An Evaluation of the Omaha Community Foundation's Nonprofit Capacity Building Program – Year 2, Cohort 4

PROGRAM EVALUATORS

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Executive Summary

This report provides information to help the Omaha Community Foundation assess its newly restructured Nonprofit Capacity Building Program (NCBP). The assessment of the 2014-2015 Cohort is the first evaluation of this updated program. The questions that guided this evaluation were:

1. What is the cumulative impact of NCBP on participating nonprofit organizations in 2014 and 2015?
2. What are the outcomes specific to Year 2 compared to Year 1?
3. How can the process for managing and administering Year 2 of the NCBP be improved?

This assessment reviews the success of the program in achieving growth in identified capacity areas as well as the overall impact of the program on participating nonprofit organizations and their leaders. The report also identifies ways in which the program can be strengthened for future cohorts and additional ways that the Omaha Community Foundation can strengthen the Omaha area nonprofit sector.

The NCBP has been funded by the Omaha Community Foundation since early 2010[1] and is one of several programs available in the Omaha area designed to strengthen the nonprofit community. The NCBP provided at no cost to participants and is distinct from other programs in that it offers participants greater opportunities for self-reflection, in a peer, co-learning environment. These opportunities and environment may foster deeper and more lasting relationships among participants. In addition, the NCBP is designed to focus not only on leaders, but also on the organization as a whole—as evidenced by the grant funding for organizational development and the focus on strategic planning. The NCBP is a restructuring of the initial Nonprofit Capacity Building Initiative (NCBI) that was previously a one-year program. The second year component is a recent addition to the initial program and this is the first Cohort to have participated in the additional year.

The NCBP is perceived to have had a positive impact on the people and organizations that participated in the 2014-2015 Cohort. The pre/middle/post program assessment demonstrated increased organizational infrastructure. Over the two-year program, on average, nonprofits had a 32% increase in measured infrastructure items as identified in the NAM Infrastructure Checklist and 30% increase in legal compliance. These increases in organizational infrastructure were found to be primarily a result of the Year 1 program. Interview participants stated Year 2 allowed them the opportunity to practice and implement what they had learned in the previous year. More details on these interviews and survey findings are included in the report that follows.

The recommendations for the Omaha Community Foundation that emerged based on the findings and a review of best practices in nonprofit capacity building are:

1. Articulate the goals of the Year 2 program.
2. Find ways to continue to engage alumni:
    a. Mentorship
    b. Community of Practice

[1] As of the writing of this evaluation report, six groups—or cohorts—of nonprofit organizations have participated in the program. This evaluation report focuses on the 2014 cohort of organizations, which was the fourth such group to participate in the NCBP but first to participate in the second year of programming. The report also incorporates data from previous cohorts.

3. Create a resource center to share information such as best practices.
4. Provide access to classes on specific topics for the general public e.g. financial management (990s and dashboards), HRM, succession plans, evaluation.
5. Continue multi-method approach to evaluation.

Evaluation Purpose and Evaluation Questions

The purpose of this evaluation is to provide information to help the Omaha Community Foundation assess its NCBP overall, with specific focus on the second year programming.

As was done in the Year 1 evaluation, this report adopts Connelly and York's (2003) typology of nonprofit capacity building. Each of the following types of capacity is important, and each type must be in place for an organization to achieve its mission:

- Leadership Capacity–the ability of an organization's leaders to inspire, innovate and decide direction to best achieve its mission. This includes creating a vision, prioritizing the work flow and making correct decisions.
- Adaptive Capacity– the ability to assess and respond to changes both external and internal to the organization. This includes evaluation, planning and collaborating.
- Management Capacity– the ability to effectively and efficiently use organizational resources to carry out the functions of a nonprofit. This includes hiring, firing, policy setting and budgeting.
- Technical Capacity– the ability to deliver programs, products and services. This includes program oversight, technology, fundraising, facilities maintenance and legal compliance.

Previous assessments of the NCBP have shown that the program builds the overall capacity of the nonprofits that have participated. The Year 1 evaluation of this NCBP cohort showed improvement in the aforementioned areas. This evaluation assesses how well the NCBP changed those capacities of nonprofit leaders and their organizations, as well as any other areas that have been impacted in Year 2. In particular, the evaluation provides important information about the impacts of the recently adopted two-year program on the participating nonprofit organizations and the ways in which the program may be enhanced in the future.

The questions that guided this evaluation were:

1. What is the cumulative impact of NCBP on participating nonprofit organizations in 2014 and 2015?
2. What are the outcomes specific to Year 2 as compared to Year 1?
3. How can the process for managing and administering Year 2 of the NCBP be improved?

Program History and Design

The Omaha Community Foundation is committed to strengthening the nonprofit sector in the Omaha area. On their Nonprofit Capacity Building Program webpage, they state:

> *"We believe that strengthening nonprofits ultimately strengthens the whole community. Simply put, a good nonprofit organization has a strong board that hires capable staff that runs quality programs. The board and staff ensure that the organization continually invest in its capacity. A community will be more prosperous when its nonprofit sector is made up of these kinds of groups." (Omaha Community Foundation, 2016)*

As such, the Omaha Community Foundation has funded and coordinated the NCBP since 2010, with the goal of building the capacity of participating organizations and ultimately, strengthening the Omaha-area nonprofit sector.

The NCBP is one of several programs available in the Omaha area designed to strengthen the nonprofit community. The NCBP is perhaps distinct in that it offers participants greater opportunities for self-reflection in a more confidential environment. This may foster different types of relationships among participants. In addition, the NCBP is designed to focus not only on organizational leaders, but also the organization as a whole—as evidenced by the grant funding for organizational development and the focus on strategic planning. The inclusion of board members is also unique and shows a commitment to the focus on whole organizational leadership, not just executive leadership. Additionally, the NCBP is provided at no cost to participants. Participants receive a $5,000 grant during the first year of the program. The NCBP is a restructuring of the initial Nonprofit Capacity Building Initiative (NCBI) that was previously a one-year program. The second year component is a recent addition to the initial program and this is the first Cohort to have participated in the additional year.

Beginning in January 2014, The Omaha Community Foundation's Nonprofit Capacity Building Program (NCBP) engaged a cohort of ten local nonprofit organizations, who met the basic eligibility criteria.[2] These organizations participated in a 24-month long, multi-component program with the goal of helping these organizations develop or improve the infrastructure needed to better fulfill their respective missions. The following were selected for and completed[3] the NCBP as the 2014-2015 cohort:

- CASA of Douglas County
- Center for Holistic Development
- City Sprouts
- Heartland Workers Center
- Midlands Mentoring Partnership
- Rebuilding Together
- The Big Muddy (previously a program under United Methodist Ministries)
- Women's Fund

This 2014 cohort represented the fourth group of organizations to participate in the NCBP. (For a list of the nonprofit organizations that comprised the previous cohorts, see Appendix A.) The Omaha Community Foundation used the knowledge gained through its previous three NCBP Cohorts to refine this year's program, including adopting the Nonprofit Association of the Midlands' (NAM) Guidelines and Principles Assessments as a measure of organizational infrastructure capacity before and after the 2014 program. Another major change was the shift from a one-year program to a two-year program. This cohort was the first cohort to participate in the two-year program.

As in 2010 through 2013, the program was largely organized and facilitated by a project director on contract with the Omaha Community Foundation. Programing centered on organizational capacity and leadership development.

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[2] Basic eligibility criteria for nonprofits applying for inclusion in the NCBP were: 501(c)(3) status; at least two full time equivalent staff; an annual budget over $300,000; founded at least 5 years ago; and a history of sound financial position as indicated in audit or budget information. Additionally, applicants were asked to provide a written response to several questions.

[3] One organization ceased to exist after Year 1 and did not participate in Year 2 programing. A second organization completed Year 2 programing but ceased to exist before this assessment was conducted. As such, only 8 organizations were available for data collection for this assessment.

The **organizational capacity building** component consisted of:

Year 1

1. The online completion of an organizational capacity assessment tailored to nonprofit organizations (the NAM Guidelines and Principles infrastructure and practices assessments[4]) by the executive director[5]; followed by discussion during a board meeting of the findings with the project director.
2. Assistance, if needed, in developing or refining a strategic plan for the organization.
3. A grant of $5,000 through the Fund for Omaha to be used for a strategic plan, if necessary, or other capacity building areas if there was a current strategic plan.

Year 2:

1. The online completion of the NAM Guidelines and Principles Infrastructure assessment.

The **leadership development** component targeted both executive directors and board leaders (board chairs and vice chairs). This leadership development component consisted of twelve half-day monthly roundtables in Year 1 and five half-day roundtables throughout Year 2. Executive directors attended each of these meetings over the course of the two years. Board leaders attended these meetings alongside the executive directors four times over the course of Year 1, and twice in Year 2. Year 1 meetings included discussions and dissemination of tools related to: nonprofit leadership, organizational development, the development of organizational narratives, team building, strategic planning, human resource management, board development (roles and responsibilities, legal responsibilities, board reporting, recruitment, consent agendas, and board self-assessment), financial reporting (dashboards/key indicators), communications and marketing (brand development, annual reports), sustainability/succession planning (board and executive directors) planning, and performance evaluation for the executive directors. Year 2 was geared specifically towards the needs of the cohort. They decided to focus primarily on communications and marketing, and fund development; and secondarily on strategic planning and sustainability.

Methodology

Data for this evaluation of the NCBP were gathered using qualitative interviews and quantitative data collected through the NAM guidelines and principles assessment.

Interviews

Semi-structured interviews with the cohort of executive directors were conducted during March-April 2016. In total, eight interviews were conducted with the participating executive directors in the Year 2

[4] NAM Guidelines and Principles provided two online assessments: an infrastructure assessment and a practices assessment. The infrastructure assessment focuses on the infrastructure that nonprofits should have in place such as "the documentation, systems, policies, procedures, and support mechanisms that nonprofit organizations should have in place to comply with the law, and to function effectively, efficiently, and transparently" while the practices assessment focuses on how to utilize those systems/processes (NAM Infrastructure Checklist, 2014).
[5] While nonprofit leaders may be referred to as executive directors or CEOs for the purpose of this report, executive director will be used.

NCBP (January 2015 – December 2015)[6]. All eight executive directors were interviewed in person. These interviews were used to gather information about each individual's experience with the program over the course of the second year of the program, the impact of the NCBP, and how the NCBP could be improved. All interviews were digitally recorded and transcribed. Transcripts of interviews were entered into the MaxQDA software system for coding and analysis. An initial, *a priori* coding scheme was developed by the evaluators based on the interview protocol. After some early coding was complete, the codes were revised to reflect the addition of new themes, finer parsing of existing themes, and the elimination of themes that were not useful. The results include common overarching themes within each of the levels of analysis as well as micro-variation within each of the themes. This report sought to capture and highlight common themes across the interview and assessment data. Therefore, not all data collected is included in the report.

NAM Guidelines and Principles

As a supplement to the interviews, the NAM Guidelines and Principles Assessment was completed by the participants prior to their participation, after completion of the NCBP Year 1 and after completion of the Year 2 program. The pre/mid/post design was chosen as a way to measure the extent to which the participating organizations increased their infrastructure capacity over the two-year program.

The NAM Guidelines and Principles assessment provide legal compliance and best practices information in twelve major areas of nonprofit management: Communication, Evaluation, Financial Management, Fundraising, Governance, Human Resources, Information Technology, Public Policy & Advocacy, Strategic Alliances, Transparency & Accountability, and Volunteer Management. The **Infrastructure Checklist** is a comprehensive overview of the policies, procedures and documents organizations must or are recommended to have in place in order to be effective. As sample report can be found here. Executive directors of participating organizations registered on the NAM website and completed the assessments online.

Executive directors identify which items the organization has in place for each of the twelve areas. Upon completion, the assessment is submitted to NAM where a report is created and returned to the organization. A copy is also provided to the UNO assessment team and facilitator. Assessment results are not public. The report highlights which areas are "On Fire" and requires immediate attention. These are areas that are required but not in place. The report also shows the areas and items that are Very Important – strongly recommended items that were marked as 'not sure' or 'in progress,' Important – recommended items that were as marked not sure or in progress, Excellent – items that the organization had in place currently, and Not Relevant – items that are not relevant to the organization. As part of the NCBP the program facilitator reviewed the results of the initial assessment with each organization's executive director and board during a board meeting.

All participating executive directors completed both the infrastructure and practices assessments as a pre-test in November/December of 2013. Participants completed the infrastructure assessment again at the end of the first year, February/March 2015 and finally again in March/April 2016. This pre-, mid- and post-test infrastructure assessment data were used to evaluate the extent to which infrastructure specific capacity building occurred in the participating NCBP organizations. The practices assessment

[6] Two of the original ten executive directors were no longer in their positions, in fact, both of those organizations closed by the time of this report.

was not required to be completed after the first year of the NCBP and therefore, the mid- and post- data for that assessment was not available for analysis.

The response rate for the pre-, mid- and post-test was 100 percent for all participating organizations that completed the two-year program.

Taken together, data from the infrastructure assessments was used to investigate the extent to which nonprofit organizations that participated in the NCBP had changes in their organization's infrastructure. Results of the assessments and interviews are discussed in the sections that follow.

Limitations

There are several limitations that should be noted in interpreting the results of the assessment.

First, this approach does not provide information about the likelihood and extent to which reported changes would have occurred within these organizations even in the absence of the NCBP. In other words, any observed changes may or may not be directly attributable to the Initiative. As Abt Associates (2010, p. 2)—who also used a before/after method in their evaluation of a federally-funded nonprofit capacity building program— note, observed changes may be due to a range of factors other than the capacity building program itself.

Second, because of the small sample size, tests of statistical significance are not appropriate and results are not generalizable to a larger population.

Third, the NAM assessment and similar assessment tools are designed for nonprofit managers to understand and track their own organization's capacity (Guthrie & Preston, 2005; McKinsey, 2001). In other words, they are meant to be used as self-assessment tools rather than tools to measure change over time. Nonetheless, such a survey instrument can provide some indication of whether or not organizations in the cohort have improved capacity in the areas of focus addressed by the NCBP.

Fourth, there was a significant amount of time that elapsed between the end of the program and the interviews/post-test. This could impact the recall of participants who were asked to remember information from over a year past the time of the interview. Participants did note that they did not remember all the program details and in fact, some confused the information from specific years of programing. Therefore, the information presented in this report may not represent the entire impact of the program as a result of participant lack of recall.

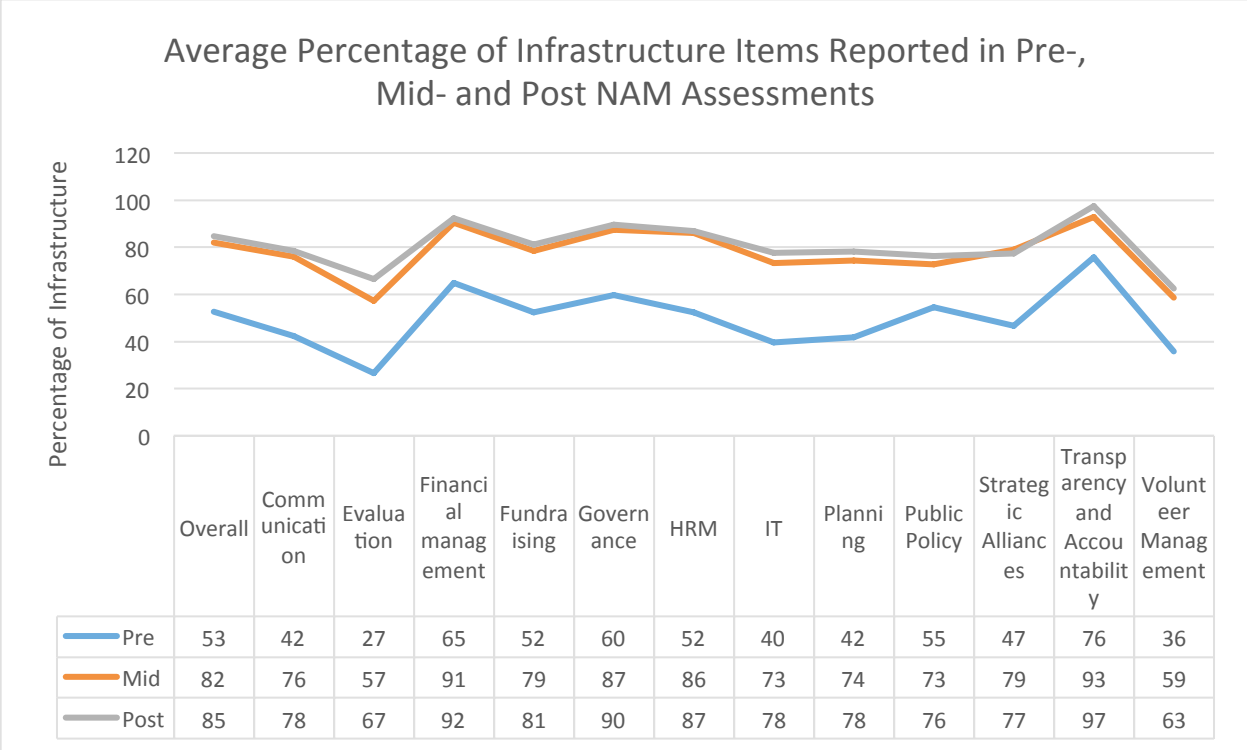
Findings – Impact

NAM Assessment Results

The NCBP has had an overall positive impact on the participating organizations. Participants reported that they had made progress and implemented needed changes at the end of both years. The pre-, mid- and post-NAM assessment demonstrated an increase in organizational infrastructure, i.e. policies, procedures etc., in place to assure effective and efficient functioning across the two years of the program. At the end of year 1, the most positively impacted areas were information technology, human resource management, and evaluation though all of other capacity building areas were shown to be positively impacted as well. In Year 2, the capacity building areas of evaluation, information technology, communication and marketing, and planning were most positively impacted. It should be noted, that

Year 2 programming specifically addressed communications and marketing, and strategic planning so the increase in impact should be expected; however, the consistent increase in evaluation and information technology, demonstrated the longer-term impact of the NCBP on these areas. The following section explains the change in infrastructure of participating organizations by examining the pre-, mid- and post-NAM assessment results.

Figure 1 below shows the average percentage of infrastructure items reported by participating organizations in the pre-, mid, and post-NAM assessments. The percentage of items that were reported from the pre-test to the mid-test shows a consistent increase in all capacity areas (approximately 30 percent). The percentage of infrastructure items from the mid-test to the post-test also showed consistent increase; however, the impact was considerably less (average 3 percent increase). This suggests that the majority of the impact on organizational infrastructure occurred in Year 1.



	Overall	Communication	Evaluation	Financial management	Fundraising	Governance	HRM	IT	Planning	Public Policy	Strategic Alliances	Transparency and Accountability	Volunteer Management
Pre	53	42	27	65	52	60	52	40	42	55	47	76	36
Mid	82	76	57	91	79	87	86	73	74	73	79	93	59
Post	85	78	67	92	81	90	87	78	78	76	77	97	63

Figure 1: Average Percentage of Infrastructure Items Reported in Pre-, Mid-, and Post- NAM Assessments

Areas that showed the most change from the end of Year 1 to the end of Year 2 were evaluation, transparency and accountability, information technology, volunteer management and public policy (See Figure 2 below). It is interesting to note that the areas of evaluation and volunteer management, while showing the most change from mid-test to the post test, also appear to be the least developed in the reported infrastructure items in Table 1. This could be as the majority of items in those areas were not required for compliance but instead were strongly recommended or recommended items. Organizations focused primarily on addressing the required items during the program and as such these strongly recommended or recommended items may not have been addressed at the time of this report. Overall, though, there was growth in each capacity building area.

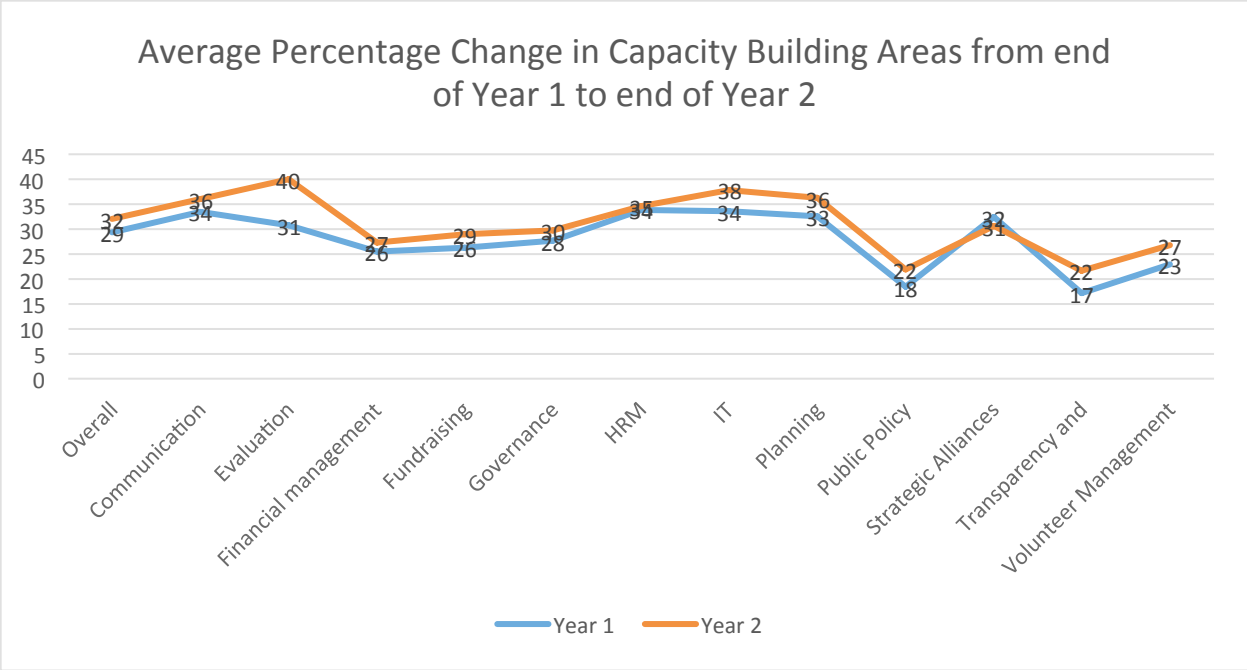


Figure 2: Change in Capacity Building Areas (as identified in Infrastructure Checklist

It is important to note that executive directors stated that the NAM Assessment was important in providing a guideline of things that needed to be addressed by the organization. One executive director explained its strength:

> *"I think the NAM survey was very good the first year and I would never have realized how much work I really needed to get done without that. And with just two years, the fact that we got it all done. Yeah. It did help the organization be strong because we didn't have very good employee policies or anything in place."*

Interview Findings

Organizational infrastructure is only one measure of organizational capacity. Utilizing Connolly and York's (2003) typology, the interview data explored other capacity dimensions, including leadership, adaptive, management and technical capacity. All capacity dimensions were found to be positively impacted in Year 2, albeit at varying degrees. The following section details the results for each capacity area based on the interview data and the NAM assessment data. All direct quotations are from Year 2 interviews.

Leadership Capacity

Leadership Capacity is defined as the ability of an organization's leaders to inspire, innovate and decide direction to best achieve its mission. This includes creating a vision, prioritizing the work flow and making correct decisions.

In the first year assessment of Cohort 4, participants reported that leadership capacity was impacted in the following ways: developing stronger internal and external relationships, clarification in roles and duties of executive directors and board, and increased confidence in ability. After the second year of the

NCBP, executive directors also stated that their leadership skills were positively impacted by the program in the following ways: taking action to initiate change and empower staff members, and developing better relationship with their board. Executive directors also described being able to create a relationship of shared leadership with board members. The following are the common themes that emerged from the Year two interview data in regards to how leadership skills were impacted by participation in the NCBP.

Year 1	Year 2
Confidence --Individual ability --Validation of skills --Peer learning	Taking Action --Initiating Change --Empowering Staff
Clarification in roles and duties of executive directors/CEOs and board	Strengthening relationship with board --shared accountability --increase trust
Developing stronger internal and external relationships	Shared Leadership with Board

Table 1: Summary of Leadership Capacity Findings.

Taking Action to Initiate Change

Participants reported an increase in confidence in their abilities as an executive director in both assessments. In Year 1, executive directors also discussed the validity and credibility that they felt, that led to an increase in confidence. In Year 2, the focus was more on how this confidence allowed them to be more productive. For example, one participant noted:

> *"I think it really helped me gain confidence in my abilities as an ED…I feel like we made a lot of change. I really do and a lot of that came from the confidence I gained."*

Another executive director, specifically noted the difference in confidence from Year 1 to Year 2 of the NCBP:

> *"Yeah, I think Year one definitely helped as kind of the new ED, helped kind of build confidence, and here's where it's at. And then Year two, again, just helped kind of solidify and strengthen that."*

Additionally, participants noted that the materials received were helpful in building their confidence as the materials assisted the executive director in building legitimacy with the board. (The impact of the NCBP materials is further discussed in the process section of this report.)

> *"I think it really helped me gain confidence in my abilities as an ED. And the materials – providing me with materials that I could share with the board so that they were on the same page with me so that they didn't just think that this is coming from out of the air, that I had these ideas. But*

they would say, oh yeah, this research shows this is good and here are some steps to take because this is a good process."

Empowering Staff

One interesting difference in participants' reports of increased confidence is that in Year 1, the increase was a personal change, that is, something that was experienced by the individual solely. However, in Year 2, participants suggested that the increased confidence in their leadership skills allowed them to delegate and empower their staff. This implies that Year 1 had the impact of building the individual leadership knowledge and skills of ED's and Year 2 was about action within the organizational context. For example, one participant described how the program clarified their role as executive director and encouraged them to focus on their leadership role instead of other duties:

> *"Well, probably some of the things that I learned at the leadership initiative encouraged me to broaden my scope in terms of staff. Because I realized there were a lot of things that I was doing as executive director, running to the post office, licking envelopes, probably were not executive director responsibilities. And so it encouraged me to focus on the things that ED really needs to do in terms of doing development and organizational structure and mission driving. So that made me realize we needed to expand, that I couldn't do all of the things that I thought I could as we grow the organization."*

One executive director discussed how the program increased their confidence and allowed them to share appropriate information with the staff. This created a bond with the executive and staff:

> *"I think overall it's just made me more confident which I was able to come back and talk to my staff. I would always come back and talk about what we shared. Certain things that I thought would be really beneficial for them so I felt like they got to go through it with me. To the point where it's applicable for them."*

Additionally, one executive director noted that the increase in confidence allowed for more assertive decision-making at the individual level but also allowed for shared decision-making with the staff.

> *"I have more confidence that – when I make a decision, I'm not naturally somebody who says, "You're going to do it my way," and when I had to do that, I don't [falter] as much. But what it's also doing, I think, the confidence to open up decision-making, at least to some extent, with the staff."*

Furthermore, one executive director noted the need for staff development in regards to sustainability, as shown by their discussion of the role of staff in succession planning:

> *"With employees, I did realize that this capacity building that I learned, I need to transfer the succession plan to my senior staff. So, this year, we are – because of those trainings – we are putting six sessions to train, in terms of capacity building, our senior organizers. And also, senior organizers, now, are coming, attending some of the board meetings as well, so that changed… – we delegate more and the senior delegate to the rest of the staff."*

Overall, the NCBP has positively impacted the executive directors' confidence, which, in turn, has impacted their ability to initiate change and empower staff. It should be noted that only one executive director discussed their relationship with volunteers (excluding board members) and as such, the

relationship with volunteers was not addressed in this report. This lack of discussion could be as these executive directors have staff to manage volunteers and therefore, were not responsible for volunteer management.

Developing a Relationship between the Board and Executive Director

At the end of Year 1 of the NCBP, participants discussed the clarification in roles and duties of executive directors and board as among the most beneficial aspects of NCBP. In Year 2, executive directors reported strengthening the relationship between themselves and their boards with shared accountability, greater clarity of roles, recognition in developing relationships, and increase in trust. These are further described in the section below.

One executive director discussed the shared accountability that developed with the board in that they were involved in many recent processes such as audits and decision-making:

> *"I think that there is starting to be more accountability towards me, but also I think there is more accountability towards them, in terms of "let us not [have] too many commitments when we are smaller". Let us be clear about… And be sure what we are doing or not. Also, we need capacity building. So, they spoke among themselves and now we have [these] trainings every month. They have to give extra time now to get trained. Every month they are getting two hours [of] training. And also, they are more clear about the mission and vision of the center, but also decisions, having – being made more from them. Like, we just finished our audit, and the board was involved in the whole thing, in the whole process from the beginning to the end, and I really like that. That they give time and they were part of the whole thing. The decision that I need to make with the organizations with partners or potential funding allies, they have been part of the whole thing as well."*

The greater clarity in roles between executive directors and their boards were noted as well. However, while Year 1 findings illustrated understanding about the distinctive character of their roles, Year 2 showed how these roles were actively separated, with board and executive focusing more on their respective roles. As one participant noted:

> *"I felt like I was in control of everything because that was how it was before, but I think the board felt the same way oddly. They needed to take care of everything. Now, in year two and beyond I don't feel worried about what they're doing and I think the same thing is true. So, I feel like because of the trust I feel empowered to do my job and actually have board members saying "That's not our job. That's your job." You know, like we are doing budgeting. "You just present the budget we'll approve or deny it. We don't wanna know all the nitty gritty." That's just such 180 from where we were."*

Another executive director noted that the NCBP facilitated the development of relationships with the board members both as individuals and as a whole:

> *"So recognizing that the importance of the individual relationships with each board member, but also their power as a group versus as individuals. So it definitely – it, again, helps you retool why am I thinking this way when here's what we need to be doing. So, yeah. I think that we have good relationship."*

This recognition of the importance of developing the board and executive director relationship was echoed plainly by this quote from an executive director:

> *"But the focus on that board's ED relationship is far more. Because without that, you're just not going to be successful. You can do everything else well, and if you're at loggerheads with your board or your board is dysfunctional, no matter how good your program is, eventually it's going to come back and bite you."*

One executive director specifically discussed the development of trust, which allowed for an improved relationship between the board and executive director:

> *"That was one of the major things that came out of it. There's – the relationship with my board really improved and that could be a natural thing that happens for me because I was a newer E.D. But I felt like, again, just the trust between board members and the E.D. really increased so there wasn't a lot of – we weren't spending a lot of board time on what I do here in the office. We were spending it more on governance. Which was helpful so I felt like the new board chair that came in during year two really started to implement some of the things that she learned in the sessions."*

Overall, executive directors reported understanding the need to develop relationships with their board as well as increased trust and accountability that allowed for better relationships with their boards.

Shared Leadership

One theme that was more prevalent in Year 2 was the concept of shared leadership. Executive directors noted that there was a focus on developing their relationship with their board, but interview participants also discussed how their relationship has evolved with a greater focus on shared leadership. For example, one executive discussed how the NCBP allowed the board to see the executive director as a leader:

> *"I think the overall program did in a positive way as that they – from the beginning they've always seen me as and treated me as the leader, but I think it strengthened that, and looked towards me as the resource versus looking outside the organization."*

One executive director discussed the increase in trust, and the partnership with the board that was formed after the second year of the NCBP:

> *"I'd say I feel like the second year I had more trust with them about everything that we were doing. The affirmation that I'm an equal with my board and we're doing this together. It was a really important affirmation for me because it's easy for executive directors to think that their boards were [bosses]. Mary Lee really, really, really hit home that this is a partnership. I think it just gave me more confidence, the second year."*

Another interview participant explained the NCBP allowed the executive director to have a role in guiding the board, which could be considered part of the shared leadership role in their organization:

> *"And then having the…power and that's not even – that's not the real word I'm thinking of, but that is a leadership tool to make sure that I'm enforcing it rather – that's not really what – that's not – those aren't really words I'm trying to – that's not explaining it the best way, but more to guide them…in other organizations I've been with and knowing other executive directors that it*

wasn't equal. And so the executive director did not have the power and wasn't looked to them as being a leader so it was hard to guide the board in the right direction …And so I feel like that was definitely a benefit of this and something that I wanted to work on to make sure that if I said, "This is the right way to do it" that they trusted me that it was the right way to do it."

Interestingly, the development of this shared leadership also allowed for less stress for both the executive director and board members. One executive director describes how developing this relationship allowed for both executive director and board to feel calmer:

"I think they feel more calm and so do I. And so I'm able to focus on what I need to do day to day. I don't feel like there's a conversation we can't have so that, again, some of the reasons that we got really wanted to get into it was that there was conversations that I felt like I didn't or shouldn't have because I'm the E.D. and it was board government stuff. Where now I feel like because we've gone through some of these things together there's conversations that we can have and I'm not telling them what to do, but it's more of like as a peer or a partner like "What do you think?" versus I've got this nervous knot in my stomach because I really want them to do this and I can't tell them to do this."

Overall, while the first year of the NCBP allowed for clarity of roles and the beginning stages of relationship building, Year 2 fostered these relationships to the point of shared leadership, with increased trust, developing more meaningful relationships, improved clarity in roles and increased recognition of need for relationship building between board and executive director.

Adaptive Capacity

Adaptive capacity is defined as the ability to assess and respond to changes both external and internal to the organization. This includes evaluation, planning and collaborating.

In Year 1, interviewees reported that their organizations were more sustainable and resilient as a result of NCBP. Specifically, participants reported positive impact in being able to strengthen their strategic plan, strategically developing their board, and developing their succession plans. After the end of year 2, participants reported positive development in those areas as well as positive impact in the area of performance assessments. These are discussed in this section.

Year 1	Year 2
Strengthening strategic plan	Revising and implementing strategic plan
Developing a succession plan	Developing a succession plan (little to no change)
Strategic development of board development	Implementation of strategic board policies and their value to board effectiveness
	Performance Assessments

Table 2: Summary of Adaptive Capacity Findings

Revising and Implementing the Strategic Plan

Strategic planning was a focus for the Year 2 program. However, participants reported significantly less focus on development of the strategic plan in Year 2 compared to Year 1. Overall, organizations noted that they now had a workable plan that they were using currently which most did not have in Year 1. For example, one person described the development of a revised, working strategic plan during both years of the NCBP:

> *"We did one right before we started session one. And then we did another one. And the prior one that we had done was just not an effective strategic plan at all. So to be able to revisit the strategic plan and have it actually be a working document was great."*

Another executive director detailed their transition from a task oriented strategic plan to a goal/vision driven strategic plan:

> *"We spent Year two also redeveloping our strategic plan. We actually had Mary Lee come in and help us work through it. And what we decided – number one, the plan and when we interviewed for the program, Mary Lee was like, "This is like the worst strategic plan," because it was very tactical. It was very much like, "Step one, you do this. And then you have a meeting. And then" – and we were like, "Look at us! We're doing great!"* ***So what she helped us really figure out is that as an organization, in our strategic plan, we have four major goals. And those goals aren't necessarily gonna change.*** *We should really re-look at them, and is that what we're working for. But what we did instead is our strategic plan is basically those four goals. And then she helped us develop an annual 12 – 18 month action plan. So what are we gonna do in each of those four areas for the next year, year and a half?* ***The thing that the program also helped us realize is that we don't necessarily need a three to five year plan.*** *If we focus on those goals, it gives us the flexibility to take on things that – and kind of strike when the iron's hot, if you will."*

Additionally, one executive director cited the focus on strategic planning as the greatest strength of the program when asked what the most valuable tool of the program was:

> *"Probably the need for a strong strategic plan, and doing your best to stick to it."*

Overall, the main impact in Year 1 was the recognition of the importance of strategic planning, and Year 2's impact was in better developing and implementing the strategic plan.

Implementation of Strategic Board Policies

Adaptive capacity was also increased with strategic board development through better recruitment of board members and the creation and implementation of board polices that allowed for board effectiveness. Board development, both in recruitment practices, and development of policies and procedures, is needed for effective nonprofit organizations. Board development is an adaptive capacity because the board is responsible for the overall governance of the organization, and needs to assess and respond to both external and internal changes to the organization. In Year 1, the majority of organizations stated this was a capacity area that was greatly impacted in the following ways: the creation of board committees; introduction of policies such as consent agendas and term limits; board members practicing elevator speeches; and. new board member recruitment strategies. In Year 2, participants noted the implementation of the preceding items and their value to board effectiveness. For example, one executive noted:

"I think our board meetings will become more efficient and working on agendas and all the things we weren't doing before. I feel like we have capacity at the board level to probably take on more and think about – so maybe I just use my board more. Because it isn't just about business anymore, now it's thinking bigger."

Another executive director also notes the effectiveness of the board development tools provided:

"When I first came on, and actually right before Year one, we didn't have a consent agenda. We were doing committee reports. We have 16 [committees]. But so people would come to the meetings, and it's like, "And then we did this, and then we had this meeting." And everyone was like glazed over, "I don't care. Like what are we actually doing, and what are we here for?" And so one of our first steps after completing the guidelines and principles at the beginning of it is we implemented consent agenda, and since then map out our board meetings for the year. We have a different mix of governance and education and development. So really, really thinking through how do we best use their time and their expertise to move the organization forward. And those are things that come from, again, those best practices that we talked about during Year one and two."

A consistent trend throughout the interview data was the increased focus on board development and utilizing members more strategically. One executive director explained the value of the NCPB as:

"It helped me realize that I need to utilize the skills of my board and that it's not just an honorary position where they get together once a month and just kinda talk about what happened. But they're really providing expertise in areas that we need it."

Beyond the need to get committed board members, executive directors also noted the need for strategic board development and finding people who understand the value of the organizations and are mission driven:

"I think we're also really examining the make-up of our board, and how we strategically get good people who wanna see us move forward, who understand our values, I think really solidifying the value of the [organization]. And so when you come on to the board, it's not about you. And we've had to have a lot of those conversations, specifically as we've gotten more engaged in public policy. I could tell you that, for example, we've had a lot of conversations of, "So what if we, within our policy agenda, we advocate for or against something, and one of our corporate donors gets upset about it? Like what does that look like?"

Similar to Year 1, board recruitment became more strategic to the needs of the organization. For example, one organization discussed the need for an IT professional on their board and strategically filling that position with someone with the desired skill set as well as the interest in the organization.

"And when we went to a new computer system, so we all got laptops and we have a new phone system and we are doing one cloud-based things now. So it was a complete change and I really just turned it over to the board member. And he was responsible for the training and he helped us decide what product to buy. And I felt completely comfortable realizing that when we brought him on that was the expectation, that we really need some help in the IT, and we're growing, and this is where we're gonna need you to help. And he's been great at that."

However, as this executive director explains, there is the understanding that board development is a process that involves the tools provided by the NCBP including term limits and strategically electing board members:

> *"And this has been a process. I mean, when we first started the program in year one, we still had very much of a founders board. So, we started the process of strategically planning but we still had a few board members that were on who had been on previously. And so we were encouraged to enforce term limits and help them to move on and help us to gain new ones. So we just looked at – through our strategic plan looked at areas where we were weak or needed support. And that's how we've looked for our board members."*

Overall, Year 1 findings demonstrated the need for strategic board development, especially in recruiting board members and Year 2 demonstrated more effective board development practices by participants.

Developing a Succession Plan

In Year 1 some interviewees discussed a need for succession planning for both executive directors and boards. However, in Year 2, participants still noted that a succession plan needed to be created. Therefore, while there was recognition of the importance of succession plans, this was an item that still needed to be worked on. One participant admitted:

> *"My goal from Year one was to map out that succession plan, and I still have not done it."*

Promisingly though, two participants noted their realization that the organization could (and should run) without them, when both participants had to leave their role for an extended period (vacation and medical leave). One participant described:

> *"But the idea of the stuff that gets piled on and you think are fires aren't actually fires. And so remembering like if I go on vacation for a week, and you ramp up and you're like, "I gotta get all this done. I gotta get all this done." And if you're on vacation, you're like, "I gotta check my phone!" You don't – it doesn't actually matter. And it shouldn't matter, especially if you've prepared everybody, and you've empowered people to be able to make decisions. I mean, unless the actual house is on fire, it's really fine. And I would say also, from our perspective, nobody's gonna die if we don't – I mean, there's systems at play, and we want to improve that, but from a systems level, it's already happening. So, yes, we'd like it to happen faster, but at the end of the day, do what you can, and go as far as you can and not beat yourself up about it. So I would say, again, that scheduling time and really mapping out how you use your time."*

Therefore, even though a formal succession plan was not in place, the participants had planned for their absences and the organization was prepared. Additionally, another participant was able articulate the need and scope of the succession plan, showing the understanding for the need for and complexity of these plans with the following quote:

> *"The main thing will be, in terms of – to well develop a succession plan, meaning that we need to train the staff, meaning that we need to create the literally the succession plan approved by the board. But succession plan is not just for myself, but it is also for the board members, that we have been kind of thinking about it."*

Overall, participants understand the need for and the importance of a succession plan, but this is an area that may need further development in the NCBP to allow for increased completion of plans.

Performance Assessments

The NCBP was shown to have a positive impact on evaluation infrastructure (31 percent increase at end of Year 1, and 40 percent increase total). It should be noted that for this report, evaluation refers to the evaluation of board members, staff and the executive director. This can be more succinctly described as performance assessments. It is interesting to note, that while this was the area of most change in the NAM assessment, the interviews revealed that organizations are more aware of the need for performance assessments but have not consistently implemented evaluation/performance processes. Executive directors noted that processes were mainly in place for staff performance assessments but assessment of the executive director was still, in some cases, being developed. Performance assessments of board members, was recognized as necessary but few, if any, organizations reported any policies or processes in place for this area. For example, one executive director notes the organization's evaluation process was tied to the strategic plan:

> *"[The executive committee] evaluate me now, and set what my salary's going to be and that sort of thing, which is good. I do much more regular evaluations with staff now. We check in regular, but there's a more formal every six months. We talk about how they're meeting their goals and that sort of thing. We're not doing as well, I don't think, on board evaluation as we could. I think I need to work with our board chair a little more to focus on that. He is – it's still rather informal, but he's done a pretty good – if we have a board member who's not making meetings or who hasn't given for the year, he'll go have lunch with them and have a talk, which I am grateful for. Mine is focused on the strategic plan. I encourage feedback. The evaluation we do with me, look at the strategic plan and try to put it in relation to that. With staff, it's still related to the strategic plan, but it's much more specific than the broad outcomes on the strategic plan. But they all – they work their way back to that or up to that. Our board evaluation is pretty informal, and I would like to make that more formal over the next couple of years."*

Therefore, staff and executive performance assessments may be more developed than board member performance assessments. This may be an area where further development is needed.

Management Capacity

Management Capacity is defined as the ability to effectively and efficiently use organizational resources to carry out the functions of a nonprofit. This includes hiring, firing, policy setting and budgeting.

The management capacity of participating organizations was positively impacted. This was demonstrated by the changes in capacity building areas such as human resource management, communications and marketing, and financial management. (See Figures 1 and 2). The following section describes the impact of each of these areas specific to the interview findings.

Year 1	Year 2
HR Policies and Practices	1% increase from Year 1 Increased staff More focus on staff development Support still needed
Communication and Marketing	2 % increase from Year 1 Increased resources and focus Infrastructure Checklist may not capture all movement
Financial Management	1% increase from Year 1 Among the areas most impacted in interviews 990s, dashboards, hired an accountant, board led finance conversations

Table 3: Summary of Management Capacity Findings

Human Resource Management

Over the two-year program, organizations showed a 35 percent increase in HRM infrastructure developed. It is important to note, there was only a slight increase (1%) between Year 1 and 2. However, all but one organization reported an increase in staff in Year 2. Participants did note the importance of the HRM resources provided by the NCBP:

> *"I think the resources presented to us have had a lot more in terms of accountability and proper HR process and I feel like that has been – that's really good for the organization."*

Similar to the staff empowerment described in the leadership capacity section, one executive discussed staff development when discussing their human resource capacity:

> *"I think that we added a little more emphasis on staff development, on providing education and resources so that they could get better at their jobs. Whether that is sending them to somebody in HR or classes, or for our staff who are doing the technical work, sending them to conferences where they learn the latest, we've done some of that. For me, it looks like being able to the online training…And recognizing that we needed somebody who was devoted as much as possible to development, so realigning the staff responsibilities, and we were able to bring on a new staff member, another staff member…. To do more of that and also start developing some skills and the other aspects of development."*

However, while HRM skills were one of the most positively impacted capacity areas at the end of Year 1 (34% increase), there was little change in Year 2 (1% increase) in infrastructure built. Participants noted, that while Year 1 provided needed HRM tools such as employee handbooks and implementation of HR policies, they still needed further training on HRM. For example, one executive director stated explicitly:

> *"Maybe I feel like I could have used more on HR policies, and hiring, and firing. Maybe just firing. Firing is so challenging but I think I could have used a little more of that."*

Furthermore, the personal aspects of management and leadership need to be developed. For example, one executive director stated:

> *"I think that staff piece, that staff management/leadership, what's the best way to do that? I'm pretty laid back until I'm not. I don't wanna micromanage you until I feel like something's not getting done. I don't wanna have to do that. So what's a better balance of that, I would say. I'm still working on it."*

One executive director noted that HR is one of the "hardest parts of the job" and asked for best practices in addressing issues:

> *"We do have to continually look at role and responsibilities, but I think that's a good thing versus just saying, "No, this is the way that it is." We're always questioning, "Well, how could it be better, and what would that look like?" And maybe I would say from that perspective in Year two or Year one, really thinking through that staff development or that staff management. I know for me personally, the HR staff piece is the hardest part of the job. That balance of "I'm your boss but you're an adult and how do we move that?" So I would say any resources that could be provided. And when I think about the organizations in my cohort, smaller, like how do they ride that line of, "I need you to get it done, and also I need you to take care of yourself." So what are, again, best practices?"*

The NCBP appears to provide a good foundation for developing effective HRM practices but the findings suggest further development is needed in this area.

Communications and Marketing

In Year 2, communications and marketing was a specific area of focus. There was a 36 percent increase in communications and marketing infrastructure developed in Year 1, and a modest increase of 2 percent in Year 2. While this slight increase might not specifically show the impact of Year 2's focus, this continues to be an area where executive directors are focusing efforts. For example, one executive noted a focus on annual reports:

> *"I think the biggest thing is an annual report. So we did one annual report and we did a second annual report, so that was really good. And so I wanted to continue to work on that. I think that's probably the main thing."*

Additionally, another executive director stated their organization hired a dedicated staff person focused on communication and marketing:

> *"Communications and marketing, we have a full-time staff dedicated to now, and really digging into that. We've taken on in-house. We used to contract …to provide our quarterly magazine… We now do that in-house."*

Therefore, while the percentage in change has not increased significantly, participants stated that there has been development in this area. This suggests this growth and development is not captured in the NAM Assessment.

Financial Management

Over the two-year program, organizations reported a 27 percent growth in financial management infrastructure, 26% growth at the end of Year 1 and a 1% increase in Year 2. Despite the very slight increase in infrastructure between Year 1 and Year 2, interviews show that this was one of the most highly impacted areas in Year 2. The sessions on 990s and dashboards were described as one of the most helpful sessions. For example, one executive director stated:

> *"One of the things I loved learning about was the 990 Form and why that is so important… I think one of the biggest things was the financial reports, and Dashboards, and reading financials, and communicating your financials. That's all any donor cares about, and most of your board"*

Additionally, one executive director noted how these financial management tools were helpful with the board as well:

> *"I feel like we actually did take some of the best practices and were able to – for example, the 990 where we had never really discussed that with the board before. Even though they were approving it they didn't know what they were looking at."*

Another executive director further demonstrates this by stating:

> *So probably one of the biggest areas is that the board has a better focus on the financial management. So before we took this program or were a part of this program they were handed financial reports once a month, but no one was looking at them and our treasurer was only a little bit involved in the organization. Now, our treasurer has developed a finance committee. He's holding monthly meetings. They are revising dashboards. And we've also hired an accountant.*

Overall, despite the minimal amount of change in infrastructure between Years 1 and 2 on the NAM assessment, this was reported to be one of the most highly impacted areas. Therefore, the learning in this area was not captured sufficiently in the NAM assessment but the importance of this area needs to be noted.

Technical Capacity

Technical capacity is defined as the ability to deliver programs, products and services. This includes program oversight, technology, fundraising, facilities maintenance and legal compliance.

While the first year of the program did not focus on development of this capacity dimension, there were measureable increases in the technical capacity of the organization as evidenced by the NAM assessment and interview data. These included changes in clients served and increases in legal compliance. Year 2 shows that there was further increase in change clients served as well as compliance. Additionally, there was impact in technology and fundraising efforts of the participating organizations. These areas will be discussed in the following section.

Year 1	Year 2
Changes in clients served	More nuanced understanding of effectively serving clients
Legal Compliance	Legal Compliance
	Technology and Fundraising

Table 4: Summary of Technical Capacity Findings.

More Nuanced Understanding of Serving Clients

Overall, the majority of organizations reported their technical capacity in delivering programs to serve clients has been enhanced as a result of NCBP. In year 2, interview participants described a more nuanced understanding of effectively serving clients, an understanding that goes beyond counting number of clients served by programs. In some cases, organizations were more strategic about the number of clients served; in others they reported serving clients more holistically. For example, one executive noted the focus on increased depth of impact on a smaller number of clients instead of less impact for a larger number of clients:

> *"And the other thing that I think that has helped us is that I – we are more focused on the impact that we're making for each [client] and making sure that we're not just putting a Band-Aid on their issues, but really solving their issues and creating a better environment for them, which has turned our focus into doing more for less [clients], so not necessarily looking to increase the number of people we're serving, but do more for each [client]… To a greater impact."*

Another executive discusses how using resources more tactically allows for the organization to serve more clients more effectively:

> *"Yeah, we have been able to serve more clients and more effectively. Yes, I think I say it before, that the thing what we do with the clients, volunteers, and also that we are not trying to do everything at once, but we are more tactical in terms of [resources]."*

This area had less robust findings because two of the eight participating organizations were not direct service providers and therefore, did not have clients, but overall, those with clients reported being able to serve clients, more effectively.

Legal Compliance

All of the participating organizations showed increase in infrastructure built after participating in the NCBP. Overall, organizations showed 32 percent increase in all infrastructure areas in the NAM assessment from the pre-test to the post-test (See Figure 2). More importantly, there was an overall, 90 percent increase in compliance, or items that nonprofits are legally required to have in place (See Figure 3 below). Additionally, organizations showed increase in all areas of infrastructure with the highest

impact in the required areas. Additionally, the increase in recommended and strongly recommended items show overall organizational improvement for participating nonprofits beyond essential legal requirements.

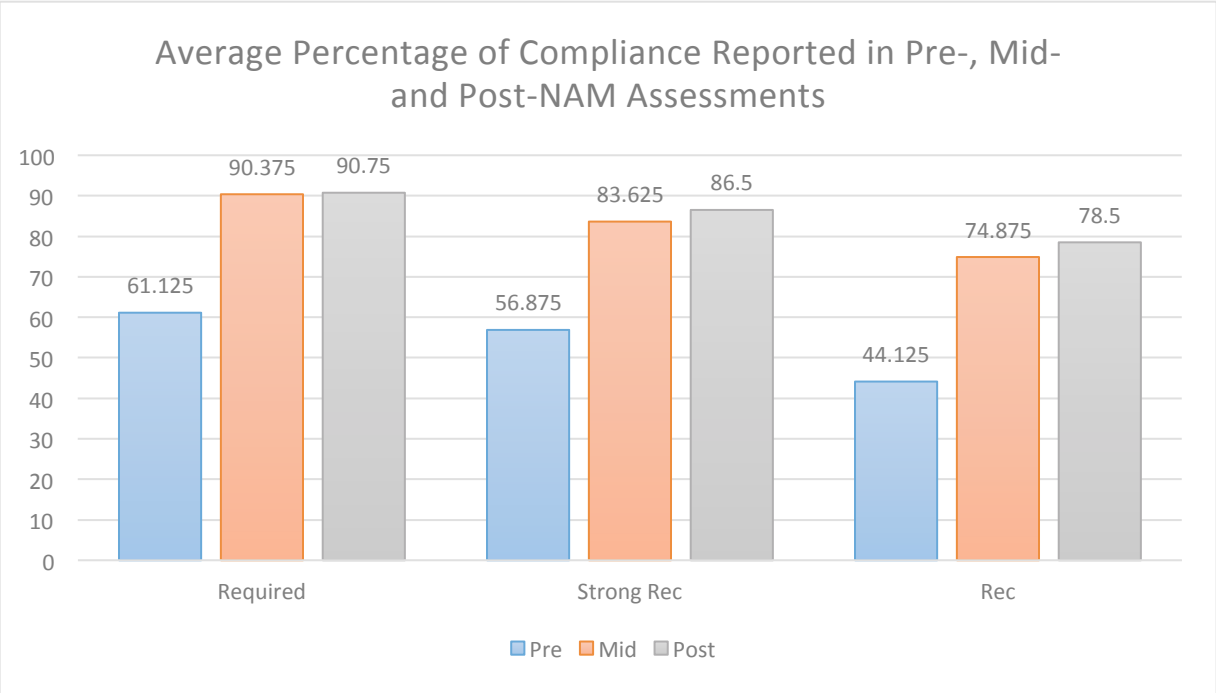


Figure 3: Showing the change in compliance from beginning, mid and end of the NCBP.

Technology and Fundraising

All but one organization stated that the NCBP increased their fundraising capacity. One executive director reported that their budget quadrupled over the two years they participated in NCBP. Another interview participant reported being able to raise a quarter of a million dollars for a capital campaign during one summer. A third interviewee reported that they were fully funded for the upcoming year, of which was a first for their organization.

Additionally, the majority of participants that reported acquiring new technology, stated the technology supported fundraising efforts. For example, one executive director stated that the purchase of the donor software was a direct result of the NCBP:

> *'There've been some – I think as a result of what we learned in year one and those follow up sessions in year two some organizational decisions to purchase donor software. So, the technology piece or those things that would help a fundraising plan or…those have been vetted and purchased and so that was helpful… that's where we're gonna focus a lot of our time because we do have a new donor software."*

Finally, one executive director discussed the importance of the Salesforce software specifically, in discussion how technology impacted the capacity of the organization.

"We got Salesforce because we did not have any way to track our fundraising, our donors and sponsors, and that was initially the reason we got it, but because it's such a powerful tool we also are going to be using it for our client data, our projects, our grants, grant tracking, inventory, volunteers. It literally – anything that has to do with this organization we'll be using Salesforce for."

Overall, organizations appear to use technology hand-in-hand with fundraising efforts to develop technical capacity.

Interconnectedness of Capacity Areas

In the first year's assessment, it was noted that there was interconnectedness between capacity areas. For example, the strategic plan can be linked to other capacity areas such as board development or fundraising, showing the interconnectedness of the NCBP. In year 2, the findings were consistent with year 1. For example, one executive director discussed how changes in the capacity of communications and marketing affected other areas such as staff capacity and capacity to serve clients:

"We did a lot of advertising and marketing. So, we ran two huge public awareness campaigns. I would say huge for us. They might not be huge for some people though. Big for us. Which then changed the capacity of our staff so we had to increase the staff capacity. We're serving more kids…so, of course, the trickle-down effect. I think overall the community is much more aware….So, that just keeps paying dividends. So, the more people that are aware are participating more in any of our fundraising events."

Another executive director described in detail how the organization's growth was connected to the strategic plan and the board as well as staff and funding, demonstrating the interconnectedness of areas:

"Yeah, we're growing all over the place. I mean, from a budget perspective, our projects have grown and morphed and become things that, again, even when we voted to say, "Yeah, we're gonna do it," I wouldn't have anticipated. But I think, again, that's a benefit of how we look at our strategic plan, and our direction of how we're gonna move forward. We've built capacity. We've hired additional staff. Specifically, the board made the decision during our planning process last year that if we're gonna engage seriously in public policy, we need to dedicate a person to do that versus relying on volunteers. And so we just hired a full-time research and policy coordinator that will really help us move and develop that and become more proactive in public policy than we've been able to be. And, again, hiring people, that's not my strength, but finding somebody who's smarter and can do that work. So, yeah, I would say from a capacity perspective, we've increased our grants – the amount of grants that we're giving. We're also really looking at – so with our projects… we're also investing additional funds that aren't a part of our regular grant cycle. And so having that conversation of, "Is our regular grant cycle antiquated? Should we really be focusing a little bit more on these projects? How do we balance all of that?" So, I would say, "Yeah." We're building capacity. I think that the issue will be of how do we – so, there's funding, planets are aligning, does it make sense for us to take it on? When is too much? How do we make sure that we're not spreading ourselves too thin? And I would say that's a conversation we're definitely having this year on the board."

It has been previously noted that each type of capacity – leadership, adaptive, management and technical – is important, and each type must be in place for an organization to achieve its mission. Each of those capacities involve the development of different capacity building areas as identified in the NAM assessments. Interviews and the NAM assessments show that these capacity building areas were positively impacted by the NCBP, and thus, the aforementioned capacities were positively impact as well. Therefore, it is promising to see the participants are recognizing the interconnectedness of these areas as it can lead to development of all capacities needed for an effective organization.

Community Level Impact

Participants also reported community level impacts. In Year 1, there was less consistency in the findings in this area but in Year 2 there were clear themes that developed. Interviewees described community engagement as primarily being connected to the community and the nonprofit sector as well being seen as a legitimate organization with a good reputation. These are further discussed in the following section.

Year 1	Year 2
Lack of Consistent Responses	Clear Themes Emerged
Known in community Expert in field Telling community story Networking	Connection to Community/Sector Developing partnerships Focus on Community Impact
	Reputation Gains Invited to Discussion Forums "At the table" with larger NPOs

Table 5: Summary of Community Impact Findings

Connection to Community/Nonprofit Sector

Overall, participants perceived that they were better known in the community and sector than before participating in the NCBP. There are important distinctions between Year 1 and Year 2 interview findings in this area. While interview participants emphasized the understanding and knowledge they have of other nonprofits in Year 1, in Year 2, interview participants emphasized developing partnerships and their ability to impact the community they serve. For example, one executive director discussed their increased connection in their neighborhood:

> *"And I think we've really improved our connection here in this neighborhood because this is a neighborhood of high needs. So we're working with a lot more [community members] than we were previously. And our interns are coming from a lot of places. So I feel like we've extended our reach in the internship program too."*

Another participant described this connection to the community through their partnerships with other organizations:

> *"For me it means that we're collaborative and that we have a lot of partners that represent all parts of the community, but especially the demographics that we want to serve"*

Additionally, one executive director noted that connection to the community included the public and nonprofit sector, demonstrating a more expansive view of connectedness:

> *"I would say that that would be collaborating with our government agencies, collaborating with other non-profit agencies, and I think doing our work in the community to help the people that we serve."*

Adding to the focus on partnerships, one executive director discussed the possibility of these partnerships allowing for more collaboration:

> *"I think it is developing beneficial partnerships and a sharing of resources and more of a cooperative spirit than a competitive spirit. I have never really endorsed a competitive spirit in nonprofits. There are lots of groups that work in a similar need like we do, you know, reducing food inequities and providing employment skills. So I don't view other groups as a competitor. I view them as support."*

Additionally, one interview participant described a change in mindset that over time became more focused on community impact:

> *"I think that from where we were when I started, and/or when the program started, because they were kind of one and the same, of really relying on volunteers, and, "Well, we can't afford anything, we can't – ah, we're a non-profit," versus strategically looking at, "How do we wanna make impact in our community, and what do we need to allocate in order to do that?"*

Overall, in Year 1 participation in NCBP impacted the extent to which participating organizations were known or made visible to other nonprofits and the community. In Year 2, the focus shifted to a connection with other nonprofits through partnerships and a focus on the impact to the community.

Legitimacy/Reputation Gains

In Year 1, two organizations reported being seen as an expert in their field. In Year two, almost all organizations reported an increase in the legitimacy or reputation gains of their organizations as a result of participation in the NCBP. As evidence for this increased legitimacy, interview participants stated they have been invited to discussion tables around a topic. As one interview participant stated,

> *"And so we're being invited to participate in a lot of what I would say pilots and new things that they're getting started. And we're being asked to be on advisory boards and things like that. So, our input's at the table….And how we're getting referrals and how we're being able to serve more kids so it's been a lot through that."*

Another executive director noted that the NCBP empowered them to be a better organization that has a seat at the table with larger organizations:

> *"I think really, the impact of the program in relation to being a community collaborator is just the empowerment that the program gave us and the resources to be a better organization so*

now that we can sit at the table with those other organizations that obviously have been around a lot longer or are maybe doing a lot more than we do on a higher level."

Finally, one other executive director described being an expert as being an organization that is sought out on topics but that has the knowledge to address the concerns presented

"I would say it means that the community, whether it's organizationally or individually, feels comfortable approaching us about whatever issue and how we can help with it, or seeking out that information, the community would know that we have quality information to share, that we are guided by best practices, that they would look to us as that trusted expert when it comes to issues… And if it's an issue that they're like, "Hey, why aren't you paying attention to this?" and we can say either "Here's why," from a capacity standpoint or, "You're right. We really need to dig into that."

It is interesting to note that organizations did not describe these community connections or other partnerships as strategic alliances/partnerships, that is, partnerships around an agreed upon common goal. This area showed a 32 percent overall increase in infrastructure items reported but participants did not discuss these relationships as strategic but rather as collaborations or partnerships. If this area is a focus of the NCBP, then more attention should be paid to how this concept is defined.

Overall Impact

The leadership capacity, adaptive capacity, management capacity, and technical capacity of participating nonprofits have all been positively impacted by the two-year program. The findings from this evaluation demonstrated that the areas that were impacted in Year 1 were also positively impacted in Year 2, though in Year 2 there were additional areas of impact. However, Year 1 seemed to have provided organizations with knowledge of the tools needed to be an effective organization. As one executive director stated:

"I think that what Year one did for us was really solidify culture change and where we needed to go organizationally. It really helped my board understand, again, roles and how we could take it to the next step, and how we could move from reporting to more strategic discussion."

Year 2 programming gave executive directors the opportunity to practice and implement what they had learned in the previous year. As one executive director succinctly stated:

"So definitely I feel that in year two we took the tools that we were presented and were able to use them."

Another executive provided more detail on the ability to practice with the provided Year 1 resources in Year 2:

"Putting more things into practice and which I did. I would say there were some dashboards that I didn't accomplish the first year. I'm trying to think what the second year – I just liked it because it gave me the chance to finish some things that I didn't finish the first year and put things back on my radar…dashboard that really helped me and that was second year."

Additionally, another executive director echoed their sentiments about the implementation capability of Year 2:

"In terms of how to implement, what we learned that whole year, that's one of the things…it was going to be useful for me to keep learning, not just from Mary Lee, but from [the cohort], in terms of implementing what we learned, so that was useful."

Conversely, one executive director noted that Year 2 was a period to practice or implement but stated that more guidance was needed to keep organizations accountable to the implementation.

"It moved us into knowing that it's best practice to do it to really implement – or having the action to do it and setting you up for implementing it. Maybe I'm the only one out of all of us that was having issues with this, but so much good work was done and I think helping us figure out how to implement – so part of – the training and the resources was obviously part of it, but holding us accountable to implementing it"

Therefore, while the NCBP has shown a positive increase in the report of infrastructure items needed to be an effective organization, especially at the end of Year 1, Year 2's strength is providing a space where organizations can practice and implement what they have learned.

Findings – Process

The second year of the NCBP was comprised of five roundtables that were conducted during 2015. Executive directors were expected to attend all the meetings, while the board chairs were invited to join two of these meetings. All participants described the roundtables as helpful, both the joint roundtables and the roundtables with executive directors only. Additionally, participants noted that they were able to attend all of the meetings, with few exceptions. There were no real concerns with the structure of meetings; however, participants discussed the impact of the cohort model, the facilitator and materials provided which will be discussed in the following section.

Roundtables

All executive directors reported that the roundtables were extremely helpful and had no suggestions for improvement except for some comments over the number of meetings. The majority of respondents noted that they wanted the sessions to continue:

"I would wish they would continue indefinitely."

Moreover, one participant suggested that they would have preferred to meet more in year two.

"I would almost meet more. I would almost do every other month."

Conversely, another stated that they would have preferred to meet less, during the two-year period. This was so executive directors and board chairs could have more time to implement what was learned at the meeting before being presented with new information.

"Every other month for two years, I think, would have been better for me… maybe less frequently because it felt like it was hard to put things in practice before the next time we'd meet."

Therefore, while participants overall, wanted more sessions and sessions to continue, there were no consistent suggestions on how often sessions should be held.

Time

One interesting theme that arose was the appreciation for dedicated time devoted to the program. While past assessments noted that time was often a challenge to participation, participants here noted that having time scheduled to work on capacity building was deemed a strength as well, as noted by this participant:

> *"It forces you to get out of the daily – the craziness of every day. And it forces you not to be in reactive mode. It's a space where you go and you can be proactive, and you can plan, and you can think. And that, I'm realizing more and more, is my goal, having phone calls and fires that I had to put out just today. So having a specific time that is devoted to that is important."*

Another participant supported this program strength by stating:

> *"The time piece that you get to sit with things, you get to talk through things. You're not allowed to look through your phone and talk about how busy you are, because everybody's busy and nobody cares. So really committing that time and thinking strategically about what your organization needs."*

Cohort Model

Similar to the previous year assessment, executive leaders discussed the trust and peer support that was developed in which the participants were able to depend on each other, ask other people questions and become a support for everyone. For example, one executive director stated:

> *"I just think that it was interesting to hear what other people, what other organizations are dealing with, how they're dealing with them, maybe how they're not dealing with them. And being able to provide that feedback when you're not in it day-to-day I think is – because then somebody would say something, and a person would give a potential solution. You could just see, "Duh! I never thought of that!" But it's fair, because it's like the world is on your shoulders, and you freak out a little bit and you don't know what to do. So I do think the cohort model is really helpful, and I think that, too, now we all know each other, and we have kind of that bond of if I needed something, they already know what situation I'm in, and vice versa."*

Another participant added:

> *"I think the moral support that you got from meeting with each other again was interesting. And it was interesting to see the growth and to share successes and challenges. And I think that's a really important thing. In other words, yeah, it was really interesting to see the growth and see how they were implementing things that we learned."*

Additionally, executive directors described the networking opportunity that these sessions. As one interview participant noted:

> *"And it's really good to see them out in the community, and you have that association and that respect and understand a lot more about what organizations did. There were quite a few organizations that I was not familiar with. And I feel like it just broadened my understanding of the nonprofit sector in Omaha and the types of great work that people were doing."*

Conversely, it was noted that the cohort did not interact outside of the sessions. One participant expressed the desire for more informal networking opportunities for the cohort by stating:

> *"As a cohort, we really didn't do a lot together. I think that might have been helpful, and maybe during some of the time that we didn't meet, maybe doing something like kind of an informal get together, go to lunch or something could have happened, but it didn't. I didn't bring it up, and I know part of it is because we're all so busy doing our own thing, but it may have been an opportunity to just kind of let your hair down a little bit and just communicate without feeling like you're in such a sterile environment."*

Additionally, some participants noted concerns with the mix of organizations within the cohort. For example, one participant stated:

> *"I don't know if this is a strength or a weakness, and I don't even know if it's even feasible, but having like-size organizations – I don't know. I think they kind of do that a little bit, though, so I don't know if that's even a weakness. I think that Mary Lee probably did that, either the like-topic organizations together or the like-size organizations together. It was addressed. Yeah, that's not a weakness"*

However, another organization was skeptical as well about the way the mix of organizations, though noted that the mix is a double-edged sword. The participant stated:

> *"So I don't know, and I don't know how the groups, the organizations are selected. Are they the same, how do you make those decisions? But I would also say to that that I also learned a lot. I feel like it's when you have a job and you have a boss that you like but you also don't like things about them, so you learn what not to do and mistakes to avoid. So I think that's probably – there's a double-edged sword on that. Do you want similar organizations, or do you want organizations that kind of challenge each other so that you can learn?"*

Participants also noted the desire to continue networking with other nonprofits. Specifically to the NCBP, one participant discussed having other nonprofit leaders at the final NCBP meeting:

> *"I know that when – maybe it was the last session where they sat down – when we finished the first year, it was the last session, and they brought in folks from previous sessions, and we got to get to know them a bit. I felt like I got experience from people and learned things from folks that I didn't know already, who maybe had a little bit of a different take on the issue."*

Additionally, participants discussed the potential value in connecting with other NCBP participants as mentors. They discussed being able to attend future sessions themselves to share their experiences and perspectives, and be able to learn from and connect with other area nonprofit leaders.

Facilitator

One of the key strengths identified by participants was the facilitator, Mary Lee Fitzsimmons. Participants discussed her expertise and the knowledge she provided. For example, one executive director stated:

"And Mary Lee is fabulous and she is such a great wealth of information that anytime you get everything – every time that you work with Mary Lee I feel like I walk away with something valuable."

She is also able to facilitate learning by making the material digestible, as noted by one participant:

"One of the strengths is in the leadership because Mary Lee is so good at breaking complex material down to digestible chunks"

Additionally, her very practical nature is also seen as an asset as noted by this participant:

"Mary Lee was just an enormous resource…Her experience, but also... her ruthlessly practical nature. Yes, there are issues. Yes, you're having problems. We can talk for five minutes about how terrible they are. Now what are you going to do about it?"

Furthermore, another participant discussed the trust the cohort had in Mary Lee:

"I will say the strength of the program is Mary Lee and her experience, and her reputation of integrity. And I worry that when younger people are involved and they – I don't know. I just think it's like a sacred thing. Fundraising is so fragile and that having somebody like Mary Lee is what it made it successful…it's all about trust…the person who's in the room leading [it should be] who you can confide in."

One participant did note that any future facilitator should be able to bring some of the same expertise and best practices that is needed as shown with this quote:

"I think that the connection with Mary Lee is a huge strength. Her thoughtfulness and her experience and, again, having that time with her was really, really helpful. Again, the time with the cohort and being able to learn from one another. And I think just the expertise, so whether it's Mary Lee that continues or whomever moves forward with actually kind of teaching or facilitating, just that here's best practices, and here's what you need to know."

Materials

Executive directors also discussed the practicality and usefulness of the information provided. For example, one executive director stated:

"And the way it was organized I thought was really helpful. And we knew ahead what the topics were gonna be and we could process it. There was always really good supporting material that we could read and share with our board members…through the process a lot of information was distilled down to some of the key points. And that was really helpful because when you're in the business of running your own nonprofit, you don't always have all the time you want to do all the research. And if somebody can do that research and say, okay, distill it down and here are the key things that you need to know."

Another participant noted that the information related to best practices which was helpful in presenting to their board:

"Being an organization that says, "We base everything we do off of best practices, especially from a programmatic, research, advocacy perspective," that's really helpful. So then I can go

back to my board and say, "Hey, here's the deal guys. This is best practice. Like this is where we need to be. Here's where we're at now, but here's where we should be. What are you gonna do as a board to get us there?" And that practical application is probably one of the biggest strengths of it as well."

Additionally, the information was accessible and adaptable so organizations were able to use the information provided. For example, one executive director explained:

"The materials were always good. So, I liked that. So, it felt like anything that we received we were able to adapt. So, I liked the fact that there weren't proprietary documents that we couldn't – you know we could look at, but then we had to recreate our own."

NAM Assessment

Similar to Year 1 participants noted that the NAM assessment allowed for a checklist of items that needed to be worked on, or validated their organization as one with a strong infrastructure in place. However, as previously noted, the impact of the assessment is more apparent in Year 1 compared to Year 2.

OCF Sponsored Program

One identified strength of the program was that it was sponsored by the Omaha Community Foundation, and therefore, lent to the credibility of the participating organization. For example, one executive director stated:

"In having the Omaha Community Foundation as sponsoring these trainings, [it] makes all of us trust in this trainings, and also that the information that we are getting, it is something that it is recognized around our networks of funders."

Another executive director described how participating in an Omaha Community Foundation program increased their own legitimacy as well as that of their organization.

"Part of it is having Omaha community foundations [sponsoring]. For us, that was huge because I was running up against questions of our liability… It was very questionable at the time. Like [a major funder] was really skeptical of whether or not we had the infrastructure to function as an organization. So we were accepted into this program, and maybe a month or two later, we had our annual breakfast, and I was able to tell him at that point that we had – the board chair and I would be going through the community foundation training. And that was a load off of his mind and also, honestly, off my back."

Conversely, one participant noted that they expected to have a better relationship with the Omaha Community Foundation, and consequently other funders, but did not find this to be the case:

I think the only thing that I had not anticipated is I thought that there would be a little more of a bump in recognition of our organization because of our participation, at least with the Omaha Community Foundation. I guess I'm not feeling that. It may be, but I'm not feeling it, and maybe it is. Maybe it's negative, and maybe that's why. I mean, I don't know for sure, but I guess I don't feel that there's a closer connection with the Omaha Community Foundation, and I thought that participating in this would lead us to that.

Therefore, while participants saw value in participating in an Omaha Community Foundation program, the role of the Omaha Community Foundation can be more clearly explained in the future.

Summary and Conclusion

Overall, the NCBP has had a positive impact on organizations that participated in the 2014-2015 Cohort. The NCBP provided leadership and professional development to executive directors, and that, in turn, positively impacted staff and board members. This contributed to the development of the entire organization. Overall, organizations reported increased effectiveness, a better ability to achieve their mission, and a more sustainable and resilient organization. The following sections summarize results for the questions that guided this assessment.

1. What is the cumulative impact of NCBP on participating nonprofit organizations in 2014 and 2015?
2. What are the outcomes specific to Year 2 compared to Year 1?
3. How can the process for managing and administering Year 2 of the NCBP be improved?

1. What has been the cumulative impact of the NCBP on participating nonprofit organizations in 2014 and 2015? Specifically, in the capacity areas identified by the Omaha Community Foundation.
    - Survey participants and NAM assessment analysis show that the NCBP assisted their organizations in identified capacity areas.
    - The cohort model of the NCBP allows for peer learning where organizations learn from each other's experiences.
    - Leadership capacity was positively impacted as participants felt more confident, take action to initiate change, empower staff, have increased knowledge base and developed shared leadership relationship with board.
    - Adaptive capacity was positively impacted as organizations reported strengthening their strategic plan, being more strategic in board development as well as the importance of developing succession plans.
    - Management capacity was increased as demonstrated by overall positive change in infrastructure items measured in the NAM assessment.
    - Technical capacity was increased as demonstrated by positive change in compliance as well as technology and fundraising capacities.
    - The findings in this report provide strong support for continuing NCBP.

2. What has been the outcomes specific to Year 2 compared to Year 1?
    - Slight growth in infrastructure items.
    - Continued increase in development of capacities as evidenced by the interview data.
    - Allowed organizations to practice and implement what they have learned in Year 1.

3. How could the process for managing and administering Year 2 of the NCBP be improved?

- There are no suggestions for process improvement for the current two-year model of the NCBP.

Recommendations

Based on the findings and summary presented above, five recommendations are offered below.

Recommendation 1: Articulate the goals for the Year 2 Program

The findings for Year 2 were mixed. The results from the NAM Assessment found that there was slight movement in Year 2 and the majority of infrastructure capacity is built in Year 1. At the same time, the interview data told another story. Interview participants stated Year 2 allowed them to put into practice the learning from Year 1. Given these two important findings from the evaluation, it is important to articulate the goals of the Year 2 program to ensure the program design and content reflect the goals of the program

Recommendation 2: Find ways to continue to engage alumni.

All but one organization stated that they wanted the sessions to continue, and all participants noted the value of and need for networking opportunities. As such, there should be ways to continue to engage alumni of this, and past cohorts, both for continued knowledge sharing/acquisition and networking. Capacity building is an ongoing process and these organizations and their leaders should have a platform to continue learning and developing. Two possible ways of achieving this is through facilitation of mentoring opportunities and developing a community of practice.

a. Mentorship

Executive directors wanted continued opportunities to learn and share information, as experience by their cohort model. One possible way to achieve is to give NCBP alumni, mentorship opportunities where they can mentor current NCBP participants. This does not have to be an entire year process, but rather opportunities to sit in specific classes share what they learnt, as well as potentially learn from the current cohort. Additionally, this can help supply some of the networking opportunities that participants are seeking.

b. Facilitate a nonprofit leaders' community of practice

Communities of practice (CoP) are groups of people who share a concern or a passion for something they do and who interact regularly to learn how to do it better. OCF is in a prime position to be able to facilitate such a group. Organizations specifically ask for opportunities to network and connect with other leaders on nonprofit issues. This can be one method of accomplishing that goal. Further research can look at ways to facilitate CoPs.

Recommendation 3: **Create a resource center to share information such as best practices.**

Participants noted the helpfulness and practical nature of the resources supplied. However, these could be provided in an assessable place for all nonprofit organizations. Prior research shows that organizations want cost-effective access to services that are needed on a limited basis. Moreover, they want to be able to have a shared, accessible platform where resources can be shared. This can allow for more streamlined processed and allow for access to materials/services that are not well-known

currently. Further research can be conducted to determine if there are successful models of this nature currently in the field.

Recommendation 4: **Provide access to classes on specific topics for the general public e.g. financial management (990s and dashboards), HRM, succession plans, evaluation.**

While organizations reported increases in the aforementioned areas, these were also areas that showed the need for further development. These areas also showed the most positive impact on participating organizations, and could provide benefit to organizations who were ineligible to apply or who were not selected to participate in NCBP. Therefore, classes on these specific topics could strengthen nonprofits in the sector regardless of their participation in the NCBP.

Recommendation 5: Continue multi-method approach to evaluation.

The findings from this study demonstrate the value of using a multi-method approach to assessing impact. The NAM Assessment provides important data about how an organization's infrastructure developed over the two years. However, infrastructure is only one type of capacity. The interview data allows us to understand other important capacities, including leadership, adaptive, management and technical. Each data source tells a particular story, but when brought together, the data sources tell a particularly rich, more nuanced, and ultimately more accurate presentation of the impact of the NCBP.

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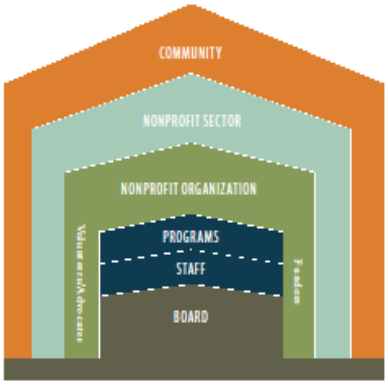
Appendix A: NCBP Participants

NONPROFIT CAPACITY BUILDING PROGRAM

Strengthening nonprofits to strengthen the whole community.

We believe that strengthening nonprofits ultimately strengthens the whole community. Simply put, a good nonprofit organization has a strong board that hires capable staff that runs quality programs. The board and staff ensure that the organization continually invest in its capacity. A community will be more prosperous when its nonprofit sector is made up of these kinds of groups. To help nonprofits operate like this, we created the Nonprofit Capacity Building program. This 15-month cirriculum is designed to strengthen organizational and leadership capacity needs. Ten nonprofits are chosen each year to participate in the class.

MODEL FOR STRONG CAPACITY BUILDING



PROGRAM COMPONENTS

- Assessment of each organization's capacity
- Strategic plan *(if the organization doesn't already have one)*
- Peer learning to discuss best practices and challenges
- Executive coaching for executive directors
- Quarterly sessions focused on board of directors
- $5,000 grant for nonprofits meeting the requirements of participation

PARTICIPATING NONPROFITS

2010 - YEAR 1

Bemis Center for Contemporary Art
Charles Drew Health Center
Family Housing Advisory Services
Habitat for Humanity Council Bluffs
Kids Can! Community Center
Latino Center of the Midlands
Love's Jazz and Arts Center
Neighborhood Center
NeighborWorks Omaha
Youth Emergency Service

2011 - YEAR 2

Concord Center
Council Bluffs Community Education Foundation
Council Bluffs Community Health Clinic
Eastern Nebraska Community Action Program
Inclusive Communities
InCOMMON Community Development
Legal Aid of Nebraska
Literacy Center
Together, Inc. of Metro Omaha
Youth Care and Beyond

2012 - YEAR 3

Heart Ministry Center
Heartland Equine Therapeutic Riding Academy
Latino Center of the Midlands
Literacy Center
Omaha Healthy Kids Alliance
Phoenix Academy
Ronald McDonald House
The Kent Bellows Studio and Center for Visual Arts
Urban League of Nebraska

2014 - YEAR 4

CASA of Douglas County
Center for Holistic Development
City Sprouts
Domestic Violence Council
Heartland Workers Center
Midlands Mentoring Partnership
Project Interfaith
Rebuilding Together
United Methodist Ministries
Women's Fund

2015 - YEAR 5

100 Black Men
Charles Drew Health Center
Children's Respite Care Center
Crossroads of Western Iowa
Douglas County Historical Society
Heartland Hope Mission
Omaha Area Youth Orchestra
Omaha Small Business Network
Pottawattamie County Mental Health & Substance Abuse Network
The Union for Contemporary Art