



**Key Findings:**  
**The Hartford Foundation for Public Giving's  
Nonprofit Support Program  
Evaluation System**

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# Table of Contents

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<b>INTRODUCTION AND OVERVIEW</b> .....	<b>1</b>
<b>EVALUATION SYSTEM DESIGN</b> .....	<b>1</b>
<b>STRATEGIC TECHNOLOGY</b> .....	<b>3</b>
Findings: Immediate Post-Grant Completion Survey .....	3
Findings: 12-Month Follow-up Survey .....	6
<b>STRATEGIC PLANNING TAGS</b> .....	<b>12</b>
Findings: Immediate Post-Grant Completion .....	13
Findings: 12-Month Follow-up Survey .....	15
Findings: 12-Month Follow-up Survey .....	23
<b>KEY FINDINGS FROM INTERVIEWS WITH BOARD LEADERSHIP PROGRAM PARTICIPANTS</b> .....	<b>27</b>
<b>KEY FINDINGS: BENEFITS OF PARTICIPATING IN MULTIPLE NSP PROGRAMS</b> .....	<b>29</b>
<b>LESSONS LEARNED, RECOMMENDATIONS, AND NEXT STEPS</b> .....	<b>30</b>

# Key Findings: NSP Evaluation System

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## INTRODUCTION AND OVERVIEW

The Nonprofit Support Program (NSP) of the Hartford Foundation for Public Giving (HFPG) is in the process of rolling out an evaluation system that is designed to meet the following two fundamental purposes:

1. To provide information about the effectiveness of NSP programs and services, including the accomplishment of specific outcomes outlined in a set of logic models developed as part of the evaluation system; and
2. To provide information to the NSP about how it could improve the delivery of its capacity-building programs and services.

This report provides a summary of findings from the first phase of implementation of the evaluation system. The components of the first phase of the evaluation—thus determining the contents of this report—include:

- **Strategic Technology Program**
  - Immediate Post-Grant Completion Surveys
  - 12-Month Follow-up Surveys
- **Strategic Planning Technical Assistance Grants (TAGs)**
  - Immediate Post-Grant Completion Surveys
  - 12-Month Follow-up Surveys
  - Third-Party Evaluator-Conducted Key Informant Interviews
- **Strategic Planning Technical Assistance Grants (TAGs)**
  - 12-Month Follow-up Surveys
- **Board Leadership Program**
  - Third-Party Evaluator-Conducted Key Informant Interviews

This report includes a summary of all survey findings, including responses to both quantitative questions (e.g., questions asked on a 5-point Likert-type scale) and open-ended questions for which respondents write in comments.

## EVALUATION SYSTEM DESIGN

As can be discerned from the above description of components comprising this report, the NSP evaluation system employs grantee-completed confidential surveys administered through a web-based survey tool (Key Survey). Evaluators from LaFrance Associates, LLC (LFA) send out survey links to grantees at the appropriate time (e.g., immediately following completion of their NSP-funded project/program or approximately 12 months following completion of the NSP-funded project/program). Survey responses are confidential: NSP staff can only see results in the aggregate. However, it is important to note that in several cases, when supplying responses to open-ended questions, grantees self-identified their agency. In

### About this Report and Cautions about the Data

*This report provides a comprehensive set of results (quantitative and qualitative) from phase I of the NSP evaluation system implementation in 2007. The report also exemplifies the type of data available to NSP from the evaluation system.*

*Please note that the data contained herein represent the full dataset from the initial pilot phase of implementation. The sample sizes are in many cases too small to draw solid conclusions. Therefore the purpose of this report is to demonstrate the types of data available to NSP staff. Over time, as sample sizes grow, the evaluation system will provide NSP with generalizable information to make-real time program modifications and assess long-term program impacts.*

## **Key Findings: NSP Evaluation System**

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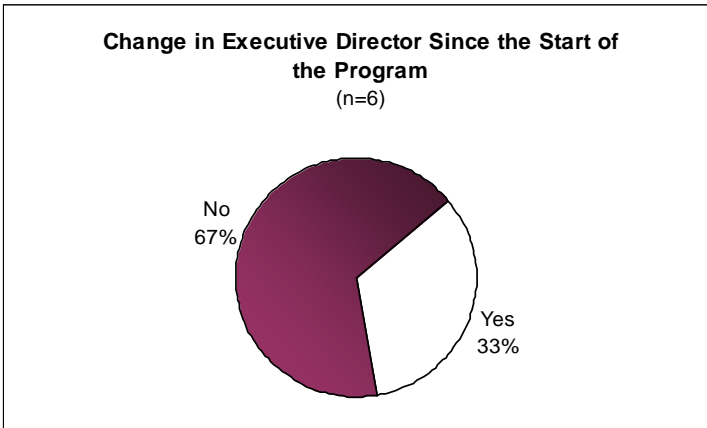
so doing, they are consenting to NSP staff knowing which comments apply to them. Due to the fact that this version of the report will reach a broader audience than NSP staff alone, LFA has cleaned open-ended comments to remove identifying information.

As a supplement to the web-based surveys, LFA evaluators conducted key informant interviews with 1) seven grantees that had participated in the Board Leadership Program and 2) seven grantees that had received a Strategic Planning Technical Assistance Grant.

## Key Findings: NSP Evaluation System

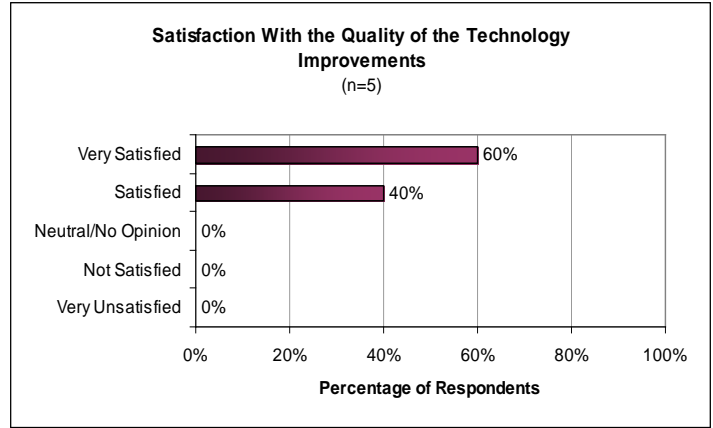
### STRATEGIC TECHNOLOGY

#### Findings: Immediate Post-Grant Completion Survey



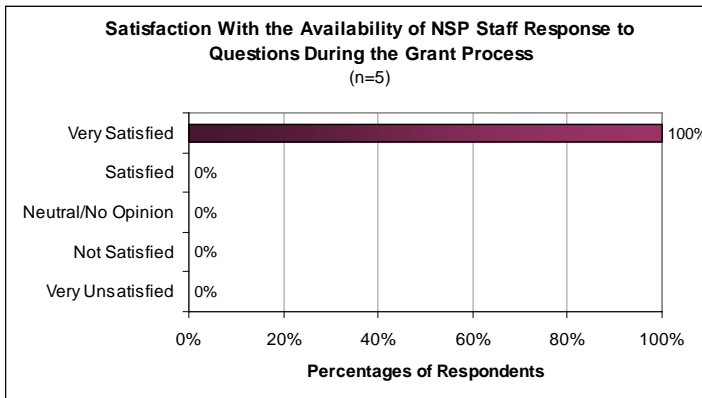
#### Key Finding

- 33% of Strategic Technology Program nonprofit participants experienced a change in executive director during the course of the project.



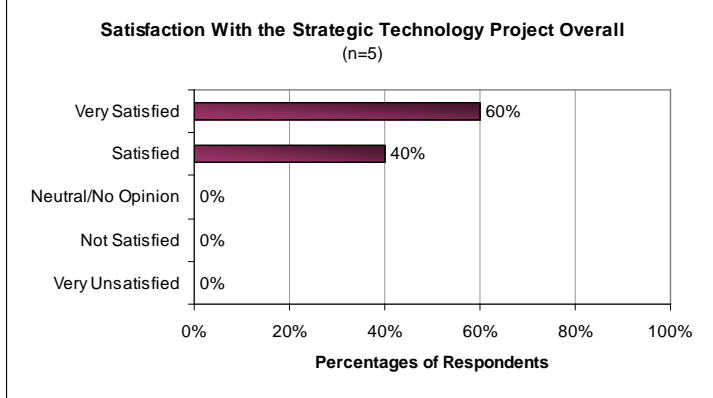
#### Key Finding

- 100% of respondents report being satisfied or very satisfied with the quality of the technological improvements resulting from the TAG.



#### Key Finding

- 100% of respondents report the highest level of satisfaction with the availability of NSP staff.



#### Key Finding

- 100% of respondents report being satisfied or very satisfied with their strategic technology project overall.

### Examples of Achievement from Open-ended Survey Comments

*“Enhanced web site – completed; Improved Marketing of the agency - on-going; New desktops for staff – completed; Create a network within office – completed; Purchase server to centralize data and backup – completed; Upgrade peripherals - on-going; Upgrade fundraising data management system – completed; Train staff - on-going.”*

*“Priorities: 1. Updated computers and software 2. Effective communications with and outside the institution 3. Technical support and maintenance of infrastructure 4. Staff training 5. Improved program technology and peripherals 6. Data management system and fundraising software. Website upgrades and restructuring. Most of these priorities were achieved at different levels through the grant. Difficulties arose in the technical support area (our consultants were not as equipped to handle the site as expected and ended up dropping all their support in year two); our data management system was purchased by another company and is now out-of-date as a result of this unforeseeable buyout; and the website upgrades were not included in the grant.”*

*“1. We built a computer database. 2. All staff have access to functioning computers. 3. Staff has increased ease and expertise in working with computers. 4. Our printing and copying capacity is greatly enhanced. 5. Our website is greatly improved; we have been enabled to post our literature on line. 6. We have learned from our mistakes and are in a much better position to advocate for ourselves in the area of technology. 7. We are empowered to use technology to further [our] mission... Amen!”*

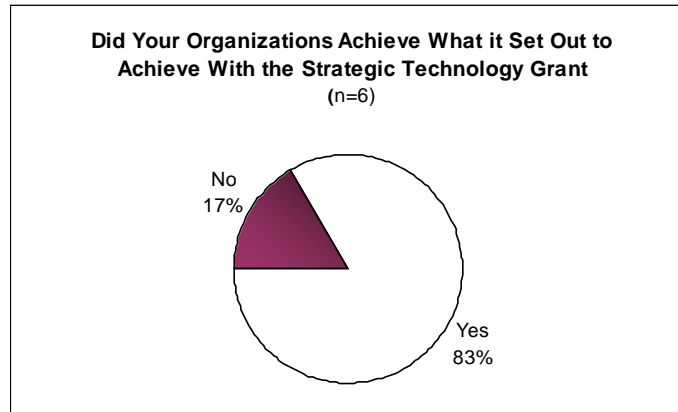
## Key Findings: NSP Evaluation System

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*“Expected outcomes included a complete upgrade of file server and networking systems, copying system and website design.”*

*“We did achieve a lot of upgrading of hardware and software for our computer systems. After a couple of failed attempts at developing a unified contact system, we succeeded in consolidating many of our office contacts into a shared system but were not able to combine phone, e-mail and regular mail lists into a unified system. I believe that we may achieve that in the new round of technology upgrading that we are doing in conjunction with a new grant from the Hartford Foundation for Public Giving in the next three years. We also improved our public education systems through learning how to use PowerPoint and having the hardware to enable us to take PowerPoint presentations to education sites out of the office. We did not upgrade our website but, again, believe that we will be able to complete that part of the project in the next year or so.”*

*“Can not be sure since there has been a large turnover of personnel.”*



### Additional Findings: Unforeseen Impacts on the Project

- All (100%) organizations report unforeseen forces (positive or negative) impacting their strategic technology project.

*“Positive - the agency we used to enhance our website, also provided installation and training services. We were able to streamline the project by using them for various services.”*

*“Communicating via email can lead to prolonged misunderstanding. Vendor expertise and our expectations did not always match up. Spam attacked our message board which was a nightmare. On the positive side, more people are reporting connecting with [us] on the web, finding our web page helpful. Kids are coming forward to participate with us in our work via the web. The potential good that a small but smart and spirited non profit can accomplish on line is unlimited.”*

*“Time constraints placed upon staff internally”*

*“The web site updating was delayed because we were using the same web designer for another major project which is taking much longer than anticipated to complete. The consolidated contact lists were hard to develop because the necessary software is outside the network program. With our new strategic technology plan, we plan to implement a web-based solution which will not rely on the [current] system.”*

### Additional Findings: What Organizations Are Doing Differently as a Result of the Project

*“Our data management as a whole has improved. By using the network we are able to access information from different desktops faster. All of our data is now backed up. The website has allowed us to keep in contact with our funders and partners. They are able to access timely information on the agency and the children we serve. We are currently in the process of migrating all of our fundraising information to the new system.”*

*“Our business has changed in numerous ways due to this grant. On a day to day level, the new staff computers allow employees to work more effectively. The training of staff on software has also allowed the museum to expand its capability and professionalize its business. Despite being discontinued, the software that we had bought to track membership/donors has been of significant value. A laptop computer and LCD projector has allowed the institution to expand and revitalize many of its formal programs.”*

## **Key Findings: NSP Evaluation System**

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*"We are thinking more long term, big picture in our technology planning. When we finish with our newest Strategic Technology grant, I think our use of the tools of technology will be outstanding."*

*"Integrated data based for fundraising, accounting, and improved communication tools internally and externally."*

*"As noted before - new, consolidated e-mail systems for the office, use of PowerPoint software for public presentations. Also - conversion to Word from WordPerfect so our documents are shareable outside the Legal Services network. Use of new publications software."*

### **Additional Findings: Useful Lessons Learned from Participating in the Project**

*"The trainings as a whole were extremely helpful. I believe that by having the board involved in the process all levels of the agency find ownership of the project. Making the trainings mandatory makes the entire project successful."*

*"It was a helpful experience in understanding our technology needs and its potential."*

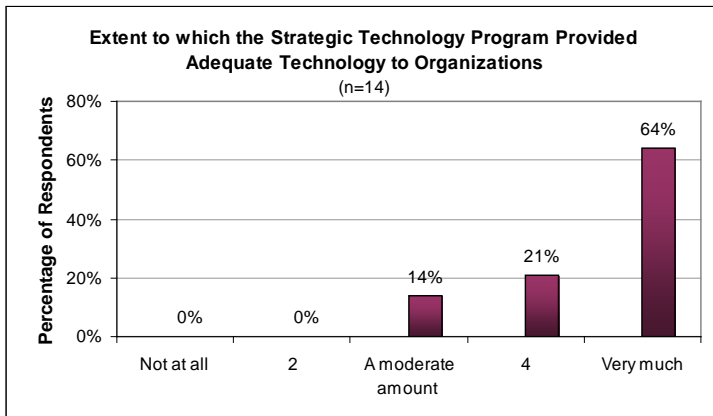
*"Make sure that the vendors you work with speak the same language you do and are responsive to less technologically savvy learners. They need to understand that is part of their job. Be proactive with your circuit rider, "the squeaky wheel..." The NSP does such smart work, thoughtful and wise. Thank you."*

*"We learned new capabilities in all phases of the technology process and the importance of putting into place a strategic technology plan that can guide future improvements, funding, and addressing needs."*

# Key Findings: NSP Evaluation System

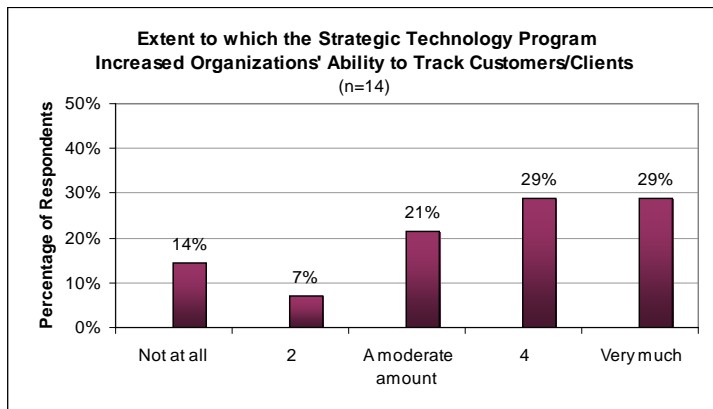
## STRATEGIC TECHNOLOGY

### Findings: 12-Month Follow-up Survey<sup>1</sup>



#### Key Finding

- 85% of respondents report more than moderate adequacy of technology received through the Strategic Technology Program.



#### Key Finding

- 58% of respondents report the Strategic Technology Program increased their organizations' ability to track customers/clients by more than a moderate amount.

#### Technology Provided as a Result of the Strategic Technology Program

*"Staff can now share files, including a library and Access database."*

*"Systems are functioning more effectively, staff better trained in applications."*

*"Able to upgrade server, add a new phone system, and install state of art computers. (Please note this was in the round four years ago.)"*

*"Addition of new hardware as well as updated old equipment."*

*"Update the computer system."*

#### Increase in Organizations' Ability to Track Customers/Clients

*"Development of an access database we can all access through our computers."*

*"We used the funds to continue to refine databases and standard reports."*

*"The server allowed that social worker data on clients to be available to other social workers and supervisors. Also, Access training allows a staff member to design a basic data collection system."*

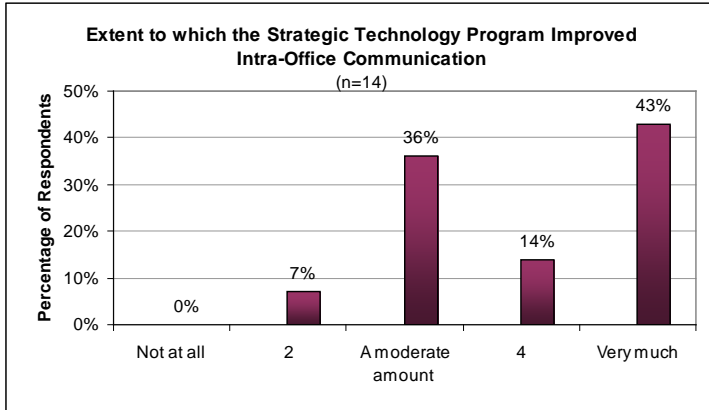
*"We were not able to improve or replace our database from those funds."*

*"We need another system to do that."*

<sup>1</sup> Respondents reporting too soon to tell are excluded from the analysis.



## Key Findings: NSP Evaluation System



### Key Finding

- 57% of respondents report the Strategic Technology Program improved their intra-office communication by more than a moderate amount.

### Intra-Office Communication Improved by Strategic Technology Program

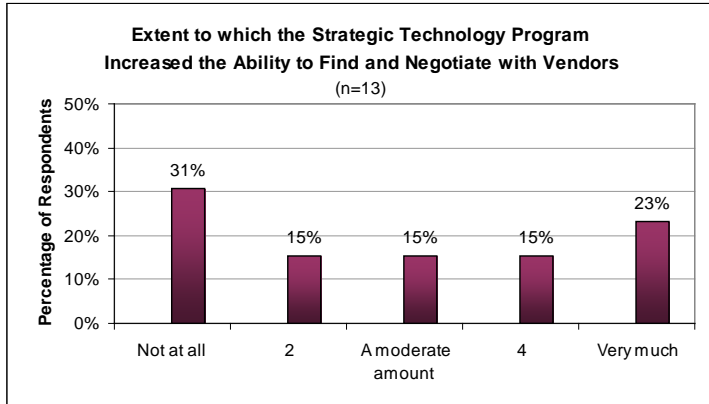
*"Use of email and shared on-line calendar."*

*"We were already doing a good job with this."*

*"Were able to have staff meetings that included technology training."*

*"Ability to communicate between three facilities."*

*"About the same."*



### Key Finding

- 38% of respondents report the Strategic Technology Program increased their ability to find and negotiate with vendors by more than a moderate amount.

### Increased Ability to Find and Negotiate with Vendors

*"We purchase almost everything online now."*

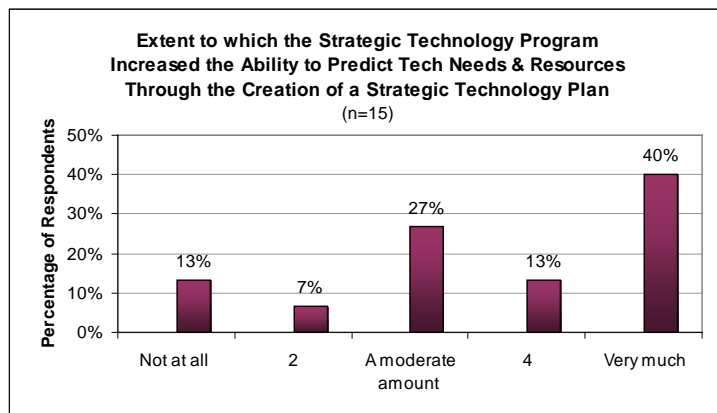
*"[We] tend to use one vendor, our IT provider, for developing scope of work and purchasing/installing equipment and software."*

*"We did not need this future. We already have this ability with our technical staff."*

*"We were able to work with our tech support provider to purchase new equipment."*

*"We needed additional expertise to determine this."*

## Key Findings: NSP Evaluation System



### Key Finding

- 53% of respondents report the Strategic Technology Program increased their ability to predict tech needs by more than a moderate amount.

### Increased Ability to Predict Tech Needs & Resources Through the Creation of a Strategic Technology Plan

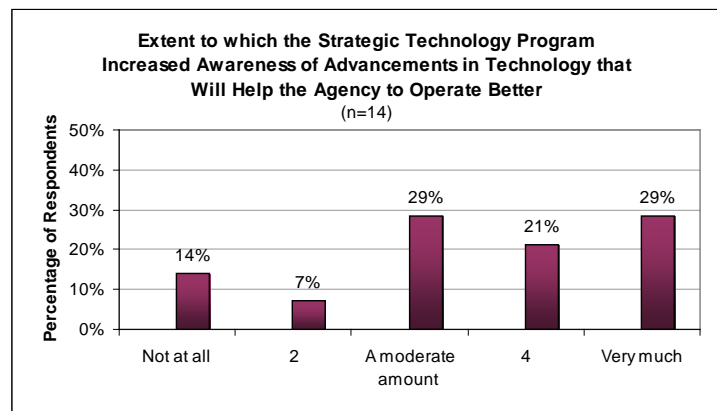
*"We continue to revise and update our plan annually."*

*"We now include technology as a line item in the operating budget, not only service but also hardware/software."*

*"We had a plan that is now almost entirely completed. The new plan that we are coming up with includes other items that we did not know about four years ago."*

*"The strategic planning process was lengthy but very useful."*

*"This was somewhat helpful but additional work and not as much payoff."*



### Key Finding

- 50% of respondents report the Strategic Technology Program increased their awareness of advancements in technology by more than a moderate amount.

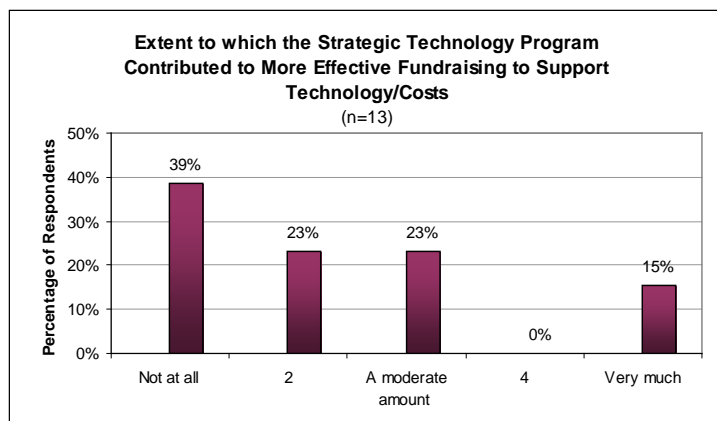
### Increased Awareness of Advancements in Technology that Help the Agency Operate Better

*"We became aware of, and joined a listserve for those in our field we definitely became more aware of current trends."*

*"We have a technology source that helps us with this item."*

*"Our awareness was increased substantially, but our ability to implement them was limited."*

*"We have our own IT guy for this."*



### Key Finding

- 15% of respondents report the Strategic Technology Program contributed to more effective fundraising by more than a moderate amount.

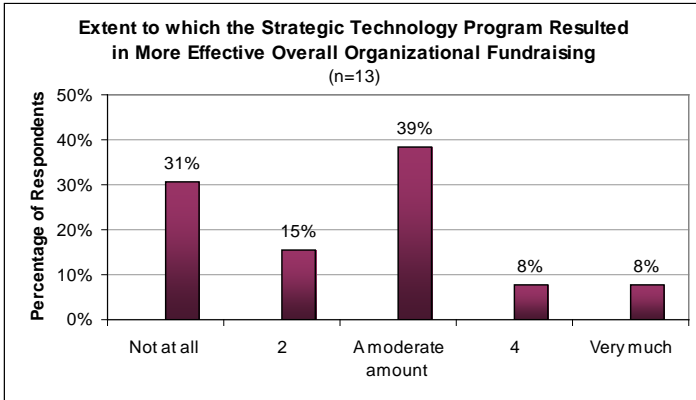
### Strategic Technology Program Contributed to More Effective Fundraising to Support Technology/Costs

*"There are few if any charitable sources that provide funding for technology upgrades."*

*"I think it is hard to do this. I tried a few sources using my technology plan and was turned down."*

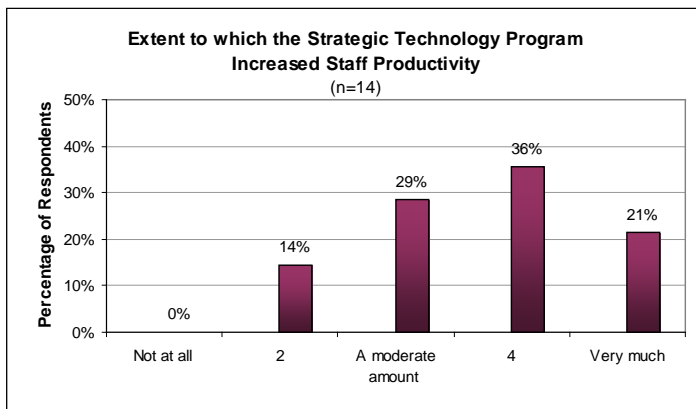
*"There is not much money out there for this, so we went through our board for additional resources."*

## Key Findings: NSP Evaluation System



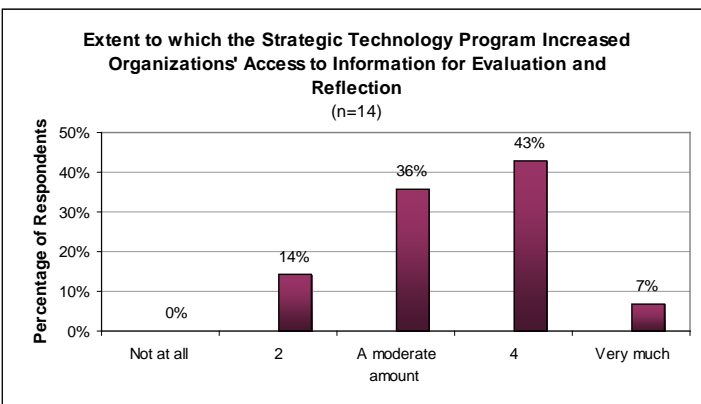
### Key Finding

- 16% of respondents report the Strategic Technology Program resulted in more effective organizational fundraising by more than a moderate amount.



### Key Finding

- 57% of respondents report the Strategic Technology Program increased staff productivity by more than a moderate amount.



### Key Finding

- 50% of respondents report the Strategic Technology Program increased access to evaluation by more than a moderate amount.

### Overall Organizational Fundraising Results due to Strategic Technology Program

*"Somewhat; most of the systems we use were in place previously."*

*"Used some of the skills learned in the trainings to help focus in on organizational fundraising."*

*"We have our development department."*

### Increased Staff Productivity

*"We can do more, faster."*

*"Very much. We eliminated duplicate efforts."*

*"Everyone has state of art computers, with DSL and email."*

*"We were able to replace aged computers with a networked system."*

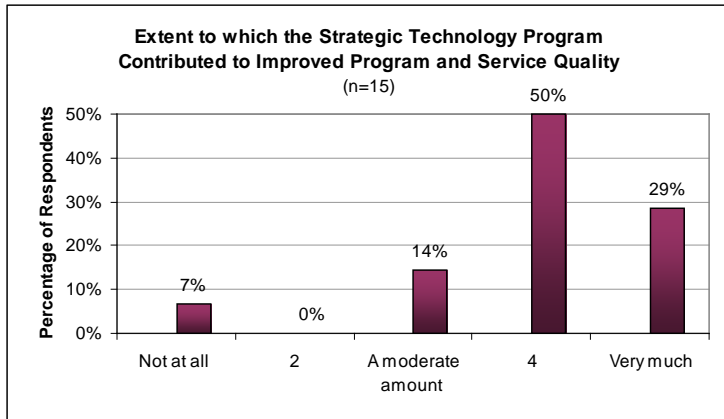
*"Staff like the new technology but work as hard as ever."*

### Strategic Technology Program Increased Organizations' Access to Information for Evaluation and Reflection

*"Most staff do research on various items for our clients."*

*"Somewhat helpful."*

## Key Findings: NSP Evaluation System



### Key Finding

- 79% of respondents report the Strategic Technology Program contributed to improved program and service quality by more than a moderate amount.

### Contribution to Improved Program and Service Quality

*“For example, the public can now submit notices to our community calendar electronically and access our schedule on the web.”*

*“We would never have been able to make technology improvements without this program.”*

*“Overall it has placed the agency in a better position to deliver services which is the bottom line.”*

### Other Changes Organizations Experienced as a Result of the Strategic Technology Program

*“We have been pushed into the digital age and it has reinvigorated the organization.”*

*“[We are] more committed to maintaining current equipment, replacing servers as needed, etc. than ever before.”*

*“In the last technology go around, a team of staff was developed to look at technology issues. This time the same team plus a few more folks were added. The new people gave new ideas that were taken up by the technology committee. In this go around, we are thinking more strategically about our technology and matching them with some of the demands of our funders. We have gone from basic hardware acquisition to more programs, methods of operation and security issues.”*

*“Too soon to tell.”*

*“We were able to get state of the art fundraising software.”*

*“Realization that this is an ongoing initiative and effort. Technology does not stand still. It doesn't take long for our hardware and software to be outdated. Finding funding to stay current is difficult.”*

*“Upgraded hardware and improved inner-office communication.”*

*“Made it clear to our Board of Directors how critical technology is to what we do.”*

*“Began applying information learned at program to overall strategic plan. Began to update websites, Guidestar, etc.”*

*“Better resources for data management. Upgrades for many staff who had outdated machines. Morale is always better when there are upgraded resources. Less breakdowns with the new mainframe.”*

## Key Findings: NSP Evaluation System

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### Additional Findings: Lessons Learned at Follow-up

*"It's so simple but it could have been disastrous if we had to learn it through experience: We learned that budgeting should not end with the hardware and software we plan to purchase. We must budget for the "consumables" like DVD's, CD's, hard drives and other items that need replacement on a regular basis."*

*"Participating in the tech workshops provided by HFPG is really helpful for keeping staff knowledge current, learning about technology opportunities, and becoming aware of the status of sister organizations in terms of technology planning and infrastructure."*

*"The technology program gave me time to evaluate the technology that was in use by the program at that time. It was particularly useful in helping me understand what it was possible to use technology to do. Unfortunately, I did not accurately assess our computer needs if the organization grew. We are currently trying to work with computer and telephone systems that do not allow us to expand enough."*

*"I don't think that a section on how to deal with vendors is useful to an agency that has gone through the process several times."*

*"The importance of budgeting for appropriate training on new technology. We purchased a software program that has actually added to our work, not done what we thought it would, not given us the reports we thought it would, and not provided the training we thought we'd get. Proper research is very important when purchasing anything. Never believe what the sales people tell you. Ask other users."*

*"There is only so much technological change an organization can take on at any given time. It is important to develop a plan that has timelines and endpoints. While the answers in the first section of this survey may look negative in some instances, they aren't. They reflect the amount of work the agency could take on for the technology program."*

*"Technology should be written in every grant proposal."*

*"One of the greatest benefits, aside from the equipment itself, was to have expert assistance in putting a Technology Plan together. That was tremendously helpful!"*

*"Too soon to say."*

*"I couldn't be more satisfied with the support. I feel some of the general requirements of the grant process are a little too much in terms of process. Many of us have been in the field for quite a long time and really do not need the additional work it requires for meetings and written materials on goals and objectives. But this is the reality of the present system."*

## Key Findings: NSP Evaluation System

### Additional Findings: Strategic Technology Projects Benefited from or Built on Other Prior NSP-Supported Projects

*"NSP is a tremendous resource for staff and board development. An organization like ours could never afford the real-world costs of such top quality training programs."*

*"Financial Management upgrade and continuation."*

*"Because of prior experience, I think our agency was already positioned to come up with a technology plan and go through some of the steps that were implemented through the current experience. I don't think we needed as much hand holding. However, I liked some of the other ideas that came up for technology issues during the workshops that didn't occur to our team."*

*"NSP has supported our organization in numerous ways over the years. They all have helped us grow into the organization we are today. We received a financial assessment grant."*

*"The NSP programs are all interrelated with each other and with other organization programs."*

*"Applied and was granted a technology grant in 2003."*

*"This was a "second round" of funding - we had received funding in 2000 for technology upgrades."*

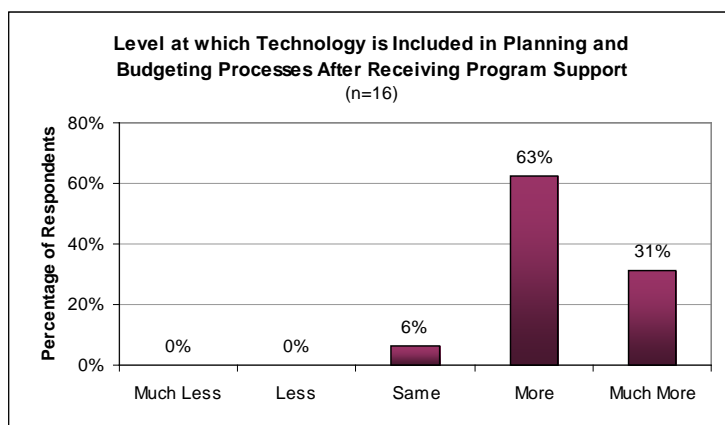
*"We are very grateful that they reconsidered and gave us partial discretionary funding. Apparently our first round funding was discretionary also, but I had not been aware of it."*

*"This was a '2nd Chance' grant that helped us to further update and innovate technologically. It helped us to build on earlier innovations (and also learn that we made some miscalculations the first time around)."*

*"Don't know if we have history of other NSP supported projects."*

*"Previous Tech grant."*

*"We have needed additional support from the Hartford Foundation for finance review, grant support for one of our major service components and management support."*



#### Key Finding

- 94% of organizations report an increased practice of including technology considerations in organizational budgeting.

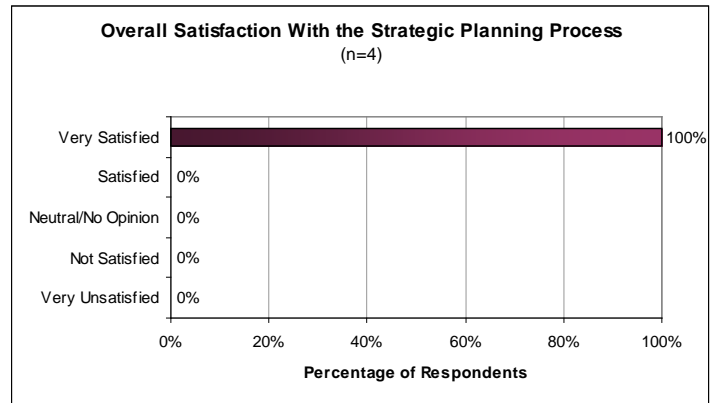
# Key Findings: NSP Evaluation System

## STRATEGIC PLANNING TAGS

### Findings: Immediate Post-Grant Completion<sup>2</sup>

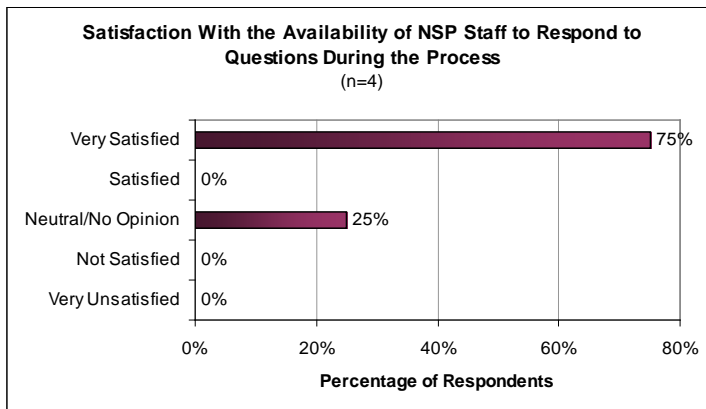
#### High Levels of Satisfaction with Consultants

- All respondents reported being satisfied (25%) or very satisfied (75%) with their consultant's responsiveness.
- 100% report being very satisfied with the consultant's ability to conduct the project in a timely manner, deliver services outlined in the proposal, and ability to meet financial estimate.
- 100% of respondents also report being very satisfied the consultants overall quality of work, and specifically with the written documents or products resulting from the planning process.
- All respondents report they would hire the same strategic planning consultant again.



#### Key Finding

- 100% of organizations report overall satisfaction at the highest level with the strategic planning process.



#### Key Finding

- 75% of organizations report satisfaction at the highest level with the availability of NSP staff. The other 25% are neutral or have no opinion.

#### Would You Hire this Consultant Again?

*"Consultants still assist [us] in the continuation of our strategic plan."*

*"We hired her to be our executive director as a result of her work."*

*"[Our consultant] took the time to understand the agency and its constituency. She also took the time to meet with the Board of Directors and was able to respond to their schedules. Our Strategic Plan represents our goals and objectives accurately and we would look to hire her again for future endeavors of this nature."*

*"Indeed, [our organization] retained our consultant as its Endowment and Capital Campaign consultant."*

<sup>2</sup> One organization had a change in executive director during the course of the strategic planning project.

## Key Findings: NSP Evaluation System

### Would You Recommend this Consultant to Other Agencies?

*“She is very accessible and very hands on. Her assistance has been a tremendous asset to our organization. I would recommend her without hesitation. Her experience as a director of a non-profit agency gives her insights that are helpful because it comes from direct experience and just theoretical.”*

*“We would highly recommend this consultant to other agencies. She has a broad knowledge and understanding of the not for profit agency workings. She would be an asset to any agency looking to develop strategic planning.”*

*“[She] has a clear understanding of the governance and budgetary issues particular to small non-profit heritage organizations. She continues to help us develop strategies to insure present and future sustainability.”*

### Achievements Attained with the Strategic Planning TAG

*“Our expectations were minimal because we had not done a strategic plan before. We were very surprised at some of the issues identified in the SWOT analysis.”*

*“We developed a mission and vision and a sense of direction, as well as an agenda for the next 5 years.”*

*“We now have a document that is used at each Board Meeting. The document is written so that every board member understands what our goals and objectives are and can discuss them at each board meeting. Reporting for the Executive Director has been made easier as the format of the report is directly connected to the strategic plan allowing everyone to know whether or not we are meeting our goals giving us an opportunity to refine objectives as we move forward if necessary.”*

*“[Our consultant] helped us write and post the Director's position; she received, evaluated and handled the correspondence and scheduling of the applicants, and served in an advisory capacity on the Search Committee. She made the whole process run smoothly, but allowed the search committee and the board to conduct the interviews and make the final determination. She anticipated and handled all of the details. We are extremely pleased with the both the process and the outcome.”*

### Additional Findings: Lessons Learned at Immediate Post-Grant Completion

*“The process allowed the Board to see the advances made by the corporation over the past seven years and also provided us with a vision for the future of the organization. Areas were discussed that heretofore would not have been discussed had it not been for this grant.”*

### How Helpful Were the Implementation Services Included in the Strategic Planning?

*“Tremendously.”*

*“The implementation services have helped keep us on track with the plan. Our consultant met with the board quarterly to review progress and to make any modifications necessary to achieve the goals.”*

### Key Findings from Interviews<sup>3</sup>

Interviews with executive directors receiving an NSP Strategic Planning TAG reveal similar high levels of satisfaction with their consultants and NSP. What challenges existed centered on two issues: 1. “one-size-fits-all” strategic planning processes; and 2. a lack of alignment between board and staff in regards to the consultant selected. Organizations valued customized strategic planning processes and executive directors voicing the strongest satisfaction described processes that were tailored to their organizations’ situation and needs. Additionally, “conceding” to a board or staff choice by one stakeholder group can stymie the process, creating roadblocks to meaningful conversation and a lack of appropriate ‘buy-in’. Interviews also revealed that whether a consultant was local or from out-of-town did not correlate with assessments of satisfaction – consultant style and processes do.

*“It was one of our best experiences with NSP and that is saying a lot because we have a lot of great experiences with them. They have done a lot to increase our capacity and helped us to be better at what we do and this is probably the best example of it. The people at NSP are phenomenal and we got a great consultant.”*

—Strategic Planning Interview

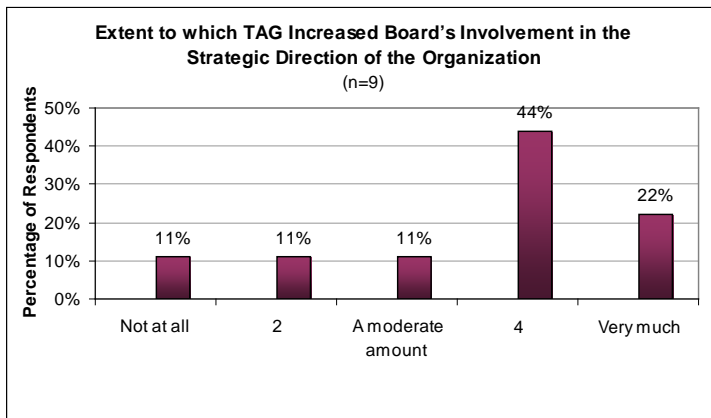
<sup>3</sup> Interview themes and findings are discussed throughout this report as they relate to the survey data. In this instance the interview data corroborates the high levels of satisfaction found in the survey with respect to the strategic planning consultants contracted and the planning processes overall. The interview data also serves to deepen the understanding of the survey data and offer further insights about what is working and where there is room for improvement.



# Key Findings: NSP Evaluation System

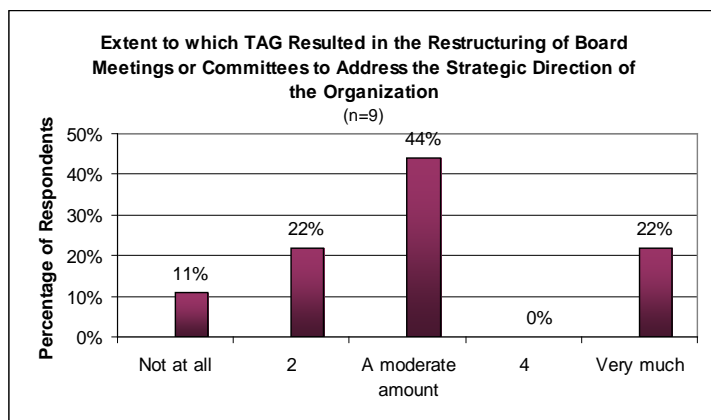
## STRATEGIC PLANNING TAGS

### Findings: 12-Month Follow-up Survey



#### Key Finding

- 66% of organizations report the Strategic Planning TAG increased board involvement in the strategic direction of the organization by more than a moderate amount.



#### Key Finding

- 22% of organizations report the Strategic Planning TAG resulted in restructuring of board meetings by more than a moderate amount.

#### Evidence of the Extent of the Strategic Planning TAG Increasing Board's Involvement in the Strategic Direction of the Organization

*"Work started before the grant was approved and continued after with same level of involvement"*

*"Attendance at board meetings remains high, three new board members have joined for '07-'08"*

*"Board activity"*

#### Evidence of the Extent of the Strategic Planning TAG in the Restructuring of Board Meetings or Committees to Address the Strategic Direction of the Organization

*"Agendas."*

*"Rewrote by-laws to have a more effective board."*

*"Service on the board."*

*"Planning committee was changed to an ongoing strategic committee."*

### Key Findings from Interviews

Key informant interviews revealed that for many organizations, strengthening board governance became a major goal within their strategic plans. Several executive directors reported that "board expectations" documents were created as part of the process. One executive said, "[The Board] came to their own conclusion that expectations are needed." Many interviewees also talked about the significance of the strategic plan as both a historical document and as performance assessment tool to assess organizational progress as well as the executive director's performance.

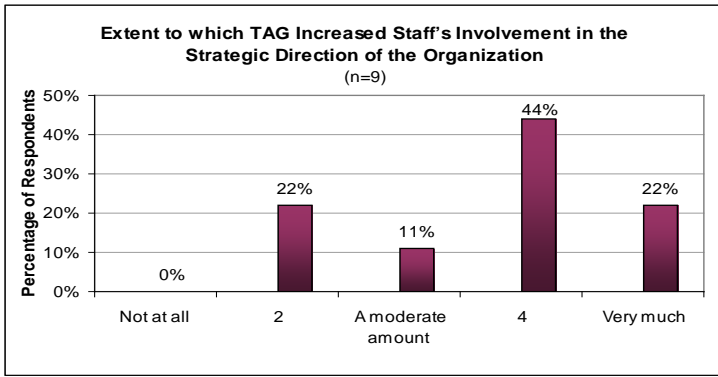
*"Just the process of talking about [Board] expectations had surprising results, and attendance dramatically improved."*

—Strategic Planning Interview

*"Board members reassessed their positions on the board. No one left because of the planning process, but some board members saw that they may be holding on to things they need to let go of."*

—Strategic Planning Interview

## Key Findings: NSP Evaluation System



### Key Finding

- 66% of organizations report the Strategic Planning TAG increased staff involvement in the strategic direction of the organization by more than a moderate amount.

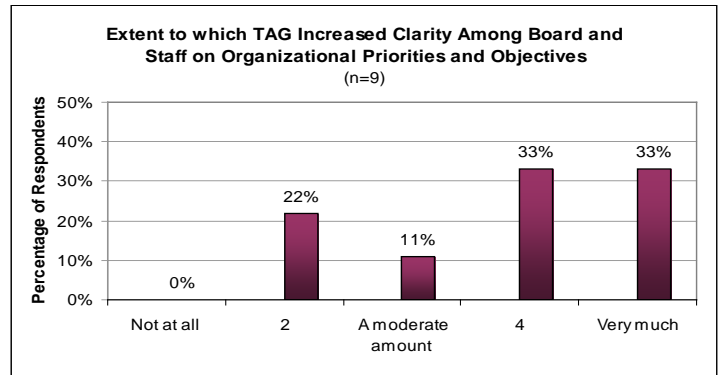
### Extent to Which Strategic Planning TAG Increased Staff's Involvement in the Strategic Direction of the Organization

*"2 line staff were involved in planning committee."*

*"They were always involved."*

*"Workshop attendance & volunteer increase."*

*"Staff meeting minutes and activity."*



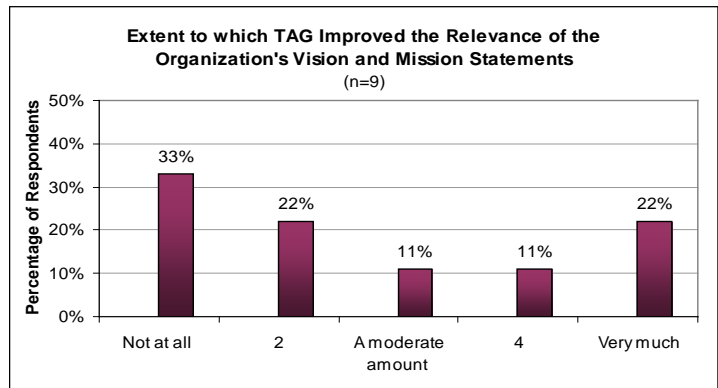
### Key Finding

- 66% of organizations report the Strategic Planning TAG increased clarity on organizational priorities and objectives by more than a moderate amount.

### Extent to which the Strategic Planning TAG Increased Clarity among Board and Staff on Organizational Priorities and Objectives

*"Our Board President has requested an update of our plan this fall for which we have secured a consultant."*

*"Feedback and performance."*



### Key Finding

- 33% of organizations report the Strategic Planning TAG increased board involvement in the strategic direction of the organization by more than a moderate amount.

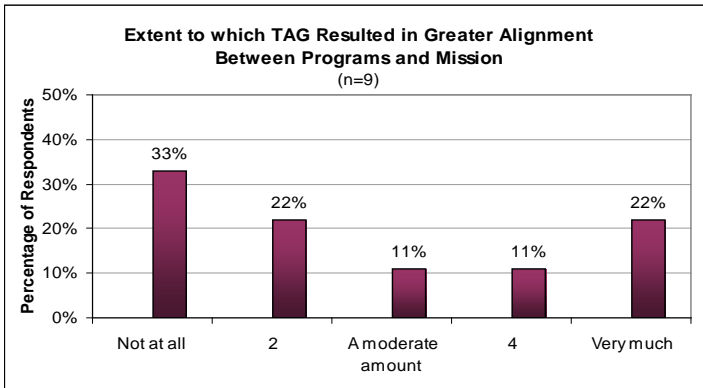
### Extent to which Strategic Planning TAG Improved the Relevance of the Organization's Vision and Mission Statements

*"Maybe not a direct result of the grant, but the process involved many small group meetings."*

*"The mission and vision statements were already established."*

*"National organization mission and vision adopted."*

## Key Findings: NSP Evaluation System



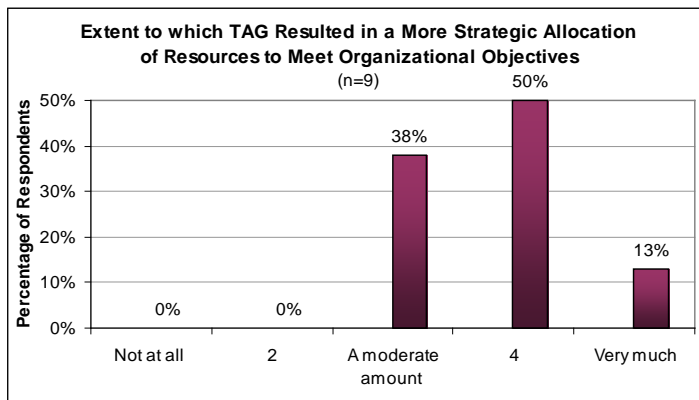
### Key Finding

- 33% of organizations report the Strategic Planning TAG resulted in greater alignment between programs and mission by more than a moderate amount.

### Extent to which the Strategic Planning TAG Resulted in Greater Alignment Between Programs and Mission

*“Always been well connected.”*

*“More specific language was added.”*



### Key Finding

- 63% of organizations report the Strategic Planning TAG resulted in more strategic allocation of resources by more than a moderate amount.

### Extent to Which the Strategic Planning TAG Resulted in a More Strategic Allocation of Resources to Meet Organizational Objectives

*“The VP of Development in conjunction with the Development Committee meets regularly to assess and update our goals to keep them in line with the allocation of funds.”*

*“Percentage of resources budgeted shifted.”*

*“Have not yet applied for funding for realigned plans.”*

## Key Findings from Interviews

In interviews, executive directors report that as a result of the planning process resources are distributed to the highest priority areas identified in the strategic plan. Most organizations are utilizing their strategic plan in the annual budgeting process. In the words of one executive director, “If it’s not in the plan, it’s not in the budget.” Another executive described how their organization had worked on increasing its visibility and as a result was able to increase its individual donor fundraising amount significantly.

## Key Findings: NSP Evaluation System

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### Changes Organizations Experienced as a Result of the Strategic Planning TAG.

*“Our organization is more organized and directed. We are all moving toward the same end.”*

*“Were able to focus on key elements such as marketing, etc.”*

*“The TAG grant allowed us to improve our staff's production in several ways. The purchase of additional computers aided in staff training and board production by making information available through laptops and screens. We were able to network the park through this grant. This allowed staff to access work files from remote locations.”*

*“A new Executive Director was hired in February '07, a new Artistic Director was hired in June of '06. There are new outreach and education initiatives being implemented including a high school internship and college independent study program which offers students the opportunity to participate in the Chorale at no cost. Two interns participated last season. Also, a small ensemble has been created to address the need for performances in smaller venues such as churches, schools, community/ civic events. An Assistant conductor position has just been created and has been filled by one of our core members. 8 paid core members are contracted each season and serve as section leaders to assist in rehearsal details, sing solo "lead ins" teach diction, help choose soloists, and brief the Artistic Director on any musical issues that may arise. Financially, we have been successful in meeting our revenue goals and increasing our savings to the point of securing a year's operating expenses in reserve. We have reached "across the river" to a new audience base.”*

*“I am the new Executive Director and thus can not compare with what was the involvement of the board prior to my arrival”*

### Cycles of Planning and Reflection within Organizations

*“Annual work planning begins in June for the year beginning the following January, start by reviewing current years work plan results to date, then discussions with all staff teams and all volunteer committees to develop priorities for following year.”*

*“At every board meeting we discuss where we are on a several select goals that we are working on at the time.”*

*“This is the first time in my time at the agency that this reflection took place.”*

*“Every year - this year we are reviewing the plan and updating also looking back eight years to a three page document that was the plan to see what progress has been made from that as well.”*

*“Through this process we got all of our equipment inventoried and have a regular schedule for replacement and upgrades.”*

*“An annual board retreat is scheduled in the fall. This year we have secured a consultant to assist in the planning process and he will meet with the board of governors for two full Saturdays; 9-4.”*

*“Quarterly review.”*

*“Annual Operation Plan; annual Board plan, 6 month formal updates on progress.”*

*“Monthly board meetings; some committee activity.”*

## **Key Findings: NSP Evaluation System**

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### **Revisiting Organization's Strategic Plan as Opportunities and Challenges Arise**

*"This is a given. We are always looking at ways to improve and organize ourselves."*

*"We have discussed a walking path which came up as an opportunity we did not expect. The planning department wrote a grant. Our goals included expanding outdoor opportunities but that was not in the plan because we never would have seen the possibility."*

*"Always revisit in annual planning process."*

*"It will in the future."*

*"The Chorale is entering an exciting phase with many new initiatives being implemented. An addendum has been added whenever the need arises."*

*"Conceptually no: operationally by experience."*

*"Mini-retreat held in July 2007."*

### **Organization's Budgeting Process Involves Looking at Organizational Priorities in the Strategic Plan**

*"We definitely looked at our mission and focusing staff on technical equipment that needs replacing and can improve productivity."*

*"Part of the planning process each summer which leads to the budget development for the following year."*

*"Although our budget has been cut, we have more fundraising opportunities. We will do more fundraising to achieve the goals."*

*"Like most non-profits unfortunately priorities change with grant funding. If we bring in less money then priorities change!"*

*"With the Executive Director and Fiscal Consultant and recently the Treasurer."*

*"The Board President and board review the annual budget projections before approval but the process could include more participation from the VP of Development, the development committee and the VP of Finance."*

*"Priority assigned by current need."*

*"Shifting of budgeted \$\$ to specific priorities."*

*"The FY 2008 operational budget was carefully reviewed as we look forward to several challenges this coming year."*

## Key Findings: NSP Evaluation System

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### People Involved in Implementing the Strategic Plan

*“Board, outside volunteers, management, staff.”*

*“Director, board, staff, population served, and Town officials”*

*“Executive Director, staff, and board”*

*“Staff and Board.”*

*“The Executive Director and department heads.”*

*“The board president, the board of governors, the Executive Director, and the Artistic Director with the approval of the membership.”*

*“Board, Staff, Department Heads, Executive Director.”*

*“All staff and Board. Management Team and Executive Committee of Board has provided leadership.”*

*“Most staff, most board members, some constituents, and some volunteers”*

### Change in Executive Director Since the Start of this Project

*“After the Strategic Plan was approved but before several of the new initiatives from the September board retreat began to be implemented.”*

*“The former Executive Director left in Feb. 05. This was just before we were awarded the grant.”*

## **Key Findings: NSP Evaluation System**

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### **Objectives Developed in the Strategic Plan Being Met**

*“For the most part yes. Most initiatives we outlined have been met. We currently are working on the website redesign, but most of the rest are completed.”*

*“Yes, requests for performances by the Chorale are up, ticket sales for our self- produced concert were robust and auditions have increased steadily in the last two years. Symphony request for the Chorale to improve its artistic quality has been satisfied in that we are contracted to perform at least three and sometimes four Masterwork performances with them each season.”*

*“Too soon to know.”*

*“Yes, they are clearly defined.”*

*“We have a 5-year calendar. We are presently up to date.”*

*“Yes.”*

*“By reviewing the plan regularly”*

*“For the most part yes. Most initiatives we outlined have been met. We currently are working on the website redesign, but most of the rest are completed.”*

*“Yes and no. Statistical and financial reports. Analysis against prior years' performance”*

*“The board will be revisiting objectives.”*

### **Useful Lessons Learned from Participating in the Strategic Planning TAG**

*“What we learned was useful to us. I don't know if it would benefit others. The process was important. Possibly more important for cohesion than the results.”*

*“It is possible to change the entire structure of your board when you have a paid professional suggesting it?!!!”*

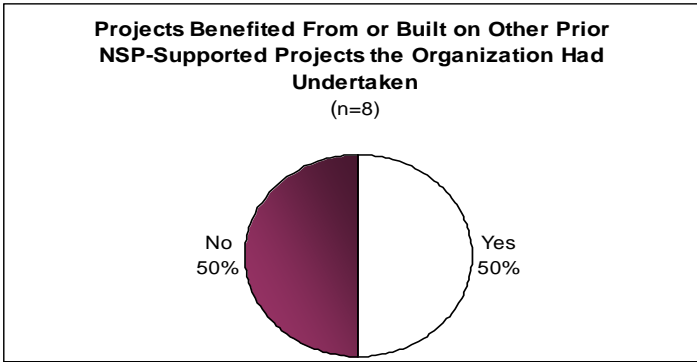
*“It was very useful looking at what we do and how technology can help achieve our mission. Most of our initiatives involved was of improving staff production.”*

*“The constant need to re-evaluate. The importance of proactive work to assure the membership is informed and has time to transition into new initiatives and staff changes made.”*

*“The development of the plan is only the very beginning of the real work!”*

*“I understand it was well received; particulars unknown.”*

## Key Findings: NSP Evaluation System



### Key Finding

- 94% of organizations report an increased practice of including technology considerations in organizational budgeting.

### Additional Findings: Lessons Learned at Follow-up

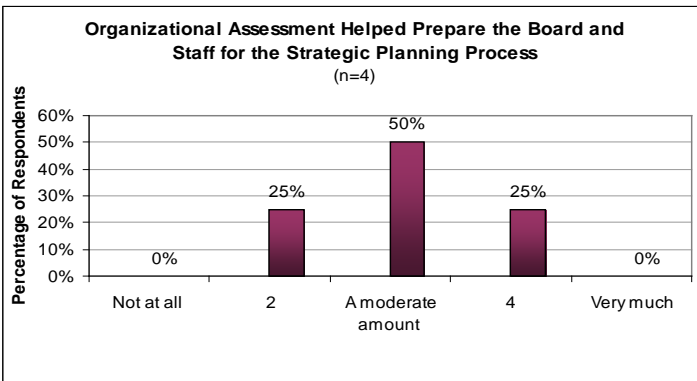
*“Built on work from each of our prior planning processes.”*

*“We used the strategic plan to gain accreditation.”*

*“Marketing Plan and Technology Plan a very well-integrated approach.”*

*“This was the first NSP project according to the prior executive director.”*

*“Board Development and Leadership workshops, technology workshop series.”*



### Key Finding

- 75% of organizations report an organizational assessment helped prepare the organization for the strategic planning process by more than a moderate amount.

### Strategic Planning TAG Impacts on Ongoing Planning:

- 80% of organizations have a regular cycle of planning and reflection in place.
- 89% of organizations revisit their strategic plan as opportunities and challenges arise.
- 90% of organizations have a budgeting process that involves looking at priorities in the strategic plan.

### Key Findings from Interviews

According to one executive director, a strong strategic plan provides a ‘roadmap’ for organizations to follow. Strategic plans help organizations to increase their focus and avoid mission creep. Although not all organizations assessed public perception of their organizations, those that did gained valuable knowledge. A few executives gained important insights into misalignments between public perception and organizational activities. In general, interviewees commented that the strategic planning process resulted in many benefits beyond the plan. Numerous interviewees talked about staff and board achieving a better understanding of their respective roles and an increased commitment by stakeholders as a result of the process.

When offering suggestions to other organizations considering engaging in a strategic planning process the message was: Be prepared for the commitment. One executive cautioned, “You have to make an honest assessment of the hours it will take.” Interviewees pushed for peer organizations to understand that much of the work falls to them, with the consultant a valuable guide.

*“We refer to [the strategic plan] as the bible. It dictates everything we do. From programs to geographic reach to audience. The board and staff refer to it on a daily basis. We actually shrank our offerings. We decided that organization had tried to do too much and we began to focus on smaller area and core offerings.”*

—Strategic Planning Interview

*“When someone, another funder, asks for a plan, and present ours we knock their socks off. We have planned for everything, but it doesn’t mean we are not spontaneous. Having the planning process and ability to look at it and our approach is hugely important in generating support from the outside world.”*

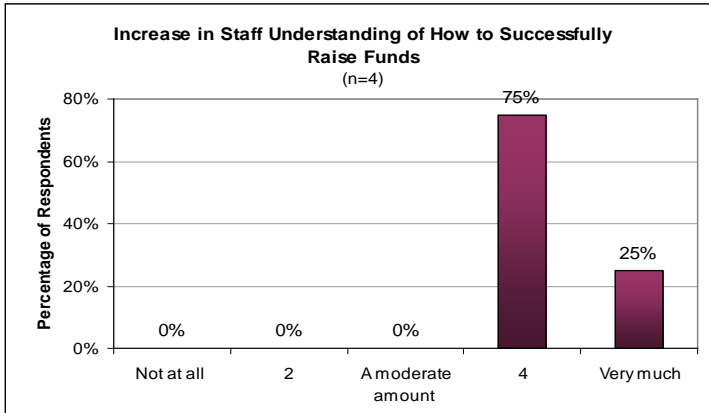
—Strategic Planning Interview



## FUND DEVELOPMENT TAGS

*Note that no findings are reported for the immediate post-grant completion surveys because only one survey has been completed to date.*

### Findings: 12-Month Follow-up Survey<sup>4</sup>

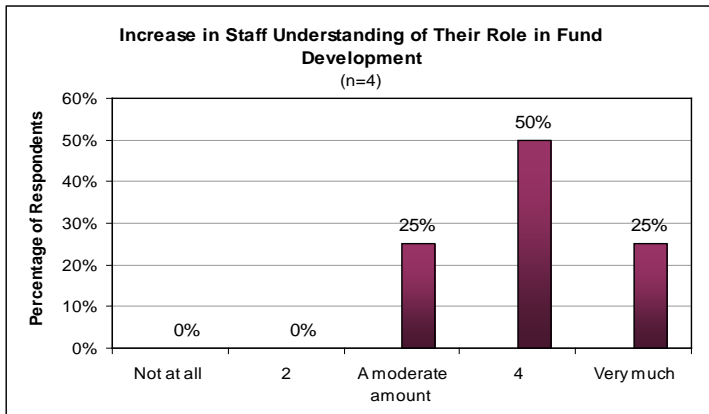


#### Key Finding

- 100% of organizations report the Fund Development TAG increased staff understanding of how to successfully raise funds by more than a moderate amount.

#### Increase in Staff Understanding of How to Successfully Raise Funds

*“The emphasis on relationships with prospects has increased our emphasis on cultivation events.”*



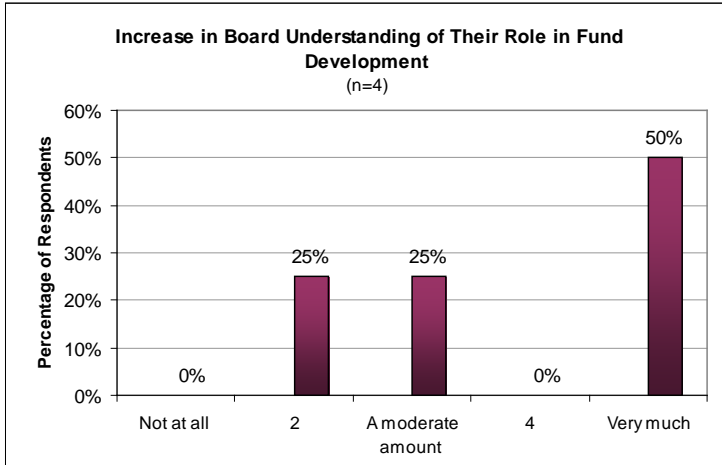
#### Key Finding

- 75% of organizations report the Fund Development TAG increased staff understanding of their role in fund development by more than a moderate amount.

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<sup>4</sup> Respondents reporting too soon to tell are excluded from the analysis.

## Key Findings: NSP Evaluation System



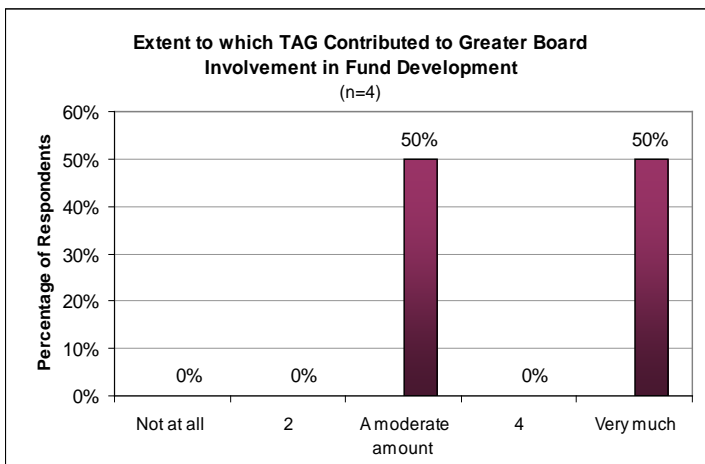
### Key Finding

- 50% of organizations report the Fund Development TAG increased board understanding of their role in fund development by more than a moderate amount.

### Increase in Board Understanding of their Role in Fund Development

*"The Board frequently references information from [the consultant's] presentation to the Board."*

*"Increased involvement & money"*



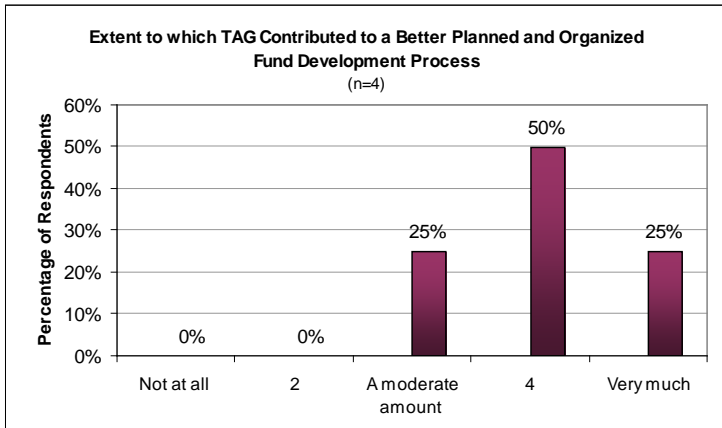
### Key Finding

- 50% of organizations report the Fund Development TAG contributed to greater board involvement in fund development by more than a moderate amount.

### Extent to Which the Fund Development TAG Contributed to Greater Board Involvement in Fund Development

*"This was already beginning to happen, the training solidified it."*

## Key Findings: NSP Evaluation System

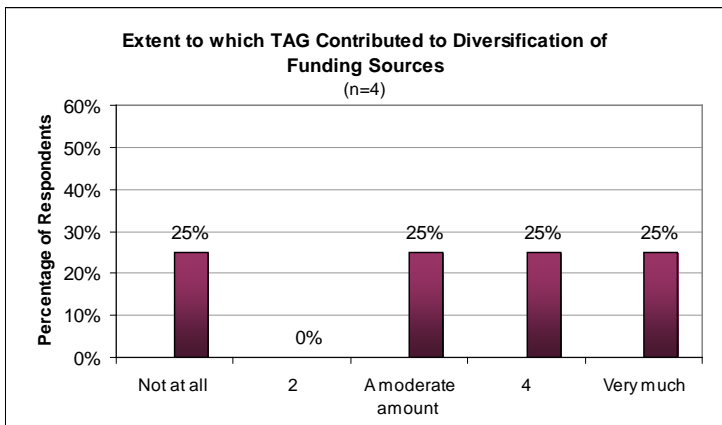


### Extent to which the Fund Development TAG Contributed to a Better Planned and Organized Fund Development Process

*“Our draft development plan was discussed and suggestions were incorporated.”*

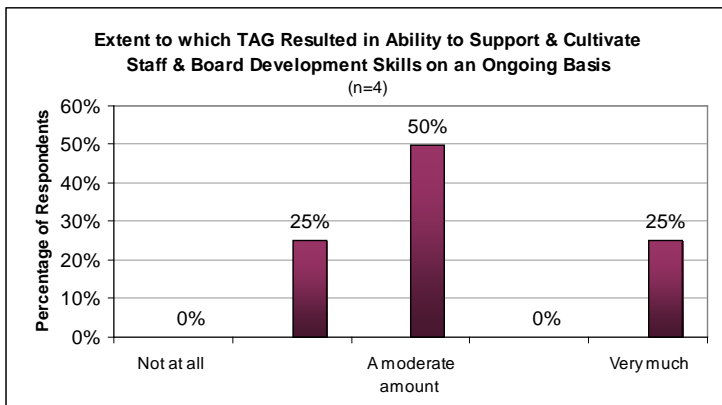
#### Key Finding

- 75% of organizations report the Fund Development TAG contributed to a better fund development process by more than a moderate amount.



#### Key Finding

- 50% of organizations report the Fund Development TAG contributed to a diversification of funding sources by more than a moderate amount.



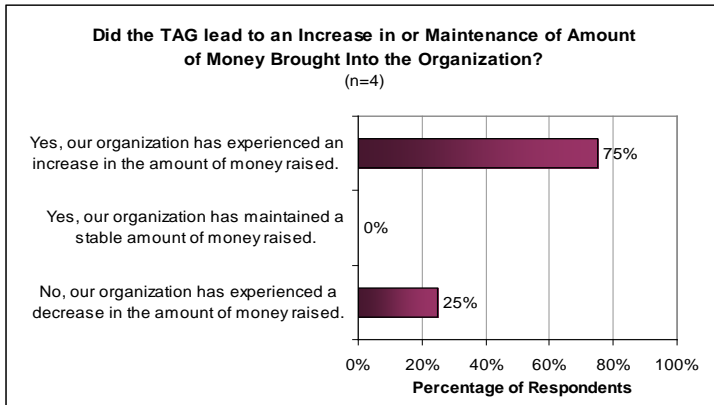
### Extent to Which the Fund Development TAG Resulted in the Organization’s Ability to Support and Cultivate Staff and Board Fund Development Skills on an Ongoing Basis

*“Board agreed to establish a new position to oversee all development efforts in addition to a Director of Development.”*

#### Key Finding

- 25% of organizations report the Fund Development TAG resulted in an ability to support and cultivate staff and board fund development skills on an ongoing basis.

## Key Findings: NSP Evaluation System



### Key Finding

- 75% of organizations reported an increase in the amount of money raised by the organization as a result of the Fund Development TAG.

### Other Changes Resulting from the Fund Development TAG:

*"Our capital campaign committees and staff benefited from the trainings. Frequent reference to learnings is the best indication to me that there was change."*

*"We see development as one of our programs. We have become more aggressive in seeking payment for services we offer whenever possible. We have increased our visibility with community programming and outreach and intentional publicity in order to be better known and funded."*

*"It's been part of an all encompassing change -- vision, programs, staff structure and approach."*

*"I believe the HEPG Development TAG was good but the consultants that were hired did not give much new information."*

### The Fund Development TAG Lead to an Increase in or Maintenance of the Amount of Money Brought into the Organization

#### Unrestricted Money Raised by the Organization has Changed in the Last Year:

*"Individual support has doubled."*

*"Down by \$100,000"*

*"\$12,346 plus in 2006, over 2005."*

#### Detailed Explanation:

*"The board has really got involved in fund raising."*

*"We were without a development director for the last 6 months of FY07. So \$100,000 is a lot but it could have been much worse."*

*"Our Budget is under \$200,000 so the \$12,346 amount reflects a significant positive upturn."*

### Additional Findings: Lessons Learned at Follow-up

*"It is very helpful to get a knowledgeable outsider's perspective on the way you are doing business. Most non profit staff members do the work for the love of helping others, not for the love of money. (Thank God!) Consequently raising money is not usually a strength of non profit EDs or Board members. The reality is that without the necessary financial resources, the work will not be done. So we need to learn how to sustain our organizations if we believe in what we are doing."*

*"A Board cannot be presumed to know or be comfortable in its development responsibilities. There needs to be ongoing education in this area."*

*"The importance of incremental change rather than see changes; the necessity to stay focused on the process not just the results."*

*"One piece of the project was to interview various people in the community. We found out that our agency had a very positive reputation in the community."*

## **KEY FINDINGS FROM INTERVIEWS WITH BOARD LEADERSHIP PROGRAM PARTICIPANTS**

### **Motivations for Participating in the Board Leadership Program**

In interviews with Board Leadership Program (BLP) participants it was not uncommon for executive directors to report low performing boards as a significant motivator for participation. In general executive directors viewed the BLP as an opportunity to motivate and engage board members considered to be inefficient or ineffective (particularly as it relates to fundraising). In the words of one executive director, the organization's board is a "book club board" that enjoys reading staff reports. "I attended the workshops because I wanted to know how to build a board, certainly with more fundraising power." There were, however, a few interviewees that offered other motivations. For these executive directors it was because of changes in the organization or on the board that precipitated their participation in the BLP. A few organizations were growing or transitioning from one nonprofit development stage to the next and recognized the BLP as an opportunity to educate board members about different functions boards can have. Other executive directors also indicated that with several new board members beginning to serve, this was an opportunity to build the 'team'.

*"I brought 3 young board members...they were very enthusiastic. The timing was perfect."*

—BLP Interview (\$1,500 Grant Recipient)

*"One of the big [motivations]... is that our board is not linked well with its fundraising responsibility."*

—BLP Interview (\$5,000 Grant Recipient)

### **Workshop Experience**

Overall, organizations expressed very high levels of satisfaction with the workshop component of the program. Workshops were described as extremely informative, very engaging, and thought provoking. No respondent suggested that the workshops be shorter, and a few encouraged lengthening the workshops. In general, executive directors valued having a team of board members attend the workshops, even executive directors who struggled to get a team to attend. According to one executive, "The benefit was that [the board members] were talking to each other. I no longer had to be a conduit for getting information to the [group]. It provided a template for the whole team concept that the board is now operating as."

*"Two of my three officers that I brought sit on other boards too and they came away thinking, wow, I haven't thought of this before. I can use this for my other board work as well."*

—BLP Interview (\$5,000 Grant Recipient)

*"We were also worried about development and stepping up in that role. Mostly because of the quality of the workshop – I still have the notebook and we use it all the time."*

—BLP Interview (\$1,500 Grant Recipient)

### **Consultant Experience**

When talking about the consultant experience, several executive directors indicated that a governance challenge persisted even when support by a consultant. In general the consulting experiences were a mixed bag. Those organizations that focused on increasing board fund development skills spoke most frequently of challenges they faced. "This is the bit that our board embraces in theory, but not in practice," is how one executive described her board after the consultancy project.

*"This is true in all great meetings [referring to BLP workshops], how do you channel that into real change. And from the board retreat not a lot changed"*

—BLP Interview (\$1,500 Grant Recipient)

*"We did develop a real action plan for the board, which was extraordinarily helpful. The consultant was kind in helping us to develop it and then checked in on how it was being implemented. The board was very worried about it, and this made them feel able to do it, and feel they are able to fulfill their role."*

—BLP Interview (\$1,500 Grant Recipient)

## **Key Findings: NSP Evaluation System**

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Consulting projects were varied. Some addressed a need for stronger governance practices and the creation of board protocols (e.g. term limits and board member expectations). These efforts utilized the BLP as an effective means to train board members to be more engaged and effective. Other projects were described as mini-retreats, which rallied the board together but did not result in longer, sustained changes. In general, the mini-retreat activities were associated with organizations participating in the program when \$1,500 was allocated for consultation.

Additionally, BLP participants indicated that finding consultants was a challenge; something the LFA team did not hear when talking with the Strategic Planning TAG participants. BLP participants indicated that there was not enough diversity in the pool of consultants and thus limited their choice. Interviewees did not indicate that there were specific consultants they would rather work with, but unlike Strategic Planning TAG participants, some felt constrained and unable to find the right 'fit' among the consultants presented by NSP.

### **Impacts of the Board Leadership Program**

In general, executive directors report that board members feel more knowledgeable and hold a larger context for understanding their role within the organizations. Not surprisingly organizations with well functioning boards prior to the BLP identified the most positive outcomes. Below is a list of the outcomes identified in the interviews:

- Attendance improved;
- Term limits adopted;
- Board expectations documents created;
- Board cohesion and buy-in developed;
- Conflict of interest policies instituted;
- Board member training plans developed; and
- Boards transitioned from hands-on, grassroots boards to governance boards.

However, for several of the executive directors interviewed there was not a clear sense that something fundamental had changed about the organization – the development of board policy, while considered a positive outcome, is not the shift in thinking that executive directors envisioned. Still others felt it is too soon to tell the outcomes. For all organizations, though, there is a desire for more time to be devoted to board fund development skills, whether in a whole new workshop series or as more workshop time within the existing BLP model.

## **KEY FINDINGS: BENEFITS OF PARTICIPATING IN MULTIPLE NSP PROGRAMS**

Survey results related to the benefits of participation in multiple NSP activities reflect the solid program design of NSP. In open-ended comments, respondents identified the interrelatedness of all NSP programs. For some respondents, it is actually NSP that drives organizational capacity building knowledge. The topics offered through NSP can be entirely new nonprofit staff and boards. One executive put it best by saying, “NSP informs me about what I need to know.” These organizations look to NSP to lead and to stage organizational interactions with NSP as appropriate. One Fund Development TAG survey respondent stated, “Organizational Assessment and Strategic Planning set the stage for this work. We could not have done it without the earlier NSP projects.”

LFA will look to further explore the benefits of participation in multiple NSP programs in future phases of work. To-date, survey data is beginning to be collected and early indications are that NSP-supported projects do build on each other and result in stronger organizations, holistically. As organizational capacities grow through participation in NSP programs, future gains are greater. Upon completion of NSP-funded projects, organizations are more professional and more successfully implementing best practices. As the survey sample size increases LFA will be better able to explore the relationships between NSP activities. In addition, LFA will explore benefits of participating in multiple NSP programs in key informant interviews.

## **LESSONS LEARNED, RECOMMENDATIONS, AND NEXT STEPS**

### **Lessons Learned for NSP Program Improvement**

Through review and discussion of preliminary findings from the NSP evaluation system, the following lessons for NSP program improvement emerged:

- **Participation in the Executive Management Institute (EMI) could be further reinforced and encouraged through all other NSP services.** The EMI appears to awaken nonprofit leaders to a wide variety of opportunities for their organization's to build their capacity and increase their effectiveness. Encouraging participation in the EMI when the NSP has contact with a nonprofit leader seeking any other NSP service could serve as the best gateway into serious, broad-based capacity-building intervention for the organization.
- **Do not assume what any nonprofit executive might know.** We found that even seasoned nonprofit executives may not know about the importance of a practice as fundamental as strategic planning. In communications with organizations about NSP offerings, NSP staff should make no assumptions about what people know is important, valuable, and available to them through the NSP.
- **Consider strategies for encouraging organizational assessment prior to engagement in strategic planning.** Right now, the NSP does not require an organization to have engaged in an organizational assessment before it undertakes a strategic planning process. This is largely out of respect for an organization's desire to follow its own momentum to get a strategic planning process moving forward. However, a quality strategic planning process should include some effort on an organization's part to take stock of its strengths, opportunities for development, and place in the external environment. The NSP should consider ways of asking an organization to demonstrate it has engaged in some kind of process to take stock in these dimensions before launching into, or that it will do as part of, a strategic planning process.
- **Nonprofit executives have a desire for the board leadership program to focus more on building fund development skills.** Even with one-half day of a two day workshop focused on board fund development, Board Leadership Program participants still want more. Organizations can use their \$5,000 implementation grant for this purpose, given that some of the consultants do have this expertise, although the \$5,000 amount may not be enough to pay for what organizations need. In evaluation interviews, respondents said that while the \$5,000 grant for implementation was valuable, they could have used more to do additional board training, particularly in the area of fund development skills. The NSP may want to consider additional ways it can support building fund development skills for nonprofit boards.
- **Communications about the board leadership program appear to be successfully building awareness about it.** The board leadership program is currently over-subscribed for the first time, and the NSP may consider running an extra session in 2008. The strong interest in the program stems from a number of successes, including: 1) the quality of the program, which appears to be contributing to word-of-mouth communication and recommendation, 2) NSP's communications directly with board chairs about the availability of the program, and consultants' efforts to talk with agencies about the program.



## Key Findings: NSP Evaluation System

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- **The NSP is constantly walking a fine line between developing its programs in adherence with best practices and being responsive/open to the nonprofits' experiences of the programs.** Because of the NSP's commitment to providing the highest quality capacity-building services, they are not going to be able to please all of the people all of the time. Put another way, there will always be a subset of participants in NSP offerings who resist "the medicine." However, more often than not, evaluation results show that even for those who resist or resented some aspects of NSP's programmatic processes (e.g., attending a training on technology) ultimately found the benefits of these components to outweigh the costs in terms of the time in took for their participation.

### Next Steps

- **Communicate that completion of evaluation surveys is a requirement of NSP support.** As the NSP moves forward with implementing the evaluation system, staff should communicate with applicants, both verbally and in writing (i.e., on grant applications and agreements), that completion of evaluation surveys is a requirement of funding. The driver of this policy is the desire to have as close to a 100% response rate as possible, thus eliminating concerns about bias in the evaluation results.
- **Revisions to Evaluation Survey instruments based on pilot-test experience.** LFA and NSP staff discussed changes to the evaluation survey instruments based on the responses received in the pilot-test implementation phase. LFA will make these changes to the instruments in the first phase of work outlined for 2008. One specific revision is to include the timeframe range for completing the survey: based on the pilot test, we have learned that the surveys can take as little as 10 minutes or as long as 30 minutes, depending on how much narrative a respondent chooses to include. Another type of change to the surveys will be to include more questions about how each component of the more complex programs (e.g., strategic technology and financial management) built on each other and contributed to the outcomes organizations experienced.
- **Implementation of "Phase 2" Evaluation Surveys.** LFA will launch the evaluation surveys for NSP programs in Phase 2 of the evaluation system implementation plan. These programs include the sequenced workshops, financial management program, and the board leadership program.
- **In-depth follow-up interviews with participants in the Strategic Technology and Financial Management programs.** In 2008, LFA will conduct in-depth key informant interviews with organizations that have completed their participation in the Strategic Technology and Financial Management programs at least one year prior to the time of the interview. In these interviews, we can explore some of the issues identified in the "lessons learned" section above, as well as pursue additional insights into how these programs create change in organizational effectiveness.