



Capacity Building Resources

From 2014 – 2019, the Community Foundation of Louisville and its partners awarded 124 capacity building grants totaling more than \$2 million to local nonprofit organizations. Capacity building includes, but is not limited to leadership development and staff training, program evaluation and feasibility studies, strategy development, and technology upgrades.

This document summarizes a selection of the leadership training options, software/hardware vendors, strategic planning consultants, website design firms, and other resources used by these past grantees to complete their capacity building projects.

CFL does not endorse or recommend any one consultant, service, or product over another.

If you have questions or wish to be connected with the nonprofit(s) that used a particular resource, please contact Liz Alkire, Community Foundation of Louisville, liza@cflouisville.org

Project Type: Leadership Development or Staff Training

<i>Nonprofit Sector</i>	<i>Project Overview</i>	<i>Resource Used</i>
Arts / Culture / Humanities	Provide professional training opportunities to staff and leadership	Attend conferences and trainings hosted by: 1) Smithsonian Affiliations National Conference 2) American Alliance of Museums 3) The Southeastern Museums Conference 4) Leadership Louisville & Center for Nonprofit Excellence
Community Development or Environment	Train staff in communication and sales skills	Trainer: Impact Sales Systems
Community Development or Environment	Provide leadership training for board members and staff and secure upgraded technology to increase operational efficiencies.	Software: Salesforce and consultation from the Center for Nonprofit Excellence
Community Development or Environment	Community engagement strategies	Citizen University Civic Training

Community Development or Environment	Board development and planned giving training.	Lily School of Philanthropy and subscription to Foundation Center.
Community Development or Environment	Data management training.	Judith Youngblood, Wist Solutions
Education	Executive coaching	Oliver Group
Education	Provide leadership training for staff	Gifted by Design Leadership & Consulting
Education	Provide cultural competence training to Board members and staff	Border Crossers (consulting firm)
Health & Human Services	Provide leadership training for staff	Oliver Group
Health & Human Services	Enhance volunteer training, fundraising skills, and board development	Professional development: CNPE courses (ShipShape and Grantsmanship training); Indiana University/Purdue University School of Philanthropy fundraising training and nonprofit executive certificate
Health & Human Services	Develop a leadership succession plan	Kelly Wesley Taylor, J.D., Partner, Trek Advancement
Health & Human Services	Train staff to fully utilize client management database	Athena Software/Penelope
Health & Human Services	Training for Director of Development and Development staff	Lilly Family School of Philanthropy at IUPUI: Developing Annual Sustainability course, and the Planned Giving: Getting the Proper Start course
Youth	Train program facilitators in social emotional learning.	Social Emotional Learning Conference hosted by the Center for the Promotion of Social Emotional Learning
Youth	Executive coaching	The Wunderlin Company / Michelle Naiser
Youth	Child safety training	Praesidium online training tools

Additional Leadership and Staff Training Options

Lilly School of Philanthropy’s “Program Evaluation for Mission Impact”

National Children’s Alliance: Various online programs

Oasis Solutions: Various software training programs

Project Type: Evaluation, or Feasibility Study

<i>Nonprofit Sector</i>	<i>Project Overview</i>	<i>Resource Used</i>
Arts / Culture / Humanities	Determine the feasibility of a new program offering.	Talleri A. McCrae - Theatre Access, Inclusion and Education Consultant
Arts / Culture / Humanities	Develop a new programmatic evaluation framework.	Susy Watts (consultant)
Arts / Culture / Humanities	Upgrade digital technology infrastructure	Hardy Communications and Cabling
Community Development or Environment	Evaluate the feasibility of a merged or collaborative model for two organizations supporting the organization.	Library Strategies, LLC.
Community Development or Environment	Complete a community needs assessment and evaluate the impact of existing programs.	Evaluation Works (consultant)
Health & Human Services	Evaluate the feasibility of opening a new facility.	Ashley Rountree and Associates
Health & Human Services	Conduct an evaluation of the organization's impact.	OMNI, Inc. for consulting services to upgrade the agency's database, ETO (Efforts to Outcomes).
Health & Human Services	Conduct a needs assessment	Dr. Stacy Deck, Spalding University
Health & Human Services	Establish impact evaluation protocols	Brad Rose Consulting and Search Institute
Health & Human Services	Evaluate and recommend changes to organizational structure, culture, and board governance	Ed Cortas, Director of Consulting Services at Center for Nonprofit Excellence
Health & Human Services	Program feasibility	Point Source Youth
Health & Human Services	With new software, improve client, donor, and volunteer data tracking and relations	University of Louisville School of Business/Department of Computer and Information Systems' Professor Rob Barker (and students)
Health & Human Services	New donor management and fundraising software	Matchmaker and Foundation Search
Health & Human Services	Custom-designed software to record and forecast transactions with clients and customers.	Scott Drake at ScholarRx and KiZan Technologies

Project Type: Strategy Development (Marketing/Communication, Program, Fundraising, Organizational Strategies)

<i>Nonprofit Sector</i>	<i>Project</i>	<i>Resource Used</i>
Arts / Culture/ Humanities	Strategic planning retreat and plan	Consultant Kathie de Nobriga
Community Development or Environment	Create and distribute short oral history and topical videos highlighting the organization's work	Kertis Creative
Community Development or Environment	Enhance the organization's marketing strategy and write a new strategic plan	AdFed (marketing strategy/branding); Ann Adams from Ashley Rountree (strategic planning)
Community Development or Environment	Write a new strategic plan	Center for Nonprofit Excellence (for strategic plan)
Community Development or Environment	Strategic planning and coaching	Shenault Solutions and Melissa Brock
Community Development or Environment	Sustainable fund development.	Lilly Family School of Philanthropy
Community Development or Environment	Capital campaign feasibility study.	Ashley Rountree
Education	Evaluate existing marketing, fundraising, development, and program growth plans and develop new approaches as needed.	The Covenant Group
Education	Enhance marketing strategies and internal data collection processes.	University of Louisville School of Business's Computer Information Systems program (data collection); FieldTrip (marketing/branding)
Education	Develop a five-year business plan	Consultant Alicia Ariatti
Education	Fundraising plan	Ashley Rountree / Mimi Ward
Health & Human Services	Develop a business plan that will provide a five-year analysis of multiple site expansion options.	Strothman and Company
Health & Human Services	Enhance marketing messages and strategies	Vivid Impact

Health & Human Services	Re-brand two nonprofits as one organization, post-merger	Branding Campaign Creation: Henrietta Pepper of the Pepper Group.
Health & Human Services	Develop an internal and external communications strategy	Communication consultant Michael Nabicht of Creative Media for Learning
Health & Human Services	Create and implement a strategic plan and standard operating procedures	Consultant Whitney Bishop, Change Agent
Health & Human Services	New strategic plan	Center for Nonprofit Excellence / Ed Cortas
Health & Human Services	New strategic plan	Ashley Rountree
Youth	Host our first board strategic planning session	Schenault Solutions, LLC

Project Type: Technology (Data management, Software/Hardware, Websites)

<i>Nonprofit Sector</i>	<i>Project</i>	<i>Resource Used</i>
<i>Data Management</i>		
Community Development or Environment	New software to capture and manage member, donor, and participant relationships and attend professional training programs	Donor Perfect CRM software. Training: National Charrette Institute and the NeighborWorks Training Institute
Education	Purchase new donor management software.	Blackbaud's eTapestry
Health & Human Services	Improve data collection and the ability to evaluate the impact and outcomes of investments in services	Homeless Management Information System training
Health & Human Services	Secure technology upgrades and enhancements to improve donor record management, increase communications efficiency with customers and donors, and better safeguard participant data.	E-Tapestry Database; hardware and software purchases
Health & Human Services	Design and install a data management system to better track members, share knowledge, and manage volunteers and donors.	Blackbaud's Raiser's Edge
Health & Human Services	Implement a web-based volunteer management system.	RFX technologies
Health & Human Services	Invest in a client database and reporting system that enables impact measurement and reporting.	Efforts to Outcomes

Health & Human Services	Convert a paper-based record and information keeping system to one that is online.	RFX Technologies
Health & Human Services	New software to improve client, donor, and volunteer data tracking and relations	Osnum Software (client management) and Flipcause (donor management)
<i>Software/Hardware</i>		
Community Development or Environment	Integrate multiple, existing data systems in order to better evaluate and communicate the organization's impact on the community.	Software: Family Metrics
Community Development or Environment	Project management software to more efficiently share information internally and with key stakeholders. Donor management software to accurately track deadlines and reporting and efficiently manage gifts and pledges	Smartsheet online project management, collaboration and process automation software Little Green Light Donor Management Software
Education	Donor management software.	DonorPerfect
Health & Human Services	Purchase grant maker search software	Foundation Search Software
Health & Human Services	Update financial accounting software	Oasis Solutions Group (a contractor) and Adaptive Insights software.
Health & Human Services	New constituent management software.	Bloomerang (software)
Health & Human Services	Upgrade financial accounting software.	AccuFund Core System
Health & Human Services	Technology upgrades, including new computers and data transfer	Voipster and Access Technologies
Health & Human Services	Purchase Foundation Search software	Foundation Search Software
Health & Human Services	Hardware, software, and technology systems upgrades to meet the real-time electronic paperwork reporting requirements for government agencies.	THERAP web-based services
Health & Human Services	Design, develop and implement a comprehensive volunteer engagement program to increase organizational education and outreach activities.	Software: eTapestry
Health & Human Services	Technology updates associated with the re-brand of two nonprofits as one organization, post-merger	Louisville Geek

Health & Human Services	New donor database.	DonorSnap
Health & Human Services	Manage volunteer and client data	Salesforce
Health & Human Services	Upgrade training technology	Creative-Image Technologies
Health & Human Services	Install new computers and network	Navigate LLC
Health & Human Services	New donor management software	Raiser's Edge
Health & Human Services	New financial and fundraising databases	Blackbaud Raisers Edge NXT and Financial Edge NXT
Youth	Track program outcomes in ways that will integrate with JCPS student tracking systems	VisionLink Youth Services System or CiviCore Youth Services Software
Websites		
Arts / Culture / Humanities	Redesign website	Xpressions Web design
Arts / Culture / Humanities	Website and software updates	Consultants (Bill Carner, U of L photographic archives and Danielle Spalenka, project director for the Digital POWRR Project)
Community Development or Environment	Invest in an upgraded, mobile-responsive website.	Think Tank
Community Development or Environment	Redesign the organization's website	Mightily
Education	Acquire new applicant management software and revamp the organization's website	Rock Paper Jones (for website) and Frontline Technologies to install AppliTrack (new software)
Education	Enhance website to allow data collection and improve outreach and promotion of the impacts and value to the community	Bisig Impact Group
Health & Human Services	Redesign the organization's website	Cubero Group Designs
Health & Human Services	Update website	Xstreme Media
Health & Human Services	New website to effectively deliver evidence based medical information	Firespring
Health & Human Services	New website that is easily viewed on mobile devices and able to be edited by staff	Louder Agency, LLC

Technology upgrades to improve service delivery

Community Development or Environment	Information technology upgrades to improve delivery of technology based education to our youth and increase operational efficiency	Advanced Business Solutions
Education	Develop a mobile application to facilitate connections between students and the nonprofit's volunteer tutors	Otreva (a software product development company with direct experience in mobile application development)