



A CAMPBELL GUIDE

Technical Assistance

What it takes to build capacity in a small organization, and how to tell whether any of it lasted.

ASSESSMENT

CAPACITY BUILDING

GRASSROOTS ORGANIZATIONS

What This Guide Covers

Capacity building is easy to fund and hard to do. A grant pays for a year of help, the year passes, and the organization is often no more able to run itself than it was at the start. This guide is about the practice that makes the difference.

It is written for two audiences. If you are a funder structuring a capacity program, the sections on assessment, sequencing, and measurement describe what to ask for and how to tell whether you got it. If you lead a grassroots organization about to receive assistance, the domains describe what will be examined and why.

One claim worth stating plainly

Capacity that depends on the consultant is not capacity. If the systems stop working when the engagement ends, the money bought a year of staffing rather than a stronger organization.

What this guide does not do

It does not reproduce the federal uniform guidance, your state's rules, or the terms of any particular award. Those govern, and they differ. What follows is the operating practice that sits on top of whatever rules apply.

Assistance Is Not Training

Technical assistance is direct help with the specific thing an organization cannot currently do. Training transfers knowledge that is the same for everyone in the room. The two get confused constantly, and the confusion is expensive.

A cohort of twelve organizations may genuinely need the same training on allowable cost. They will not need the same help building a chart of accounts, because they are not starting from the same place and several of them do not have one at all. Delivering the second as though it were the first produces attendance and no change.

A practical ratio

Group training is the cheapest way to cover what everyone needs and the most expensive way to cover what only one organization needs. Use it for the shared material, and protect individual time for the work that only makes sense inside one organization's own books and bylaws.

Where assistance goes wrong

- It is aimed at a topic the funder finds interesting rather than the constraint the organization is actually stuck on.
- It produces documents nobody adopts, because the board was never in the room while they were written.
- It is delivered to the executive director alone, so nothing survives their departure.
- It ends at the moment of handover, before anyone has used the new system through a full cycle.

Working With Grassroots Organizations

Peer-led and volunteer-staffed organizations run on different constraints than larger nonprofits. Assistance designed for one does not transfer to the other, and arriving with the wrong model wastes the engagement.

What is usually true

- Staff are part-time, volunteer, or founder-only, so assistance has to fit around delivery of the service itself.
- The board may be composed of people close to the mission rather than people recruited for financial or legal expertise.
- Systems larger nonprofits take as given, such as payroll, accounting software, or a written personnel policy, may not exist.
- The organization has survived on relationships and persistence, and is reasonably wary of outsiders explaining its own community to it.

The asset you can damage

Lived experience and community trust are usually the organization's real advantage over a larger provider. Assistance that quietly trades them for polish has made the organization more fundable and less effective, and the people it serves pay for the difference.

The Assistance Domains

Six domains, examined at assessment and revisited at closeout. An organization is rarely weak across all of them, and concentrating on the two or three that actually bind is what produces change inside a funding period.

Nonprofit financial management

Chart of accounts, internal controls, segregation of duties, budget construction, cost allocation, and the financial reporting a funder will ask to see.

Board development and governance

Board composition and recruitment, officer roles, bylaws, conflict of interest policy, meeting discipline, and the board's own oversight of finances.

Grassroots organizational development

Policies, personnel practice, insurance and risk, record keeping, and the operating infrastructure that registration and funding both assume.

The Assistance Domains, Continued

Sustainability planning

Revenue diversification, funding pipeline, reserve building, and a realistic plan for the period after a one-time award is spent.

Strategic planning

Mission, priorities, and a plan sized to the organization, with objectives the board and staff can actually hold themselves to.

Program design and data

Service model documentation, participant pathways, outcome definition, and the data practice that lets an organization evidence its results.

Sequencing matters

Financial management and governance usually come first, because the rest depends on them. An organization without internal controls cannot safely receive a disbursement, and a board that cannot read a financial statement cannot approve the budget a sustainability plan rests on. Strategic planning placed before those foundations tends to produce a document nobody uses.

Running an Assessment

The assessment decides where the next ninety days go, and establishes the baseline the closing assessment is measured against. It is not a ranking exercise.

What it draws on

- Governing documents: articles, bylaws, minutes, conflict of interest and personnel policies
- Financial records: statements, budget, chart of accounts, bank arrangements, and who reconciles them
- Interviews with leadership, board officers, and whoever actually keeps the books
- Program documentation: what the service is, who receives it, and what is recorded about it
- The organization's own account of what it finds hardest

Score to decide, not to rank

Domain scores exist to direct effort and to establish a baseline. Publishing them as a league table across a cohort turns an honest assessment into something organizations have an incentive to game, and the next round of scores stops being useful to anyone.

How Assistance Is Delivered

Four formats. A cohort gets all four, weighted to what the assessment found rather than divided evenly.

01 Individualized consulting

Direct work on the organization's own documents, systems, and decisions, scheduled against its assessed priorities.

02 Coaching

Recurring sessions with the executive director, founder, or board chair on the judgment calls that sit with them.

03 Facilitated group training

Shared instruction where the need is common across a cohort, so individual time stays reserved for what is specific.

04 Structured networking

Convenings built around a question the organizations have in common, so peers become a durable resource.

Showing That It Worked

Activity counts are not outcomes. Hours delivered and sessions held describe effort, and a funder reviewing a capacity program needs to know what changed.

Evidence worth reporting

- Movement on domain scores between baseline and closing assessment, per organization and across the cohort
- Artifacts that now exist and did not before: a chart of accounts, approved bylaws, a board matrix, a written personnel policy
- Financial behavior: budgets adopted on time, statements produced monthly, reconciliations completed
- Governance behavior: meetings held with quorum, financials reviewed by the board, officer seats filled
- Funding behavior: applications submitted, new revenue secured, reserve established

Report the misses too

A cohort report showing every organization improving in every domain is not credible and will not be read as such. Naming what did not move, and why, is what makes the rest believable.

NEXT STEPS

Working With CAMPBELL

CAMPBELL assesses, builds the workplan, and does the work alongside the people who will have to sustain it.

Three engagement levels

- Assessment & Workplan: Establish the baseline and the plan built on it.
- Cohort Assistance: Deliver assistance to a group of organizations.
- Embedded Capacity Partner: Stay through implementation and measure what changed.

How an engagement begins

With a conversation about who needs strengthening and what they are funded to do. Scope is confirmed through discovery, and the assessment is designed with you before anything begins.

Statewide and multi-state cohorts are delivered virtually, with assistance scheduled against each organization's own calendar rather than a single cohort-wide track.

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