yearly Request

Year 1 Amount Requested	
Year 2 Amount Requested	
Year 3 Amount Requested (if applicable)	
Total Requested Amount	

Organizational Self-Assessment Executive Director's View*

In your own words, describe areas for growth your organization should focus on. Please upload the self assessment taken by the leadership staff. Please identify leadership roles that participated.

Character Limit: 500 | File Size Limit: 10 MB

Organizational Self-Assessment Board of Director's View*

In your own words, describe areas of growth your organization should focus on. Please upload the self assessment taken by the board of directors. In the text box, list the board members (and roles) that participated in this evaluation.

Character Limit: 750 | File Size Limit: 10 MB

Nonprofit Lifecycle Stage*

In a brief summary, share where your organization falls in the nonprofit lifecycle stage. We would like an uploaded copy of the tool that clearly marks where you currently believe your organization sits. In the summary, we want to hear why you believe that is where your organization sits. **Nonprofit Lifecycle Tool**

Character Limit: 1000 | File Size Limit: 5 MB

Board of Directors Questionnaire*

Please answer the following:

- Current number of members on the board
- Allowable number of seats on the board (from by-laws)
- Quorum Number
- Executive Committee Identification (name, role, and role in community)

Character Limit: 1000

Letter of Support from Board*

Please upload a letter of support and commitment from your board of directors. This letter should state how the board of directors will support additional capacity of the organization as well as what they see as priority goals of the capacity increase from their perspective.

File Size Limit: 5 MB

Financial Statement*

Copy of your 2024 financial statement

File Size Limit: 10 MB

Revenue Streams*

Please list your revenue streams and percentage of budget.

Character Limit: 1000

Financial Management*

How are your financials managed?

Things to consider:

- How often does your board see financials?
- Who is responsible for entering data into your financial management system?
- Does an accountant or CPA review your financials on a regular basis?
- What is your cash handling process?
- Do individuals at your organization have checkbooks, credit cards, cash, or line of credits?
- Anything else you think is critical to your financial management plan/process.

Character Limit: 2000

Impact Questions

La Crosse Area Community Foundation is embracing the Trust Based Philanthropy model and the data collected in this section will be used to guide future evolutions to meet nonprofit needs and will not be used against you in any capacity.

Service Area*

Please select which communities your organization serves.

Choices

Bangor/Rockland

Holmen

La Crosse

Onalaska

West Salem

La Crosse County only

Coulee Region (multiple counties)

Wisconsin

National

International

Which of these best describes the purpose of your project?*

Choices

New Strategy to meet community need

Improved Strategy to meet community need

Required Growth to meet community need

Existing Program Support

Which of these impact areas best describes your project, program, or organization?*

Please select those that most closely relate to your work. Select no more than 3 impact areas.

[Click here](#) for definitions to each impact area.

Choices

Arts and Humanities
Community Improvement
Culture and Diversity
Education and Scholarships
Environment
Faith
Health and Human Services
Recreation and Wellness

Which Sustainable Development Goal(s) does your project support?*

Please select all that apply. [Click here](#) for more information about each sustainable development goal and quick definition.

Choices

1. No Poverty
2. Zero Hunger
3. Good Health and Well-Being
4. Quality Education
5. Gender Equality
6. Clean Water and Sanitation
7. Affordable and Clean Energy
8. Decent Work and Economic Growth
9. Industry, Innovation, and Infrastructure
10. Reduced Inequalities
11. Sustainable Cities and Communities
12. Responsible Consumption and Production
13. Climate Action
14. Life Below Water
15. Life On Land
16. Peace, Justice, and Strong Institutions
17. Partnership for the Goals

Nonprofit Capacity Building Program Grant – LOI Evaluation

Categories/ Questions	1	2	3	4	5	TOTAL
	WEAK		AVERAGE		STRONG	
I. SOCIAL CAPITAL ALIGNMENT	Does not advance social capital	Has moderate impact on advancing social capital; primarily through BONDING	Advances social capital; includes bridging OR linking	Advances social capital through more than one branch (bonding, bridging, linking) AND social capital inspires future growth.	Significantly advances social capital; strongly through bridging OR includes all 3 networks. Social capital inspires future growth.	
II. ORGANIZATIONAL SELF ASSESSMENT	Organizational Self-Assessment completed by one staff or one board member	Organizational Self-Assessment completed by one staff and executive board leadership.	Organization Self-Assessment completed by staff leadership and B.O.D. leadership not aligned (distant scores)	Organization Self-Assessment completed by staff leadership and B.O.D. leadership somewhat aligned (some similar scores, some distant scores)	Organizational Self-Assessment from staff leadership and B.O.D. leadership well aligned (similar scores)	
III. ALIGNMENT w/ ORGANIZATION LIFECYCLE STAGE	Organization does not meet lifecycle stage criteria for Developing		Organization meets up to 2 lifecycle stage criteria for Developing		Organization meets 3 or more lifecycle stage criteria for Developing	
IV. BOARD OF DIRECTORS/ GOVERNING BODY SUPPORT	Does not currently meet quorum, and general letter of support provided.	Meets Quorum. Letter of support provided; no understanding of capacity intake.	Meets Quorum. Letter of support provided; addresses capacity intake; no plan to address	Has more board members than needed to meet quorum. Letter of support addresses intake and consideration for how to address.	Has more board members than needed to meet quorum. Letter of support acknowledges capacity intake and identifies solutions to address priority goals for capacity increase.	
V. FINANCIAL REVIEW	Organization cannot identify financial management practices. Has minimal revenue streams.		Organization can clearly demonstrate internal financial management practices. Has at least 2 revenue streams.		Organization can clearly demonstrate internal financial management practices and has financial professionals engaged regularly. Has 4 or more revenue streams.	

Nonprofit Capacity Building Program Grant – LOI Evaluation

VI. PRIORITY POINTS					Application qualifies for preference priority points	
VII. IMPACT AREA	<i>Self-reported impact area here:</i>				<i>Total points here:</i>	
VIII. EVALUATION TEAM COMMENTS	<i>Comments here:</i>					
RECOMMENDATION: <input type="checkbox"/> Invite Organization to Apply <input type="checkbox"/> Decline; opportunity to meet to discuss feedback					Initials: _____	

2025 Capacity Building Program

La Crosse Community Foundation

Capacity Building Grant Application

Purpose of this Grant:

La Crosse Area Community Foundation is committed to investing in our community's nonprofit sector through evolving grant programs aimed at meeting needs identified by nonprofits during several nonprofit focus groups held in early 2024. We are also committed to building a more equitable and inclusive community by uplifting opportunities for area residents to build social capital across areas of difference.

Nonprofits are a vital resource for diverse communities, expanding relationships and connecting them with essential services needed to build social capital and thrive. When the infrastructure of these organizations is strengthened, the communities they serve benefit, and our region moves closer to reducing disparities.

The specific purpose of the Nonprofit Capacity Building Program is to align financial support for both general operating and capacity building along with intense, on-going technical assistance to support nonprofits in achieving new levels of organizational strength and effectiveness.

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Organizational Eligibility:

Organizations that are eligible to apply must meet the criteria defined below. This round, award preference will be given to organizations with missions aimed at reducing disparities for La Crosse County residents who identify with historically marginalized communities.

- 501(c)3 nonprofit organization with at least one paid staff (full-time or part-time)
- Located in and primarily serve residents of La Crosse County
- Has been consistently operating for at least three years
- Filed an IRS Form 990EZ or 990 in 2023
- Participation in a 1-hour pre-application informational session
- Agreement to all Grant Awardee Requirements and Expectations
- Organizations must comply with **LACF's DEIB Policy**

- Organizations that are best suited for this opportunity will also identify with most of the indicators defined in the 'developing' column of the Nonprofit Organizational Lifecycle tool.

Application Evaluation

The La Crosse Area Community Foundation Impact Committee oversees the foundation's competitive grantmaking, a separately recruited committee of current and/or former nonprofit leadership/experts will evaluate all applications and make award recommendations for approval by the Board of Directors.

Applications will be evaluated utilizing the scoring rubric share. All applicants will also be invited to meet with the evaluation committee to further advocate for their organization and address any questions or concerns during the application interviews.

Organization Name*

Character Limit: 75

Organization EIN*

Enter your nine (9) digit EIN with no dash.

Character Limit: 9

Year Founded*

Character Limit: 4

Organization Mission*

Character Limit: 250

Project Name*

Character Limit: 100

Project Summary*

In 3 sentences or less, provide a general summary of your capacity plan and the anticipated impact.

Character Limit: 750

Organizational Assets*

What physical assets belong to your organization? (i.e. building, land, vehicle, heavy machinery, etc.)

Character Limit: 750

Yearly Request

Year 1 Amount Requested	
Year 2 Amount Requested	
Year 3 Amount Requested (if applicable)	
Total Requested Amount	

Current Strategic Plan

If your organization currently operates under an active strategic plan, please upload. If not, skip this question.

File Size Limit: 4 MB

Alignment, Community Need, and Social Capital

Change Readiness*

How do you know your organization is ready and able to take on the change in capacity now? What was the score from the change readiness assessment?

Character Limit: 750

Alignment*

Based on your organizational self assessment (from both the executive director and board of director views) and where your organization falls on the nonprofit lifecycle tool, what in-kind training or resources do you believe will be most valuable through the Nonprofit Capacity Building Program and how will they move your organization forward?

Character Limit: 1500

Community Need*

What is your organization's impact on its constituents and the La Crosse County community in recent years?

Character Limit: 750

Social Capital*

How is your organization's mission uniquely positioned to help constituents build their social capital? For LACF's definition of social capital, [click here](#).

Things to consider: Why is social capital important to your organization? How does having

strong social capital across differences strengthen the work? How does having social capital inspire future growth?

Character Limit: 1500

Priorities and Goals

Use of Funds*

Eligible Use of Funds - Please check the boxes you believe your organization will be using funds to support.

Up to 70% of award may be utilized for ongoing operational expenses. This funding is intended to allow "breathing room" as organizations work toward capacity building efforts. A minimum of 30% of award must be dedicated to specific capacity-building activities including, but not limited to:

- *Planning Activities:* E.g., organizational assessments, strategic planning, fundraising assessment and development, communications/marketing, contingency/disaster planning, or business planning.
- *Board and Leadership Development:* May include activities such as leadership training, defining the role of the board, strengthening governance, assistance with executive transition, succession, expanding the diversity of the board and leadership, and search process.
- *Strategic Relationships:* Technical assistance/consultant support to help two or more organizations work through collaboration and strategic restructuring; positioning for merger or affiliation; or business planning for social enterprise and earned income.
- *Internal Operations:* Improvements to financial management, internal controls, and chart of accounts, human resources, or volunteer management; onboarding new staff, training and technical assistance on quality improvement, or facility planning.
- *Technical Improvements:* IT capacity through upgrades to hardware and software, cybersecurity, networking, websites, and staff training to optimize the use of technology.
- *Developing New Sources for Earned Income:* Business planning, contracting, startup costs for a new program, legal services, accounting, or actuarial services.
- *Building Evaluation Capacity:* Consultants may be utilized to develop evaluation plans and train staff and board on outcome evaluation methods and metrics.
- *Evidence-Based Program Adaptation or Implementation:* Explore, modify, or adapt an existing evidence-based program or service not currently or previously offered. **NOTE:** Because of the small dollar amount and short duration of this grant opportunity, it is not intended for the development from scratch, or validation, of a new program or service. This opportunity is intended only for organizations to implement or adapt an existing evidence-based model that is new to the organization.

This is not an extensive list of activities that can be funded by this grant program. LCF will work with grant applicants to determine how and if their proposed activities fit within the eligible activities listed above. Applicants will be required to complete LCF's NPO Self-Assessment Tool in advance of their application to help direct them to their areas most in need of support. Results from the assessment must substantiate the need for the capacity building goals and activities defined in their grant application.

Choices

Planning Activities
Board and Leadership Development
Strategic Relationships
Internal Operations
Technology Improvements
Developing New Sources for Earned Income
Building Evaluation Capacity
Evidence-Based Program Adaptation or Implementation
Other

Goals of Capacity Building*

In a perfect world what do you want to accomplish:

Year 1: Short Term Goal

Year 2: Short Term from Year 1 Growth

Year 3: Short Term from Year 2 Growth

How do your 3 goals connect to the needs of your organization?

Character Limit: 5000

Current Priorities and Implementation*

What are your top 2 - 3 priorities as an organization and how will they be impacted by this capacity grant?

Things to Consider: Strain on existing internal capacity, focus shifting from priorities to capacity building, other projects in process, change management

Character Limit: 1500

Partnerships*

Describe other local organizations with who your organization regularly partners or collaborates. Expand on the nature of your collaboration (i.e. resource share, financial share, referral based etc.)

Character Limit: 1000

Letters of Support

Please upload any letters of support you have obtained related to this opportunity.

File Size Limit: 10 MB

Capacity Challenges*

Consider the following:

- If we do give you the money, what are your challenges to completing the goals you've shared?
- What do you still need to accomplish to push past the challenges that arise?
- What do you need for growth (professional development)?

Character Limit: 2500

Sustainability

Consider the following:

- What happens to your organization if you don't receive this grant?
- What is your revenue or fundraising strategy?
- Do you envision your organization ceasing to exist at any time (i.e. we will solve community hunger by 2030)?

Character Limit: 2500

Impact Questions

La Crosse Community Foundation is embracing the Trust Based Philanthropy model and the data collected in this section will be used to guide future evolutions to meet nonprofit needs and will not be used against you in any capacity.

Which of these best describes the purpose of your project?*

Choices

New Strategy to meet community need
 Improved Strategy to meet community need
 Required Growth to meet community need
 Existing Program Support

Service Area*

Please select which communities your organization serves.

Choices

Bangor/Rockland
 Holmen
 La Crosse
 Onalaska
 West Salem
 La Crosse County only
 Coulee Region (multiple counties)
 Wisconsin
 National

International

Which of these impact areas best describes your project, program, or organization?*

Please select those that most closely relate to your work. Select **no more than three (3)** impact areas. [Click here](#) for definitions related to each impact area.

Choices

Arts and Humanities
Community Improvement
Culture and Diversity
Education and Scholarships
Environment
Faith
Health and Human Services
Recreation and Wellness

Which Sustainable Development Goal(s) does your project support?

Please select all that apply. [Click here](#) for more information about Sustainable Development Goals and to review definitions.

Choices

1. No Poverty
2. Zero Hunger
3. Good Health and Well-Being
4. Quality Education
5. Gender Equality
6. Clean Water and Sanitation
7. Affordable and Clean Energy
8. Decent Work and Economic Growth
9. Industry, Innovation, and Infrastructure
10. Reduced Inequalities
11. Sustainable Cities and Communities
12. Responsible Consumption and Production
13. Climate Action
14. Life Below Water
15. Life on Land
16. Peace, Justice, and Strong Institutions.
17. Partnerships for the Goals

Categories/ Questions	1	2	3	4	5	TOTAL
	WEAK		AVERAGE		STRONG	
I. ASSETS		No organizational assets. Operated out of home.	Rented physical space or vehicle to conduct work.	Owned physical space or vehicle to conduct work.		
II. CHANGE READINESS	Low Score: 0-7		Midrange Score: 8-15		High Score: 16-21	
III. ALIGNMENT	Needs identified through organizational self-assessment are not well aligned with current offerings of NCBP	Needs identified through organizational self-assessment aligns with in-kind offerings of the NCBP	Needs identified through organizational self-assessment aligns with in-kind offerings of NCBP and organization identifies how opportunities move their organization forward in 1 element of the nonprofit lifecycle	Needs identified through organizational self-assessment aligns with in-kind offerings of NCBP and organization identifies how opportunities move their organization forward in 2 elements of the nonprofit lifecycle	Needs identified through organizational self-assessment aligns with in-kind offerings of NCBP and organization identifies how opportunities move their organization forward in 3 or more elements of the nonprofit lifecycle	
IV. COMMUNITY NEED	No identified need in the community.	Lack of clarity around need (scope, target audience)	Community need identified	Community need identified with qualitative OR quantitative data	Community need identified with qualitative AND quantitative data	
V. SOCIAL CAPITAL ALIGNMENT	Does not advance social capital	Has moderate impact on advancing social capital; primarily through BONDING	Advances social capital; includes bridging OR linking	Advances social capital through more than one branch (bonding, bridging, linking) AND social capital inspires future growth.	Significantly advances social capital; strongly through bridging OR includes all 3 networks. Social capital inspires future growth.	
VI. STRATEGY/ PROGRAM DESIGN	Use of funds identified. Capacity Building goals listed. Current priorities listed.	Use of funds identified. Capacity Building goals listed. Current priorities listed. Consideration given to implementation.	Use of funds identified. Goals of capacity building identified and directly related to current priorities of the organization. Consideration given to implementation.	Use of funds identified. Goals of capacity building identified and directly related to current priorities of the organization. Challenges to implementation identified.	Use of funds, capacity building goals, and current priorities are all well aligned. Challenges to implementation identified and strategized.	

<p>VII. PARTNERS/ COLLABORATION</p>	<p>No Letters of Support; list of partners without reason</p>	<p>Minimal partners/ collaborations demonstrated; no Letters of Support</p>	<p>Partners/ collaborations exist; Letters of Support provided</p>	<p>Partners/ collaborations are utilized; Letters of Support provided to demonstrate collaborative work</p>	<p>Partners/ collaborations utilized to share capacity and resources; Letters of Support demonstrates mutually beneficial relationship</p>	
<p>VIII. CAPACITY CHALLENGES</p>	<p>No challenges identified.</p>	<p>Challenges revolve around funding with plans to raise more.</p>	<p>Identifies challenges without understanding of solution to address the issues. Professional development is identified.</p>	<p>Identifies challenges with realistic expectations to overcome. Professional development is outlined with reasoning related to nonprofit lifecycle tool.</p>	<p>Identifies challenges, with realistic expectations to push past the challenges. Applicant has identified elements of organizational growth and clearly stated how professional development interacts with the nonprofit lifecycle tool and accomplishes the capacity goals of the organization.</p>	
<p>IX. SUSTAINABILITY</p>	<p>Organization has capacity to meet existing need.</p>	<p>Organization meets a temporary need in the community and needs to increase capacity to serve that need.</p>	<p>Organization meets a permanent need in the community and needs to increase capacity.</p>	<p>Organization meets a permanent need, needs to increase capacity, and has identified revenue or fundraising strategy.</p>	<p>Strong need to increase capacity to meet a demonstrated growing need (data provided). Realistic expectations to increasing revenue or fundraising strategy and organization expects lifelong commitment to community.</p>	
						<p>Total: _____ / 44</p>

Organizational Readiness for Social Change

Who should participate in the assessment?

The assessment is designed for the leadership and staff members of an organization where there is interest in pursuing social change work. For this assessment, the board of directors and the organization's staff should complete this assessment (thus receiving two sets of scores).

How do we take this assessment?

Hand out copies of the assessment to each respondent and ask each person. Keep track of staff versus board response. Respondents should simply select the answer that fits best as there is likely no way to perfectly describe your organization. Once participants have submitted their answers, take the average of both staff and board (thus leaving you two results).

Part 1: Vision, Mission, and Theory of Change

1. Does your organization have a written mission statement?
 - a. No, our organization does not have a written mission statement.
 - b. Yes, our organization has a written mission statement, but I don't really know what it is or how it applies to our work.
 - c. Yes, our organization has a written mission statement; I know what it is but I don't think it really guides our work.
 - d. Yes, our organization has a written mission statement that guides our work; staff and board understand the mission.
2. Does your organization have a vision statement? (A vision statement is a description of the world that your organization wants to help create.)
 - a. No, we don't have a written vision statement, and we have never talked about our vision.
 - b. No, we don't have a written vision statement, but we talk about our vision. However, there doesn't seem to be any overall agreement among staff and board members about the vision.
 - c. Yes, we have a written vision statement, and I know what it is but I don't think it really guides our work.
 - d. Yes, we have a written vision statement that guides our work; staff and board understand the vision.
3. Does your organization evaluate how your activities advance the mission and/or vision?
 - a. Unless something is obviously going wrong, we assume that our activities are working.
 - b. Our program staff and their supervisors evaluate their programs. These evaluations do not reference our agency's mission or vision and are often dictated by funders' guidelines or grant proposals.
 - c. Our programs are routinely evaluated based on our agency's goals and anticipated outcomes, which stem from our mission or vision. However, we rarely discuss the results of these evaluations.
 - d. We set goals and strategies that reference our agency's mission or vision. Programs are routinely evaluated, and we discuss the results among ourselves and with others in the organization. We then make changes in the program based on our mission/vision, and on the evaluation results.

Part 2: Leadership for Change

1. The organizational structure and decision-making process within your organization can best be described in the following way:
 - a. The director and/or board of directors make most of the decisions.
 - b. The director regularly consults with staff and constituents, but there is no formal leadership structure with decision-making power beyond the director and the board.
 - c. The director consults with staff and constituents. We are working on developing a more formal power-sharing process.
 - d. Decision-making structures and accountability are clear, and power is formally shared among people at different levels of the organization.
2. How does your organization's leaders reflect the communities you serve? ("Leaders" refers to senior staff and other staff with significant decision-making authority and autonomy, as well as the board of directors.)
 - a. Our organization's leadership does not reflect the community we serve in terms of race, ethnicity, economic status, gender, age, etc. There is little interest in recruiting, developing or promoting leadership that reflects those we serve.
 - b. Our organization's leadership does not reflect the community we serve. The organization has tried to change through diversity training or other efforts, but with little success.
 - c. Our organization's leadership is not fully reflective of our community, but it is more reflective than it has been in the past. The organization is consciously working to address this issue.
 - d. Our leadership (or organization) reflects and is representative of the communities we serve. We have ongoing, well-developed procedures in place to recruit and develop leaders from the community.
3. How do clients/constituents participate in your organization?
 - a. Our clients/constituents receive services, but do not have any say in the services they receive or the goals of the organization.
 - b. We are interested in feedback and periodically ask clients/constituents for their opinions or feedback through surveys, evaluations, comment cards, or meetings. However, this process is not consistent and there is no structured way for clients/constituents to have a say in how the organization operates.
 - c. We get feedback from clients/constituents in different ways and take the feedback into account when we evaluate our agency's work. We have tried to bring constituents into leadership roles (such as board members), but we haven't done it consistently and when we have done it, the results have not gone very well.
 - d. Clients/constituents successfully participate in our organization at every level, from giving feedback on services to serving on committees, leadership groups and the board of directors.
4. Does your organization work with clients/constituents for social change?
 - a. We provide services only; the organization does not seem interested in doing social change work, such as advocacy or teaching our clients/constituents about their rights.
 - b. Our organization is interested in social change but is afraid that if we speak up it will jeopardize our ability to do our work. We do belong to coalitions that advocate to prevent funding cuts in our organizations.
 - c. Our organization has been active in several issues affecting our clients/constituents and keeps us informed about what is going on in that arena. Mainly, the executive director and a few senior leaders are involved in this effort.
 - d. Our organization has been active in social change work and its activities include and are led by constituents who have had leadership training on how to do this work. We are regularly informed and updated on progress in this area and are encouraged to participate and to include our clients/constituents in these efforts.

Scoring the Assessment

Score each section separately, as your score in each section will help you identify where to begin your efforts. For each of the following answers, give yourself the following score:

A = 0 B = 1 C = 2 D = 3

Part 1: Mission, Vision and Theory of Change: _____

Part 2: Leadership for Change: _____

Total Score: _____

Organizational Self-Assessment

This questionnaire is designed to help you assess your organization. It will help affirm strengths and identify weaknesses and areas which need attention. It should take about twenty minutes to respond to the questions and evaluate.

Directions: Do not put your name anywhere on this questionnaire. Please respond to all statements. For each, answer to what extent you agree that the statement is true for your organization. Be open and honest! For each statement, circle only one number to indicate your thinking. After you have responded to all of the statements, transfer the numbers to the scoring sheet.

These are the response choices for each statement:

- 1 I agree (this statement is certainly true for my organization).**
- 2 I agree slightly (this statement is sometimes or partly true).**
- 3 Uncertain (I don't know).**
- 4 I disagree slightly (this statement is usually not true).**
- 5 I disagree (this statement is certainly not true for my organization).**

1. The goals of this organization are clearly stated. 1 2 3 4 5 (1)
2. Detailed operations decisions are not made by the board. 1 2 3 4 5 (2)
3. Board meetings are mostly concerned with matters of policy, planning, funding, and financial management, not day-to-day details. 1 2 3 4 5 (3)
4. Meetings are used effectively make decisions and accomplish important tasks. 1 2 3 4 5 (4)
5. I feel like my efforts are recognized and appreciated. 1 2 3 4 5 (5)
6. I know most of the board members and staff well enough to understand their skills. 1 2 3 4 5 (6)
7. This organization prepares an annual budget which is regularly monitored to see if expenses and revenues are on target. 1 2 3 4 5 (7)
8. New ideas are fairly considered in this organization. 1 2 3 4 5 (8)
9. This organization identifies and nurtures new volunteer leadership. 1 2 3 4 5 (9)
10. New board members are oriented to their tasks and given a written description of their responsibilities. 1 2 3 4 5 (10)
11. I understand my responsibilities. 1 2 3 4 5 (11)
12. We have a balanced source of funding from grants, donations, and earned revenue. 1 2 3 4 5 (12)
13. This organization is open to changes. 1 2 3 4 5 (13)
14. I understand the purpose of this organization. 1 2 3 4 5 (14)
15. There are adequate systems to assure that volunteers, staff, board members, and the committees communicate with each other. 1 2 3 4 5 (15)
16. The board has an ongoing process for determining leadership needs and recruiting new board members. 1 2 3 4 5 (16)
17. The board reflects the community's demographics and racial mix and has a balance of the needed skills, contacts, and access to resources. 1 2 3 4 5 (17)
18. When conflicts arise, we cope with them. 1 2 3 4 5 (18)
19. Staff and board members have timely, accurate financial information. 1 2 3 4 5 (19)

- | | | | | | | |
|---|---|---|---|---|---|------|
| 20. We tend to spend our money and energy to fulfill our highest priorities. | 1 | 2 | 3 | 4 | 5 | (20) |
| 21. When decisions are made, it is clear who is responsible to do what by when. | 1 | 2 | 3 | 4 | 5 | (21) |
| 22. Board members get timely information in order to fulfill their job: agendas, minutes, financial reports, etc. | 1 | 2 | 3 | 4 | 5 | (22) |
| 23. Staff, volunteer and professional, are regularly evaluated. | 1 | 2 | 3 | 4 | 5 | (23) |
| 24. Staff have adequate salaries and benefits. | 1 | 2 | 3 | 4 | 5 | (24) |
| 25. Someone is clearly responsible to monitor volunteer and staff fulfillment of committed tasks. | 1 | 2 | 3 | 4 | 5 | (25) |
| 26. For every program, it is clear who is in charge. | 1 | 2 | 3 | 4 | 5 | (26) |
| 27. Enough board members are committed to the organization and devote enough time so that the board is effective. | 1 | 2 | 3 | 4 | 5 | (27) |
| 28. Staff members have job descriptions and understand their responsibilities. | 1 | 2 | 3 | 4 | 5 | (28) |
| 29. I clearly benefit from my association with this organization. | 1 | 2 | 3 | 4 | 5 | (29) |
| 30. Newcomers to the organization are quickly made to feel welcome | 1 | 2 | 3 | 4 | 5 | (30) |
| 31. I understand the financial condition of this organization. | 1 | 2 | 3 | 4 | 5 | (31) |

Now transfer your scores to the scoring section to self-assess your organization.

Organizational Self-Assessment Instrument Scoring Sheet

Instructions: Transfer the numbers you circled on the questions to the blanks below, add each column, then divide by the number of blanks in that column. This will give comparable scores for each of the areas.

PURPOSE	STRUCTURES	LEADERSHIP	GOVERNANCE	MANAGEMENT
1. _____ +	2. _____ +	9. _____ +	3. _____ +	4. _____ +
14. _____ +	15. _____ +	16. _____ +	10. _____ +	11. _____ +
20. _____ =	21. _____ +	26. _____ =	17. _____ +	23. _____ +
	25. _____ =		22. _____ +	28. _____ =
			27. _____ =	
<u> </u> Subtotal	<u> </u> Subtotal	<u> </u> Subtotal	<u> </u> Subtotal	<u> </u> Subtotal
Div by 3 = <u> </u>	Div by 4 = <u> </u>	Div by 3 = <u> </u>	Div by 5 = <u> </u>	Div by 4 = <u> </u>

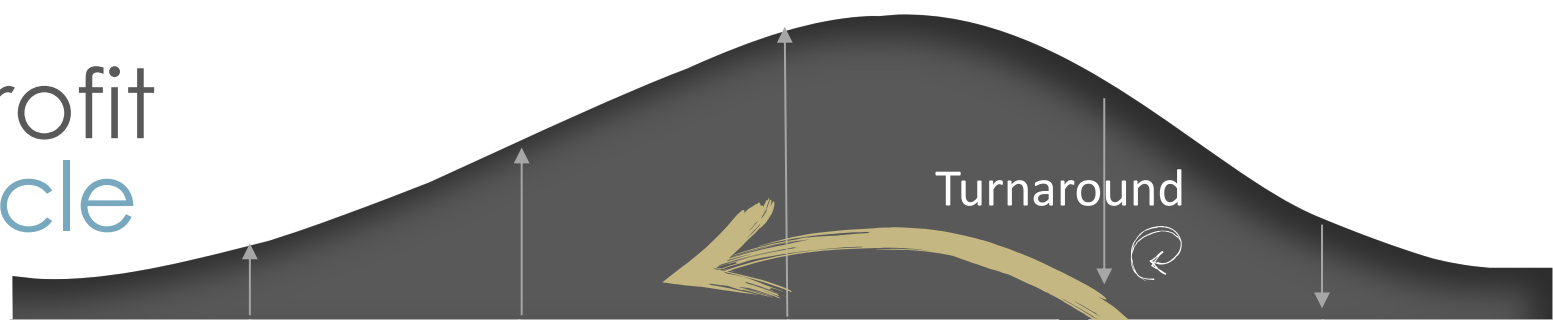
BENEFITS	RELATIONSHIPS	RESOURCES	ATTITUDE TOWARD CHANGE
5. _____ +	6. _____ +	7. _____ +	8. _____ +
24. _____ +	18. _____ +	12. _____ +	13. _____ =
29. _____ =	30. _____ =	19. _____ +	
		31. _____ =	
<u> </u> Subtotal	<u> </u> Subtotal	<u> </u> Subtotal	<u> </u> Subtotal
Div by 3 = <u> </u>	Div by 3 = <u> </u>	Div by 4 = <u> </u>	Div by 2 = <u> </u>

Interpretation of the Scores

An ideal organization, with an average score of one for each area, does not exist. Even if it did, it would not be possible to describe one ideal for all circumstances. For example, organizations with complicated objectives need more structures than a more informal, networking organization.

A score of one within every category would describe that ideal organization in an undefined circumstance. The scores give a starting point for some analysis about the health and character of an organization. Generally scores of two or below describe healthy organizational characteristics. Scores above five indicate problem areas. Scores of five indicate areas that definitely should be closely examined to see if there is a problem and if there can be improvements.

Nonprofit Lifecycle



Lifecycle Stages		Idea	Developing	Growth	Maturity	Decline	Crisis
Organizational Elements	Impact	Informal – Need established, best practices integrated & pilot launched	Pilot successful – Lessons integrated into design / Measurement starts	Established in marketplace – Strong results, partner-of-choice & consistent delivery	Consistent results through robust evaluation / Focused on continuous improvement, scale & system-building	Need exists, but nonprofit isn't partner-of-choice / Market duplication from other nonprofits	Demand near zero / Intense competition for resources & energy
	Brand	Not utilized	First official marketing materials – Primary method of marketing is word-of-mouth	Build-out of marketing & communication needs, including public & media relations	Sophisticated marketing & communications plan using multiple channels / Everyone equipped to tell story	Decreased public interest / Issue area not discussed in the media	Unable to attract media or public attention / Messaging does not resonate with public
	Revenue	Most are in-kind	Limited financial resources – Lives hand-to-mouth	More diverse financial resources with established relationships with funders, but still unpredictable	High degree of financial diversity with established relationships with multiple funders / Endowment exists / Higher degree of financial predictability	Funders are not renewing contracts and not contacting organization / Low cash reserves / Decreasing donor retention & loyalty	Cash reserves insufficient to cover operating expenses / Long-time donors tapped out
	Operations & Culture	Entrepreneurial Founder using volunteer resources for guidance / Culture is defined by Founder	Flat organization – Decisions are likely made by Founder / Volunteers needed for hands-on support / Culture is action-oriented	Founder has hired or becomes Executive Director and is key decision-maker with Board guidance / Increased division of labor & accountability as staff is hired / Culture is results-oriented / Volunteers are used as resources	Leadership is often second or third generation from Founder / Clear division of labor & accountability among staff / Culture is well-defined and serves as a competitive advantage / Volunteers are seen as ambassadors	Increasing turnover of staff & volunteers / Decreased ability to attract top talent / Decreased transparency	Inability to fill key roles / High contention & division among staff / Mistrust of leadership
	Governance	Not yet developed	Formal governance starts – Most likely homogeneous group	Board expansion – More diversity with more focus on planning & oversight	Board is more policy- & strategy-focused / Delegates management to Executive Director	Board members hard to recruit, retain & engage / Low focus of strategic issues	Board not fulfilling fiduciary responsibilities