COLLABORATIVE CAPACITY BUILDING

Lessons Learned From the Los Angeles Information Exchange Feasibility Study

Nonprofit Finance Fund
Where Money Meets Mission
Center for Nonprofit Management
Building Better Leaders
taproot Foundation

Collaborative Capacity Building

LESSONS LEARNED FROM THE LOS ANGELES INFORMATION EXCHANGE FEASIBILITY STUDY

Nonprofits across the Los Angeles region have been stressed and stretched in countless directions in recent years. Management teams are face increasing demand for their services but there are fewer and fewer resources available to support crucial programs. With dwindling resources and increasing need, nonprofit management teams must focus more time and energy on developing high-impact strategies, creating alternative revenue streams, fundraising, leveraging volunteers, building a brand, and the list goes on. But at a time when nonprofits most need capacity building support, a report by the TCC group ("Fortifying L.A.'S Nonprofit Organizations: Capacity-Building Needs and Services in Los Angeles County") found that nonprofits in Los Angeles County experienced significant challenges accessing quality professional and organizational development services.

To address this disconnect between nonprofit capacity constraints and effective capacity building, the Weingart Foundation convened a meeting of nine major funders that support capacity building in the Los Angeles region. The funders collaborative sought to explore a wide range of options and recognized the need to move beyond 'business as usual' if they were to address the needs of the nonprofit community in Los Angeles. The collaboration of funders decided to explore the feasibility of a robust technology-based Information Exchange that would offer a medium through which nonprofits could easily connect to the appropriate capacity building services. After a competitive RFP process, the funder collaborative then selected three capacity builders to jointly explore the feasibility, components, structure and business model for an effective web-based capacity building information portal.

The planning and funding teams agreed that the model for a successful online Information Exchange should incorporate several key features:

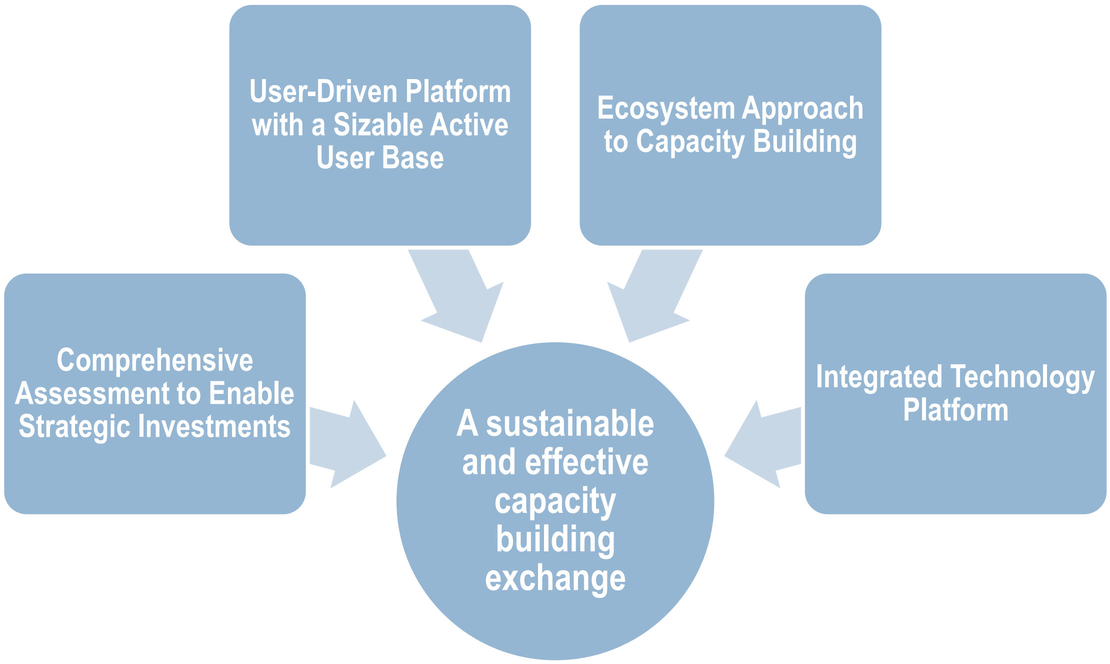
- An online assessment of capacity building needs with links to appropriate consultants based on results.
- A vetted, user-driven directory of consultants. Ratings of consultants should be crowd-sourced by the nonprofits that work with capacity builders.
- Access to customized resources based on the results of the online assessment.

There have been several other initiatives around the nation that aggregated consultant databases, provided scoring systems for capacity builders, or aggregated online resources. However, this is the first initiative to evaluate the feasibility of including all three components above in an integrated online format. With this ambitious goal in mind, the planning team evaluated the feasibility and potential business model for an Information Exchange in Los Angeles. The report that follows summarizes the findings, recommendations and lessons that emerged from this feasibility study.

We believe that the following 4 factors will be essential in building and sustaining an impactful capacity building exchange in any community:

1. A comprehensive assessment to enable strategic investments
2. A user-driven platform with sizeable active user base
3. A capacity building ecosystem
4. An integrated technology platform

The report concludes by summarizing why an Information Exchange is not feasible in Los Angeles at this time. We have also provided additional background information on the planning partnership and the planning process in the appendix. Our hope is that this report clarifies the likely stumbling blocks for other communities aiming to create an Information Exchange and highlights the investments that would be required to make this idea a reality.



1. COMPREHENSIVE ASSESSMENT TO ENABLE STRATEGIC INVESTMENTS

Extensive surveys and focus groups made it clear that most decisions about the need for capacity building were reactive and in response to short-term specific incidents – loss of a grant, resignation of a board member, an executive transition, financial challenges, etc. This lack of a proactive and integrated approach to capacity building leads to short-term, stand-alone projects that often treat symptoms but not the root cause of organizational instability. The required starting point for any meaningful organizational development or capacity building effort is the identification of an organization's key needs and readiness to address those needs. For any coordinated capacity building effort or information exchange to be viable, it must provide a robust but not laborious assessment that helps nonprofits first identify critical capacity building needs but also gives a broader overview of the organization's strengths and challenges.

NEED FOR THE HUMAN TOUCH

Online assessments are an important tool to explore capacity building needs, but must also be paired with a human coach. Regardless of budget size or experience, once an organization has completed an assessment or diagnostic, people want to talk to someone knowledgeable to assist them in translating the results, thinking through their specific situation and what may be most useful in addressing the issue or issues at hand. While a number of organizational assessments are well known and have been actively used for some time, the planning process uncovered the critical role of an interpreter who could provide insight into the results.

"Sometimes organizations don't know what they don't know – an assessment is not as important as the next steps to help you determine where to focus." — Pacoima Focus Group

CHALLENGES

While all partners agreed that upfront assessments are important to the success of an effective Information Exchange, there were several challenges identified in the feasibility study that would complicate the implementation of such an assessment:

- Identifying a single comprehensive assessment. While the use of different capacity building assessments is common practice for nonprofits there is no existing assessment that works for all organizations with different missions, needs and stages of development. Such an assessment would need to be developed and would require collective buy-in from nonprofits, capacity builders and funders.
- Sufficient output for effective consultant matches. The assessment was envisioned as a tool that would effectively match nonprofits with appropriate services. For this to be the case, the assessment must provide sufficient, detailed outputs that would link to specific search criteria in a consultant database. No assessments are currently available that provide this level of detail.
- Technological functionality. Though databases and assessments exist successfully on various websites, there is no platform currently available that effectively combines the two. As explored in greater detail in the technology section below, an investment in technology would be required to develop the functionality required to make an online assessment effective.

2. SIZEABLE ACTIVE USER BASE

The Information Exchange collaboration in Los Angeles fundamentally believed that an online capacity building resource must include a user-driven rating system of capacity builders. To manually evaluate and assess consultants and capacity building providers, to review and continually update resources and content, and to actively monitor forums and online discussion groups would be a laborious and resource intensive approach. Rather, it was determined early on in the planning process that we must 'let the market decide'.

With a critical mass of active users, a nonprofit-driven rating system would gather feedback in a way that is cost effective and crowd sourced. In order for the exchange to be sustainable and user driven – especially the reviewed consultant directory and online resources – the exchange would require a significant number of active users. Active users refer not just to visitors but to users who would review consultants and capacity building services, provide new resources and links to information and contribute to a peer learning network.

For crowd sourcing to work, you need a crowd. To create a database with sufficient ratings to be meaningful, the technology planning team found that about 5,000 users per year would be required. With fewer active users, the project risks having inaccurate or nonexistent ratings for consultants, stale or irrelevant content, and lack of responses to inquires or requests for information. Given that the potential exchange focused on Los Angeles, it was unlikely that an Information Exchange would be able to maintain that volume of active users at a given time. After accounting for organizations that are strictly volunteerrun and wouldn't make use of capacity building services, the market analysis in Los Angeles showed that the site was unlikely to drive sufficient traffic to maintain a user-driven rating system in Los Angeles.

In order to create an effective user-driven consultant review database, two things would be necessary:

- **State or region-wide partnerships**. It would be difficult for any individual city to reasonably reach 5,000 users at any point in time. Partnering at a statewide or regional level could help to reach the threshold necessary to make the rankings informative and accurate.

- **Funding Incentive Structures**. There must be some incentive structure in place to encourage the use of the rating system. Once the rating system reaches a critical mass, the ratings themselves will drive traffic. However, the funding community must invest in coordinated outreach and incentive structures to inspire the first users to generate content.

3. A CAPACITY BUILDING ECOSYSTEM

Capacity building is complex and requires an ecosystem to successfully build the capacity of mission-driven organizations in order to solve the most pressing challenges in our communities. A holistic approach to capacity building has discrete implications for funders, capacity building providers and nonprofits.

FUNDERS: DON'T GO IT ALONE

Funders cannot pursue stand-alone one off projects and initiatives that are not integrated into what other support is being provided. They must work together to ensure that all the various aspects of assessments, coaching and interpretation, and the range of capacity building services are supported and continue to be made available to nonprofit organizations in the community. Also, the more that funders use the exchange – particularly the organizational assessment – in their technical assistance funding decisions, the more incentives nonprofits will have to use the system. Lastly, it is imperative that funders continue to fund the actually capacity building work above and beyond the exchange.

CAPACITY BUILDING PROVIDERS: WORK TOGETHER

Too often service providers and consultants only focus on their specific area of expertise - be it fundraising, board governance, finance, or leadership development. There is little if any integration between how these different capacities need to work together. Consequently, nonprofits are exposed to a wide range of contradictory and often confusing messages about how to proceed. We end up with strategic plans that have no connection to economic and funding realities; fundraising plans that do not address key business needs, and board and leadership development programs that fail to achieve their potential. One of the reasons the online organizational assessment and upfront coaching is critical is that they can help capacity building providers better understand an organization's overall needs and how they link to the nonprofit's overall sustainability.

NONPROFITS: BE STRATEGIC

Capacity building is not a one-time stand-alone process. Simply going to one workshop or having a consultant provide short-term technical assistance is not enough. Capacity building must be something that is integrated in the organization's overall strategy and mission delivery. We would encourage nonprofits to take more of a "wellness" approach to capacity building that is holistic, integrated, and proactive—one that addresses the capacity, human capital, and resources the organization needs to support its long-term strategic goals and mission.

4. INTEGRATED TECHNOLOGY PLATFORM

There is currently no technology platform that enables communities to easily create an online capacity building exchange. The team conducting the Los Angeles feasibility study found that significant investments would be required to create a website that incorporates the key functionalities that were important to the community: a user-driven vetted consultant database, an online assessment and tailored resources. In an attempt to minimize the cost of building the platform, the technology team investigated the potential of an already existing system. However, many of the desired functionalities do not exist on available platforms and would require significant investment to develop, especially in combination. The specific functionalities that are missing in currently available platforms include:

- Capacity Building Assessments. As highlighted above, there is no capacity building assessment with sufficient output to make appropriate, customized matches to capacity builders.
- Independent Rating System. Offering some type of user review system (such as Yelp or Angie's List) is a critical and distinctive element of this proposal. While a few consultant database systems offered the ability to review consultants, they would have required significant adaption to work in a coordinated fashion with the rest of the Information Exchange.
- Menu of capacity building services so that there is not a "one size fits all" approach.
- Connecting nonprofits to professional, human resources that can help interpret survey results and guide them to appropriate next steps.
- Link to a semi pre-populated common application to submit to foundations for capacity building funding and a semi pre-populated RFP for consultants based on needs.

WHY WE DID NOT MOVE FORWARD IN LA

This process, from the very beginning, was a process of planning and experimentation. The goal was to explore ideas outside of what currently existed in the market and to determine whether an Information Exchange with a user-driven vetted consultant directory, an upfront assessment to match nonprofits with capacity builders, and robust online resources and community forums was possible.

"This is what R&D looks like. This is the process by which we get to innovation."

— Claire Peeps, Durfee Foundation

At the conclusion of the feasibility study in Los Angeles, the collaborative funding partnership decided not to move forward with the Information Exchange for two main reasons: potential active user base and required technological investment.

As discussed above, market analysis and technological feasibility studies revealed that a user base of approximately 5,000 would be required to create a strong user-driven rating system. Both the planning partners and funders felt it was unlikely that the project would generate enough active users to make the exchange current, relevant, and customized to the needs of the community.

On the technological side, the feasibility study revealed that a substantial investment would be needed to create a platform that incorporates all of the critical components for an Information Exchange. It is not clear at this time whether such a substantial investment would generate sufficient benefit to the user base as they were defined in this feasibility study. However, a technological investment of this size could generate a significantly larger return with a larger user base.

Other factors that were included in the decision not to move forward in Los Angeles include the cost to provide the necessary support from coaching to training and outreach, not wanting to duplicate existing products or services, and not wanting to cannibalize funding for existing capacity building programs.

While it was determined that a fully built out Information Exchange was not feasible for Los Angeles at this time, this process resulted in tremendous learnings. As with many experiments, it is often what you discover when your experiment does not work that proves to be the most valuable part of the process. And with this experiment, that holds true.

CONCLUSION

The planning process revealed was that there are already a number of initiatives and efforts underway that could be brought together to achieve the goals of assisting nonprofit organizations to become better consumers of capacity building services; better connect Los Angeles nonprofits to appropriate and quality technical assistance and support; and create a regular forum for nonprofit organizations, capacity builders, and funders to plan and coordinate a capacity-building strategy for Los Angeles.

Not only did the process help develop a wealth of new data and a set of learnings and recommendations for the field, the process has also served to build tremendous social capital here in Los Angeles. Funders, nonprofits, consultants, management support organizations, and technology providers are all working more collaboratively and thinking more strategically about how best to create real world solutions to help make our communities, healthy, vibrant and just places to live.

The participants in this planning process will continue to work together and meet regularly to review how organizations have changed how they do their work, the new work that has developed and the new collaborations. Based of the many collaborative efforts underway, this team chose not to proceed with a central capacity building initiative, but we invite others to examine if such an approach would be appropriate for your community. We present our findings and recommendations here to serve as a potential springboard for other communities that are seeking new ways to build a more durable and sustainable nonprofit sector capable of addressing the pressing challenges in our communities.

APPENDIX 1:

PARTICIPANTS AND BACKGROUND INFORMATION

FUNDERS

Annenberg Foundation
California Community Foundation
First 5 LA
The California Endowment
The Durfee Foundation
The Eisner Foundation
The James Irvine Foundation
The Ralph M. Parsons Foundation
Weingart Foundation

PLANNING PARTNERSHIP

NONPROFIT FINANCE FUND

David Greco, Vice President
Karla Salazar, Director, Los Angeles Program
Kimberly Bailey, Graduate Fellow

CENTER FOR NONPROFIT MANAGEMENT

Regina Birdsell, President & CEO
Maura Harrington, COO & Vice President of Consulting
Heather Tunis, Senior Consultant

TAPROOT FOUNDATION

Ann Burroughs, Executive Director, Los Angeles
Aaron Hurst, President & Founder, Taproot Foundation
Pamela Saelieb, Program Manager, Los Angeles

TECHNOLOGY TEAM

Aaron Hurst, President & Founder, Taproot Foundation
Gregory Curtin, Principal & Co-Founder, Civic Resource Group
Gene Elias, CEO, GroundWork group Orange County
Viral Kadakia, Group Product Manager, LinkedIn
Lisa Rau, CEO & Co-Founder, Confluence Corporation
Ryan Scott, CEO & Founder, CauseCast

ADVISORY COUNCIL

Aileen Adams, City of LA - Office of Strategic Partnerships
Tom Backer, Valley Nonprofit Resources
Evelin Montes, Liberty Hill Foundation
Maria Cabildo, East LA Community Corporation
Oscar Cruz, Families in Schools
Richard Diaz, Riordan Leadership Program
Marilyn Flynn, USC School of Social Work
Linda Fowells, Community Partners
Rafael Gonzales, City of Los Angeles,
Service Officer (Office of the Mayor)
Ed Grice, American Jewish University
Marianne Haver Hill, MEND
Fran Jemmott, Jemmott Rollins Group
Bonghwan Kim, Department of Neighborhood Empowerment
John Kim, Healthy City/Advancement Project
Jennifer Li-Shen, Blue Garnet
Molly Moen , Downtown Women's Center
Vici Nagel, Association for Grassroots Organizations
Sylia Obagi, Alchemy/Annenberg Foundation
Bill Parent, UCLA Center for Civil Society
David Porges, Deloitte
Judy Ross, Long Beach Nonprofit Partnership
Kaile Shilling, Violence Prevention Network
Judy Spiegel, Consulting for a Change
Sharon Spira-Cushnir, Executive Service Corps
Paul Vandeventer, Community Partners
Eric Wat, Special Services for Groups
Lisa Wilson, Flintridge Center

BACKGROUND

To better understand how to support the performance and sustainability of LA's nonprofit organizations, The Weingart Foundation commissioned a study of capacity resources in the greater Los Angeles area conducted by the TCC Group between 2009 and 2010.

The resulting report "Fortifying L.A.'s Nonprofit Organizations: Capacity Building Needs and Services in Los Angeles County" found that nonprofit organizations experienced significant challenges accessing quality professional and organizational development services, individual consultants and consulting firms play a significant role in providing services, there is a lack of awareness in the nonprofit sector about available resources, and that capacity building support is diffuse and not well coordinated.

The report identified key characteristics of a cohesive capacity building ecosystem:

- A strong, centralized resource with the capacity to provide initial needs assessments and function as a resource and referral-maker for capacity building services.
- A robust set of nonprofit capacity builders that provide a diverse range of high-quality, in-depth, culturally competent, coordinated and comprehensive services.
- Nonprofits that are well-informed consumers of capacity building services.
- Funders' widespread provision of explicit and coordinated support for capacity building, including sufficient funding and general operating support, to support a thriving cohort of high-quality capacity builders.
- A regular forum for funders, capacity builders, and nonprofits to discuss key trends and issues in nonprofit capacity building.

APPENDIX 2:

PLANNING PROCESS, ACTIVITIES, AND FINDINGS

To develop a comprehensive plan for an Information Exchange that will allow nonprofit organizations to become better consumers of capacity building services, that also leverages innovative technological solutions, and that provides a forum for nonprofits, funders, and capacity building service providers to institutionalize and sustain this project, the planning team engaged in a multi-phase planning and development process as outlined below:

As we entered into the planning phase, we established some Guiding Principles to ensure the planning was inclusive and actionable:

- Planning for the Information Exchange must be data- and customer-driven
- Don't assume you know the answer or what customers want
- Don't judge ideas, people, or feedback
- Listen to what people are telling you
- Be inclusive and seek a diverse range of participation and partnership

Discover
Engage key stakeholders, validate their information needs

Design
Identify key user types, develop a narrative for a productive user experience

Specify
Specify technology, content and interface requirements

Plan
Develop a plan for developing, housing and maintaining the exchange

PHASE 1: DISCOVER

During the Discover Phase, our objective was to gather data from nonprofits, funders, consultants, and other community stakeholders on what they were looking for in an Information Exchange, what elements would be most helpful, and what aspects of an online exchange would encourage usability.

1. Information Exchange Surveys

   Conducted an online survey of Los Angeles area nonprofits and consultants.

   - **Nonprofit Survey:** Center for Nonprofit Management, Taproot and NFF as well as the members of our Advisory Council and the Los Angeles Capacity Building Roundtable sent the survey to more than 4,000 nonprofits across Los Angeles. We had 575 nonprofit leaders complete the survey.

   - **Consultant Survey:** The Center for Nonprofit Management, Taproot and NFF and our partners also surveyed more than 420 experienced consultants. We had 111 completed surveys.

2. Focus Groups/Information Gathering Sessions

Following the surveys, we held two in-person community meetings as well as an in-person meeting with consultants and capacity building providers. The purpose was to gather more information as well as to vet the preliminary findings from the surveys.

- On April 11, MEND and Valley Nonprofit Resources partnered with us to have 55 nonprofit leaders gathered in Pacoima to learn more about the Information Exchange and to provide their thoughts and feedback into the process.
- On May 16th we held our second focus group in South Los Angeles in partnership with the Community Coalition and had 37 people participate.
- Also on May 16th we held a gathering of consultants to hear their thoughts about how best to incorporate consultants into the Exchange and what components would be necessary to set up both the clients and consultants for a successful engagement.

3. Preliminary Findings

Based on the results of the nonprofit survey, initial focus groups, and conversations with nonprofit leaders, funders, and advisory council members, we gathered the following preliminary information :

- **Organizational Assessment –** can offer different levels of assessments that would require less than one hour (or different subject areas that can be offered a-la-carte). But the assessment would need to be helpful in identifying areas of need, translating the results beyond a list of needs, and linking to specific areas of consultants or TA providers to meet those needs.
- **Vetted consultant directory–** any directory would need to be current and include a vetting process that was thorough and accurate. Consultants would need to be able to be searched by sector-area expertise, location and content expertise
- **The human touch** – coaching, diagnosing needs, and/or in person workshops.
- The exchange would need to be **owned by the nonprofit community**, and would allow for user-generated content, and exchange of information being two-way.
- **Free online resources** that are dynamic, accurate, timely not static.
- **Creating Long Term Sustainability** – services offered by the exchange will most likely fluctuate depending on the capacity needs of organizations. Therefore, the exchange needs to address the following:
    - Value– it is important to create a platform that inspires the investment of time, resources, and exchange for all stakeholders
    - Comprehensive Funding for Capacity Building – beyond financing the operational support for the Information Exchange, there still must be funding to allow nonprofits access to the services identified by the organizational assessment.
    - Sustainable Revenue Model – there was interest in the platform across stakeholders but it is not clear if it was high enough to be a fee for service model that could cover the costs.
    - Going Beyond Los Angeles - creating a viable online community to support the system may create economics that would necessitate making the platform national eventually.

PHASE 2: DESIGN

Based on the findings from Phase 1 as well as the recommendations of the technology content team, we developed the initial structure and process for the exchange. The key objective here was to identify the main user types and how they would utilize the exchange and access information.

User Types, Process, Possible Challenges/Breakdowns

	User Type 1	User Type 2	User Type 3
Description	Our organization needs help in a lot of different areas. But I am not sure where to start, how to hire a consultant or even how much it will cost.	I know I need a consultant or a specific training. And I know how to be smart about choosing and establishing a solid working relationship with the appropriate resource.	I just want access to information on capacity building resources.
Process	Assessment and meaning of the diagnosis, recommendations	Provide links to relevant resources such as the consultant network	Information Exchange provides annotated index/listing and links to resources selected for quality
Challenges/ Breakdowns	▪ Is the diagnosis actionable? ▪ Does the user need personal assistance in interpreting and determining next steps? How much personal assistance? (time and cost) ▪ Does the diagnosis take too much time? ▪ Is the recommendation for the diagnosis too expensive?	▪ Who is the arbiter for the referral? ▪ Does the user really know what they need? Should an assessment be required for this type of user? Should the use of personal assistance be encouraged? ▪ What happens if they select the "wrong" consultant and are unhappy in the midst of or conclusion of project?	▪ Are there any issues of time, price ▪ Quality control is primary – how to accomplish and promote that this is a characteristic of the IE ▪ Is any kind of technical support (personal assistance) desired? ▪ Keeping the content links live, current, dynamic

PHASE 3: SPECIFY

The Technology Content Team held a series of meetings to determine what the technology infrastructure would need to look like to support the user types and components identified in Phase 1.

Technology Assessment and Planning

Given the role of technology in the successful development and implementation of the Information Exchange, we pulled together a content team of experts in the field to advise us on technology needs, costs and timing, and the latest in customer-focused research.

1. Basic Assumptions

Through research, survey and consultation with technology advisors, the technology specification for the Information Exchange was built with the following assumptions and basic recommendations:

- Housing platform is already in existence. The technology specification should not name the location or entity that houses the IE, but assumes that the basic required website infrastructure to ensure proper implementation and functionality of the IE are in place and existing, including a webserver, etc.
- Leverages partnerships. To allow for maximum cost efficiencies in building and maintenance as well as scalability and long term success, the IE should leverage partnerships and existing resources, including links, open source code, APIs, and content, where possible.
- User types and needs will vary. Users of the IE will have differing levels of need and sophistication; these must each be met with use of technology, but supported by additional resources.
- Approach is open. Given the various stakeholders and audiences that the IE may reach, the intent should be toward openness.

2. Functional Requirements

The functional requirements of the IE need to include the following:

- **Capacity Building Assessments**. In order to create better informed consumers of capacity building services, adequate assessment tools and an understanding of their results are critical for nonprofits. One consistent factor among nonprofits that was revealed repeatedly in town halls and surveys is that, given different missions, needs, stages of development and so on, one size does not fit all. While the use of different capacity building assessments is common practice for nonprofits, the most widely used being the TCC Group's Core Capacity Assessment Tool (CCAT), the interpretation of assessment results and clear indication of implementable next steps were repeatedly called out as the most challenging factors for nonprofits, therefore the IE must:
  - Provide a limited menu to nonprofits that include CCAT and other survey options so that there is not a "one size fits all" approach.
  - Create a new assessment.
  - Connect nonprofits to professional, human resources that can help interpret survey results and guide them to appropriate next steps. Because there is already a mass use of CCAT and other tools, this component can serve as a differentiator in creating better informed consumers.
  - Funders want the assessment to be able to assist a request for capacity building funding, so after assessments are completed, the IE should generate: A semi pre-populated common application to submit to foundations for capacity building funding; and/or a semi pre-populated RFP to go to bid amongst consultants

- **Provider Directory**. Survey and focus group research has shown that one of the most trusted sources amongst nonprofits are their peers. In fact, nonprofits rated their preference of information sources in order: (1) colleagues, (2) board members, (3) local MSOs, (4) Foundations, (5) Institutions/Research Centers. Nonprofits also indicated repeatedly that, in addition to ensuring that consultants had professional credentials, they would be more inclined to work with providers who had experience in working with organizations of their same mission, size, constituent make-up, and locality. Also, in order for the IE information to be effective, the consultant database must be up-to-date. To give nonprofits the sufficient amount of information about provider credentials, and the adequate ability to filter and query that information to make an informed decision, the Information Exchange must:
  - Use an already existent platform. The cost of using an already existing system (such as Elance) is significantly lower than the cost of building, populating and maintaining a customized system.

Name functionality points to highlight – consultants can update their own profiles; searchable directory; ability to hire and secure the job in one place.

- Not focus on active reputation management. Rather, we should allow market forces to regulate competition and rely on eLance to help provide platform for this.
- Still allow for peer sharing and information sharing from qualified peers through forums and discussions.

▪ **Coaching**. We know that tech is not enough – people want to talk to people to help them talk through what they need and, particularly, what assessments reveal.

- This celebrates the knowledge in the field (i.e. a nonprofit that specializes in research could help a peer organization think through this)
- Coaching must be provided, either online or in-person, recommended models:
    - pro bono model where Taproot could manage, schedule and train; or
    - co-op model where nonprofits could serve as peer coaches to one another, nonprofits self-select what functional areas they feel most well suited to coach
- Use an online tool to schedule coaching office hours with peer coaches and specially trained coaches.

▪ **Static Content and Resources**

- Managed, but community owned. The curating and selection of resources made available on the IE, including consultant and provider names, should be based on collective participation of IE users, but monitored by a community manager. Users should be able to submit content.
- The static content is stand alone as well as linked to the findings of assessments
- Should include more than just articles, but webinars, research papers, etc.
- Content must also be provided for consultants as well - not just focused on nonprofit capacity, but also consultant ability
- By doing this, there is a stronger sector overall.

3. Technical Architecture

▪ **Base Layer: Data & APIs**

- Initial release web online
- Design to extend to tablets and mobile devices in future
- Design to enable national extension or use option

▪ **First Layer: Directory**

- Managed by community manager
- Discussion forums on key topics
- Nonprofits, consultants and other stakeholders can submit, rate and comment on resources
- Includes content, consultants, assessments, and services
- Multiple navigation channels:
- Advanced search based on capacity build needs "fundraising, education and Latino"
- Directory by topic (fundraising, board, etc.)

▪ **Second Layer: Content**

- Articles
- Consultants

- Services (software, training, etc.)
- Assessments
- Initially just link to existing
- Second version might integrate more fully

- **Third Layer: Connect**
  - Live chat with experts to help diagnose needs and find resources
  - Schedule office hours further scoping needs