

## BEST PRACTICES IN TECHNICAL CAPACITY “DOING THE WORK”

**TECHNICAL CAPACITY:** The ability of a nonprofit organization to implement all of the key organizational and programmatic functions.

CORE PROGRAM DEVELOPMENT	INFRASTRUCTURE DEVELOPMENT	IMPACT EXPANSION	STAGNANT/DECLINE
<b>A. TECHNOLOGY SKILLS.</b> The technological skills to run efficient operations.			
<p>The organization has enough paid and/or volunteer staff who have the technology skills needed to effectively and efficiently:</p> <ul style="list-style-type: none"> <li>• secure and maintain its nonprofit status;</li> <li>• manage its finances; and,</li> <li>• communicate with its constituents and donors.</li> </ul>	<p>In addition to the functions listed for the Core Program Development stage, the organization has enough paid and/or volunteer staff who have the technology skills needed to effectively and efficiently:</p> <ul style="list-style-type: none"> <li>• support and track its fundraising efforts;</li> <li>• document the services/programs it provides; and,</li> <li>• manage its technology systems (i.e. computers, phone systems, communications software, etc.).</li> </ul> <p>The organization periodically trains its staff in how to use technology including computer systems, databases, etc.</p>	<p>In addition to the functions listed for the previous stages, the organization has enough paid and/or volunteer staff who have the technology skills needed to effectively and efficiently:</p> <ul style="list-style-type: none"> <li>• support and track its fundraising efforts (including more sophisticated efforts such as capital campaigns, earned income initiatives, endowment development, etc.).</li> </ul> <p>The organization formally and/or informally conducts its own internal staff technology training.</p>	<p>The board and staff lack knowledge, skills and experience in how to develop or use technology and/or to manage data.</p>
<b>B. TECHNOLOGY.</b> The technological resources (equipment, systems, software, etc.) to run efficient operations.			
<p>The organization has the computers, software, communications systems, etc. it needs to effectively and efficiently:</p> <ul style="list-style-type: none"> <li>• secure and maintain its nonprofit status;</li> <li>• manage its finances; and,</li> <li>• communicate with its constituents and donors.</li> </ul>	<p>In addition to the functions listed for the Core Program Development stage, the organization has the computers, software, communications systems, etc. it needs to effectively and efficiently:</p> <ul style="list-style-type: none"> <li>• manage its finances as the organization grows;</li> <li>• support and track its fundraising efforts; and,</li> <li>• document the services/programs it provides.</li> </ul> <p>The organization regularly upgrades its technology to meet its changing needs.</p>	<p>In addition to the functions listed for the previous stages, the organization has the computers, software, communications systems, etc. it needs to effectively and efficiently:</p> <ul style="list-style-type: none"> <li>• support and track its fundraising efforts (including more sophisticated efforts such as capital campaigns, earned income initiatives, endowment development, etc.).</li> </ul> <p>The organization networks its computers and other technology to ensure good coordination across programs.</p> <p>The organization has a long-term plan for maintaining its technology and replacing equipment as it becomes obsolete.</p>	<p>The board and staff lack knowledge, skills and experience in how to develop or use technology and/or to manage its data.</p>

# BEST PRACTICES IN MANAGEMENT

CORE PROGRAM DEVELOPMENT	INFRASTRUCTURE DEVELOPMENT	IMPACT EXPANSION	STAGNANT/DECLINE
<b>C. STAFF DEVELOPMENT.</b> How well organizational managers coach, mentor, train and empower staff to improve their skills and innovate.			
<p>Staff take the time to welcome new staff members and help them understand the mission of the organization, who does what, and how their work fits into the overall mission of the organization.</p> <p>Staff regularly reflect together about their work and seek ways to improve their individual and collective performance.</p> <p>The organization intentionally seeks opportunities to provide staff with professional development.</p>	<p>The organization provides every new employee with at least a basic level of orientation and training.</p> <p>The organization uses what it has learned over time about what does and does not work for the program to orient and train staff and volunteers.</p> <p>The organization uses a systematic approach to provide all staff (including the executive director) and volunteers with support, direction and constructive feedback on their work.</p> <p>Organizational leaders and managers approach staff mistakes as learning opportunities.</p> <p>The organization provides all staff members with formal and informal opportunities for professional development.</p> <p>Organizational leaders encourage staff to innovate and find ways to do their work more effectively.</p>	<p>The organization has a formal system for orienting all new staff.</p> <p>Every staff member has a professional development plan for the year that is directly tied to the continuous improvement goals s/he has identified in his/her annual performance review.</p> <p>Supervisors coach and mentor staff throughout the year to assist them in reaching the goals they identified in their performance review.</p> <p>The organization's budget includes a line item for professional development.</p> <p>The organization provides managers with access to training and support in how to motivate, support, teach, and supervise staff.</p>	<p>The organization has allowed the amount, quality, and relevance of professional development opportunities for staff to shrink or stagnate.</p>
<b>D. MANAGING PROGRAM STAFF.</b> How well organizational managers ensure that program staff has the knowledge, skills and cultural sensitivity to effectively deliver services.			
<p>The organization intentionally hires program staff who understand the culture of the local community and who are able to work with them in a culturally competent manner.</p> <p>Members of the organization meet frequently to reflect on how their core programs are doing and what they can do to make them better.</p>	<p>The organization orients program staff to the culture of the local community and provides them with training on how to work with diverse populations.</p> <p>The organization uses formal feedback processes (e.g., meetings, client satisfaction surveys, etc.) to help program staff improve the work they do.</p> <p>Organizational leaders and managers provide program staff with clear, consistent direction.</p> <p>The organization periodically provides its program staff with the professional development they need to increase their skills.</p> <p>Organizational leaders and managers do what they say they are going to do and follow-through on decisions.</p>	<p>Organizational leaders have institutionalized some form of diversity training and orientation for all program staff.</p> <p>Program managers frequently and regularly observe program staff and provide them with oral and written feedback.</p> <p>Program managers use program evaluation data to determine whether or not staff members are delivering the quantity and quality of services the organization expects of them.</p> <p>The organization regularly provides program staff with professional development/training to help them consistently deliver high quality programs and services.</p>	<p>Staff and leaders have become disconnected from or insensitive to the community and constituents they served.</p> <p>Program managers only infrequently assess, observe or provide staff with formal feedback.</p> <p>Program managers do not use program evaluation findings to help staff deliver high quality programs and services.</p> <p>Program managers do not provide staff with the professional development they need to deliver high quality programs and services.</p> <p>Organizational leaders do very little program innovation or program improvement.</p>