



Capacity Building: Organizational Lifecycles Assessment

Date

We are facilitating this workshop from the unceded territory of the Coast Salish Peoples, including that of the x^wməθkwəy̓əm (Musqueam), Skwxwú7mesh (Squamish), and Səlílwətaʔ (Tsleil-Waututh) Nations.

∴ vantage point is on a mission to...

Transform Non-Profit Organizations

Vantage Point convenes, connects and equips non-profit leaders to lift organizational capacity.

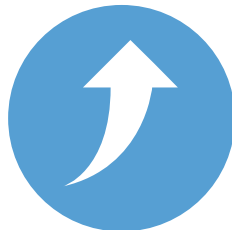
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Workshop tools



- Interactive polling questions
- Chat box
- Non-verbal feedback
- Please mute yourself unless speaking
- Breakout rooms
- Live transcript

This session will **NOT** be recorded

Facilitators

Name

Digital Host

Name

Facilitator

•• Introductions



Who are you?

What brings you here today?

Community agreements



Make space, take space



Be respectful and considerate



Breaktime anytime



Uphold the confidential



We will send the PowerPoint to you

Learning outcomes

By the end of this session, you will be able to...

1. Explain the 7 stages of organizational lifecycle and identify the 5 areas of organizational capacity.
2. Identify the benefits of applying the lifecycle lens and capacity framework to improve mission impact and program delivery.
3. Self-assess their organization's current stage using the Nonprofit Lifecycle Selfie tool.
4. Identify realistic, concrete steps the organization or program can take to build capacity in governance, management, financial resources and/or administrative systems.

• Agenda



- **Overview of lifecycle theory**
- Characteristics of each lifecycle stage
- Lifecycle self-assessment
- Capacity improvement planning

∴ The Nonprofit Lifecycles Institute



NONPROFIT
LIFECYCLES
INSTITUTE®

“a community of nonprofits, foundations and consultants driving organizational capacity and resilience in the nonprofit sector to build stronger communities.”

∴ Capacity is...

“an organization’s ability to achieve balance or complete alignment among its **programs**, **management**, **governance**, **financial**, and other **structural** requirements...”

Capacity is...

Organizational **capability** and **competence** expressed in terms of its...

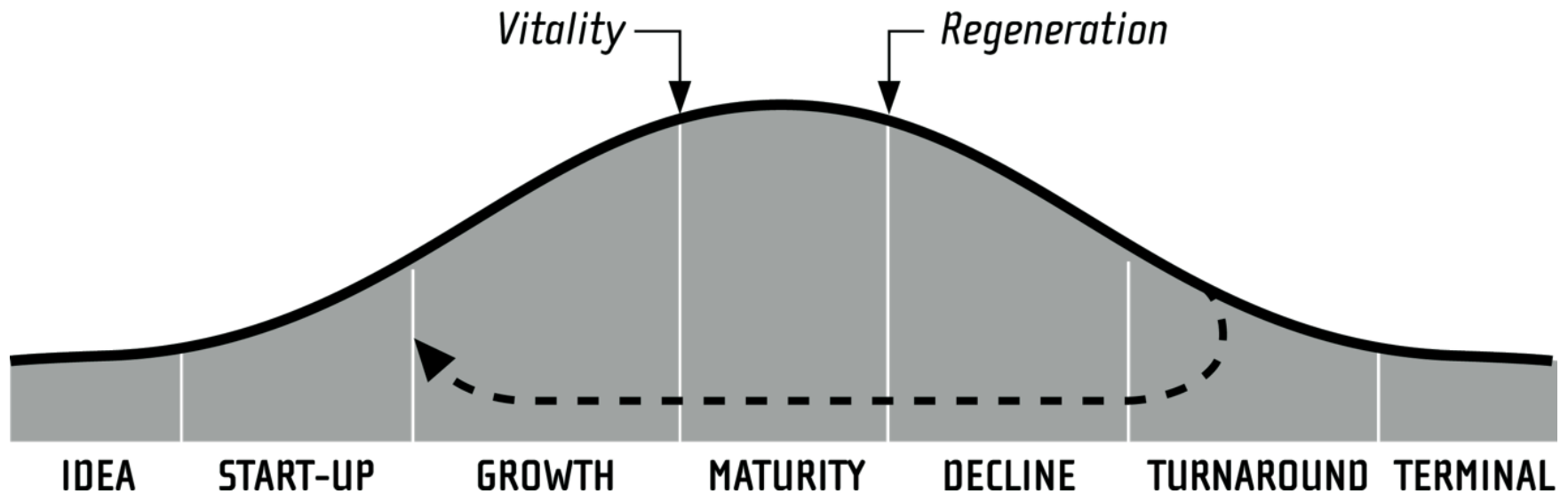
- Management
- Governance
- Financial Resources
- Administrative Systems

Building capacity

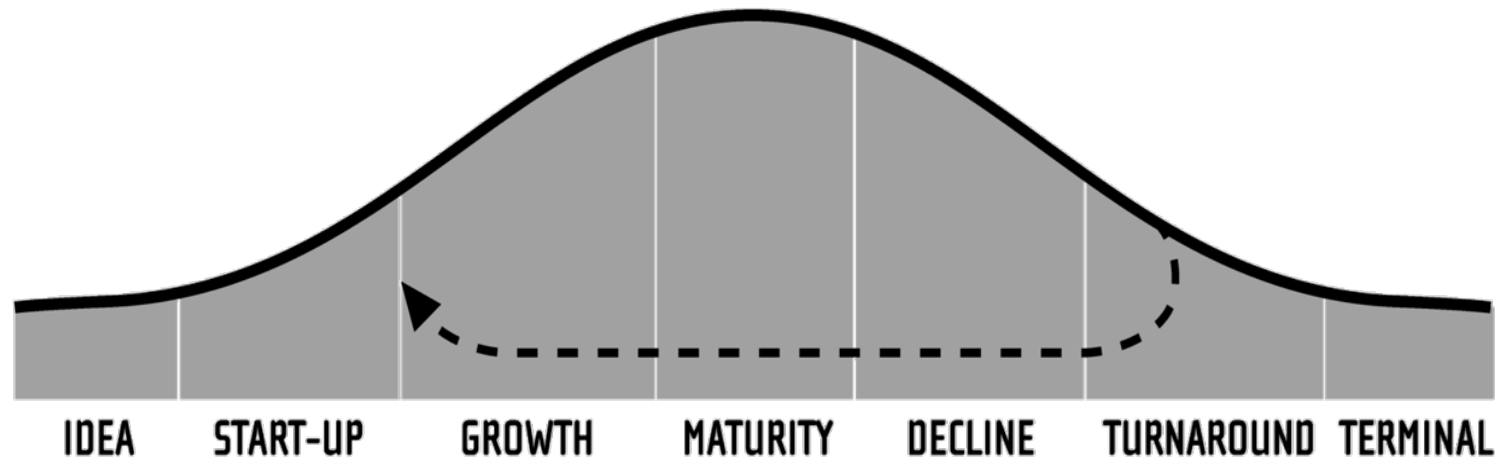


Strengthening the **organizational platform** which supports and sustains your mission and programs

Nonprofit lifecycles stages



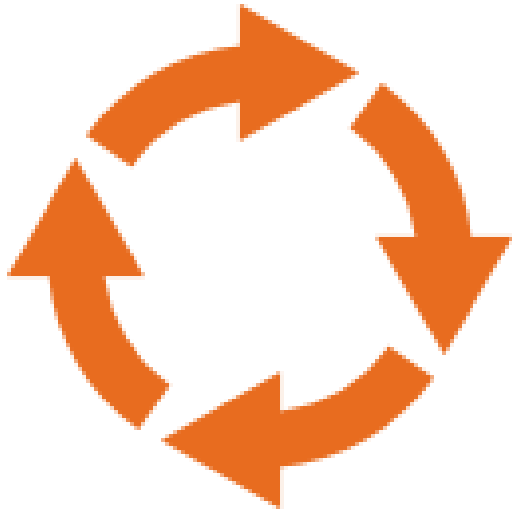
Characteristics of each lifecycle stage



∴ Developmental stages and capacity

“A stage is a **developmental period** when characteristic patterns of behaviour are evidenced and certain capacities become established.”

∴ Key principles in the lifecycle approach



- Diagnostic not deterministic
- Not necessarily sequential or evolutionary
- Not age or size dependent
- Holistic
- Enables you to diagnose your capacity in governance, management, financial resources and administrative systems.

∴ Benefits of lifecycle thinking








- Gives **vocabulary** to understand “where you are” and puts challenges in perspective
- Organizations realize pains are “**normal**”
- A way for organization to **talk to funders** about where they are – and what they need to make progress.
- **Depersonalizes** management, staff, and even board weaknesses

••• Agenda










- Overview of lifecycle theory
- **Characteristics of each lifecycle stage**
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Programs characteristics

-  **Idea:** Programs not defined, personal mandate only.
-  **Start Up:** Programs experimental, more breadth over depth.
-  **Growth:** Beginning to understand and define a distinctive approach.
-  **Maturity:** Well-organized; results focused; in touch with community needs.
-  **Decline:** Losing clients to more accessible, less expensive options.
-  **Turnaround:** Programs reassessed and modified considering needs and finances.
-  **Terminal:** Programs unreliable, unsteady, and seriously under-funded.








Management characteristics

-  **Idea:** Originators are action-oriented people.
-  **Start Up:** Leader is a “spark-plug” and the most experienced staff person.
-  **Growth:** Organization is led by people who see infinite potential for services.
-  **Maturity:** Executive leadership is often 2nd 3rd generation from the originators.
-  **Decline:** Slippage is unseen, denied, or blamed on external sources.
-  **Turnaround:** Turnaround leader is a strong-willed and inspiring person.
-  **Terminal:** Staff have dwindled to a few, possibly working without pay.








⋮ Governance characteristics

-  **Idea:** No board exists, only supporters with a personal connection to mission.
-  **Start Up:** Members have a personal connection to mission or founder.
-  **Growth:** Board structure begins to appear.
-  **Maturity:** Board sets direction, is policy oriented and leaves management to ED.
-  **Decline:** Board is unaware something is wrong; don't act until finances alarm them.
-  **Turnaround:** A few committed board members work to restore integrity.
-  **Terminal:** Board has lost its collective drive to continue; may exist in name only.

Business model characteristics

-  **Idea:** Sweat equity is the usual self-funding device.
-  **Start Up:** Usually a low-budget, boot strap operation.
-  **Growth:** More sources of income create greater complexities.
-  **Maturity:** Organization has multiple sources of income and financial flexibility.
-  **Decline:** Budgets are fixed-cost and expense-heavy, reserves may be used.
-  **Turnaround:** Willingness to cut expenses to reflect real income and cash flow.
-  **Terminal:** Organization is most likely out of money and may have deficits.

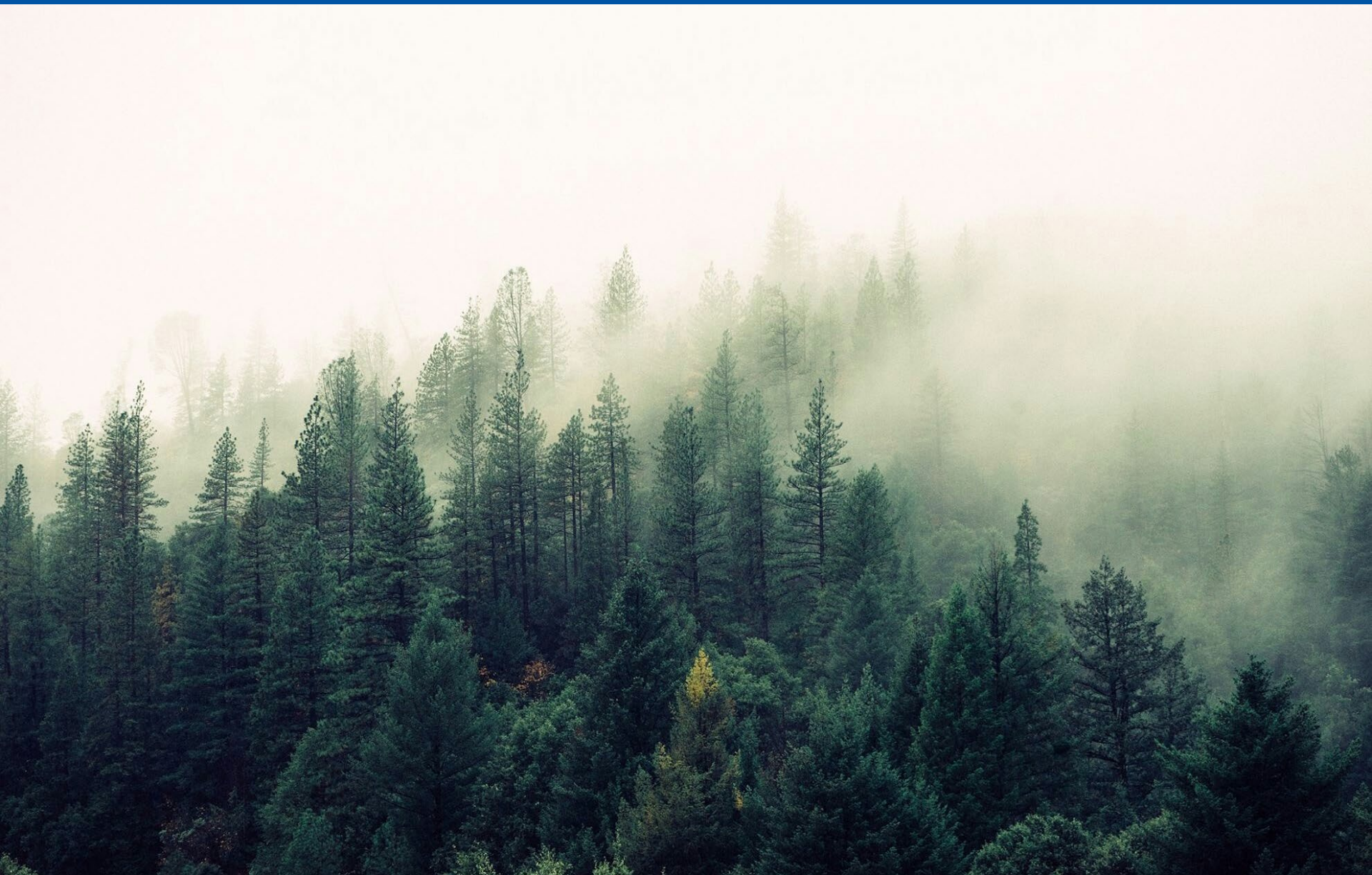
⋮ Systems characteristics

-  **Idea:** Few; in-kind services, equipment, and other goods may exist.
-  **Start Up:** Weak financial and administrative functions and systems.
-  **Growth:** Current systems must now be improved to meet expansion.
-  **Maturity:** Clear outlined processes for routine client, board and staff matters.
-  **Decline:** Out of date systems and physical space may be deteriorating.
-  **Turnaround:** Processes may be too complex, expensive, or “mature”.
-  **Terminal:** Systems have been abandoned. Decisions happen ad-hoc.

Common challenges

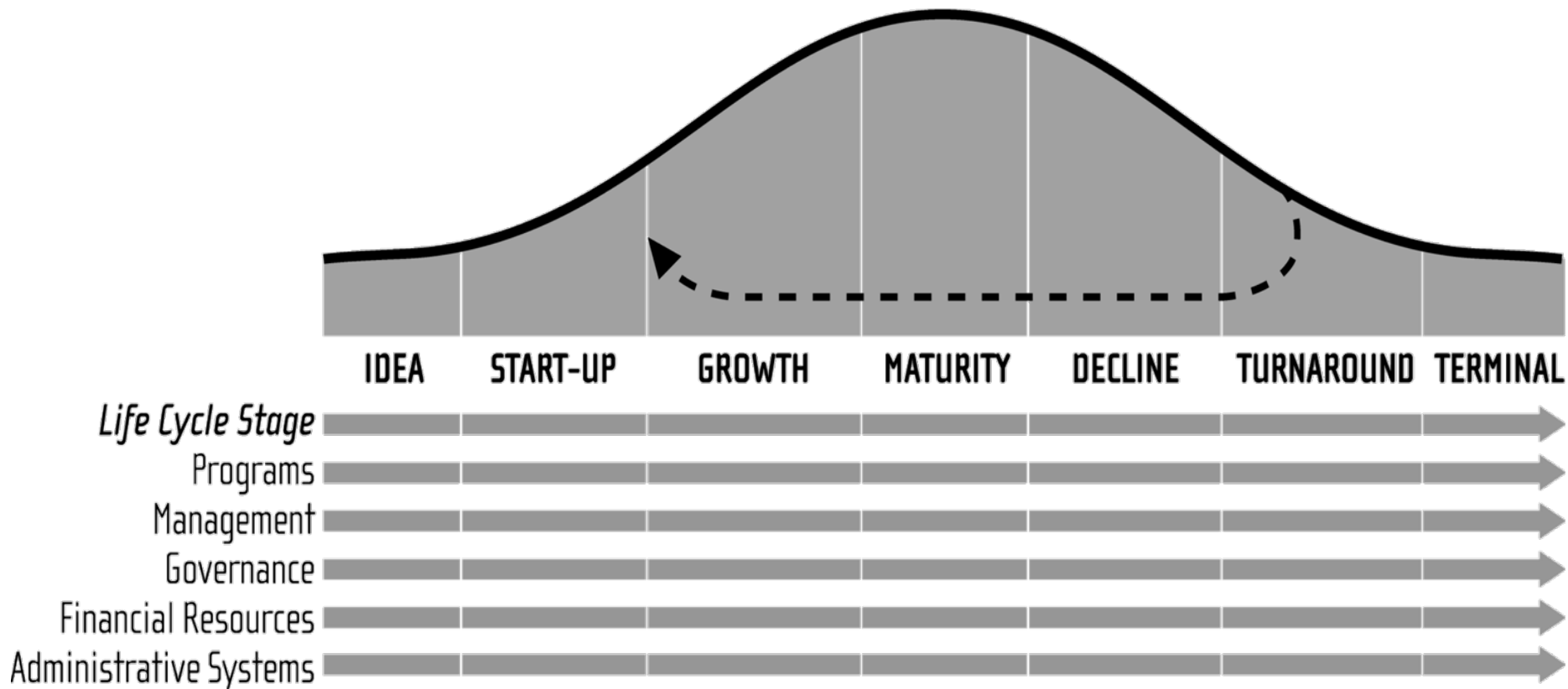


Let's break



Case study

Using the Lifecycle Selfie, identify which lifecycle stage you believe **the organization in the case study** is at within the **5 areas of capacity**.



Let's break



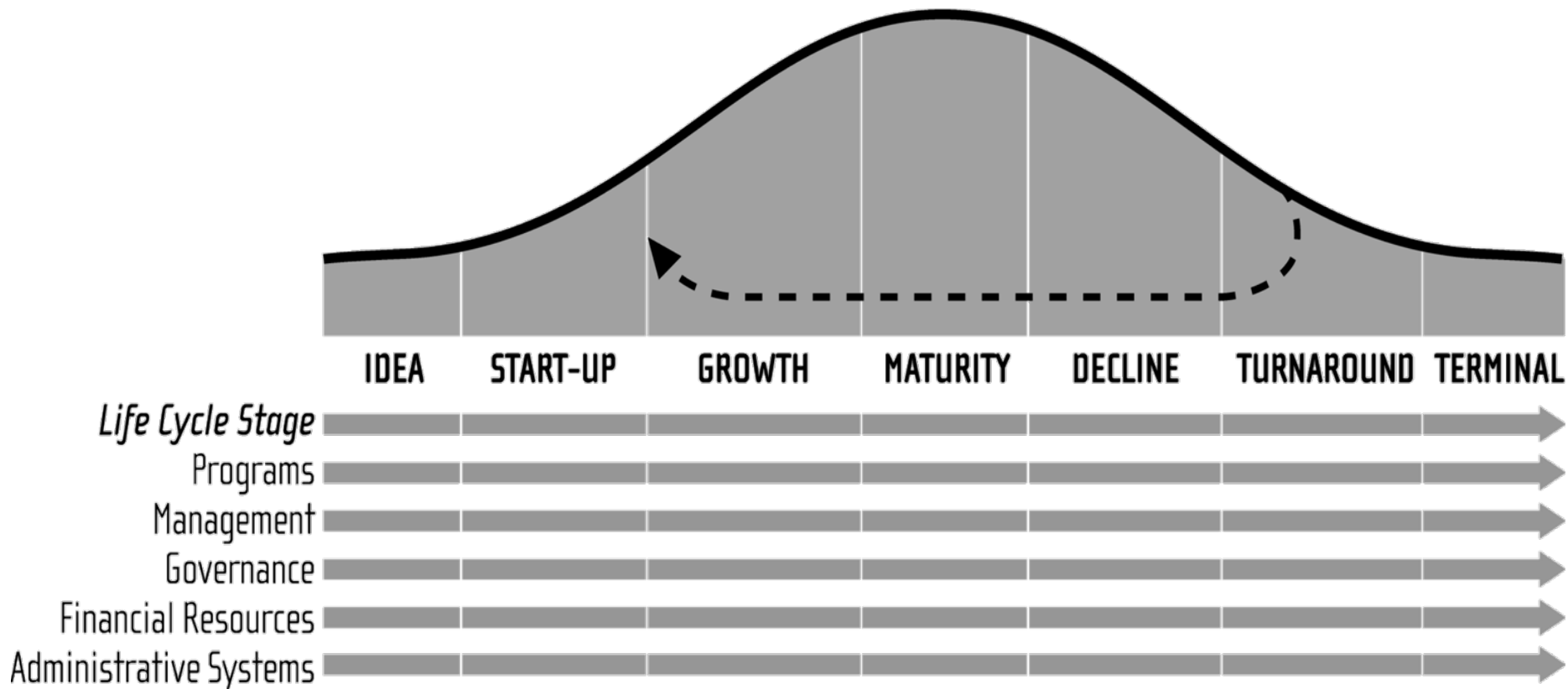
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- Overview of lifecycle theory
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- **Lifecycle self-assessment**
- Capacity improvement planning

Where are you?

Using the Selfie, identify which lifecycle stage you believe **your organization** is at.



Discussion

What does it feel like to be at this stage?

What are the benefits of this lifecycle stage?

What are the challenges of this lifecycle stage?



∴ The self-assessment process

- Key elements: history, values, mission, programs, management & staff structure, governance, financial health, facilities...
- Always provide and review evidence of your diagnosis.
- Remember your assessment is **NOT prescriptive**

• Evidence table

For each capacity area:

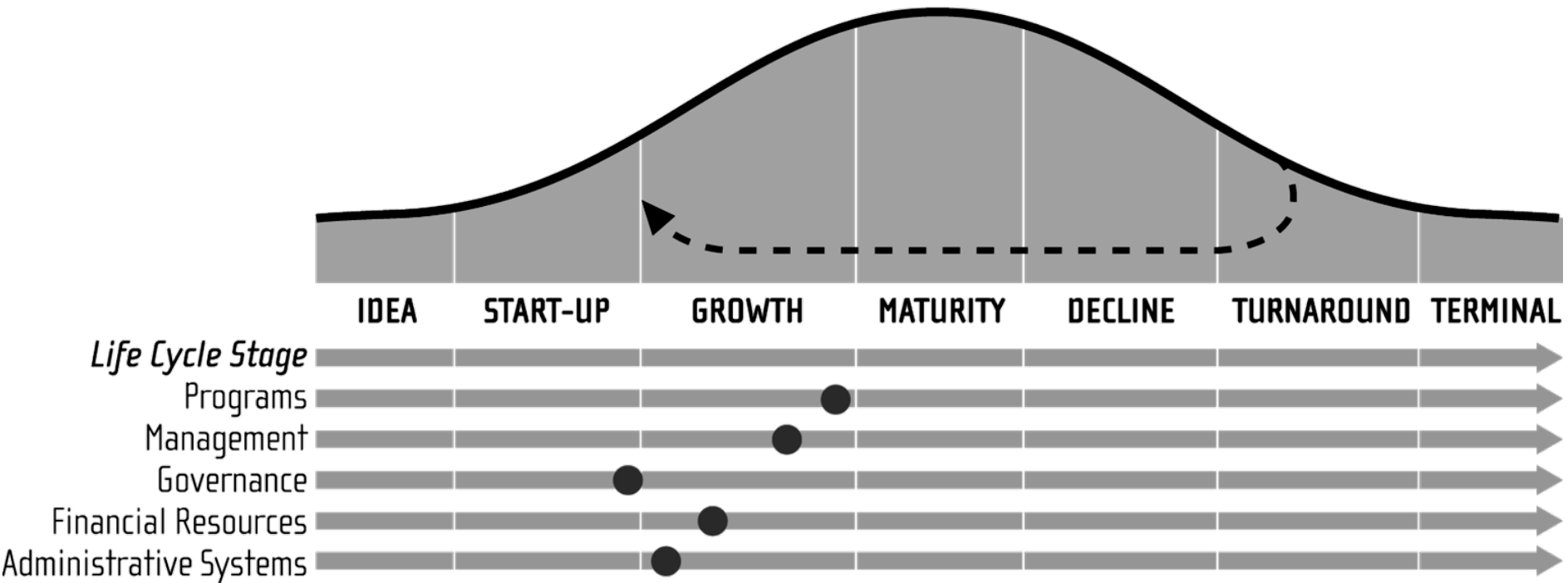
- What evidence do you have to support your self assessment of your lifecycle stage?
- What barriers are you experiencing ?

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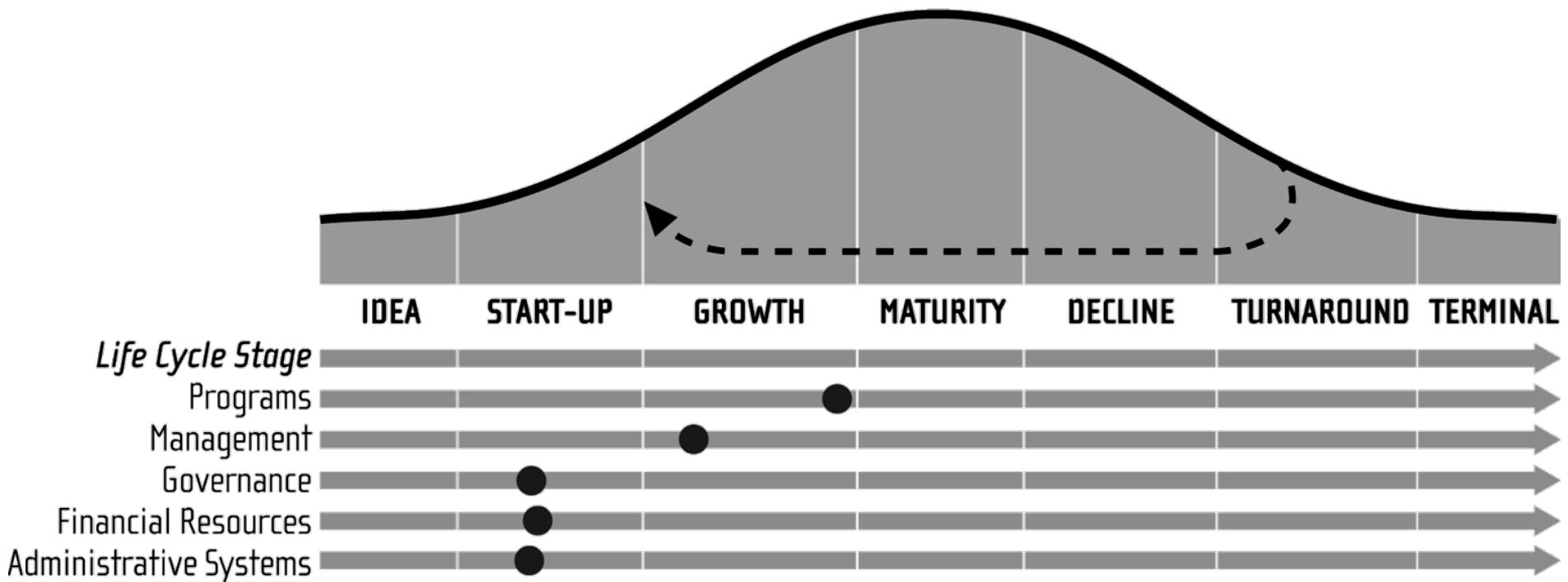


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- **Capacity improvement planning**

Alignment...



⋮ Out of alignment...



Capacity improvement planning



- What areas of capacity are most **out of sync**?
- What steps can you take to enhance capacity in these areas?

∴ Capacity improvement planning

- What **immediate changes**, if made, would better support your organization capacity?
- What **long-term changes**, would support your organization get to the desired phase of development?
- What can you do **on your own**?
- Where would you need **external support**?

⋮ Questions and comments



∴ Implementing new practices

Where would you like to start?

Take time to reflect and share.



Session evaluation

Your feedback matters!

Please complete the evaluation form
and help us continually improve.

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