



**Wilder
Research**



Progress achieved by the Initiative Foundation's Healthy Organizations Partnership Program

A strengthening communities initiative



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Summary

Background

In late 2009 Central Minnesota's Initiative Foundation was awarded a \$1 million Strengthening Communities Fund grant by the U.S. Administration for Children and Families in 2010. The purpose of this grant was to build the organizational capacity of faith- and community-based nonprofits working in the Foundation's 14-county service area.

The Foundation used its award to fund three separate capacity building programs:

- A 10-month, intensive capacity building program intended specifically for new and emerging organizations, called the Start Strong Program
- An 18-month capacity building program designed for slightly more experienced organizations (i.e., organizations that had been in operation at least two years), called the Grow Strong Program
- A 12 month capacity building program targeting well established nonprofit organizations, called Stay Strong

Over the course of its funding period, the Foundation engaged a total of 60 organizations in these programs. Participants in each cohort received small financial awards, and (as appropriate) targeted training, technical assistance, ongoing peer support, and individualized coaching.

By the end of the program all of the participating organizations were expected to have developed a work plan with specific capacity goals, and to have made some measurable progress in at least three of the following areas: organizational development, program development, collaboration and community engagement, leadership development, and evaluation of effectiveness.

Purpose of this report

In 2010, the Initiative Foundation contracted with St. Paul, Minnesota-based Wilder Research to assess the success of its Strengthening Communities work. To accomplish this, Wilder reviewed the data contained in participating organizations' baseline organizational assessments and progress reports and asked all grantees to complete a detailed follow-up questionnaire upon completion of the program. This report summarizes Wilder's findings.

Key findings

Overall, the data submitted by participating organizations suggests that participants in the Initiative Foundation's Strengthening Communities Initiative made significant progress in building their organizational capacity:

- Approximately three-quarters of participating organizations met or exceeded their target capacity building goals
- Over 80 percent increased their organization's workforce (primarily through significant additions to their volunteer labor force)
- Approximately 70 percent formed new strategic partnerships
- Approximately 60 percent significantly increased their annual budgets

A majority of participants also reported that they added new or improved services and significantly increased the numbers of individuals they served as part of the initiative.

In general, participants in all three cohorts appear to have benefitted from the initiative. However, the strongest gains in many outcome areas were experienced by the new and emerging organizations in the Start Strong Group—a not unexpected pattern, since these fledgling organizations generally had “more room to grow” from baseline to follow-up.

Slightly more mixed results were seen among the established organizations of the Stay Strong cohort, some of whom suffered significant setbacks as a result of recent changes in the nonprofit funding environment. For example, 11 of 33 Stay Strong organizations reported significant cuts in their annual budgets due to the loss of public funding.

Issues to consider

The mixed experience of the Stay Strong organizations suggests that there may be an emerging need for more risk assessment and contingency planning work with established nonprofits.

Some of the organizations participating in the Strengthening Communities Initiative also felt that their outcomes could have been strengthened if they had receiving more guidance on setting realistic goals and been given more time to complete their action plans. (It is important to note here that some grantees' timelines for accomplishing their goals were cut short unexpectedly when the Administration on Children and Families ended its support of the Strengthening Communities Initiative earlier than originally anticipated.)

Several organizations also reported that they found the reporting requirements of the grant burdensome and difficult to accomplish (although they recognized that these requirements may have been imposed by the federal funder, rather than the Initiative Foundation).

Taking these issues into consideration in planning future capacity building efforts may help the Initiative Foundation to strengthen and enhance its already strong programs in this area.

Overall, however, the strong positive outcomes and glowing feedback provided by most Strengthening Communities grantees clearly indicate that the program was highly valued by participants, who felt strongly that it helped them achieve their goals. Indeed, the sentiments of most participants seem to be best encapsulated in the words of one enthusiastic grantee, who wrote:

Keep it going! This is a great resource for those smaller "capacity" type projects that are hard to fund in other ways. Can we get another?

Background

The Strengthening Communities Fund (SCF) is a federal initiative of the Office of Community Services in the Administration for Children and Families. It was created to support capacity building efforts among faith- and community-based organizations and designed to address the economic recovery needs of communities throughout the U.S. The focus of this grant was to assist nonprofits in ensuring that the information and services described in the American Recovery and Reinvestment Act of 2009 was made available to disadvantaged and underserved populations.

The program made one-time awards up to \$1 million to a variety of experienced lead intermediary organizations nationwide to provide smaller local nonprofit agencies with capacity building training, technical assistance, and financial assistance. The grant period ran for 24 months from September 29, 2009 through September 29, 2011.

Central Minnesota's Initiative Foundation was one of the experienced intermediary organizations awarded Strengthening Communities Funds by the Administration for Children and Families in 2009. Their grant was used to support the work of faith-based and community-based nonprofits in the Foundation's 14-county service area, which includes many communities with unemployment or poverty rates higher than state or national rates. The Foundation's efforts involved the granting of sub-awards, the provision of leadership and management training, on-going support through relationships developed with other sub-awardees, technical assistance, and individualized coaching.

This report was prepared by Wilder Research at the request of the Initiative Foundation. The purpose of the report is to assess the value of the capacity building assistance delivered through the initiative and to describe the outcomes achieved by participating nonprofits.

Introduction

In September 2009, the Initiative Foundation received a Strengthening Communities Fund award in the amount of \$1,000,000 from the Administration for Children and Families of the U.S. Department of Health and Human Services. The purpose of the project was to provide capacity building assistance and related services to local faith- and community-based organizations to help them address and build capacity, strengthen infrastructure, and address economic recovery needs in their communities. The specific economic recovery goals include helping low-income individuals gain and retain employment, earn higher wages, get better jobs, and gain better access to federal and state tax benefits and credits.

Local organizations that work with low-income populations, and work to address the economic recovery needs of their communities, especially those with relationships with providers of Temporary Assistance for Needy Families (TANF), were encouraged to apply.

The Initiative Foundation served as an intermediary organization to provide a range of capacity building support including technical assistance, community training, and disbursement of financial awards for two years. In their efforts to help build the capacity of selected organizations, the foundation focused on five key priority areas identified for the project: *leadership development; organizational development; program development; collaboration and community engagement; and evaluation of effectiveness.*

To accommodate the diverse backgrounds and needs of participating organizations and strengthen their effectiveness, the Initiative Foundation offered three separate capacity building program options for Strengthening Communities participants:

- A 10-month, intensive capacity building program intended specifically for new and emerging organizations, called the Start Strong Program
- An 18-month capacity building program designed for slightly more experienced organizations (i.e., organizations that had been in operation at least two years), called the Grow Strong Program
- A 12 month capacity building program targeting well established nonprofit organizations, called the Stay Strong Strong

Grantees in the first two cohorts participated in monthly group trainings, received individualized technical assistance from the Initiative Foundation's staff and consultants, participated in peer support networks, and were provided with financial awards of up to \$15,000 which could be used to support a wide range of capacity building activities.

Organizations in the Stay Strong group received more limited (often optional) technical assistance and training and generally smaller financial awards which were intended to support more specialized capacity building projects (e.g., the introduction of a new information technology system to improve client records).

During the entire two-year Strengthening Communities grant period, a total 60 organizations participated in the three capacity building programs. This report examines their collective progress in achieving their goals.

Goals of the project

The goals for the Strengthening Communities Fund project were to strengthen the capacity of local faith- and community-based nonprofit organizations in five critical areas:

- Organizational development
- Leadership development
- Program development
- Collaboration and community engagement
- Evaluation of effectiveness

To guide participating organizations towards accomplishing their goals, the Initiative Foundation provided resources, targeted trainings, financial support, one-on-one coaching, and peer learning networks.

Process for recruiting and selection of organizations

The Initiative Foundation began its outreach to potential program participants in early 2010. It hosted five informational sessions in Little Falls, Brainerd, Saint Cloud, and Mora to introduce the application and participation requirements to potential grantees. The Foundation also worked with a variety of nonprofit networks and partner agencies, such as the Minnesota Council of Nonprofits, community foundations, and Bremer Bank nonprofit Resource Specialists to publicize the Strengthening Communities programming opportunities. In addition, social service financial assistance departments within the 14-county Initiative Foundation service area were contacted to reach organizations that work with Temporary Assistance for Needy Families (TANF) providers. For broader community outreach, multiple media outlets were utilized and several emails were sent to organizations connected to the Initiative Foundation's community development, and nonprofit capacity building work.

To be eligible to apply for training and technical assistance, organizations were required to:

- Be small to mid-sized faith- and community-based nonprofits, partnerships, and ministries located in the central Minnesota area
- Build a service organization, if an emerging group
- Provide services in the Initiative Foundation's 14-county region
- Have at least one secular social service program that addresses economic recovery issues, if a worshipping community
- Work on economic recovery issues, if a collaborative
- Have staff willing to participate in required capacity building activities

Priority was given to organizations that:

- Have operating budgets under \$500,000
- Have not received federal funding in the past five years
- Work with agencies that administer the TANF program
- Implement or improve programs to address the economic recovery issues in their communities

Applicant organizations were not required to have 501(c)3 status or to have a fiscal agent to receive funding for the project.

A review committee comprised of internal and external nonprofit professionals used an objective screening and scoring system to determine the eligibility of organizations.

Study methods

This evaluation was designed by Wilder Research in consultation with staff from the Initiative Foundation. It examines changes that occurred within grantee organizations over the course of the grant period.

The primary data sources for this report are:

- Program documents provided by the Initiative Foundation
- Participating organizations' baseline organizational assessments
- Participating organization' benchmark assessments
- Grantees' progress reports
- Grantees' final follow-up questionnaires

Baseline organizational assessment

Representatives of each organization completed a Baseline Organizational Profile as part of the grant application process. This tool collected background data about each organization including information about the number of staff and volunteers, characteristics of populations served, annual budget, revenue sources, existing services or programming including those that address economic recovery issues, existing partnerships, current use of evaluation methods, and a description of capacity building goals they intended to work on during the project.

Representatives from the organization received coaching on how to complete the baseline assessment from Initiative Foundation staff. Once completed, all baseline profiles were forwarded to Wilder Research for analysis and reporting.

A copy of the baseline organizational assessment can be found in the Appendix.

Benchmark assessments

Once organizations were accepted into one of the Initiative Foundation's three capacity building cohorts, they were also asked to complete a benchmarking tool. This tool, which was adapted from a tool originally developed by the Institute for Conservation Leadership, was designed to help grantees identify their organization's specific strengths and weaknesses in each of the five critical capacity building areas and to track their growth in these areas over time. For example, organizations were asked to rate their capacity in 40 different aspects of organizational development on a scale of 1-5 at baseline and then

again at the end of their funding period. The baseline ratings from the tool were used by the organizations to help set their goals for the initiative and to develop specific capacity building plans, while the follow-up ratings were used to help assess capacity building progress over time.

Representatives from each organization received training on how to complete the benchmarking tool from Initiative Foundation staff. Once completed, all benchmarking results were forwarded to Wilder Research for analysis and reporting.

A copy of the benchmarking tool can be found in the Appendix.

Grantee progress reports

All participating organizations were required to submit an interim and final progress report to the Initiative Foundation as part of their grant requirements. These reports asked grantees to provide a brief description of their project goals and their progress towards meeting these goals, as well as a summary of project successes and challenges encountered to date. Once completed, all progress reports were forwarded to Wilder Research for analysis and reporting.

A copy of the progress report can be found in the Appendix.

Follow-up questionnaires

All participating organizations were asked to complete a follow-up self-administered questionnaire at the end of their grant period. The purpose of the questionnaire was to learn about the kinds of capacity building progress or program improvements participants made as a result of the project. Questions focused on any changes that may have occurred in their organizations over the grant period, including any work that focused on creating jobs or promoting new business growth, the development and diversification of funding, current budgets, size and scope of programs, current numbers served, current partnerships, work encouraged by or knowledge gained from experience with the project, current evaluation methods, progress made on goals at project onset, and responses to services provided by Initiative Foundation staff and consultants.

Additional questions were asked about overall project benefits, other assistance that might be helpful in the future, and what might have been done differently to improve capacity building outcomes. Once completed, all final follow-up questionnaires were submitted to Wilder Research for analysis and reporting.

As Table 1 below indicates, 58 of the 60 organizations originally engaged in the project successfully completed all of their Strengthening Community Initiative program requirements. (Two participants in the Stay Strong cohort dropped out before their grant period was over.) Out of the 58 organizations that actually completed their program requirements, 57 also completed and submitted their final progress reports and follow-up questionnaires. This represents a response rate of 98 percent.

1. Number and percentage of participating organizations completing final reports and follow-up questionnaires

	Start Strong	Grow Strong	Stay Strong	Total all programs
Number of organizations completing all program requirements	17	6	35	58
Number completing final reports and questionnaires	17	6	34	57
Response rate at year-end	100%	100%	97%	98%

A copy of the follow-up questionnaire is located in the Appendix to this report.

Characteristics of participating organizations

Number of organizations and types of services provided

A total of 60 different organizations were selected to participate in the Initiative Foundation's capacity building initiative, and 58 successfully completed all of their grant requirements.

Participating organizations classified themselves as faith-based or community-based nonprofits, and each provided services to one or more of the 14 counties in the Foundation's service area. Participants' programming tended to focus on one or more of the following areas or target populations:

- Poverty and/or financial literacy issues
- Strengthening low-income individuals and families
- Securing and retaining employment
- Earning higher wages or obtaining better jobs
- Gaining greater access to state and federal benefits and tax credits
- At-risk youth and children
- Workforce re-entry services

Organizational assets and resources at baseline

During the application process, priority was given to those organizations with budgets of less than \$500,000 per year.

According to their baseline organizational assessments, all of the organizations participating in the Start Strong and Grow Strong capacity building cohorts met these criteria. The average budget for participants in the Start Strong group in 2010 was approximately \$96,000 per year, while the average budget of Grow Strong Organizations was \$171,145.

However, it is important to note the actual size of participating organizations' budgets varied widely both within each cohort and across cohorts. For example, some Start Strong organizations reported annual programs budgets as low as \$10,500 in their baseline assessments, while others entered the program with budgets approaching almost \$300,000. The extremely diverse character of organizations participating in the initiative is even more evident in the fiscal profiles of the Stay Strong organizations, where some

organizations reported annual budgets well over \$500,000 at baseline and budgets ranged from a minimum of \$13,000 to just over \$6 million per year.

2. Organizational resources at baseline (annual budgets)

	Start Strong (N=10)	Grow Strong (N=5)	Stay Strong (N=34)	All programs (N=49)
Average program budget at baseline	\$95,856	\$171,145	\$614,283	\$463,468
Median organizational budget	\$40,000	\$176,000	\$316,950	\$217,431
Minimum organizational budget	\$10,500	\$44,000	\$13,000	\$10,500
Maximum organizational budget	\$273,073	\$332,225	\$6,007,747	\$6,007,747

Another important nonprofit resource is staff and volunteers. Participants in all three cohorts were asked to report the number of paid full- and part-time staff they employed at baseline. On average organizations employed seven full-time and nine part-time employees, but, as with budgets, there was great variation both within and across cohorts, with quite a few organizations reporting that they employed no full-time staff and others reporting as many as 51 full-time paid employees (see table 3 below).

Across all cohorts, volunteers were more numerous than paid employees with organizations reporting an average of almost 40 volunteers at baseline.

3. Organizational assets at baseline (staff and volunteers)

Staff/volunteers	Start Strong (N=15)	Grow Strong (N=6)	Stay Strong (N=34)	All programs (N=55)
Minimum number of full-time staff	0	0	0	0
Maximum number of full-time staff	4	34	51	51
Average paid full-time staff	2	10	7	7
Minimum number of part-time staff	0	1	0	0
Maximum number of part-time staff	8	13	207	207
Average number of part-time staff	2	6	11	9
Minimum number of volunteers	0	8	0	0
Maximum number of volunteers	57	166	450	450
Average number of volunteers	18	62	43	39

Note: Averages have been rounded to nearest whole number.

Types of training, technical assistance and financial support provided

The Initiative Foundation offered a nonprofit management training program to all participants as part of their capacity building experience. Organizations in the Start Strong and Grow Strong cohorts were required to fully engage in the following activities, while participants in the Stay Strong cohort had the option of participating as they deemed necessary.

Cohort meetings

Meetings were held during the months between trainings for representatives of participating organizations to engage in peer learning. These meetings created opportunities to share knowledge and experiences with other nonprofit leaders in the program, and to potentially create networks or partnerships. They also offered opportunities for individualized assistance on topics developed around the needs of the group. The cohort meetings were led by field consultants with support from Initiative Foundation program staff.

Group trainings

In-person and web-based trainings were offered based on common goals specified in the grantees' capacity building plans. Initiative Foundation staff led several of the trainings and hired consultants for most. Training topics were organized around the five critical capacity building areas as follows:

Organizational development

- Financial management for nonprofits, employment law, fund development, grant writing, alternative revenue streams

Leadership development

- Volunteer resources, succession planning, board development, board governance, board chair training, and developing leadership capacity

Program development

- Program design, logic modeling

Evaluation of effectiveness

- Program evaluation, outcome-based goal development, data detonation

Collaboration and community engagement

- E-communications, partnerships and collaboration

According to program records, the Foundation offered a total of 174 hours of training opportunities during the Strengthening Communities grant period, and organizations were expected to participate for between 24 and 30 hours, with the exact amount depending on their specific capacity building goals and plans.

Individualized technical assistance

Individualized TA (one-on-one coaching) was also provided, as needed, at no cost to grantees by paid consultants identified by the Initiative Foundation and/or by Foundation staff. In addition, participants were able to use their sub-award dollars to contract separately for specialized consulting work within program guidelines. Start Strong or Grow Strong participants received ongoing technical assistance, as needed, in at least three of the five priority areas.

According to program records, collectively organizations participating in the Initiative Foundation's Strengthening Communities Initiative received a total of approximately 5,043 hours of individualized technical assistance, including in-person, email and telephone-based advice and assistance. Over half of this assistance (approximately 3,450 hours) was provided by paid consultants.

Some of the most common forms of individualized TA included:

- Application assistance
- Assistance with action planning to meet capacity building goals
- Assistance with strategic planning
- Assistance with financial management
- Assistance obtaining 501(c)3 status
- Assistance with board development and organizational development.
- Assistance with staffing issues
- "Other" miscellaneous types of TA related to organizational development, program development, fundraising, and community engagement.

Sub-award grants

According to program records, a total of 60 organizations received financial assistance as part of their participation in the project. Training and specialized components were required components of the Start Strong and Grow Strong sub-awards, and were optional with the Stay Strong awards. Sub-award dollars were intended to help organizations develop or improve services or programs. Examples of how sub-awards could be used included:

- Consultant fees
- Training
- Technology improvements
- Limited salary support for staff engaged for the project

Initial sub-awards varied in size from a minimum of \$5,000 to a maximum of \$15,000 with most larger awards going to organizations in the Start Strong and Grow Strong capacity building cohorts. Several organizations, particularly those with the lowest initial funding amount and with ongoing capacity building needs, later received an increase in funding. As Table 4, below, indicates, the final total amount of sub-awards dispersed to all participating organizations was \$645,195.

4. Total dollars awarded to participating organizations

	Start Strong (N=17)	Grow Strong (N=6)	Stay Strong (N=35)	Total all programs (N=58)
Sub-award amount	\$223,602	\$85,436	\$336,157	\$645,195
Minimum award	\$2,850	\$11,168	\$5,000	\$5,100
Maximum award	\$19,400	\$19,000	\$15,000	\$19,400
Average award amount	\$13,153	\$14,239	\$9,604	\$11,124

Key findings and outcomes

According to program records, organizations participating in the Initiative Foundation's Strengthening Communities programs were expected to spend their time in the program:

- Strengthening their organizational capacity
- Developing and strengthening their financial sustainability
- Increasing and enhancing their ability to serve their clients

The participants overall progress in each of these areas is summarized here.

Capacity building achievements

Achievements reported in organization's progress reports

At baseline, all participating organizations were asked to develop detailed action plans focusing on at least three of the Strengthening Community Fund's five critical areas. These critical areas include organizational development, leadership development, evaluation of effectiveness, program development, and collaboration and community engagement.

The most common areas that organizations chose to focus on included organizational development and leadership development.

5. Percent of organizations focusing on each priority area

Focal areas	Start Strong (N=17)	Grow Strong (N=6)	Stay Strong (N=34)	Total all programs (N=57)
Organizational development	100%	100%	88%	93%
Program development	71%	50%	65%	65%
Evaluation of effectiveness	0%	83%	44%	35%
Leadership development	100%	100%	68%	81%
Collaboration and community engagement	71%	50%	62%	63%

This was true across all cohorts. Program evaluation and collaboration and community engagement were generally less popular areas of focus; although a significant number of Grow Strong grantees did express an interest in learning to how evaluate and document the emerging results of their work.

As part of their action planning, participating organizations were also asked to identify more specific goals within each of their target capacity building areas. (For example, within the broad focus area of Leadership Development, they might select the more specific goal of creating a volunteer management plan.) The 10 most common goals that programs elected to focus on are shown in Table 6.

6. Most frequently targeted capacity building goals (by number and percent of grantees)

Capacity building goals	Start Strong (N=17)	Grow Strong (N=6)	Stay Strong (N=34)	Total all programs (N=57)
Provide management and leadership training	17 (100%)	6 (100%)	19(56%)	42 (73%)
Install new computer/IT systems	14 (82%)	6 (100%)	18 (53%)	38 (67%)
Board training	13 (77%)	6 (100%)	16 (47%)	35 (61%)
Strategic planning	13 (77%)	6 (100%)	15 (44%)	34 (60%)
Create or update website	11(65%)	3 (50%)	19 (56%)	33 (58%)
Develop marketing materials	13 (77%)	3 (50%)	13 (38%)	29 (51%)
Recruit board members	16 (94%)	2 (33%)	11(32%)	29 (51%)
Presentations to community groups	11 (65%)	1 (17%)	16(47%)	28 (49%)
Recruit volunteers	13 (77%)	2 (33%)	12 (35%)	27 (47%)
Develop new strategic partnerships	12 (71%)	1(17%)	14(41%)	27 (47%)

According to their grantee progress reports and final reports, regardless of the specific goals they selected, most organizations made significant progress in achieving their objectives over the course of the initiative.

7. Percent of organizations achieving their the target goals

	Start Strong (N=17)	Grow Strong (N=6)	Stay Strong (N=34)	Total all programs (N=57)
Exceeded goal	23%	46%	18%	23%
Met goal	51%	32%	59%	53%
Partially met goal	25%	23%	21%	23%
Goal not met	2%	0%	2%	2%

Note: As a result of rounding, totals may not equal 100%

At follow-up, just over three-quarters of grantees (76%) reported that they had either met or exceeded the goals identified in their action plans. A majority of the remaining grantees (23%) reported that they at least partially met them. Only 2 percent of grantees reported making no progress whatsoever on their goals.

The high level of success that grantees achieved in working on their goals across all the initiative's priority areas is clearly reflected in the success stories that organizations frequently shared as part of their progress reports. A representative sample of these stories is presented here.

Organizational Development

Strategic Planning

A huge breakthrough came for us in working on our mission/vision statement. As a faith-based agency, we have been struggling with the relationships within and outside the church. With strong leadership from our consultant, we discovered that what we were feeling was our core values of why we do our work. When we were able to articulate this value, it enabled us to move forward with our mission and vision statements of the work we are doing. The understanding of the "why" we do what we do, and "what" we do, enabled us to grow significantly through this process. thank you!

Board Development

This process has equipped our board of directors and executive director on how a healthy nonprofit operates. It has familiarized us with a deeper notion of the roles and responsibilities of a board and how it is to function.

We are really proud of our Board of Directors. We have a full board (with room to grow) and all of the executive positions are filled. It is a diverse group with great experiences to share and are willing to put in the time it takes to get an organization off of the ground.

Leadership Development

As a result of her leadership role on the board, one member has launched her own business. Her opportunity to lead increased her level of confidence which was a necessary component of starting her business. This goes back to one of AWA's main goals to build immigrant and refugee women leaders in the community.

A portion of the grant funds were used to provide National Development Council training for Region Five Staff. That staff member successfully completed the Economic Development Finance Training Program and was granted certification as an Economic Development Finance Professional by the President and Training Director of NDC.

Program Development

The biggest success that we had with this project was determining the need for change in how we deliver our services... We realized we needed to add an educational component to our services. Then began the process of developing a 6 week curriculum. We are now just beginning to implement this into the program. This will be a major change for the Father's Resource Program but has been very well received especially in the court system.

One of the "A Brush With Kindness" projects resulted in very happy homeowners and meaningfully engaged an entirely new group of volunteers.

Evaluation of Effectiveness

Through the development and implementation of our Survey Monkey assessment tool, we are able to demonstrate to participants as well as funders the progress that participants make while in our program.

[We] developed customized evaluation tools using the Logic Model. The Logic Model is a graphic representation of how an organization works and the underlying assumptions of the agency's programming. The model also links the theory of the assumptions with the short and long term outcomes which are the organization's goals. We utilize outputs from the program component to fulfill the goals and objectives. Inputs lead to activities, activities to outputs, and outputs to outcomes.

Collaboration and Community Engagement

One success story that came out of this process was the new collaboration with the Healthy Communities Collaboration. They have a Live Better Live Longer (LBLL) Committee that is fairly established in the community.

Being the key organizer in partnership with the St. Cloud City Planner in the development of the Joint Planning District's annual Sustainability Event was a huge success. Our greatest success however has been the development of collaborative relationships with various governmental, religious, nonprofit and business entities.

Achievements reported in grantees benchmarking analyses

Generally speaking, the achievements cited by grantees in their progress reports are consistent with the results of their benchmarking analyses. When asked to rate their progress in building their capacity in each of the five focus areas at baseline and follow-up, most organizations rated themselves significantly higher at follow-up. On scale of 1-5, organizations increased their average score across all areas of capacity building by several tenths of a percentage point (around 15% overall).

A number of participating organizations also commented on the value of the benchmarking process in their grantee reports.

The board showed increases in 48 benchmarking measures spread over 5 key focus areas. We participated in both benchmarks and measured 69 out of 79 areas with improvement.

We achieved an improvement in 50 of the 78 areas according to board, staff and volunteers who took the benchmark survey. We also have identified another area of need being systematic volunteer recruitment out of this process.

Pre and post benchmarking completed. Process brought insight into our strengths and weaknesses, guiding us in determining what we do well and how we can improve our organization.

However, it is important to note that the results of organizations' benchmarking analyses should be approached with some caution, since the individuals completing the benchmarking analysis were not asked to use any uniform criteria or to provide any explanation of their ratings.

While scores generally improved over the course of the grant, there was also a significant amount of variation among grantee's average benchmarking scores—especially among Stay Strong grantees, who reported both dramatic decreases and increases in their average ratings over the course of the initiative. Such fluctuations may well be the result of the funding cuts experienced by some Stay Strong grantees over the course of the year. However, it is impossible to determine their precise significance without additional data collection and analysis.

Changes in financial sustainability

In addition to working to achieve their stated capacity building goals, participants in the Strengthening Communities Initiative were expected to improve their financial position and sustainability over the course of their grant periods.

Grantee progress reports make it clear that a number of organizations focused intensively on fundraising and sustainability issues in their capacity building work, with several grantees reporting that they used their award funds to purchase donor tracking software, develop fundraising plans, or otherwise strengthen their financial position.

With the purchase of Donation Tracker, two staff persons and two volunteers were trained in the use of the software. It became evident that the database would need a keen eye, and we were able to hire one of the volunteers to become an office assistant and take on the duty of managing the database. As a result, it is obvious that we are becoming more efficient in our donor tracking process, our financial process, and in our reporting process.

One of our goals was to develop a fund raising plan that would increase event outreach from 1800 - 3000 participants, and increase revenue from \$8000 - \$15,000. As of Oct 30, 2011 our event income is \$18,935 and participants at 2300 with two events to go till our fiscal year end!

Central Minnesota Housing Partnership, Inc. (CMHP) has submitted our very first tax credit application without the use of a consultant. The submission of this application is the first since CMHP's inception in 1993. This is a huge mile stone for CMHP as an organization. By not utilizing a consultant, CMHP will have more control of the development and provide additional resources for the organization to better serve its mission.

As a result of such activities, over 60 percent of the grantees participating in the Initiative Foundation's Strengthening Communities Fund programs (37 grantees out of 60) significantly increased their annual budgets over the course of their grant periods.

Budget growth was evident in all three programming cohorts. Organizations in the Start Strong cohort increased their annual budgets by an average of approximately \$25,000; Grow Strong organizations increased their annual budgets by an average of almost \$70,000; and Stay Strong Organizations increased their annual budgets by an average of almost \$225,000 per organization.

However, these average growth figures do not fully reflect the wide range of budget changes that participating organizations experienced: Some Start Strong organizations experienced budget increases as small as \$1,450 while some Stay Strong grantees netted almost \$2 million in new revenue.

8. Changes in participating organizations budgets (N=57)

Increases	Start Strong (N=12)	Grow Strong (N=6)	Stay Strong (N=19)	Total all programs (N=37)
Average Increase	\$23,644	\$67,620	\$222,328	\$132,802
Median increase	\$17,000	\$21,000	\$30,000	\$20,000
Minimum increase	\$1,450	\$10,000	\$314,725	\$314,725
Maximum increase	\$60,000	\$314,725	\$1,925,259	\$1,925,259
Decreases	Start Strong (N=3)	Grow Strong (N=0)	Stay Strong (N=11)	Total all programs (N=14)
Average decrease	\$10,717	NA	\$49,945	\$41,539
Median decrease	\$10,000	NA	\$31,109	\$26,082
Minimum decrease	\$7,153	NA	\$355	\$355
Maximum decrease	\$15,000	NA	\$154,398	\$154,398
No. organizations with no change in budget	(N=2)	(N=0)	(N=4)	(N=6)

At the same time, 14 organizations participating in the initiative actually experienced significant budget reductions over the course of the grant cycle. Most of these organizations belonged to the Stay Strong cohort, which had almost one third of participants (11 grantees) suffer significant budget cuts. Generally speaking, these budget losses appear to be the result of declining local economic conditions and cuts in federal and state spending for social service programs. A few examples of the unexpected financial setbacks encountered by some Stay Strong participants are described here:

In the middle of this grant we saw our financial base weaken, if not collapse. The number of donors and the number of clients contributing towards the cost of services both diminished. As a result the amount of revenue coming into the program declined by almost 35%, though the needs and demands for our services increased. We are still reeling from the effects of the past six months and trying to navigate these troubled waters.

Due to the Minnesota state government shut down, the ending of our state funding, and the large amount that was cut from foundation grants that we have received for many years, we are in a very financially devastating situation. We are seeking funding from a wide range of funding sources, but do [not know] at this point what kind of funding we will receive. This may have a huge impact on our ability to provide services in Central Minnesota.

The reduction in State funding will have a long-term effect on our organization.

Clearly, the state shutdown and the broader economic recession are factors beyond most grantees control. However, the “devastating impact” of these systemic factors on so many Stay Strong participants does suggest that some established nonprofits might benefit from additional training and technical assistance in the areas of financial risk assessment and contingency planning.

Changes in program operations and service capacity

Program additions and enhancements

Over half of the organizations involved in the Strengthening Communities Initiative reported that they added new programs and services or improved existing programs or services during their grant cycle.

As one might expect, Start Strong grantees placed a slightly stronger emphasis on creating new programming, while Grow Strong and Stay Strong grantees focused more on improving the operations or efficiency of their existing programming.

9. New programs and improvements to existing programs at follow-up

	Start Strong (N=17)	Grow Strong (N=6)	Stay Strong (N=34)	Total all programs (N=57)
Number of organizations adding new programs	10	2	18	30
Number of organizations improving existing programs	9	5	24	38

Changes in service capacity

Most participating organizations also expanded their workforce while participating in the Strengthening Communities Initiative. Increases in paid staffing were relatively modest—with seven organizations adding new full-time staff and 23 organizations adding new part-time staff—but over 80 percent of participants (46 of 57 organizations reporting) added significantly to their volunteer rosters.

Organizations across all three cohorts dramatically increased their volunteer labor force, almost doubling their number of volunteers (from an average of 39 to an average of 62) between baseline and follow-up.

10. Average increases in paid and unpaid personnel (staff and volunteers)

	Start Strong	Grow Strong	Stay Strong	Total all programs
Average increase in paid full-time staff	1 (n=1)	1 (n=2)	1 (n=4)	1 (n=7)
Average increase in paid part-time staff	3 (n=5)	1 (n=2)	2 (n=16)	2 (n=23)
Average increase in volunteer force	110 (n=16)	27 (n=5)	36 (n=25)	62 (n=46)

These figures appear to reflect the strong focus that many grantees placed on developing volunteer recruitment plans at baseline. Overall, developing volunteer recruitment plans was one of the ten most popular specific goals selected by grantees at the outset of the initiative (see p.18 for more information on goals).

On a less positive note, it may also at least partially reflect the growing reliance of many organizations on unpaid staff, as they are forced to reduce the size of their paid workforce. Four organizations participating in the Stay Strong cohort did report being forced to make reductions in their paid staff—primarily because of the cuts in public funding described earlier in this report.

Average growth in numbers served

Organizations across all three cohorts also increased the number of clients they served annually. Not surprisingly, the biggest increases in numbers served occurred in the Start Strong group, where many organizations focused their capacity building efforts on building new programs and services. On average, participants in the Start Strong group increased their numbers served from 568 individuals annually to almost 1,000 individuals annually.

The Grow Strong and Stay Strong groups also increased the numbers of individuals they served between baseline and follow-up, but their increases were more modest—probably because these organizations focused their energies on program improvement rather than expansion. Again, in a small number of cases, Stay Strong organizations also reported having to actually cut the number of people they served due to reductions in public funding.

11. Average growth in numbers served from baseline to follow-up

Clients served	Start Strong (N=11)	Grow Strong (N=6)	Stay Strong (N=31)	Total all programs (N=50)
Average number of clients served at baseline	568	1909	1588	1394
Average number of clients served at follow-up	983	2101	1644	1527
Increase in average numbers served	415	192	56	133

The growth of new partnerships

Finally, many of the organizations involved in the Strengthening Communities Initiative reported forming new strategic partnerships or collaborations as part of their capacity building efforts. Overall, approximately two thirds of participating organizations said they had formed at least one new partnership between baseline and follow-up, and almost 90 percent of the fledgling organizations in the Start Strong group reported acquiring new partners while involved in the capacity building program.

12. Number and percent of new partnerships formed by participating grantees

Cohort	Number	Percent
Start Strong (N=17)	15	88%
Grow Strong (N=6)	2	33%
Stay Strong (N=34)	22	67%
All cohorts (N=57)	39	69%

Most of the new partnerships that participants formed involved public or nonprofit social service agencies, but organizations also reported forming new partnerships with schools, colleges, faith-based organizations, arts organizations, youth groups, libraries, prisons, local businesses, and the chamber of commerce.

Participant satisfaction

Positive feedback

In general, organizations participating in all three cohorts of the Strengthening Communities Initiative were overwhelmingly positive in their feedback on the experience. When asked to rate the quality of the consulting services they received, 96 percent of participants said that they found their consultants to be effective or highly effective, and said that they would recommend the consultants to others.

Numerous organizations also sang the praises of Initiative Foundation staff and its capacity building program as a whole in their final reports and follow-up questionnaires. A representative sample of the positive comments offered by grantees follows:

Tricia and Cathy have been just ACES through the entire process.

Staff all does a great job!

We have grown a great deal and have always felt supported in our efforts.

The HOP program has been key to building our infrastructure. We could not have done it without the funding, training or technical support.

This Stay Strong grant once again gave us a huge boost in many areas, such as IT, board development, evaluation and outcomes.

The HOP program has been crucial to our successful rebranding. Thanks!

This program has been extremely valuable for our agency... It has allowed us to have a vision toward our future and the direction our agency will take in providing services to the community.

This opportunity is so well timed with market pressures, economic stresses and challenges. It has been a welcome shot in the arm to us to help evaluate where we are and what is needed to go where we want to be.

In the last year, we have developed a strong foundation that will no doubt carry us well into the following year. The HOP grant was an exceptional tool in helping guide us.

We are very fortunate to have been able to go through this process. It has really helped the capacity of our organization to better serve our clients and become a stronger organization. Thank you!

Keep it going! This is a great resource for those smaller "capacity" type projects that are hard to fund in other ways. Can we get another?

Reported challenges

While generally reporting high levels of satisfaction, some Strengthening Communities grantees did note common challenges that they experienced in their capacity building work. Some of the most frequently cited obstacles to success were lack of time, lack of resources, and overly ambitious capacity building plans.

Understanding the basic foundation of an organization takes time and we had to shift some of our action plan timeline as we learned more about what tasks need to be accomplished and in what order.

The main obstacle was the time frame. If we were to have had an additional 3 months to complete the project it may have not felt so rushed. The timing of the grant was another issued that we struggled with.

I think that the major obstacle we encountered was time constraints. We set some lofty goals for our program, and as you can tell by the report, we did not fully complete everything that we set out to do during the grant period. We are committed to fully finishing these areas and have laid significant groundwork towards completing by year end.

One large obstacle toward achieving our goals was that many of the tasks associated with our project were scheduled to occur over the summer months when we offer fewer services and people are more likely to be gone. Given the time constraints of the funding, this was largely unavoidable.

Once again for us the time factor and trying to find time to work together as a team with all of us working full time jobs got to be a challenge. Also being a startup organization waiting for the next installment of funds put is at a standstill on occasion.

The timeframe needed to work with consultants. It took us more time than planned to find, engage and begin the process of working with the consultant. This limited the time we had to implement the consultant recommendations. We also budgeted too low for consultants and ended up covering the additional costs.

Not having enough committed members, people not being honest about their time to commit, summer, and our spring fundraiser which takes so much time and energy, that the few people that are helping were busy up until the end of April, and then were burnt out by the time we got to this project.

It is important to note that some of the perceived challenges related to lack of time and unrealistic deadlines may have been the result of circumstances beyond the Initiative Foundation's control. In the final year of the Strengthening Communities Initiative, the Administration on Children and Families unexpectedly announced that it would not be able to provide intermediary organizations with a one-year extension grant that they had originally been offered at the time of their awards. The cancellation of this extension

option forced the Foundation to terminate its support for several groups of grantees earlier than anticipated, making it difficult for them to achieve all of the goals they had originally set for themselves.

Potential areas for improvement

When asked what advice they would offer the Initiative Foundation on how to improve the Strengthening Communities Initiative, participants also identified a number of potential areas for program improvement. The most common suggestions participants offered included giving organizations more time to implement their action plans, helping grantees to develop more focused and realistic capacity building plans, and reducing or simplifying the reporting requirements for grantees. Some typical suggestions for improvement are provided here:

Perhaps more time for organizations to implement action plans.

Help the organization more clearly define exactly what they plan to do under the focus area. We should have taken on a smaller piece than we did to complete in a year.

Project success would have been greater had we had a longer period of time in which to complete the various tasks (although we realize this may not have been possible).

With the smaller level of funding grants, I would recommend focusing on one or two capacity building areas instead of 3. We had to secure additional funds to accomplish the goals in all three areas.

The time logs and other financial reporting requirements were extremely stringent and were difficult for us to stay on top of in the midst of also trying to carry out our goals for this grant. The Initiative Foundation made valiant efforts to keep us informed about reporting requirements and deadlines; however, the process was still cumbersome.

The demands of the application, revisions and reporting process could be reduced. I think it involves too many steps. As a part-time employee I don't think my board of directors would recommend I use so much of my time this way.

I would have liked to have seen the final reporting requirements well in advance so that I knew what the final expectations were as opposed to completing the process and then looking to see if what we did meshed with the final reporting requirements.

Since the Strengthening Communities Fund grant program is being discontinued by the Administration on Children and Families, the Initiative Foundation does not expect to implement the grant program again. However, some of these suggestions offered by

participants may still prove useful in refining and carrying out the Foundation's ongoing organizational capacity building work.

Conclusions and issues to consider

The findings of this evaluation suggest that participants in the Initiative Foundation's Strengthening Communities Initiative made significant progress in building their organizational capacity:

- Approximately three-quarters of participating organizations met or exceeded their target capacity building goals
- Over 80 percent increased their organization's workforce (primarily through significant additions to their volunteer labor force)
- Approximately 70 percent formed new strategic partnerships
- Approximately 60 percent significantly increased their annual budgets

Most participants also reported that they added new or improved services and significantly increased the numbers of individuals they served as part of the initiative.

In general, participants in all three Strengthening Communities Initiative cohorts appear to have benefitted from the initiative. Not surprisingly, the strongest gains in many outcome areas were experienced by the new and emerging organizations in the Start Strong Group. Slightly more mixed results were seen among the more established organizations of the Stay Strong cohort, some of whom suffered significant setbacks as a result of recent cuts in public funding for social services.

The mixed experience of these Stay Strong organizations suggests that there may be an emerging need for more risk assessment and contingency planning work with established nonprofits.

Some of the organizations participating in the Strengthening Communities Initiative also felt that their outcomes could have been strengthened if they had received more guidance on setting realistic goals and been given more time to complete their action plans.

Taking these issues into consideration in planning future capacity building efforts might help the Initiative Foundation to strengthen and enhance its already strong programs in this area.

Overall, however, the strong outcomes and glowing feedback provided by most Strengthening Communities grantees clearly indicate that the program was highly valued by participants and very successful in helping them to achieve their goals.

Appendix

Sample baseline questionnaire

Sample benchmarking tool

Sample grantee progress report

Sample follow-up questionnaire

*Complete open-ended responses from grantee progress reports
and follow-up questionnaires*

Sample baseline questionnaire

2010 Application Form

Name of Applicant Organization:

Executive Director/Key Staff Member:

Name:

Telephone

Fax

Email Address

Street/Mailing Address

City, State, Zip

Additional Contact Person:

Name

Telephone

Fax

Email Address

Street/Mailing Address

City, State, Zip

Your Organization At a Glance

Please check one of the following statements describing your organization:

☐ Emerging service organization, not yet fully formed

☐ Community-based organization

☐ Faith-based organization

☐ Worshipping community – church, synagogue, mosque, temple, meeting or other religious entity with at least one substantial

secular social service program.

* If your organization is a worshipping community, what is your average weekly attendance at your worship service?

☐ Collaborative or partnership of two or more organizations

*If your organization is a collaborative, indicate the lead agency making the application:

*If your organization is a collaborative, list the organizations participating in the collaboration:

Is your organization incorporated as a nonprofit in the State of Minnesota? ☐ Yes ☐ No

If yes, what is your IRS 9-digit employer identification number?

If no, are you in the process of becoming incorporated? ☐ Yes ☐ No

Does your organization have written by-laws? ☐ Yes ☐ No

Does your organization have articles of incorporation? ☐ Yes ☐ No

Does your organization have a 501(c)(3) status letter from the IRS? ☐ Yes ☐ No

Do you have a governing Board of Directors or another governing body?

☐ Yes, governing Board of Directors ☐ Yes, advisory body ☐ Other ☐ No

Total number of staff and volunteers in your program or ministry:

Number of paid full time staff: Number of paid part time staff: Number of
volunteer staff:

Please indicate the county, or counties, where you provide, or intend to provide the majority of your services:

If your organization is an emerging organization, community-based or faith-based organization, do you have an annual operating budget for 2010?

☐ Yes ☐ No

If yes, what is the annual budget for 2010? \$

If your organization is a worshipping community, do you have an annual human services (local mission, community outreach) budget for 2010?

☐ Yes ☐ No

If yes, what is the annual human services (local mission, community outreach) budget for 2010?
\$

What percentage of your annual budget, or if a worshipping community, the percentage of the human services budget, comes from each source?

- | | |
|----------------------------------|--------------------------|
| a. Individual gift | % |
| b. Corporate/foundation gifts | % |
| c. Special events/product sales | % |
| d. Gifts from religious entities | % |
| e. Denominational support | % |
| f. Government grants/contracts | % |
| g. Other – please specify | % |
| h. Not applicable | <input type="checkbox"/> |

Does your organization have a bank account? ☐ Yes ☐ No

Has your organization filed an IRS 990 form in 2010? ☐ Yes ☐ No

Did your organization conduct a financial audit in 2007, 2008 or 2009? ☐ Yes ☐ No

Does your organization have a Website? ☐ Yes ☐ No

Sample benchmarking tool

Benchmarking Analysis Comparison	Rated Now (initial)	Rated Now (final)	Importance Now (initial)	Importance Now (final)	Gap (initial)	Gap (final)
ORGANIZATIONAL DEVELOPMENT						
Mission						
Vision						
Core Values						
Strategic Plan						
Annual Plan						
Performance Measurement						
Organizational Learning						
Fund Development Plan						
Diversified Funding Sources						
Tracking Donations						
Grants Management						
Cost Effectiveness						
Budgeting/Financial Planning						
Accounting System						
Internal Controls						
Meet Legal Requirements						
Financial Planning						
Financial Audit						
Goals/Performance Targets						
Knowledge Management						
Human Resources Planning						
Adequate Pay						
Manageable Workload						
Adequate Office & Systems						
Work Plans						
Regular Evaluation						
Staff Initiative – problem resolution						
Public Information						
Communications Strategy						

Media Coverage						
Community Participation						
Participant Development						
Buildings and Office Space						
Risk Management						
Board Fund Development						
Organizational Expertise						
Revenue Generation						
Telephone and Fax						
Computer Technology						
Management Information Systems						
PROGRAM DEVELOPMENT						
Program Development						
Constituent Feedback						
Choosing Programs Strategically						
Monitoring Goals						
Staff Expertise						
COLLABORATION & COMMUNITY ENGAGEMENT						
Partnerships and Alliances						
Organizing and Advocacy						
Community Presence and Standing						
Constituent Involvement						
Website						
LEADERSHIP DEVELOPMENT						
Board Meeting Preparation						
Board Decision-Making/Governance						
Board Decision-Making/Process						
Board Governance - Policy						
Board Governance – Roles						
Board Minutes						
Board Composition						
Board Renewal						
Board Committees						

Board Delegation/Staff Goal Setting							
Board Delegation/ED Goals & Evaluation							
Board Financial Oversight							
Board Outreach							
Senior Staff - Experience							
Senior Staff as Coach							
Senior Staff in the Community							
Senior Staff and Strategic Leadership							
Appreciation of Power Issues							
Senior Staff and Financial Judgment							
Planning for Transitions of Staff							
Training and Staff Development							
Systematic Volunteer Recruitment							
Development of Volunteer Leaders							
Member Recruitment							
EVALUATION OF EFFECTIVENESS							
Program Success							
Client Information Systems							
Client Satisfaction							
Client Outcomes							

Sample grantee progress report

INITIATIVE FOUNDATION GRANTEE PROGRESS REPORT

These reports are our primary tool for measuring the achievements of the projects we support. We ask for your candid, critical attention in completing this report. We are interested in what contributed to the success of your project, as well as reasons that made some goals more difficult or impossible to achieve. This report should also help you assess your accomplishments.

You may complete and submit this report electronically or print it out and complete it by typing or hand. You may attach additional sheets as needed if completing manually.

SECTION 1: Background

Grant Number	
Grantee Organization	
Project Title	
Grant Amount	
Grant Dates	
Phone/Email	
Date of Report	<input type="checkbox"/> Midpoint (grants over \$5,000) - Complete Sections 1 and 2 of this form <input type="checkbox"/> Final (all grants) - Complete all Sections of this form

Brief description of the funded project:

--

SECTION 2: Progress toward achieving goals

For each of your goals, briefly summarize the measurable differences your project made in your organization or community. Consider changed lives, skills, knowledge, behaviors, or attitudes.

TOP PRIORITY GOAL

Expected Result/Outcome (from Action Plan):

Actual Result/Outcome:

Please rate your progress toward meeting this goal:

☐ Exceeded goal ☐ Met goal ☐ Partially met goal ☐ Goal not met

GOAL 2

Expected Result/Outcome (from Action Plan):

Actual Result/Outcome:

Please rate your progress toward meeting this goal:

☐ Exceeded goal ☐ Met goal ☐ Partially met goal ☐ Goal not met

GOAL 3

Expected Result/Outcome (from Action Plan):

Actual Result/Outcome:

Please rate your progress toward meeting this goal:

☐ Exceeded goal ☐ Met goal ☐ Partially met goal ☐ Goal not met

Please complete SECTION 3 only if this is your Final Report

SECTION 3: Lessons learned

1. If you were doing this project again, would you do anything differently?

☐ Yes ☐ No

1a. If yes, what would you do?

2. Did you encounter any obstacles in trying to achieve your goals?

☐ Yes ☐ No

2a. If yes, describe:

3. Do you have any advice to offer the Initiative Foundation staff that might improve the chances for success for a similar project?

☐ Yes ☐ No

3a. If yes, please describe:

4. Please provide one example of a success story in your program:

Sample follow-up questionnaire

INITIATIVE FOUNDATION Healthy Organizations Partnership *Strengthening Communities Initiative* Final Report

Section A. Organizational Background

Name of Organization

Director or head of organization

Person preparing this report (if different from the director or head)

Telephone: Fax:

Email Address:

Address:

City State Zip Code

Program you participated in:

- ☐¹ HOP *StartStrong*
☐² HOP *GrowStrong*
☐³ HOP *StayStrong*

1. How do you characterize your organization? **Please check one of the following statements describing your organization:**

- ☐¹ This is an emerging organization, still in formation
☐² This is a community-based organization (CBO)
☐³ This is a faith-based organization (FBO)
☐⁴ This is a worshipping community (church, synagogue, mosque, temple, meeting or other religious entity)

2. What is your annual budget now?

3a. Is your annual budget higher or lower than when you first became involved in the Healthy Organizations Partnership (HOP) program?

- ☐¹ higher → → GO TO Question 3b
☐² lower → → GO TO Question 3c

3b. How much has it increased? (fill in dollar amount)

3c. How much has it decreased? (fill in dollar amount)

Answer 4a and 4b only if you represent a worshipping community

4a. In the year before you became involved with the Healthy Organizations Partnership program, what was your annual human services/community outreach budget?

4b. What is your annual human services/community outreach budget now?

As a result of your Healthy Organizations Partnership program award, did you...

	Achieved	In progress	Not applicable
5. Develop and implement written by-laws	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ⁹
6. Incorporate your organization	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ⁹
7. Obtain an IRS Employer Identification Number (EIN)	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ⁹
8. Apply for an IRS 501(c)(3) status letter	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ⁹
9. Obtain an IRS 501(c)(3) status letter	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ⁹
10. Obtain a Fiscal Agent	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ⁹
11. File an IRS Form 990	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ⁹
12. Undergo a financial audit	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ⁹

As a result of your Healthy Organizations Partnership program award and your capacity building work this year:

13a. Did you create or improve an evaluation process for your organization this year?

☐¹ Yes

☐² No → → GO TO Question 14a

13b. What did you do to create or improve your evaluation process?

14a. How many people did you serve in the year immediately before you received your Healthy Organizations Partnership program grant?

(fill in number)

14b. How many people did you serve in the last 12 months?

(fill in number)

15a. Before you became involved in the Healthy Organizations Partnership program, how many programs did your organization operate?

(fill in number)

15b. During your involvement with the program, did your organization add new programs?

☐¹ Yes → → → GO TO Question 15c

☐² No → → → GO TO Question 15d

☐³ Not sure → → GO TO Question 15d

15c. If yes, how many **new** programs were added? (fill in number)

15d. During your involvement with the program, did your organization improve existing programs?

☐¹ Yes → → → GO TO Question 15e

☐² No → → → GO TO Question 16a

☐³ Not sure → → GO TO Question 16a

15e. If yes, how many **existing** programs were improved? (fill in number)

16a. Did you enter into any new partnerships, networks, or collaborations because of your work with the Healthy Organizations Partnership program and the Initiative Foundation?

- ☐¹ Yes → → → → GO TO Question 16b
☐² No → → → → GO TO Question 16c
☐⁸ Don't know → → GO TO Question 16c

16b. If yes, please describe these new partnerships.

16c. Are you involved in any work either by yourself or with other organizations that focused specifically on creating jobs or encouraging the growth of new businesses in your community?

- ☐¹ Yes → → → → GO TO Question 16d
☐² No → → → → GO TO Question 17a
☐⁸ Don't know → → GO TO Question 17a

16d. Did these efforts focus on.....**PLEASE ANSWER EACH QUESTION**

	Yes	No
1. Creating or retaining jobs?	<input type="checkbox"/> ¹	<input type="checkbox"/> ²
2. Providing access to state or federal resources?	<input type="checkbox"/> ¹	<input type="checkbox"/> ²
3. Helping people become more job ready?	<input type="checkbox"/> ¹	<input type="checkbox"/> ²
4. Helping people get or keep a job?	<input type="checkbox"/> ¹	<input type="checkbox"/> ²

17a. Before your involvement with the Healthy Organizations Partnership program, how many paid staff and volunteers did your organization have? (IF YOU DID NOT HAVE STAFF OR VOLUNTEERS, ENTER 0)

	Enter number of staff and volunteers in month before project began
1. Number of paid full-time staff	
2. Number of paid part-time staff	
3. Number of volunteers who provide services to participants	

17b. During the program, did your organization increase the number of paid full-time staff?

- ☐¹ Yes → → → → GO TO Question 17c
☐² No → → → → GO TO Question 17d
☐⁸ Don't know → → GO TO Question 17d

17c. If yes, how many full-time employees have you added? (Number of full-time employees)

17d. During the program, did your organization increase the number of paid part-time staff?

- ☐¹ Yes → → → → GO TO Question 17e
☐² No → → → → GO TO Question 17f
☐⁸ Don't know → → GO TO Question 17f

17e. If yes, how many part-time employees have you added? (Number of part-time employees)

17f. During the program, did your organization increase the number of volunteers?

☐¹ Yes → → → → GO TO Question 17g

☐² No → → → → GO TO Question 17h

☐⁸ Don't know → → GO TO Question 17h

17g. If yes, how many volunteers have you added? (Number of volunteers)

17h. Since the beginning of your participation in HOP, did your organization reduce the number of staff or volunteers providing service?

☐¹ Yes → → → → GO TO Question 17i

☐² No → → → → GO TO Question 18

☐⁸ Don't know → → GO TO Question 18

17i. If yes, please identify the positions below and indicate the number of staff that decreased.

	Decreased by: (#)
1. Number of paid full-time staff	
2. Number of paid part-time staff	
3. Number of volunteers who provide services to participants	

17j. Please explain any reductions in staff and/or volunteers.

Section B. Capacity Building Achievements and Progress

Your focus this year was on building your organization's capacity to function more effectively, to provide new and/or improved services to your clients, and to become more financially sustainable. Indicate all the goals you chose to work on in your Action Plan **by first checking those particular goals in the left column**. For those you have checked indicate if you received help from a consultant for this work. Finally, please check if the goal was achieved, in progress, or if you did not make progress on this goal.

Check each goal you worked on as part of your Action Plan	Check if you received help from a consultant with this goal		Indicate level of progress		
			Achieved	In progress	No progress made
Leadership Development					
<input type="checkbox"/>	<input type="checkbox"/>	18. Created a volunteer management plan	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	19. Created a volunteer recruitment plan	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	20. Created board policies	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	21. Created an executive succession plan	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	22. Engaged an executive coach	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	23. Implemented a volunteer management plan	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	24. Provided management/leadership training to staff	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	25. Provided training/written information to board of directors	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	26. Recruited board members	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	27. Recruited volunteers (non-board)	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
Organizational Development					
<input type="checkbox"/>	<input type="checkbox"/>	28. Created a staff performance review process	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	29. Created a strategic plan	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	30. Created financial management procedures/improved internal controls	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	31. Created job descriptions	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	32. Created marketing materials	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	33. Created/revised organizational identity or brand	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	34. Created/updated annual report	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	35. Implemented a new accounting system	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	36. Implemented a new budgeting system	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³

Check each goal you worked on as part of your Action Plan	Check if you received help from a consultant with this goal		Indicate level of progress		
			Achieved	In progress	No progress made
<input type="checkbox"/>	<input type="checkbox"/>	37. Implemented a staff performance review process	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	38. Implemented new financial management procedures	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	39. Incorporated as a legally recognized organization	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	40. Installed new computer or information technology	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	41. Created a revenue development plan	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	42. Identified potential funding sources	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	43. Implemented donor tracking software	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	44. Provided revenue development training to staff	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
Program Development					
<input type="checkbox"/>	<input type="checkbox"/>	45. Analyze outcome data/evaluation effectiveness of current services	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	46. Collected information related to service recipient outcomes	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	47. Collected information related to service recipient satisfaction	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	48. Created an outcome measurement plan	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	49. Obtained program-related equipment or durable supplies for new/expanded programs	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	50. Researched and developed new programs or services	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	51. Took steps to expand current services to new geographic area	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	52. Took steps to increase the number of clients served in existing geographic area	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	53. Took steps to reach an underserved population in existing geographic area	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
Collaboration and Community Engagement					
<input type="checkbox"/>	<input type="checkbox"/>	54. Assessed effectiveness of existing collaborative efforts	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	55. Conducted assessment of community needs	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	56. Created a map/inventory of community assets	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	57. Created action plan for partnering or collaborating with others	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	58. Created or updated a brochure	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	59. Created or updated a website	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³

Check each goal you worked on as part of your Action Plan	Check if you received help from a consultant with this goal		Indicate level of progress		
			Achieved	In progress	No progress made
<input type="checkbox"/>	<input type="checkbox"/>	60. Developed new strategic partners	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	61. Established partnership agreements	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	62. Made presentations to community groups	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
Evaluation of Effectiveness					
<input type="checkbox"/>	<input type="checkbox"/>	63. Implemented systems to keep information related to client needs, referral sources, and services provided	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	64. Implemented systems to keep records on service recipient satisfaction and/or service recipient outcomes	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	65. Collected information related to service recipient outcomes	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³
<input type="checkbox"/>	<input type="checkbox"/>	66. Collected information related to service recipient satisfaction	<input type="checkbox"/> ¹	<input type="checkbox"/> ²	<input type="checkbox"/> ³

67. Please indicate other areas, **not listed above**, that you worked on during the year to build your organizational capacity and indicate your level of achievement or progress.

Section C: Financial Sustainability

We are interested in whether or not your organization received additional financial or in-kind support since becoming part of the Healthy Organization Partnership program. Please indicate below all categories of support you have received during the past 12 months, the total amount received, and the percentage of total funding that was new since your participation in HOP.

68. Support from Individuals

- a. Number of individual gifts received: (Number)
- b. What was the total amount of all gifts? (Amount)
- c. What percent of the total amount are new gifts? (Percent)

69. Corporate gift/foundation donations

- a. Number of corporation or foundation donations: (Number)
- b. What was the total amount received? (Amount)
- c. What percent of total gift or donation amount is new? (Percent)

70. Gifts from a religious community or organization

- a. Number of religious gifts: (Number)
- b. What was the total amount of all gifts received? (Amount)
- c. What percent of the total gift amount is new? (Percent)

71. Government grants or contracts

- a. Number of government grants or contracts: (Number)
- b. What was the total amount received? (Amount)
- c. What percent of the total grant amount is new? (Percent)

72. Earned income

- a. Number of sources of earned income: (Number)
- b. What was the total income amount received? (Amount)
- c. What percent of the total income amount is new? (Percent)

72d. Did your overall earned income increase during the year of this project? ☐¹ Yes ☐² No

72e. If yes, how much additional revenue did your organization earn? (Amount)

73. In-Kind

- a. Did you receive any type of in-kind support?
☐¹ Yes
☐² No → → → GO TO Question 74
- b. Describe the donated goods and services received:
- c. What is the total value of all goods and services? (Amount)
- d. What percent of this value is new this year? (Percent)

74. Did you receive funding from any other source?

☐¹ Yes

☐² No → → → GO TO Question 75

b. How many different sources were there? (Number)

c. What is the total amount of all funding from other sources? (Amount)

d. What percent of the total amount is new this year? (Percent)

Section D: Consultants

A large part of your Healthy Organizations Partnership program award budget may have been allocated to engaging local consultants to assist you with creating Action Plans. Please list the consultants you engaged, and briefly indicate the work you and the consultant undertook during the award period.

If you hired more consultants, please copy this form and complete it for every consultant you engaged.

a. Consultant's Name:

Consultant's Firm:

Telephone: Fax

Email Address:

Address

City State Zip Code

Please provide in 1 to 3 sentences, a brief description of the activities you worked on with this consultant.:

How effective did you feel this consultant was in helping you meet your goals? Would you say they were...

☐⁴ Highly effective ☐³ Moderately effective ☐² Somewhat effective ☐¹ Not at all effective

Would you recommend this consultant to others looking for similar services?

☐¹ ☐² No

Brief comments, if any.

b. Consultant's Name:

Consultant's Firm:

Telephone: Fax

Email Address:

Address

City State Zip Code

Please provide in 1 to 3 sentences, a brief description of the activities you worked on with this consultant.:

How effective did you feel this consultant was in helping you meet your goals? Would you say they were...

☐⁴ Highly effective ☐³ Moderately effective ☐² Somewhat effective ☐¹ Not at all effective

Would you recommend this consultant to others looking for similar services?

☐¹ ☐² No

Brief comments, if any.

c. Consultant's Name:

Consultant's Firm:

Telephone: Fax

Email Address:

Address

City State Zip Code

Brief Project Description:

Please provide in 1 to 3 sentences, a brief description of the activities you worked on with this consultant.:

How effective did you feel this consultant was in helping you meet your goals? Would you say they were...

☐⁴ Highly effective ☐³ Moderately effective ☐² Somewhat effective ☐¹ Not at all effective

Would you recommend this consultant to others looking for similar services?

☐¹ ☐² No

Brief comments, if any.

Section E: The Narrative

Please provide a narrative response to the questions below. Brief bullet point responses are acceptable.

75. Looking back at your **Healthy Organizations Partnership program** award period, what were the most important capacity building steps you undertook for the well-being of your organization?
76. Think about the trainings offered during the program. What trainings, workshops, or conferences were the **most helpful**, and why?
77. Think about your evaluation measures before your involvement with the program. Please describe what progress you have made in implementing evaluation measures to assess the following areas:
 - a. client needs?
 - b. customer/client satisfaction?
 - c. program effectiveness in creating change?
78. Is there anything else you think we should know about your organization's growth and development since your involvement with the program? If so, please describe.
79. If you could change one thing about the HOP program to make it a better fit for your organization, what if anything, would you change?

Complete open-ended responses from grantee progress reports and follow-up questionnaire

1a. If you were doing this project again, would you do anything differently? If yes, what would you do

NA

I think I would have the board meet monthly throughout the project in order to stay on top of the goals. We implemented a new strategy of alternating board meetings and committee meetings, which I think will ultimately be a good move over the long term, but it made it harder for assessing progress as well as keeping up with the regular board tasks.

NA

Include some potential future board members so they can feel and gain ownership in the work we have done.

I would do the Stay Strong Program

We would have taken on less food production opportunities in the first and second year of the organization and recruited more volunteers competent in supporting the development of the infrastructure of the organization. The demands of successful hands on sustainable food production can be exhausting. We have been very successful in that food production but have flirted with exhausting human resources in doing so.

I would provide both for online and in person seminar capabilities for boards that have both working members and those more available to travel to seminar sessions. I would increase the board management training capabilities to include specific subjects to working as board members for newer organizations and I would increase the time for new organizations so they get a full year to expend their grant amounts. Almost 3 months passed between the first training session that taught us how to develop the action plan and budget and the time the initial funds were available. The funding was more than adequate for us because we had some of our consulting and web work donated rather than having to expend grant funding for those tasks.

I would have been more realistic in the time frame of "one year" so I could have gone more in-depth on some of the subjects. Yet, it was a lot of great information for our organization to move forward to continue our service.

Attempt to secure additional funding sources to compliment the capacity building work.

NA

With additional support the MOC would like to seek out individuals with the appropriate qualifications, the necessary skills to support the MOC's needs, and with a background in the non-profit sector.

NA

I think we would all agree that we need to find more meeting times when everyone can attend. I would also not wait until the last minute to take care of spending our funds.

Maybe have two more months to complete the process-it was very intense and because of the tight timeline, we were unable to take advantage of some of the workshops made available to us...Also, I would've sought out funding to reward the volunteers with some type of celebration-everyone worked VERY hard to make a difference!

I would create more opportunities for the community as a whole (partners, community leaders, supporters, etc.) to keep up with how the project was going. This would continue the information sharing and momentum at the same time that we are focusing most of our energy on the project itself.

NA

I believe that our initial action plan was too ambitious for the timeline given for the grant. Many projects that we would have liked to complete and use HOP funds for, were amended out of our action plan as there was not enough time to complete them. I would also stress the importance of other members becoming more actively involved in the work to be done. Much of the work was completed by the coordinator alone.

NA

The only thing that I would do differently is to realize how much time is actually required to accomplished what we set out to do. I think I would have more realistically set goals for what could be achieved in the time frame. We did accomplish the majority of our goals so it shows that stretching beyond what we think we can helps us move forward.

NA

Try to spend more time on board development.

The website development business we went with was referred to us by a board member. Research was done to compare product with other businesses of this type, but I feel we may have been inclined to go with the suggestion of the board member, and as a result, we have partnered with a business that slowly meets our needs. I have been in the process of researching other businesses again who work with United Way's thinking that we may need to change, but after a talk with Norton Creative Group, there is an understanding that our needs must be met and there is effort on his part to do so.

NA

These goals were very appropriate for our organization at this time. The only change I would make is to further break down the steps we would encounter in accomplishing the first focus area on evaluating our effectiveness. This is a huge task and an ongoing one. We were able to make great progress in this area and actually accomplish what we expected, but there was much more to it than we had anticipated or had defined. I think it would have been smoother if we had known the questions to ask or been able to map out the work more fully at the start.

The technology updates took longer and the transition was not as smooth as we would have liked however things are working good now. I don't think we really could have foreseen this however.

1. Start the Taskforce at the time of the year it would have been easier to hold the first meeting in-person.
 2. Structure a way to have involved more representatives of work preparation organizations and leaders of volunteers in discussion with each. The most value part of the project was what these two groups could learn from talking with each.
 3. Built in a more in-depth review of the Toolkit by a more leaders of volunteers at the end of the project.
-

NA

I don't think I would do anything differently - it was a process for our organization. They have been involved at every level from completing the initial assessment through implementing strategies. Board members time contributed to the organization and there involvement increased by 50% - this was done through board workdays (6 per year) and accountability to there area of work on the strategic plan goals and activities. Every board member was asked to lead or be a member of one high level goal. I believe visiting the dash board of progress at each meeting held members accountable.

NA

Apply for more funding. While we believe that in order for nonprofits like us to retain our edge, we must have access to and the ability to use appropriate technology, we underestimated the full cost of implementing these systems. There were "hidden costs" that were difficult to realize at the outset of the project. For instance, we found out that several of our existing computers were inadequate to handle the software we purchased, thus requiring the purchase of several additional computers. Specifically as it relates to information technology, anticipating greater expenditures than planned for would be wise in order to truly get the desired depth of the technology.

I would have focused solely on the branding activity, it is what has yielded the greatest return.

Remaining in touch with the funders to make sure that everything being submitted was appropriate. Communication with Minnesota Housing (MHFA) on submitting a tax credit application is always good. Central Minnesota Housing Partnership (CMHP) staff did meet with MHFA staff to discuss the Low Income Housing Tax Credit project in Princeton. However, additional communication will help MHFA staff better understand the project during the submission process.

The acquisition / rehabilitation / resale funding for single family homes was provided by Greater Minnesota Housing Fund (GMHF). It has been difficult to provide the information that they needed due to the fact that we do not have a checklist of items needed. More communication with the funders will help to alleviate this issue.

NA

If we were to do this project again I would involve more people in the research, planning and implementation phases. As a small agency it can be challenging to maintain hours specifically devoted to this project.

One of the biggest challenges we have faced is the time it takes to start with a brand new database. It took us a long time to input all the data. Although the software is located only on the Development Director's computer, we worked with our IT Department to figure out a way to train another employee on the system in order to get all the information input into the database.

I think that we bit off more than we could chew - therefore a few things didn't get the attention they needed to make a systemic change, most notably, Raiser's Edge and Fund Development.

Work on one key focus area in the time allotted rather than three

NA

NA

Our biggest challenge was to setting aside staff time to focus on the many projects while completing our regular duties. It would have been less stressful to focus on one Key Focus area at a time.

We would set fewer goals and not have quite as many activities, particularly since the project period was so short.

We would have started focus groups earlier on instead of waiting first for the numbers of people using voice mail to increase. We would have used the focus group members to help us recruit members of an advisory group and to be outreach workers.

NA

I would have chosen 3 key focus areas instead of 4 and committed more time and resources to the 3.

NA

Estimate more time and greater cost for working with a consultant.

We did not have enough coalition members committed to working on this project. Unfortunately, one that did commit didn't express that she found she wouldn't have enough time which led to duties being put off time and again. I would definitely make sure that I had more people committed to working on a project, so when work isn't getting done, I have others to fall back on. Our project was to add members so we had people to work on projects. This was pretty much a vicious circle of not having enough committed members.

NA

In two of the goal areas, it became evident that we needed to do more than we had anticipated to accomplish the goals we had established:

- We did not realize how little information some of the administrators and staff of area schools and faith-communities had about our work, so the process of dialogue with them regarding whether and how to integrate our programs into their curricula and programming was more involved and time-consuming than we had anticipated. As a result, we were not able to achieve the level of partnership agreement that we had initially hoped for by the end of the grant period. If we were to do this project again, we would have devoted more time to this goal.

- Although the re-design of our website has made it easier for the Center's staff to maintain and develop it, it still requires more expertise than our current staff have. (The consultant who worked with us is no longer in the area, and the new staff member we have arrived after her departure.) We are working to develop that expertise, and are confident we will achieve it. If we were to do this project again, we would have devoted more time to the training of staff members regarding this goal.

Engage the help of others so I am able to stay on top of the reporting.

This project would have gone much smoother and completed more of its goals if the timelines had been more realistic. Much of the work was put off until the last 2 months of the grant. This meant that several key pieces are still being worked on and the printing costs had to be prepaid because the printed materials are not ready to be printed yet. It may have been more efficient to complete the hiring of the new ED as one of the first steps and then the development of the Strategic Plan, etc. once that person was on board. I would also try to get more people involved in the actual work part of the process. Because the ED position is part time, there is not always enough time to do the leg work involved in a project of this scope. I would also make sure that there is strong enough leadership at the start of the process as opposed to trying to develop programs and processes while also working to strengthen the leadership.

We would more realistically evaluate the timeframes set to achieve our goals/objectives. Some things took much longer than we would have anticipated.

NA

Obtain written agreement regarding rights to material and curricula prior to doing the field test.

We would have conducted the Strategic Planning session earlier in the year.

It was challenging to have so many activities and goals in so many different areas with such limited funds. It would have been easier to just focus on one area of capacity building.

I would work harder to get a few more board members involved from the beginning.

2a. Did you encounter any obstacles in trying to achieve your goals? If yes, describe:

Due to the past process of acquiring board members (which was not a recruitment process) at times it was difficult to have our board fully engaged with this process. However, the act of going through this process has enlightened these board members of what their roles are and whether they actually want to serve on the board as they have gained understanding of the expectations. Through this process there has been some natural attrition. We are now in a place to begin recruiting board members based upon our needs.

Time is always an issue.
Managing all the paperwork.

There is a long learning curve in utilizing technology, specifically, working with different video files. I haven't been able to access all the video files taken, so I've discovered that that particular project required more expertise than I initially thought. Also, there was a long delay in the launching of the new database, which was totally different than the old one. In addition, the timing of this grant cycle has been a challenge for some board members--two board members were dealing with moves, one got a new job, one bought a new store, one has been dealing with an in-law going through a lengthy illness--huge life transitions all taking place this year, so I am grateful to have completed as much as we did.

The obstacle that I had was dwelling on the time commitment but this was not a factor. People were willing to put the time in that was needed to make this a valuable and meaningful process to go through.

Push back from some of the original members of the committee that began Salem WEST. Many of them are in the late 80's and early 90's and they struggled at times with the rapid growth and expansion we have experienced and the necessary changes that had to be made.

The biggest hurdle for us was our decentralized leadership style. IF was very accommodating and did a great job working with us

The culture of understanding of issues of sustainability is still in the early stages of development in Central Minnesota thus reducing the size of our pool for potential board members and volunteers. We have been in danger of exhausting volunteers and board members because of the demands of our programs and the fragility of food production. We have also encountered some occasional negativity from a small number of local long-term residents of the area because of our intense work with new Americans.

The biggest obstacle to overcome were those action tasks that required board time and input. Having a board that all work full time jobs, getting them together to work on projects such as developing financial policies was sometimes difficult; as was getting everyone together at the same time to work on the strategic plan. As a result, while we began working on the strategic plan prior to the end of the grant period, we will complete working in a second session after the reporting period is complete. Another difficulty initially was that as a completely new nonprofit, we did not have a cash reserve to use for initial purchases that were reimbursable under the grant. This slowed down our ability to balance between operating needs and grant reimbursable purchases. An example is that after the initial \$3,000 was received, we had to switch which actions we would fund first because of timing with filing the 501(c)(3) and the need to cover those costs. This put us back in accruing needed computer and hardware items that allowed us to make rapid progress in other operational areas of our work. If the financial amount was available for use for the full year the grant period was for, or if the grant period was extended to include the amount of time it took to develop the action plan and budget that would make things easier for new nonprofits that have just gotten started. For nonprofits that have been established for a couple of years and already have funding sources that can sustain the initial outlay of funds while they wait for final grant approval is not an issue.

I had very little help at various points of the year; Struggling with a challenging board; no other staff to take on the extra load.

As a new organization it is difficult to be patient in community response, however the rewards of recognition and client enrichment prove to be invaluable.

Maintaining youth interest/involvement on board and in strategic planning activities.

As a new organization, MOC has encountered many challenges. The staff / volunteers lack experience in the efficient operation of a non-profit like the MOC. This is due to language barriers, lack of resources in general, and the historic oppression of the Oromo people in their homeland. The staff/volunteers members are new to the U.S. and are learning the non-profit system.

The major one is the constant re-adjustments within the budget revisions and how non-user friendly the forms were. Specifically, the Action Plan and Budget revision forms need to be compatible with making the necessary changes such as both created on excel.

NA

~Using a pro-bono person to help complete our 501 c-3 application was frustrating ~government shutdown in July 2011 didn't help ~We had a change over in City government -new Mayor & Council members, and that always takes awhile to bring everyone up to speed ~ And we lost Joel Peck, our City Administrator in late July to another job offer-he was a big part of our team & leadership training attendee...

Working with consultants that are new to your project is challenging. Everyone you meet that wants to help your project doesn't necessarily have the same vision and therefore may not be a good fit even though they want to help. Understanding the basic foundation of an organization takes time and we had to shift some of our action plan timeline as we learned more about what tasks need to be accomplished and in what order.

The main obstacle was the time frame. If we were to have had an additional 3 months to complete the project it may have not felt so rushed. The timing of the grant was another issued that we struggled with.

I believe that there were two major obstacles in our coalition trying to achieve it's goals. One obstacle being the short timeline and having grant dollars over the summer months. Many of our coalition members are school district employees and they work decreased hours over the summer. Our coalition also typically meets once per month, but does not meet in July and numbers of members attending other summer meetings are greatly decreased. Another obstacle is member involvement. Everyone wants something done but it remains extremely difficult to get volunteer members to complete tasks. The coordinator works a very part time schedule and should not have been charged with all tasks, in order for increased member involvement.

NA

Once again for us the time factor and trying to find time to work together as a team with all of us working full time jobs got to be a challenge. Also being a start up organization waiting for the next installment of funds put as at a stand still on occasion.

The 501c3 application was more labor intensive than originally assumed. This was due to some internal adjustments necessary in order to include specifics related to a partnership with another nonprofit organization. However, we were able to overcome this obstacle.

In the middle of this grant we saw our financial base weaken, if not collapse. The number of donors and the number of clients contributing towards the cost of services both diminished. As a result the amount of revenue coming into the program declined by almost 35%, though the needs and demands for our services increased.

We are still reeling from the effects of the past six months and trying to navigate these troubled waters.

Working with Norton Creative Group. Also, the transfer of information from Peachtree to QuickBooks ahs been insufficient and took extra work on behalf of our accountant and a consultant.

NA

NA

Technology glitches slowed us down a bit so in the initial phase we didn't feel as efficient. With the interest in our programs also, we need to create a sustainable funding model to continue these programs. We also found recently there were some glitches within our process and communications with the teachers, therefore we will now create a more formal process for the JA Finance Park program not only in our markets but across the state.

The only obstacles was a change in Board member time available to work on financial planning.

Due to bad weather several of the trainings were postponed to later dates thus lowering anticipated attendance. Also we moved our office to a new location and that was a much bigger job than we anticipated.

Yes - levels of understanding of non-profits and our organization mainly with board members. We spent a lot of time making sure we were all on the same page during our strategic planning session. We reviewed mission- vision and SWAT - We will continue this process again October of 2012 - we believe this is important to do each year, especially if you want an active board. Investing this time is critical, especially to small non-profits. Another area where we invested time that was not really planned was strength based leadership. All staff and the ED read Tom Rath's/Barry Conchie's Strengths Based Leadership and did the online assessment. We then mapped the strengths for each staff out - this created a greater awareness for that staff of their strengths and we agreed as a team this is a better way to work from our strengths. The next step will be sharing the staff strengths and having board members read the book and take the assessment.

Learning the new database system has been more challenging than we anticipated and it has taken longer than we had hoped to get things truly off the ground. While we are making good progress, we had hoped to have a better grasp of the tools available and that is just taking a little longer. These new programs can do SO many things, we have to learn just what we can now do!

Mostly monetary as described above. Additionally, the staff was somewhat resistant to the new systems until they became more accustomed to them, as anticipated.

No.

There is definitely a learning curve with submitting an application to Minnesota Housing for funding of Tax Credits. Increasing the communication with the representative at Minnesota Housing would help to ensure that they understand the project and can suggest ways to enhance the application to maximize the points to get the project funded.

From the standpoint of the acquisition / rehabilitation / resale program, I would want to make sure that the program has sufficient value gap to cover any cost overruns. The two homes that we have purchase, rehabbed and sold needed value gap to cover Central Minnesota Housing Partnership's costs to administer the program. Additionally, selling the homes really needs the expertise of an experience Realtor.

NA

NA

Our work with ROI Solutions, Inc. has gone very well. They have been gracious enough to provide us with extra services, which they have not billed for, in order to make sure we have the social media presence that we need. The consultants worked on the project with us until it was completed in December.

Staff time vs work load. The entire team had a fantastic attitude and was very grateful for the training, however, their workloads remained high (possibly higher due to the loss of 3.62 FTEs in a year) therefore we couldn't always give the follow-up attention needed.

The demands of daily operations, as well as "surprises" or delays caused by constituents/clients, donors and volunteers. It is often difficult to focus on or find time to put into foundational, capacity building work when "fires" regularly pop up that need immediate attention. In some cases, we're still trying to understand why response to programs and other opportunities are sluggish. Frankly, we often scratch our heads in wonder.

NA

I think that the major obstacle we encountered was time constraints. We set some lofty goals for our program, and as you can tell by the report, we did not fully complete everything that we set out to do during the grant period. We are committed to fully finishing these areas and have laid significant groundwork towards completing by year end.

NA

One large obstacle toward achieving our goals was that many of the tasks associated with our project were scheduled to occur over the summer months when we offer fewer services and people are more likely to be gone. Given the time constraints of the funding, this was largely unavoidable.

Although we did recruit a substantial number of agency partners, they did not focus enough attention on providing voice mail numbers to clients. For instance, in a focus group, 5 people attended from a transitional housing program that had voice mail numbers to provide, and these clients were unaware that the service existed. This also occurs to some extent in the metro area, but awareness of the program in the communities is greater in the metro area.

We had set a goal to reach the Somali, Latino, Sudanese and Asian communities, however we encountered obstacles in making a connection with the Asian community. This was primarily due to lack of adequate project management time to pursue the Asian community involvement. Five community groups in the other targeted groups were successfully engaged.

The State shutdown consumed a lot of time, so trying to fit everything into a 9 month grant period was difficult.

Our vice chair resigned her position on the board. Since she chaired our board development committee, this presented difficulty with meeting some of our goals during the grant cycle. Additionally, our program coordinator was gone for two months during the funding cycle, which required the shifting of responsibilities to implement programming.

The timeframe needed to work with consultants. It took us more time than planned to find, engage and begin the process of working with the consultant. This limited the time we had to implement the consultant recommendations. We also budgeted too low for consultants and ended up covering the additional costs.

Not having enough committed members, people not being honest about their time to commit, summer, and our spring fundraiser which takes so much time and energy, that the few people that are helping were busy up until the end of April, and then were burnt out by the time we got to this project.

Some unexpected and some anticipated resignations from our board of directors. Due to term limits we anticipated one board member's departure, but were not prepared for other resignations due to personal schedules and therefore were unable to complete or get much work done on our strategic plan. We are currently recruiting new board members and our strategic plan continues to be a priority for our organization.

In two of the goal areas, it became evident that we needed to do more than we had anticipated to accomplish the goals we had established:

- We did not realize how little information some of the administrators and staff of area schools and faith-communities had about our work, so the process of dialogue with them regarding whether and how to integrate our programs into their curricula and programming was more involved and time-consuming than we had anticipated. As a result, we were not able to achieve the level of partnership agreement that we had initially hoped for by the end of the grant period. If we were to do this project again, we would have devoted more time to this goal.

- Although the re-design of our website has made it easier for the Center's staff to maintain and develop it, it still requires more expertise than our current staff have. (The consultant who worked with us is no longer in the area, and the new staff member we have arrived after her departure.) We are working to develop that expertise, and are confident we will achieve it. If we were to do this project again, we would have devoted more time to the training of staff members regarding this goal.

NA

A big obstacle in this process was the change in the Executive Director position. The person who started the grant process is not the same as the person who is completing it. This meant that there was a disconnect in ideas and the process. Additionally, much of the purchasing was left for the new ED so that they could get what they felt was appropriate. Another obstacle was the involvement of the Board of Directors. Not all of the Board members had the same sense of urgency or commitment to this process. What ended up happening was the Strategic Planning was done in the spring, the hiring process for a new ED was done in the summer, and the actual implementation pieces were generally done at the end of summer. A lot of planning has been done but many of the actual implementation pieces are still in process.

Time and staff to accomplish the stated objectives.

NA

University of Minnesota has resisted giving us the right to use curricula we used for low income families in a general public class offering. If negotiations fail, we intend to draft our own curriculum, but the implementation is being delayed a full year by this obstacle.

Our greatest challenge was that our board did not have a collective vision prior to our Strategic Planning session. Towards the end of the HOP period our board was more willing to participate because they felt that they had ownership of the organization after our strategic planning session. CGMC should have tried to foster the board's collective vision earlier in the process.

Delays with contractors

Not really, had the support of the board for the changes that needed to be made. Mentors were a great help!

3a. Do you have any advice to offer the IF staff that might improve the chances for success for a similar project? If yes, please describe.

NA

Board members really struggled to fit the workshops into their work schedules (lawyer, teachers and probation officer make up the majority of the board right now), so providing multiple formats including online access to videos, webinars, etc., or even longer "retreats", will be helpful for those in these intensive professions.

NA

I know it was out of your hands, but we would have enjoyed the 24 month period, as we found the workshops so important to our work, as well as very timely in our process, and would have appreciated the continue support over a longer period of time.

NA

This may not be feasible given financial constraints but we would love to see more on-site contact with the Initiative Foundation staff.

Overall the program was well thought out and provided the basic information and skills that should help any nonprofit succeed. I would add online training options for board members who cannot attend sessions with a method for direct response and feedback, or testing of some type that would not only cover the basic information presented in the seminars we attended, but would also cover training that board members need to perform their functions, as well as specialized training such as grant writing that board members and staff can access anytime to enhance their value to the organization.

NA

No.

Many contacts with others working on similar issues such as Kevin LaNave in St. Cloud.

We are very pleased with the Initiative Foundation's support. The IF enabled the MOC to develop services that would otherwise be unavailable to the Oromo community. With the help of the IF the Oromo community is making great progress towards its overall goal. Thus, we encourage the IF to continue its support of similar services and programs.

NA

NA

NA

NA

I know it was not within the ability of the Initiative Foundation, but an extended timeline would have been extremely helpful.

NA

NA

Perhaps more time for organizations to implement action plans.

NA

I feel the Initiative Foundation did their part in offering guidelines and benchmarks. Our challenges were internal.

The time logs and other financial reporting requirements were extremely stringent and were difficult for us to stay on top of in the midst of also trying to carry out our goals for this grant. The Initiative Foundation made valiant efforts to keep us informed about reporting requirements and deadlines; however, the process was still cumbersome. Because it is a federal grant, we realize it may simply not be feasible for it to be any less complicated.

As mentioned in 1a, maybe help the organization more clearly define exactly what they plan to do under the focus area. We should have taken on a smaller piece than we did to complete in a year.

Both communities feel we are strong going into the 2011-2012 school year with new technology, programs, and an increased board membership. Thank you for this opportunity.

My only advice is state our appreciation for the confidence that an "out of the box" idea could have merit. As far as we know, you were the first u.s. funder to support this topic. As we got into it further we found that work had been done in this area in England and in the u.s. there was growing awareness of the importance of fostering the connection between volunteerism and workforce skills. We broke new ground and ended up with a successful product and fully achieved the hopes for the project.

NA

I would like to thank you for your support. I feel so fortunate that we have been able to invest in our board through your resources. I truly believe we have grown a stronger organization and created a culture of learning for our staff and board members through HOPStrong process. Thank you.

An organization undertaking new database software should plan for more staff time for the learning curve.

Please advise anyone undertaking a similar project to anticipate it requiring more money than they expect.

Keep it going! This is a great resource for those smaller "capacity" type projects that are hard to fund in other ways. Can we get another?

Communication is the key to all funded projects. Being able to have an open line of communication with the funder while you are applying for the funds helps when submitting the application as well as when you are administering the funds.

I have found the Initiative Foundation staff to be knowledgeable and very helpful.

Our grant period has ended.

Tricia and Cathy have been just ACES through the entire process. My advise would be to keep working with nonprofits as you have been. Resources (time, dollars, supplies) are tight, therefore we need to be smarter with how we use them. IF has really been sensitive and responsive to nonprofit needs. Its been just a fantastic experience and BBBS has always been confident of IF's support/back-up.

NA

NA

NA

NA

Related to question 2, project success would have been greater had we had a longer period of time in which to complete the various tasks (although we realize this may not have been possible)

Maybe the Foundation could occasionally, in their communications with area service providers, help frame the issue of communications tools considered as a basic need.

NA

Tricia Holig was very helpful throughout the grant. I appreciate her keeping us on schedule and answering my questions. Having a list of recommended consultants (a consultant resource guide) would be helpful once a KFA is determined.

The demands of the application, revisions and reporting process could be reduced. I think it involves too many steps. As a part-time employee I don't think my board of directors would recommend I use so much of my time this way.

NA

NA

Someone using the computers that we now have available was able to identify a possible employment opportunity, apply for it and was offered the position. Her initial response to the job offer was that "I could not have done this without the help of having the computer". She was very appreciative and said that she was going to tell others that this service was available. This is why we wanted to be able to recycle our computers--we knew that they could be beneficial to others, even if they weren't meeting all of our organizational needs at the time.

I think that there's a tendency in non-profit organizations to underestimate the amount of time and resources that a new initiative can require, not only because they lack previous experience with the work required for that initiative, but because of the tendency to try to do as much as possible with limited resources.

I would encourage IF staff to caution non-profit staff of this tendency, and to assure them that it's important not to be excessively frugal in their requests for time and resources.

NA

Perhaps actual dollar amounts could be tied to specific outcomes. For example, it was difficult to plan a budget for everything at the beginning of the process because as the Strategic Plan was developed, new initiatives were established which needed varying amounts of time and money assigned to them. The challenge was then to either manipulate the initiatives to fit the budget or to have to revise the budget to fit the new initiatives. Also, I would have liked to have seen the final reporting requirements well in advance so that I knew what the final expectations were as opposed to completing the process and then looking to see if what we did meshed with the final reporting requirements. One particularly difficult piece for me to document was improvement and financing because we needed to develop new tracking mechanisms to use moving forward. Consequently, it was quite difficult to look backwards to compare where we were to where we are now. Perhaps it should be required that the organization have certain tracking mechanisms in place at the start of the process so that the final reporting is more doable and more accurate.

NA

NA

NA

If there is another new organization that has not completed their strategic plan, have the organization approve a strategic plan at least midway in the HOP timeline. This will make the organizational development easier because they have a clear path to follow.

With the smaller level of funding grants, I would recommend focusing on one or two capacity building areas instead of 3. We had to secure additional funds to accomplish the goals in all three areas.

Staff all does a great job!

4. Please provide one example of a success story in your program:

As mentioned above, the processes we are implementing for board recruitment, board policies, etc. are going to define CAER in the future. The tools and knowledge that we have gained are going to greatly impact how our board and organization function in the future. The gains from this are immeasurable for sustaining this organization!

I think the evaluation of the Compass program led to our going to the major stakeholder, East Central School, to seek financial support for the program, and we got it (\$5,600 for 2011-2012). We are currently training 13 teens to be mentors, and, in conjunction with Central Minnesota Jobs and Training Services, we are offering an upcoming team-building activity at the Audubon Center of the Northwoods and additional training for them through the AmeriCorps program at the "Make Kids Matter" conference in which they can earn a certificate in the SUCCESS series. Ultimately, once the mentors are matched one-on-one with elementary students, 26 youth at East Central will have their lives enriched through the Compass program this year. One father remarked recently about his son's mentoring in the Compass program, "Thanks for your continuing excellent work with Shannon. I really see growth in him through his association with your program."

The marketing committee was able to come together and develop a new logo, get a banner made with this new logo as well as letterhead and envelopes. This is our "brand" and we have been able to use it on our website, Facebook page, banner at local events and letterhead for mailings. We have had many comments on it and that it is a good fit for our organization.

A huge breakthrough came for us in working our mission/vision statement. As a faith-based agency, we have been struggling with the relationships within and outside the church. With strong leadership from our consultant, we discovered that what we were feeling was our core values of why we do our work. When we were able to articulate this value, it enabled us to move forward with our mission and vision statements of the work we are doing. The understanding of the "why" we do what we do, and "what" we do, enabled us to grow significantly through this process. thank you!

Within hours of inviting alumni to the Brainerd Timber Bay Facebook site, there were 100's of responses. They were positive with many success stories but one that caught my attention was from an alumnus who has had a tough life including incarceration who replied. "Wish I'd of tried harder at learning what they had to offer. But I really enjoyed spending the countless hrs there. Thanx u guys"

Being the key organizer in partnership with the St. Cloud City Planner in the development of the Joint Planning District's annual Sustainability Event was a huge success. Our greatest success however has been the development of collaborative relationships with various governmental, religious, nonprofit and business entities. One such success story is the development of Maine Prairie Garden in Diocese City Park in St. Cloud. It is a project that required and continues to require support and cooperation from the City of St. Cloud, St. Cloud Parks Director Scott Zlotnik, the Unitarian Universalist Fellowship and CMSP. The Garden is in Diocese Park, water is provided free by the city of St. Cloud with the water hook up inside the UU Fellowship Church building. Much of the garden is specifically staffed by members of the African Women's Alliance and the Sudanese Women's Association although the "community garden" portion of the garden is open to the entire neighborhood. This garden is located in the heart of what is likely the highest concentration of New Americans in Central Minnesota. An open house at the garden site on 7/28/11 featured African foods is being planned and sponsored by CMSP, the UU Fellowship and the City of St. Cloud and will be a community building effort.

Because of the grant funding and training, we have been able to extend our outreach from a three county area to include the entire Twin Cities Metro area as well as St. Cloud. We toured food shelves increasing our knowledge of the issues they face that are part of our mission. In addition because of the grant funding that was available to us, we are now able to use general funding to begin purchasing new refrigerators and freezers for food shelves in our service area. This will result in increased food storage capacity for food shelves that will increase their service to the communities they provide for.

At first it was a challenge to see how an arts organization could fit in the same "need" category as some of the other groups (dealing with homelessness, domestic violence, hunger, etc). One workshop, in particular, hit me in that way. Yet when lunch came around, my two board members and I were hit from different directions from the other organizations to see if art could be integrated into their programming (or that they have used art as a tool). This made it very evident that the arts are needed! It was reassurance that our work is needed on many levels.

A local veteran who was referred to a nursing home in another community is able to continue to live independently with his spouse in a beautiful northern Minnesota lake setting.
A mother with a disability is able to remain home and active in her child's life.

The Shop and Wellness Educators program have been our two primary successes. The Shop is a virtual beehive of activity sponsoring workshops, street theater, a youth directed newspaper, homework help during the school year, access to the internet, and in general a comfortable place for 12 to 30 youth on any given afternoon/evening. The Wellness Educators began in January and is in its third session. There have been 24 participants to date, with two returning to be mentors in future groups. Participants have met or exceeded expectations for peer health education goals.

Last spring, the MOC sponsored a community meeting at the St. Cloud Public Library to provide information about immigration issues, justice systems, civics, and employment opportunities for Oromo immigrants and refugees. As a result of our ongoing effort, the MOC has become an important asset to the greater St. Cloud area. The St. Cloud Times published an article about the growth of our organization, and the story was picked up by the local CBS affiliate online.

Due to the focus and process of the development of our promotional materials we were able to get a website created and developed from a student at CLC as her project for the spring class and at no cost. The launch date is planned at the end of the month.

Our after school program is immensely successful. We have students in grades Pre-K-12 who are attending and getting help with homework. These students are growing in their skills in literacy and in their knowledge of their new community. We are all very proud of the progress we have made in this area.

The JFHML Friends Foundation project "Backstreet Books" has been a great way to bring in new people to our Library. Repurposed Book Art was an "afterthought" and has really helped the Friends to raise additional funds for the Library. Our relationship with DCL (Douglas County Library in Alexandria) was a catalyst-they were very helpful in sharing ideas. Our success became their success! The timing of everything was PERFECT: the Hallett Trustees arrived for their yearly visit in mid-September at the end of our grant cycle, and they were duly impressed by all we had achieved to begin the process of meeting their funding challenge. A quote from Margaret Poley(Executive Director of the Hallett Trust, our major benefactor): Hi Peggi. Just a quick note before I leave town again. First I want to thank you so much for your gracious hosting abilities. You and your staff always make us feel so comfortable and welcome. The library looks beautiful and we love your new store!

And even more importantly - I want to applaud you- on behalf of myself and all the Trustees on your truly amazing year. We were astounded by all the work, planning, traveling, studying and more work that you and your staff and your board of directors put in this year towards your goals. When we gave you a challenge last year we simply had no idea how wholeheartedly you would all accept it, and immediately roll up your sleeves and get to work. Wow. Think of all the things this world could get done if there were more people like all of you. We are so impressed. Thank you.

Margaret Poley
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We are really proud of our Board of Directors. We have a full board (with room to grow) and all of the executive positions are filled. It is a diverse group with great experiences to share and are willing to put in the time it takes to get an organization off of the ground.

The biggest success that we had with this project was determining the need for change in how we deliver our services. This was determined through our assessment of the effectiveness of the Father's Program. When we met with the Father Project we realized that we needed to add an educational component to our services. Then began the process of developing a 6 week curriculum. We are now just beginning to implement this into the program. This will be a major change for the Father's Resource Program but has been very well received especially in the court system.

One success story in our program would have to be our new member breakfast, which allowed the coalition to increase it's membership by 5 new members. These members are from spokes of the coalition building wheel that had been missing prior to that time and the new members have already attended a coalition meeting and become actively involved in coalition activities.

Because of the extensive engagement and outreach required to effectively and efficiently gauge and analyze all of the project elements a comprehensive picture of the region has been developed that allows us to better implement our goals. Further it has advanced the concept of Regional cooperation and collaboration well beyond the anticipated results.

My personal favorite success story beside getting out 501(c)(3) application in is our new board of directors. We have found the most wonderful group of diverse people to serve as our founding board of directors. With the foundation that we had put together when we hosted the community gathering we got a wonderful group of people who have a similar vision of making our community a better place by helping those most in need with there foundational needs to become stronger members of society by offering them the tools to shed past ways.

This process has equipped our board of directors and executive director on how a healthy nonprofit operates. It has familiarized us with a deeper notion of the roles and responsibilities of a board and how it is to function.

As a result of her leadership role on the board, one member has launched her own business. Her opportunity to lead increased her level of confidence which was a necessary component of starting her business. This goes back to one of AWA's main goals to build immigrant and refugee women leaders in the community.

From where I sit, today, its hard to think of even one....I know there are many to share....But when the world is crashing down around you, its hard to find the positive when you are trapped in a cycle of paralysis. I guess one success that does come to mind from the last year is how strong our current team is.

They are not only committed, but exceptionally gifted in their work. They are making a tremendous impact in our community, as they sacrificially serve the sick, the poor, the weak, the broken and the forgotten. I am tremendously thankful for their unwavering devotion to the mission in spite of overwhelming adversity.

With the purchase of Donation Tracker, two staff persons and two volunteers were trained in the use of the software. It became evident that the database would need a keen eye, and we were able to hire one of the volunteers to become an office assistant and take on the duty of managing the database. As a result, it is obvious that we are becoming more efficient in our donor tracking process, our financial process, and in our reporting process. That is a success story for us, as well and the fact that we were able to hire a staff person, someone who had volunteered for us for six years, is loyal to the organization, and is back in the workforce. It is a win-win situation.

We have received many comments and compliments on the design, information and ease of use of our website. We have also had a large increase in donations made to our Give MN page through the link from our website.

One obvious success story is the way that productivity has increased due to upgraded computer equipment. I could measure the amount of time we used to spend in dealing with limitations of what we were previously able to get done.

Also, I have been very pleased with the way that several Board members have risen to the task of defining the work that we do and working to define outcomes and evaluation strategies. This is very new to many people and it has been good for all of us.

We have never participated in a career fair in Brainerd before and due to the new technology we were able to impact over 150 students with a business simulation program. This enabled us to reach students who have never participated prior.

At one of the Taskforce meetings a representative from a workforce center and a representative from technology college talked about their expectations of the support for a job seekers referred to a nonprofit would receive. The expectations included a staff person coming "along side" the volunteer to teach "soft skills" (being time, how to act in a work setting, etc.), and giving an opportunity for a volunteer experience that had meaning and impact. They stated this seemed a fair trade for the nonprofit getting the free help. Several representatives from nonprofits articulated this was more than they could offer given the amount of time they have per volunteer and limits on what a short-term volunteer could do in their organization. While handled in a respectful conversation, it was clear that all involved developed a new understanding of expectations of the workforce and volunteering experience and way to test expectations the against reality. While we can incorporate examples such as this into the training, this emphasized the importance of getting workforce preparation organizations and volunteer programs in dialog.

Being able to provide support group in neighboring towns is a huge success for us. Battered women and victims of sexual assault have requested this for quite sometime. Transportation right now with high gas prices makes it difficult for participants to get to our office. Several women told us they would not be able to attend group if they had to drive to Milaca. One woman was able to complete group and move onto a life free of violence for her and her children. We also feel partnering with Rum River Health Services as a success and we are having dialogue to partner on more projects in the future.

We learned that our program participants are some of our greatest resources. A teen who is in our home visiting program was really struggling. Six months pregnant, lonely with very low self esteem. A staff member asked if she would be interested in assisting us with some of our summer programs. Her role would be taking pictures and writing an article about the activity each week to share with the community. In just two short weeks she has written an awesome article which we will use in the paper and post on our website, taken photos and is happier, feeling better about herself which we feel will only help her growing baby! Who would have thought such a simple offer would change a life so much! We have now asked her to video and interview some of our program participants for use on the website - she is very excited.

The best example I can give for this particular project (upgrading technology) is that I just used our new database to give you the information you wanted! That would have been very difficult in the past!

One of our clients reported to us this year that she has money left over in her energy assistance budget for the first time ever! She loves her solar heating system.

Our new website and communications pieces have doubled our mailing list. More and more folks are aware of us and our progress on goals. Over time we expect this to be reflected in more donations and a broader appeal.

Central Minnesota Housing Partnership, Inc. (CMHP) has submitted our very first tax credit application without the use of a consultant. The submission of this application is the first since CMHP's inception in 1993. This is a huge mile stone for CMHP as an organization. By not utilizing a consultant, CMHP will have more control of the development and provide additional resources for the organization to better serve it's mission.

Another success story would be the home that was purchase in Annandale through the acquisition / rehabilitation program. This home was purchased as a foreclosed home were the dishwasher overflow producing a lot of water damage, missing flooring, ceiling repair, etc. After the home was purchase by CMHP, a contractor was hired to fix the property and do a thorough cleaning of the furnace, duct work, and house. The ultimate homebuyer has severe allergy issues. So, when they were informed that the rehabilitation included a thorough cleaning of the home, they were very excited about purchasing the house. The household was below the 50% area median income level for that county. They received financing through Rural Development's Direct program making this an affordable and safe housing option for them.

Just today we sent out our agency newsletter via Constant Contact. In the past this would have been a paper document that went out in the mail and very costly. This electronic newsletter was then saved as a PDF document and placed on our website, reaching more people than the direct email. In addition, the link to the newsletter on our website was put on our social media site, reaching even more people. This whole process would not have happened without the training specific to our website and how to update our website. This is also helping us on our strategic plan as we have a marketing goal.

A 38 year old mother of two came to Rivers of Hope's attention one day in early June. The incident involved the family, which was documented by the local Sheriff's Department, was a verbal altercation between the woman and her husband. When the ROH advocate phone the woman, she stated that she was very relieved to receive the call because her husband was currently on probation for a previous domestic assault. However, the woman decided against filing for an order of protection at the time due to fear of the harm that may come to her. After several additional incidences in which the women refused to file a report our advocate was finally able to convince the woman. The woman recently stated that Rivers of Hope has been an angel to her and that she doesn't know if she would have ever filed for a protection order if the advocate hadn't continue to call. She said that she never felt pressured, just supported, and that she feels more independent and confident each day.

I really appreciate all of the workshop opportunities that have been presented to us during the course of the grant. I also appreciate the time that Initiative Foundation staff takes with us to help us through the grant process.

"The Stay Strong grant has been invaluable to BBBS of Central Minnesota. As a small not-for-profit, we do not have the resources to hire consultants to carry out high level projects for our agency. Jeanette Bineham did an excellent job in helping our agency create a strategic plan, update our by-laws, update our Board Handbook, and bring us into compliance with the latest regulations affecting our agency. As a result, we will be more proactive in carrying out our mission, thanks to the strategic plan. We have "modernized" the agency, making it compliant with the latest regulations. And we will better recruit and retain Board members, thanks to better orientation and training. Our agency is much stronger today because of the Stay Strong grant. Thank you!"

John Schnettler

Board President July 2009 to June 2011

"With the Stay Strong Grant our staff was able to attend many trainings and workshops. I see more motivation, involvement, and more of a sense of connection as a result of Jeannette's leadership in our strategic plan. "

Sharon A. Harren, Executive Assistant (17 years)

"I was very impressed with the level of devotion and care expressed by the Big Brothers and Big Sisters organization in Central Minnesota during my presentation to the staff. Few organizations are willing to analyze their procedures and process with the intensity and genuine compassion exhibited by this group. I greatly enjoyed presenting, as people had insightful questions related to the real problems we experience when working with children who need guidance from volunteer staff."

Frank Weber, Core Professional Services, presented to BBBS staff on sexual predators and improving our intake and ongoing assessment processes

"I have seen much more focus on clearly defined goals and the direction the agency wants to take as a result of the StayStrong grant. Big Brothers Big Sisters has increased its training of staff and – through strategic planning sessions – has developed a road map to help it reach the milestones it has set. The children and citizens of central Minnesota will benefit greatly due to these enhanced efforts to further improve the agency's ability to positively impact youth in our community."

John Holaway, current Big, former BBBS VISTA

"It was a pleasure meeting with and working with the staff at Big Brothers Big Sisters over two full days of training this summer. They understand and embrace the idea of engaging volunteers into their day to day work. They were willing to explore a new way of thinking, some were more enthusiastic than others, but all participated and worked through various scenarios that led them through the planning stages of what steps they will need to take in order to be successful in working with volunteers."

Zeeda Magnuson, Associate Director, HandsOn Twin Cities

One of the "A Brush With Kindness" projects resulted in very happy homeowners and meaningfully engaged an entirely new group of volunteers. We'll provide a news article telling the full story.

There are many successes from this program. The one that I believe will have a long-term and evolving impact is the web-page improvements. Visitors to the page have soared making sharing our information (family stories and shopping experiences) a much simpler process to a growing audience. We've been tracking what visitors use most frequently and we are adapting our strategies for information sharing to target those uses. The changes made also make adapting to more social media uses an easier process.

There have been many great things that have happened as a result of receiving this grant. The greatest success has been by far the work that we have done in the area of our Volunteer Program. If I were to look at our program one year ago and compare it to what it is today, it would pale in comparison. All the work that has been done on standardizing our methods, cleaning up our processes and files, and the greater focus on educating our volunteers and supporting them in their roles has been remarkable! I know that into the future the changes that we have made in this area will help us make great strides towards growing our volunteer base, retaining the volunteers we currently have and allowing us to meet even more people facing poverty and challenges in their lives.

We accomplished many things during this project. I would rate the addition of our new Crosby coordinator, with offices in Crosby, as the most important and strategic. With 65% of the children in the CRES schools living in single parent families this area has been a priority for us. In only a few weeks the new person has made a huge impact on the area with many new mentors and kids referred to the program. I anticipate we will double the children served in less than one year.

Our VISTA helped us with revising our manual for using the voice mail system and he discovered a way to simplify the process for both setting a client up with a number and also the process for clients to retrieve messages. This eliminated a step which had been confusing to people and made the instructions more clear.

This project has been a huge success and it will have ripple effects across multiple levels of our organization for years to come. Our cultural forums provided an excellent opportunity for diverse community groups to gather and learn about diverse community needs. This process led to one of the groups (the Sudanese) pursuing greater formal organization as a community non profit. Relationships that were developed in our cultural forum process have been nurtured towards that end.

Participants in our process have commented on the incredible relationship building across cultures that has occurred in this project. Watching Sudanese, Somali and Latino community leaders giving each other hugs at the end of meetings, is a testament to the cross cultural relationships that have been built and supported.

The results of our cultural forums have been accepted as a presentation at the National Training Institute of Zero to Three in Washington DC this December. This is a highly competitive conference proposal process, and it is a major complement to the participants to have our project represented.

Thank you!

The research we completed under this grant to find a good information management data base system was used to apply for other grant funding, which we secured and are now in the process of designing our database and upgrading all of our information management hardware and software.

Our entire board was able to receive valuable training in the area of fund development, allowing us to identify potential donor opportunities as well as collect a better understanding of our organization and the perceptions others hold about our organization.

NA

We got our website together and now we can direct people to that site to promote our events, and other community projects and events for families and small children. Even though we didn't meet all of our goals, or get to use all of our grant money, we are still holding a fall event for the community to get more people involved and build our coalition. We are also going to use the event as a fundraiser in the future since it is more family friendly and is less time consuming than our previous fundraiser.

Prior to the beginning of the HOP/SCI program, we believed that it would be strategic for our Center to become involved in the Refugee and Immigrant Advisory Committee (now the Refugee and Immigrant Equity Coalition). We sensed that this partnership would increase our expertise, our networks of contacts, and our visibility in the wider community. We also suspected that the RIAC (now RIEC) would be strengthened by our participation.

Over the course of the grant period, all of those anticipated outcomes have been realized -- and in several significant ways.

- We now have the capacity to implement a collection of strategies (including half-day and full-day educational programs, the development of a speakers' bureau, the use of web-based and print resources) to increase community awareness of and engagement on immigrant and refugee issues. When the Morgan Family Foundation learned about these strategies (via a "letter of inquiry" that we submitted to them in August), they encouraged us to submit a full grant proposal and recommended that we ask for more funding than we had initially requested (evidently, in part, because of the quality of our organization's reputation).

- We have become much more visible and known within the organizations involved in the RIEC; and two participants in the RIEC are now among our board members.

- We have been sought out by several schools and faith-communities to assist in their efforts to address immigrant and refugee issues.

- The REIC has engaged in a considerable amount of important strategic planning over the past nine months. While the primary sources of that vision and energy has come from those who were "at the table" before we became involved, I believe that our sharing about our involvement in a similar coalition focused on homelessness (the St Cloud Area Homeless Concerns Group) has supported and strengthened their sense of direction. I also believe that the other RIEC organizations see us as a valuable partner, particularly in their efforts to address the goal of "community education and engagement".

One of our advocates was attending court with a victim who has a bi-polar, PTSD and depression diagnosis. The victim was very frightened to have to see her abuser and this fear heightened her mental illnesses. Many court personnel and opposing attorney believed her to be high and intended to use that to their benefit. Because of the mental health training the advocate had received she was able to not only help the victim calm down but was able to talk to the other professionals about how these mental illnesses can manifest under stress and fear.

One success story that came out of this process was the new collaboration with the Healthy Communities Collaboration. They have a Live Better Live Longer (LBLL) Committee that is fairly established in the community. We were able to form a collaboration with this committee when the new Executive Director for OASIS/Share a Meal went to their committee to present our current programs. From that presentation, it was realized that it would be a great fit for LBLL to become a sponsor of one of the weekly Share a Meals. Historically, the serving group is allowed to plan their own menu so there is no expectation of any particular health or nutritional requirements. LBLL is going to prepare and serve a meal that is quite healthy yet tasty. This will expose our clientele to some new ways of eating as well as give an opportunity for LBLL to do some outreach to a new population. This also expands the list of possible volunteers for Share a Meal as this will be a brand new serving group. This also gives an opportunity going forward for LBLL to do continuing education/outreach to this population. This collaboration meets a need for OASIS/Share a Meal, LBLL, and our clientele. A true win-win-win situation.

Based upon the Annual Stakeholder Meeting and Strategic Planning process, INFINITY gained two new member districts to the collaborative, thus opening online learning opportunities for more students in our state.

A portion of the grant funds were used to provide National Development Council training for Region Five Staff. That staff member successfully completed the Economic Development Finance Training Program and was granted certification as an Economic Development Finance Professional by the President and Training Director of NDC.

Each class session was overbooked. Roughly 90% of those entering class one graduated from class six. We have a waiting list of fifteen families for the next class which can only accommodate 12.

In CGMC youth group program, we have a young leader who has taken every single opportunity that has been provided for her. She is helping pilot the college access program and has attended every leadership conference and social justice program we have presented to her. She volunteers with CGMC every single day totaling over 800 volunteer hours. She has become part of the CGMC Board of Directors and will be the first in her family to graduate from high school and go on to college. Before becoming actively involved, Yessenia never thought about college or much less leaving Cold Spring MN. Now she aspires to study math and education at the College of Saint Benedict and become a licensed teacher in her high school. She wants to come back to Cold Spring to be the only Latina teacher in Roccorsi high school. She wants to model the way for other Latino youth. Yessenia is an example for what can happen when CGMC invests into the potential of Latino youth.

Through the development and implementation of our Survey Monkey assessment tool, we are able to demonstrate to participants as well as funders the progress that participants make while in our program. Specifically, participants in our program increase their economic skills based on pre and post assessments.

One of our goals was to develop a fund raising plan that would increase event outreach from 1800 - 3000 participants, and increase revenue from \$8000 - \$15,000.00 . As of Oct 30, 2011 our event income is \$18,935.00 and participants at 2300 with two events to go till our fiscal year end! An action step was to have a planning month (JAN 2011) - that also happened and the result of that is we had two events that each had a chair person and a committee. Both those events doubled in size and in revenue. If we had not had an action plan to have the planning month, to get event chairs in place and host a Volunteer Summit to get volunteers excited I just don't think we would be seeing this success! Thank you!
