

Hartford Foundation for Public Giving SMALL AGENCY PROGRAM

FINAL EVALUATION REPORT

May 2016 through December 2018

January 2019

“We were in decline, but are now making significant changes to put us into the renewal stage with new leadership. We’re in a great spot for the future.”

Participant in Building on Success, September 2018


Cross Sector Consulting

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Thanks to Small Agency Program participants who shared their experiences and insights through the completion of feedback forms, online surveys, and in focus groups and meetings. Finally, thanks to the Hartford Foundation for Public Giving for supporting the evaluation.

Executive Summary

Introduction. In 2016, the Hartford Foundation for Public Giving (the Foundation) launched the Small Agency Program with four main components: (1) **Building on Success (BOS)** delivered two years of capacity building and grant support for a cohort of 12 small agencies; (2) the **Small Agency Grants** component offered general operating support and project grants; (3) **Community Partners** convened 14 capacity-building organizations to share information and explore opportunities for collaboration; and (4) an **Advisors Group** of representatives from small agencies met periodically to review and provide feedback on program plans.

The Foundation contracted with Cross Sector Consulting to evaluate the Small Agency Program. The evaluation focused on documenting and assessing program services, implementation accomplishments and challenges, early program outcomes, and lessons learned about supporting small agencies. Key evaluation findings and considerations for the next phase of the program are presented below.

Accomplishments. The program made substantial progress in achieving its desired outcomes:

- **Program Implementation.** The Foundation successfully implemented all four program components. Overall, the program directly engaged at least 48 small nonprofits – through BOS (12 participating agencies), Small Grants (24 additional grantees), and the Advisors Group (12 additional agencies).
- **Building on Success.** BOS successfully implemented its learning sessions and consultation, with 11 of 12 BOS agencies completing the program. Most BOS participants rated learning sessions as “good” to “excellent” and roughly half cited the consultants as the most valuable aspect of BOS. All 11 BOS graduates improved their organizational capacity (as measured by a pre- and post-organizational assessment), and 10 of 11 reported improving their services or programs through BOS. All met the Foundation’s board diversity standards at exit, with the average number of non-white board members increasing from 3.7 to 4.3 board members. Nearly all improved their fundraising capacity: 10 of 11 improved their fundraising capacity on the organizational assessment, 8 of 11 increased their operating budgets, and 8 of 12 received Small Grants after completing BOS.
- **Small Grants.** This component was successfully launched in 2017, with 32 grants awarded over its first three funding cycles and most agencies seeking Small Grants rating the grant-seeking process positively. The 2017 recipients reported meeting or exceeding 74% of their organizational development and program effectiveness measures, with nearly all making at least some progress in achieving these measures in their first year (general operating support grants are for two years).
- **Community Partners.** The Community Partners met consistently and made progress in expanding resources for small nonprofits – including new workshops and an Information Fair. All partners reported learning new information about the services Community Partners offer.
- **Advisors Group.** The Advisors Group met four times to provide feedback on the overall program design and individual program components. Most members appreciated the Foundation’s focus on

small nonprofits and the opportunity to develop personal connections to the Foundation.

- **Views of the Foundation.** Across components, most participants agreed that the Foundation is doing more to support small agencies in the region. For example, on Small Grant Information Session feedback forms, more than 90% of respondents agreed that “the Foundation supports small agencies in greater Hartford.”

Challenges and Lessons Learned. Participants and staff reported several challenges:

- Program staff struggled to identify and engage a wider set of small agencies, given limitations in the Internal Revenue Service (IRS) database.
- In reflecting on the first two years of the program, Advisors suggested the Foundation could do more to support “all-volunteer” agencies and those not meeting board diversity standards. Several also cited the meeting schedule (i.e., during work hours, infrequent meetings) as a challenge.
- In reflecting on the first two years of the program, a number of Community Partners cited the slow pace of implementation as a challenge, given the number of meetings of both the full group and the three workgroups. These partners suggested it may make sense to move beyond initial efforts toward a more targeted and well-resourced efforts to support small agencies.

Program staff and consultants used stakeholder feedback and evaluation data to improve the program and make mid-course adjustments through regular planning and debriefing sessions. Early lessons from BOS informed the design of the Small Grants application process. BOS participant feedback and staff / consultant observations informed the planning of future BOS sessions (e.g., different topics and activities) and the design for the next BOS cohort.

Considerations. The Foundation may also consider the following options for improving the program:

- Expand opportunities to connect small agencies across components and with Community Partners.
- Continue to assess BOS, with particular attention to planned adjustments in the application (and vetting) process, learning sessions, and use of strategic planning to guide consultation.
- Facilitate a planning session with Community Partners to explore suggestions for formal commitments that achieve greater results for small agencies.
- Engage additional small agencies by publicizing the Small Agency Program and its grantees using traditional media and social media. This approach could help small agencies “find” the Foundation vs. the Foundation finding small agencies.
- Support an alumni group for BOS and Small Grants to create opportunities for cross-agency collaboration and for continued capacity building through the Community Partners.
- Assess the long-term impacts of BOS and Small Grants via annual surveys collected on-line and/or in conjunction with program events and meetings (e.g., networking events, BOS reunions).

1. Introduction

Background. In 2015, the Hartford Foundation for Public Giving (the Foundation) established a Small Agency Workgroup to assess potential need and related options for supporting small nonprofit organizations in Greater Hartford. The Workgroup defined small agencies as nonprofit organizations with: (a) annual operating budgets below \$200,000 and an active financial history that spans at least one full reporting year; (b) a functioning board that meets regularly; and (c) a track record of program delivery.

The Small Agency Workgroup benchmarked efforts with counterpart foundations and other support organizations; reviewed past Foundation programs and available research and literature; examined regional nonprofit data; held roundtable discussions with area small nonprofit organizations to better understand their goals and challenges; and proposed options to provide more robust support to the area's small nonprofits.

The Small Agency Workgroup activities resulted in the creation of the Foundation's Small Agency Program in 2016 with the following components:

1. **Building on Success (BOS) Program.** A cohort of 12 agencies participated in a two-year capacity building program. Capacity building support was coordinated by organizational development consultants based on an initial organizational assessment, and included eight learning sessions on topics relevant to identified group needs. Participating nonprofits received mission support grants of \$5,000 per year of the program (\$10,000 total).
2. **Small Agency Grant Program.** The Foundation offered project grants (up to \$7,500 for one year) and general operating support grants (up to \$10,000 over two years).
3. **Community Partners.** The Foundation convened 14 community partners – organizations that provide support or services to small nonprofits – to share information on their existing services and explore opportunities to expand support services for small agencies.
4. **Advisors Group.** The Foundation established and periodically convened a select group of small nonprofit leaders to provide feedback and input on ongoing efforts to support small nonprofit organizations.

As part of the development of the Small Agency Program, Foundation staff (with input from the evaluators) created a logic model (see Table 1 on next page). The logic model identified activities, outputs, outcomes and impacts for each component, including the program evaluation.

Table 1. Small Agency Program Logic Model

Component / Activities	Outputs	Short Term Outcomes	Long Term Outcomes	Impact
Building on Success (BOS) Program <ul style="list-style-type: none"> Develop program and contract with consultants Announce program to small agencies Select BOS participants Administer BOS program Evaluate program 	<ul style="list-style-type: none"> Program materials Cohort training sessions and participants Grant awards Pre- and post-organizational assessments Communications media 	<ul style="list-style-type: none"> Comprehensive program is established Small agencies receive information about the program and submit applications 	<ul style="list-style-type: none"> Small agencies work with consultants for organizational assessments and advice Small agencies participate as learning cohort in sessions Small agencies receive small mission support grants 	<ul style="list-style-type: none"> Selected small agencies improve planning and governance activities, access new resources, improve volunteer engagement, become more stable and improve service delivery
Small Agency Grant Program <ul style="list-style-type: none"> Develop and announce program Administer grant program Evaluate grant program 	<ul style="list-style-type: none"> Program materials Program announcement Applications Grant awards 	<ul style="list-style-type: none"> Grant program is established Small agencies receive information about grant program 	<ul style="list-style-type: none"> Selected small agencies receive mission support grants Grant program is improved by evaluation 	<ul style="list-style-type: none"> Selected small agencies become more stable & improve service delivery
Community Partners <ul style="list-style-type: none"> Convene meetings with partner organizations Coordinate communications about existing programs 	<ul style="list-style-type: none"> Partnership meetings Partner agreements Communications media 	<ul style="list-style-type: none"> Shared understanding of existing programs Could include agreement to offer additional programs 	<ul style="list-style-type: none"> Small agency leaders learn new info/skills Could include establishment of a nonprofit hub 	<ul style="list-style-type: none"> Small nonprofits easily learn about existing programs, participation increases Small nonprofits access information, resources & advice to improve
Small Agency Advisors <ul style="list-style-type: none"> Identify and invite selected small nonprofit leaders Convene committee meetings Obtain feedback, share information with partners and stakeholders, utilize input to improve small agency program 	<ul style="list-style-type: none"> Advisory Committee participants Advisory Committee meetings Committee feedback Program improvements 	<ul style="list-style-type: none"> Selected small agency leaders provide feedback and input Foundation gains better understanding of small nonprofits and vice versa 	<ul style="list-style-type: none"> Advisory Committee input results in recommendations for program improvement Foundation and partners improve abilities to meet the needs of small agencies 	<ul style="list-style-type: none"> Foundation and partner programs continually improve and meet the needs of small agencies Foundation builds improved relationship with nonprofit organizations and the community
Program Evaluation <ul style="list-style-type: none"> Develop and implement evaluation Receive periodic evaluation feedback and reports Identify and implement program improvements 	<ul style="list-style-type: none"> Refreshed data sets Evaluation reports Reflection sessions 	<ul style="list-style-type: none"> Evaluator assists Foundation staff to improve logic model and establish evaluation plan 	<ul style="list-style-type: none"> Evaluator gathers data and provides periodic feedback Foundation and partners use reports to identify and implement improvements and report to stakeholders 	<ul style="list-style-type: none"> Foundation and partner programs continually improve and meet the needs of small agencies Foundation management receives assessment of program effectiveness

Desired community results:

- A vibrant Greater Hartford community defined, in part, by the robust activity of small nonprofit organizations in every sector
- Stable and healthy small nonprofit organizations that provide valued services to the Greater Hartford community
- Citizens that participate generously and confidently in the life of their community as volunteers, board members, and donors with small nonprofit organizations

2. Evaluation

In June 2016, the Foundation contracted with Cross Sector Consulting to evaluate the Small Agency Program. Key evaluation questions guiding the evaluation process and products included:

- **Services.** What services and activities did the program deliver? How were services delivered?
- **Accomplishments and Challenges.** What went well in implementing services and activities? What were the main implementation challenges?
- **Outcomes.** To what extent is the program achieving its desired outcomes? How effective was the program design in supporting small agencies? To what extent are small agencies able to apply for and fully participate in the cohort and small grant programs? To what extent has the program advanced the Foundation's mission?
- **Lessons Learned.** What are early "lessons learned" about supporting small agencies? How can program services and activities be improved? What are the characteristics of nonprofits that benefited from the different program components? What services were most effective for different types of small nonprofits? How can the program design be changed to achieve desired outcomes and results?

The evaluators:

- **Documented program activities** including BOS learning sessions, Community Partner meetings, Small Advisors Group meetings, and staff / consultant meetings. Collected and reviewed program documents, including meeting materials and grant reports.
- **Collected formative feedback on program services and activities** via feedback surveys and focus groups with program participants as well as interviews and "after-action reviews" with Foundation staff and consultants.
- **Compiled and analyzed data on key activities and outcomes measures.** For BOS, the evaluators created an organization-level database that included organizational characteristics (e.g., demographic information, financial information), services delivered (e.g., attendance at learning sessions, participation in technical assistance), and pre- and post-data using the Point K Organizational Assessment Tool and BOS applications and final reports. For the Small Agency Program, the evaluators created an organization-level database that tracked participation in all components.
- **Produced evaluation memos and a final evaluation report**, supplemented by detailed data reports.
- **Facilitated reflection sessions** in conjunction with reports and the completion of BOS to present evaluation findings, discuss the implications for the program, identify program improvements and mid-course corrections, consider adjustments for the next program iteration, and modify (as needed) the evaluation plan.

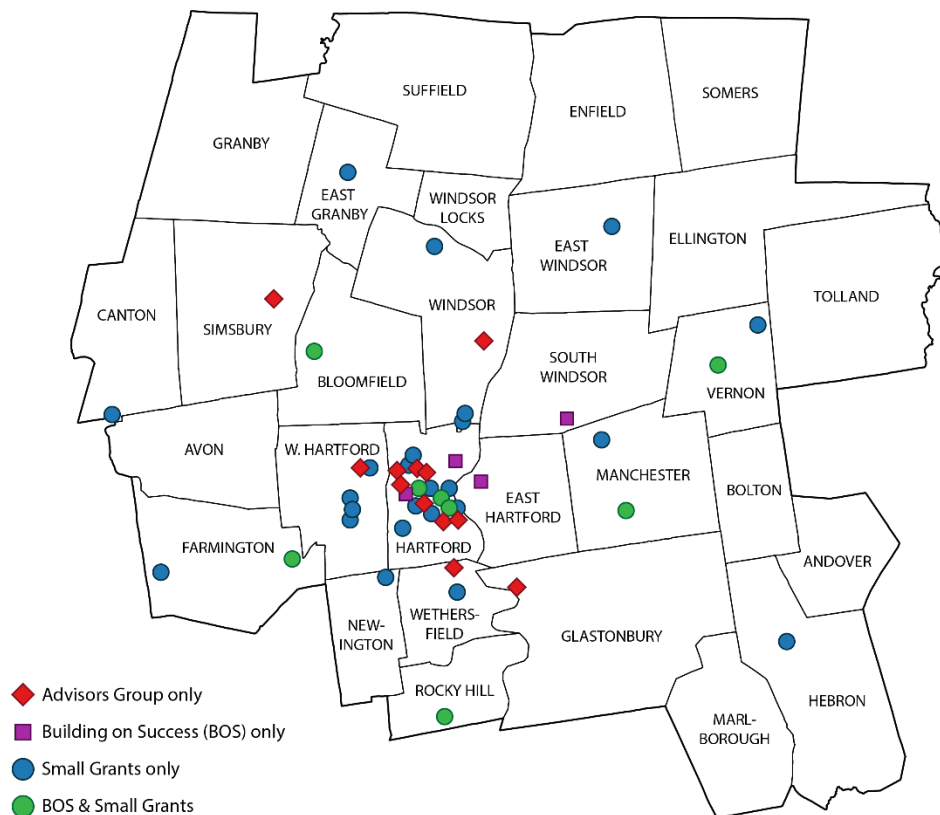
3. Evaluation Findings

This section presents evaluation findings from the start of the Small Agency Program in May 2016 through December 2018 – encompassing completion of the first BOS cohort and three rounds of Small Agency Grants. Section 3a presents overall findings using the evaluation questions (and logic model) as a framework, with Sections 3b – 3e presenting findings for each component.

a. Overview

Services. The Small Agency Program directly engaged at least 48 small nonprofits across program components – through Building on Success (12 participating agencies), Small Grants (24 additional grantees), and the Advisors Group (12 additional agencies). Twenty-one (21) of these small agencies participated in multiple components, typically joining the Advisors Group after receiving support through BOS or Small Grants. The program also touched hundreds of small agencies through mailings, agency participation in information sessions, and through new workshops¹ offered by the Community Partners. Figure 1 shows the location of the 48 small nonprofits. See Appendix D for a list of all program participants (including Community Partners).

Figure 1: Small Agencies by Program Component



¹ Note that the evaluation does not have the names of agencies participating in the new workshops offered through the Hartford Public Library. See Section 3d for details on overall participation in these new workshops.

As shown in Table 2, program activities were delivered substantially as planned. Small agencies and community partners participated in activities and generally met program goals (where these were set).

Table 2. Small Agency Program Activities

Component	Activities (✓ = achieved, ➤ = not achieved)
Building on Success (BOS) Program	<ul style="list-style-type: none"> ✓ 12 agencies participated in BOS and received general operating support grants ✓ 8 BOS learning sessions with an average of 3.5 participants per agency at each session ✓ 287 hours of direct consultation (meetings, calls, email) with BOS agencies, an average of 24 hours per agency ➤ 4-5 agencies struggled to participate in consultation, with 3 receiving fewer than 15 hours of consultation
Small Agency Grant Program	<ul style="list-style-type: none"> ✓ 400+ agencies invited to information sessions, 92+ attended information sessions, 51 inquired about grants, and 32 applied for grants ✓ All 32 agencies applying received small grants ✓ Grants to 32 agencies, 19 general operating grants and 13 project grants ➤ Challenges in identifying accurate and up-to-date information on small agencies; only 20% of all agencies on mailing list attended sessions
Community Partners	<ul style="list-style-type: none"> ✓ 10 Community Partners meetings (not including workgroup meetings) ✓ 7 new workshops as part of the Hartford Public Library's Nonprofit Workshop Series – Board Member Bootcamp (6 workshops) and QuickBooks (1 series with 5 sessions) – with 119 participants ✓ 1 Information Fair for Small Nonprofits with 20 participants ➤ No formal agreement regarding the group's potential future role (as of December 2018)
Small Agency Advisors	<ul style="list-style-type: none"> ✓ 4 Advisors Group meetings with an average of 20 small agency participants per meeting

Accomplishments and Challenges. The program generally received positive feedback from participants, who appreciated the opportunity to establish personal connections to the Foundation, apply for and receive grants, and participate in capacity-building activities (see Sections 3b-3e for data by component). The Foundation also used data and feedback to improve the program on an ongoing basis. Lessons from BOS informed the design of the Small Grants application process. BOS participant feedback and staff / consultant observations informed the planning of future BOS sessions and the design for the next BOS cohort.

Two cross-cutting challenges emerged from the feedback and reflection sessions that were held in Fall 2018. First, small agencies applying for Small Grants that did not meet the Foundation's board diversity standards requested additional support in this area. Second, the program struggled to reach beyond a core group of small agencies. The Small Agency Program initially relied on the IRS database to identify

small agencies, which has a number of limitations (e.g., mail addresses only, data that is several years old, data that is challenging to compile and analyze).

Outcomes. The program made substantial progress on its outcomes and impacts, although particularly for BOS the evaluation is not able to directly attribute outcomes to program components (i.e., many external factors can affect organizational development). Table 3 shows outcomes by component, which can continue to be assessed in future years.

Table 3. Small Agency Program Outcomes and Impacts

Component	Goal	Actual
Building on Success (BOS) Program	BOS agencies improve their organizational capacity (i.e., planning, governance, resources, volunteers)	<ul style="list-style-type: none"> • 11 of 12 agencies completed BOS • All 11 agencies completing pre- and post-assessments improved their organizational capacity • 8 of 11 agencies increased their operating budgets • All 11 agencies met board diversity standards at completion, average number of non-white board members increased from 3.7 to 4.3
	BOS agencies become more stable	<ul style="list-style-type: none"> • On final feedback surveys, 7 of 11 (64%) agencies reported improved financial stability • 8 of the 12 (75%) agencies applied for and received Small Agency Grants after completing BOS • 7 of 12 agencies applied for Donor Advised Funds (DAF) and 6 received DAF grants
	BOS agencies improve service delivery	<ul style="list-style-type: none"> • On final feedback surveys, 10 of 11 (91%) agencies reported improving their services / programs
Small Agency Grant Program	Grantees become more stable	<ul style="list-style-type: none"> • 2017 grantees reported meeting or exceeding 74% of their organizational development measure goals, with another 22% reporting progress towards goals
	Grantees improve service delivery	<ul style="list-style-type: none"> • 2017 grantees reported meeting or exceeding 73% of their program effectiveness or project goals, with the remaining 27% reporting progress towards goals²
Community Partners	Shared understanding of existing programs	<ul style="list-style-type: none"> • All 12 partners completing August 2018 survey reported learning new information about the services Community Partners offer
	Small agencies learn about and increase participation	<ul style="list-style-type: none"> • 5 of 12 partners (42%) reported receiving more requests from small agencies since May 2016 • Most (91%) BOS agencies reported accessing additional resources to support capacity building
	Small agency leaders learn new information / skills	<ul style="list-style-type: none"> • To be assessed (e.g., connect Hartford Public Library workshop data to Small Agency database)

² Note that the two of the eight project measures and two of the seven program effectiveness measures focused on organizational development (strategic planning, board development, income, partnerships).

Component	Goal	Actual
Small Agency Advisors	Foundation and partners use recommendations for program improvement	<ul style="list-style-type: none"> Advisors provided positive feedback on overall program, Small Grants, and new workshop topics Foundation allowed flexibility in mix of Small Grants (general operating vs. project) per Advisors Meeting notes summarized additional Small Agency Advisor recommendations for Small Grants and Community Partners – these recommendations <i>could</i> inform the next phase of the program
Overall	Foundation builds improved relationship with nonprofits and the community	<ul style="list-style-type: none"> Most participants agreed that the Foundation is doing more to support small agencies in the region On Small Grant Information Session feedback forms, more than 90% of the 39 respondents agreed or strongly agreed that “the Foundation supports small agencies in greater Hartford” and “the Small Agency Program addresses the diverse needs of small agencies in greater Hartford” A small number of participants suggested that the Foundation could do more to support all-volunteer small agencies and those not meeting board diversity standards

Lessons Learned. A key component of the program is identifying and incorporating lessons learned from the evaluation to improve the program. To facilitate this process, the Foundation has utilized brief “after-action reviews” after each BOS learning session, reflection sessions after each evaluation memo, and an end-of-BOS after-action review in December 2018. The Foundation has also incorporated feedback from the Advisors Group, including flexibility regarding the Small Grant types.

Lessons learned include:

- BOS.** At the December 2018 after-action review, the BOS team agreed on a number of changes for BOS 2.0 – including additional vetting of BOS applicants, the use of strategic planning as the guiding framework, additional planning time for consultants, and shorter learning sessions that include time for consultant-agency interactions (see Appendix B-66 for details).
- Nonprofit characteristics.** Early evidence suggests that agencies with annual budgets greater than \$50,000, agencies with paid staff, and younger agencies benefited more from BOS on their pre-post organizational assessments (see Appendix B-63). Given the small number of BOS agencies, these results should be viewed with great caution; the Foundation can continue to track results for the next BOS cohort to check if these differences are consistent across a larger pool of agencies.
- Most effective services.** There is not clear evidence yet about which agencies will benefit from different Small Agency Program services. In this iteration, BOS was launched a year before Small Grants, so all small agencies interested in applying for Foundation support in 2016 had a single option. In 2019, small agencies will be able to choose between BOS and Small Grants. Will there be

differences in the types of agencies that apply for BOS vs. Small Grants? Will there be different results for these future cohorts vs. the first set of BOS and Small Grants agencies?

- **Achieving desired results.** An emerging lesson is the opportunity to integrate Small Agency Program components to expand the pool of prospective program participants and support small agencies over a longer period of time.³

b. Building on Success (BOS)

A cohort of 12 small nonprofit agencies participated in the two-year BOS capacity building program between September 2016 and September 2018. Participating agencies received annual mission support grants of \$5,000, participated in eight learning sessions, and received tailored technical assistance (TA) from BOS organizational consultants.

BOS Enrollment. Foundation staff launched BOS in June 2016 with two information sessions for interested small nonprofits. Representatives from approximately 60 agencies attended these sessions, and 33 small agencies applied to participate in BOS. The Foundation selected 12 agencies to participate. All 12 selected agencies accepted, attended the BOS Overview Session on September 27, 2016, and completed the Point K Organizational Assessment (OA)⁴ at the start of the program.

The 12 BOS agencies entered the program with the following characteristics:

- 10 of 12 agencies (83%) had annual operating budgets under \$100,000.
- 10 of 12 agencies (83%) met the Foundation's board diversity standards.
- Agencies had a range of staffing patterns: seven agencies had at least one part-time staff person, three had at least one full-time staff person, and two had no paid staff.
- On the organizational assessment, agencies rated themselves (on average) highest on Leadership and Finance / Accountability, and lowest on Evaluation, Communication and Organizational Planning. Agencies had the widest range of scores on Organizational Structure and Fundraising.

BOS Learning Sessions. Agencies participated in learning sessions on the following topics: Board Leadership; Financial Management; Fund Development; two full-day Strategic Planning sessions; Strategic Plan Implementation; Sustainability Planning; and Evaluation. Excepting the longer Strategic Planning sessions, learning sessions were held on Tuesday evenings from 4:00 – 8:30 p.m.

³ See for example the [Cricket Island Foundation case study](#) that provides 8+ years of support to build the capacity of nonprofits.

⁴ The Innovation Network's Point K Organizational Assessment Tool is organized into seven domains: Organizational Planning, Organizational Structure, Leadership, Fundraising, Finance and Accountability, Communication, and Evaluation. With the exception of the Leadership domain, the tool uses objective criteria (e.g., do you have a strategic plan). See Appendix B-2 for the assessment questions by domain.

- **Attendance.** Agencies were expected to send 3-person teams to typical sessions and 5-7 person teams to the Strategic Planning sessions. Agencies satisfied attendance expectations 80% of the time (i.e., sent 3-person teams or 5-person teams to sessions). On average, 3.0 people/agency attended typical sessions and 5.3 people/agency attended strategic planning sessions. Overall, 94 different individuals participated in one or more learning sessions between 2016 and 2018.

- **Participant Feedback.** Participants generally gave high ratings to the sessions on end-of-session feedback forms and during focus groups held at the April 2017 and September 2018 learning sessions. On a scale of 1 (poor) to 4 (excellent), average ratings of session components typically ranged between good and excellent (see Appendix A-4 for details). The Financial Management session had the highest overall ratings, with 87% of participants rating the overall usefulness of the session as excellent.

“The combination of questions / interactions and Power Points led by an expert is very effective.”

“Budget section was very informative and handouts very useful tools.”

Financial Management Session participant feedback

- **Challenges.** Most participants reported that the sessions were too long and asked for shorter sessions. Some participants requested new topics for future learning sessions, including several topics listed on the original BOS program schedule (e.g., volunteers). Participants had mixed views

“There is so much information and the session is long and sometimes you need a break to walk around and stretch your legs.”

Learning Session feedback

of the value of networking – some positive and others negative. Many participants wanted more networking opportunities, and valued the opportunities that they did get. Other participants felt that networking would benefit agencies if set up more deliberately (e.g., with a clear topic / objective or with discussion questions).

- **Strategic Planning Process.** All 12 agencies participated in two full-day strategic planning sessions led by Jay Vogt of Peoplesworth. At the end of the sessions, each agency’s team had created a two-page “Essential Strategic Plan” using Jay’s process and framework. Most participants valued the strategic planning sessions, with a few agencies reporting it was not a good time / fit for their organization to produce or implement a strategic plan (see Table 4 below for plans to address this). Some participants noted the value in the sessions simply because it required core members of their agency to spend two days together to discuss agency priorities. Almost every agency identified the strategic plan as an accomplishment in their post-project organizational assessment.

“What a great day to interact with our board members and staff. Thank you.”

“Great by Jay! Wow! I didn't think we could do that.”

“Jay was a great facilitator + resource – ‘Real’ examples from other small organizations were very helpful.”

Strategic Planning feedback

- **Participant Suggestions.** Specific suggestions for improving the learning sessions include:
 - Facilitate easier on-line access to resource documents; consider taped sessions, webinars.
 - Start sessions after work hours so board members with inflexible schedules can attend.
 - Have participants leave each session with a tangible product and/or tool they can use.
 - Have less lecture and more activities / interactive opportunities.
 - Allocate more time for agencies to work with their own consultant on agency-level issues.
 - Customize session content to small agencies and draw on small agencies as resources.
 - Spend more time on board development and fund development (e.g., follow-up sessions).

See Appendix B for detailed findings from end-of-session feedback forms and focus group summaries.

BOS Consultation. Over the course of the two-year program across all participating agencies, consultants held 74 face-to-face meetings and delivered approximately 287 hours of direct consultation via meetings, phone calls and email exchanges. The number of consultation hours by agency ranged widely. The organizational domains addressed most often were: (1) Organizational Planning; (2) Organizational Structure; and (3) Leadership.

- **Positive views of consultants.** Most participants had very positive views of BOS consultants / technical assistance (TA). In the first focus group, approximately half of all participants cited the consultants as the most valuable aspect of BOS. Participants reported that consultants helped agencies focus and set direction, addressed organizational structure, supported strategic planning, and facilitated retreats.
- **Challenges.** A few participants expressed concerns about consultant fit with their agency. One participating agency requested a different consultant; Foundation staff hired a new consultant to work with this agency. Some participating agencies wanted more time with their consultant to discuss agency-specific priorities during the cohort learning sessions. Finally, 4-5 participating agencies were difficult for consultants to engage on a consistent basis due to limited capacity (e.g., board members not attend meetings) and/or communication issues (e.g., not return emails or phone calls). There were no major differences between these agencies and those that utilized consultation at higher rates, in terms of their budget size, staffing, or age of organization.

See Appendix B-6 and B-55 for more information about the consultation process.

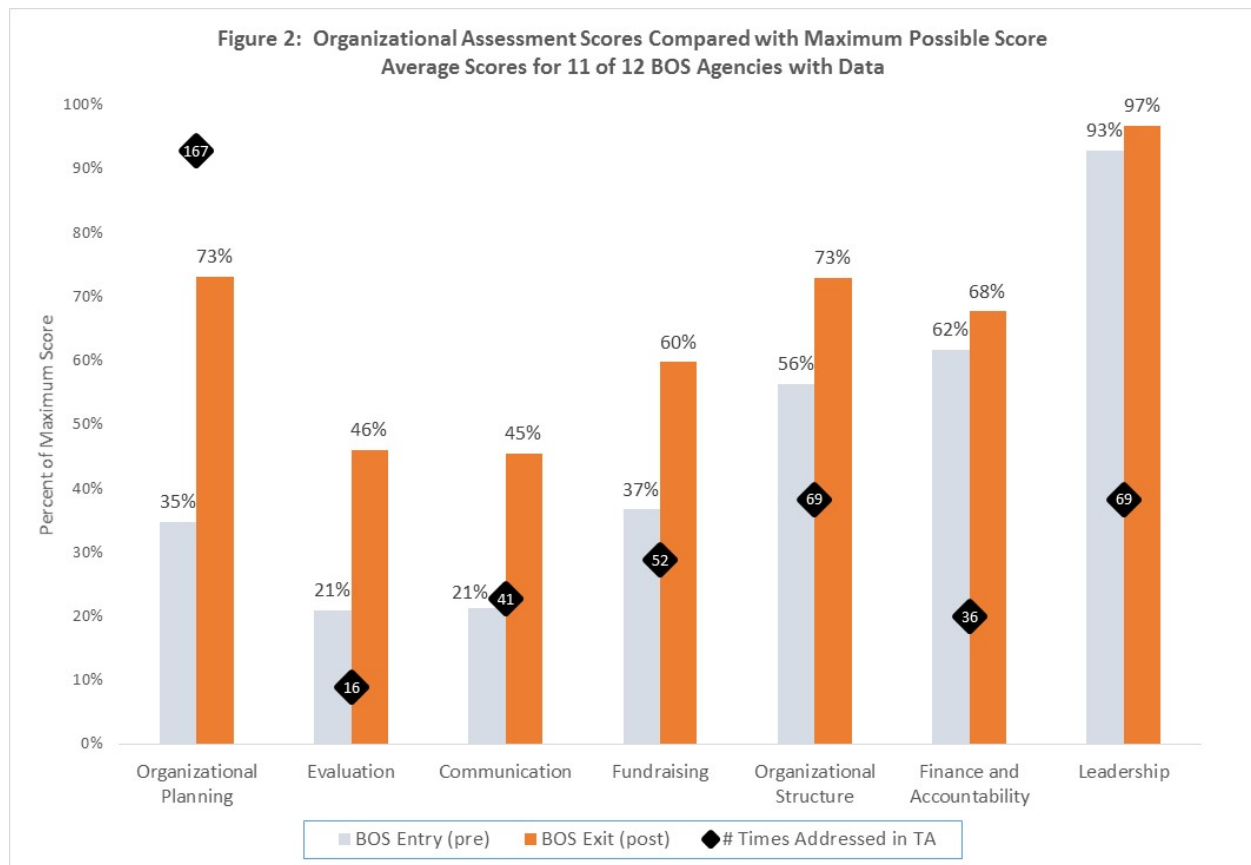
BOS Grants. Predictably, BOS participants appreciated receiving general operating support grants as part of BOS. On final feedback forms, 27 of 31 (87%) rated the grants as “very valuable”, the highest rating across BOS components. On final reports, agencies reported using the grants for a variety of purposes – for staff (7 agencies), computers and other technology (3), marketing / outreach materials (3), insurance (2), and fundraising events (2), among others.

BOS Outcomes. At the conclusion of BOS, participating agencies participated in a final focus group and completed feedback forms, final reports and OAs. Themes from these sources include the following:

- **Successful completion.** Eleven (11) of 12 agencies completed the program. One agency struggled to participate in technical assistance and did not attend the final BOS learning session or complete the final reports.
- **Improved organizational capacity.** All 11 agencies with data increased their scores on the OA (see Figure 2 below). Agencies that showed greater growth included those with annual budgets greater than \$50,000, agencies with paid staff, and younger agencies (see Appendix B-59 for details). The hours of consultation received was not a factor in organizational growth, although the one agency that did not complete BOS received few hours of consultation.

“For the first time in 20 years, we’re taking [receiving] application for new board members!”

BOS Participant



On feedback forms, most agencies reported improved **leadership** ability (82%), strategic alliances or partnerships (73%), adaptability (73%), and financial stability (64%).

On final reports, the average annual operating **budget** of participating agencies increased from \$60,516 (at entry) to \$74,079 (at exit). Eight (8) of the 11 agencies completing the program increased their operating budgets. All agencies met the Foundation’s **board diversity** standards at

exit, with the average number of non-white board members increasing from 3.7 board members to 4.3 board members. Agencies reported little change in their staffing patterns or board engagement (number of meetings, attendance) over the two years.

There is additional evidence that BOS agencies improved their **fundraising** capacity. Six (6) agencies reported submitting information or an application to the Foundation’s Donor Advised Funds (DAF); the

Foundation reported that 4 agencies completed the DAF form and a total of 7 agencies submitted grant applications with 6 receiving grants totaling \$34,089. Eight (8) of the 12 participating agencies also applied for and received Small Grants after completing BOS.

- **Improved service delivery.** On final feedback forms, 10 of 11 agencies reported improving their services or programs through BOS. Agencies reported launching new programs (6 agencies), improving program quality (5), increasing the number of participants served (4), and improving outcomes for participants (3).

“[BOS] empowered us to make changes to the board. We’d been stagnant. I’ve been on the board for 30 years. We re-did our bylaws and now have term limits that renewed the board. It forced us to get new board members (and become more diverse). We went for 6 to 16 board members. We updated our strategic plan.”

BOS Participant

BOS Improvements. Foundation staff and BOS consultants utilized evaluation data and after-action reviews to make mid-course adjustments and develop the initial plan for the next BOS cohort (i.e., BOS 2.0). As noted in the January 2018 Evaluation Memo, based on the success of the 2-day Strategic Planning sessions, the BOS team decided to use **strategic planning** as a centerpiece for future cohorts. This would include: emphasizing strategic planning as a BOS expectation at information sessions, holding strategic planning sessions earlier, not developing a separate capacity building plan, focusing consultations on preparing for the strategic planning sessions and implementing the completed strategic plans, and aligning the pre- and post-assessment of agency capacity with the strategic plan.

Table 4 (on next page) summarizes these and other adjustments to the model. See Appendix B-66 for details on planning for BOS 2.0.

Table 4: BOS Adjustments

Component	Challenges / Issues	Mid-Course Adjustments	Decisions for BOS 2.0
Application and Consultant Assignment Process	<ul style="list-style-type: none"> • 33 agencies applied for 12 spots • Some consultant “mismatches” (geographic, background, content area) • Organizational Assessment (OA) was not useful in guiding consultation 	<ul style="list-style-type: none"> • Two consultants “traded” assigned agencies before program launch to better fit their respective locations • Hired new consultant in 2017 to work with one agency for a better fit 	<ul style="list-style-type: none"> • Utilize Small Agency Grants process to conduct initial assessment of agencies before distributing application • More initial vetting of applicants with consultant involvement / input • Revise Organizational Assessment to align with strategic planning
Learning Sessions	<ul style="list-style-type: none"> • Long sessions (4.5 hours) • Balance of lecture vs. activity • Applicability of materials (content, tools, resources) to small agencies • Mixed participant feedback on desire for networking opportunities • Some agencies asked for more learning session time with their consultant 	<ul style="list-style-type: none"> • Consultants / staff adjusted learning session design on an ongoing basis in response to feedback; adjustments included limiting lecture, infusing networking (e.g., inter-agency work), and offering activities with movement to increase energy 	<ul style="list-style-type: none"> • 3-hour cohort session plus final 30 minutes devoted to consultant / agency check-ins • 30-minute pre-session optional networking • More experiential learning • Participants leave each session with “tangible product” • Tailor materials to small agencies (to extent possible)
Consultation / Technical Assistance (TA)	<ul style="list-style-type: none"> • Consultants experienced difficulty engaging 4-5 agencies 	<ul style="list-style-type: none"> • Consistent attempts to engage agencies (with limited success) 	<ul style="list-style-type: none"> • Clarify role of consultants / purpose of TA at the first learning session; include information on “how to work with your consultant”
BOS Overall	<ul style="list-style-type: none"> • Strategic planning was well-received by most agencies; served a similar purpose as capacity building plans for many agencies • Foundation staff and BOS consultants retrospectively estimated time spent on the project. Estimates indicate that staff costs were roughly \$25,000 below initial projections, while consultant time was roughly \$25,000 above initial projections. 	<ul style="list-style-type: none"> • Revised February 2018 learning session to focus on successfully implementing strategic plans 	<ul style="list-style-type: none"> • Utilize strategic planning as the organizing framework – which will also address several challenges noted above (TA, OA) • Allocate more consultant time for team planning (compared with BOS 1.0 budget)

c. Small Agency Grants

Foundation staff developed and implemented three rounds of Small Agency Grants in 2017-18:

- **Information Sessions.** The Foundation held information sessions in advance of each round of grants, inviting the 400+ small agencies on the Foundation’s small agency distribution list. At least 92 agencies attended the sessions, including agencies that attended multiple sessions (for different grant cycles).
- **Revised Application Process.** Based on the experience with BOS – where 33 agencies applied for 12 BOS slots – staff decided to ask small agencies to contact the Foundation before receiving an application. Foundation staff speak by phone with agency staff, and may meet or make site visits to agencies to learn more about their organizations and services. Agencies that did not meet grant requirements (often board diversity standards) were encouraged to pursue other options or to apply in future funding cycles. As a result of the revised process, all agencies that completed applications were funded.
- **Applications and Awards.** Nineteen (19) agencies applied for general operating support grants, and 13 agencies applied for project grants. All 32 agencies received grants totaling \$267,260, with general operating grants averaging \$9,368/grant and project grants averaging \$6,866/grant. Thirty (30) agencies received grants in the amount requested; two agencies applying for general operating support grants had very small annual budgets (under \$10,000), so were awarded grants of \$3,000 and \$5,000, respectively.

Small Grants by the Numbers
• 400+ small agencies invited to information sessions
• 92+ agencies attended information sessions
• 51 agencies followed up with an inquiry
• 32 agencies applied for grants
• 32 agencies awarded grants: 19 general operating grants and 13 project grants

Small agencies that had a direct connection to the Foundation – those applying for BOS and those participating in the 2015 focus groups – were much more likely to attend the Small Agency Grants information sessions. Approximately 54% of these “connected” agencies attended, compared with 20% of all agencies invited to the sessions. This difference may be due to the challenges in compiling accurate contact information for small agencies. The original database relied on the IRS database, which includes only mail addresses from IRS 990 forms and which may have been as much as two years old when analyzed in 2015.

The evaluators collected feedback from small agencies on the Small Grants Program via feedback forms at the two information sessions in July 2018, and through an online survey in August 2018 of small agencies that inquired and/or applied for small grants (see Appendix C for details). A total of 58 individuals provided feedback. Themes included the following:

- **Clear communications.** Nearly all (92%) respondents “agreed” or “strongly agreed” that the grantmaking guidelines and grant-seeking process were communicated clearly and effectively.

- **Foundation support for small agencies.** On feedback forms, 92% of respondents agreed that “the Foundation supports small agencies in greater Hartford” and all agreed that the “Small Agency Program addresses the diverse needs of small agencies in greater Hartford.”
- **Generally positive views of grant-seeking process.** Most survey respondents agreed that Foundation staff communicated in a timely manner (89%), that the required information was appropriate to the grant request (75%), those who did not receive grants felt comfortable contacting the Foundation in the future (75%), and that the Small Grants Program meets the needs of their organization (93%). As one respondent noted, “the whole grant process was straight forward and easy to complete.” Of note, two respondents reported submitting an unsuccessful application even though all the applications were funded (perhaps confusing an inquiry with the application); these respondents had negative views of the process.

In November 2018, the first round of grantees were asked to submit either: (1) final reports on their project grants; or (2) interim reports on their general operating grants. Cross Sector Consulting worked with Foundation staff to develop 1-page reports for both grant types, and assisted grantees in selecting measures and setting goals for each measure (see Appendix C-9 and C-10 for report templates). Thirteen (13) of 14 grantees submitted reports as of December 19, 2018. While each report was tailored to the grantee’s project or organizational goals:

- Approximately 61% of measures related to organizational development, with others focused on program effectiveness and specific programs / projects. Individual measures focused on increasing revenues (21%), expanding programs (13%), strengthening boards of directors (13%), and increasing attendance / participation in program activities (11%), among others.
- Across all measures, grantees reported that approximately 74% of goals were achieved or exceeded. Grantees met or exceeded goals for fundraising, recruiting new board members, engaging board members in committees, increasing attendance at activities, implementing new communications products and strategies (websites, newsletters), recruiting new volunteers, and other goals. Nearly all grantees that did not achieve their goals made progress; only one measure across the 13 grantees was not achieved.

d. Community Partners

In May 2016, Foundation staff invited 14 community partners – organizations that provide support or services to small nonprofits – to an introductory meeting to share information on their existing services and explore opportunities for future collaboration. Community partners discussed how they can better support small nonprofits and the extent to which they were interested in working together on these issues. The group agreed in 2016 to pursue a *moderate* level of collaboration (i.e., help make our existing resources more accessible, small collaborative effort involving minimal staff or financial resources, medium collaborative effort involving modest staff or financial resources).

The Community Partners met as a full group 10 times from August 2016 through December 2018 to develop and implement supports for small agencies. The primary results of these meetings include:

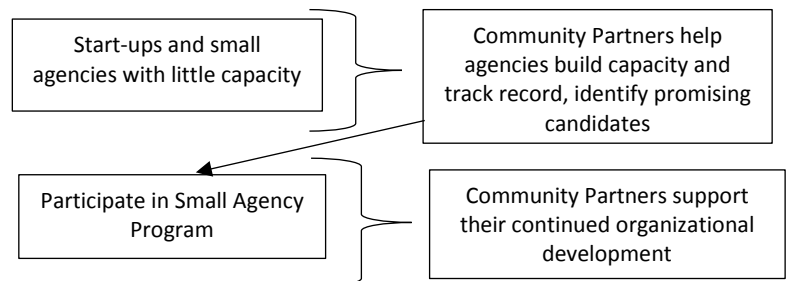
- **Sustained Participation.** An average of 10 agencies attended each Community Partner meeting, with consistent attendance throughout the program period. Eight (8) of the 14 partner agencies attended at least 7 of the 10 meetings.
- **Workgroups.** Community Partners developed and prioritized ideas for collaborating to support small nonprofits, and formed three workgroups in early 2017 to refine the ideas in the following areas: (1) training; (2) consultation; and (3) information sharing. Workgroup activities are summarized below.
 1. The **Training Workgroup** implemented several new training programs via the Hartford Public Library's Nonprofit Workshop Series and in collaboration with a number of the partner organizations. In Fall 2017, Leadership Greater Hartford held two sessions of a new "*Board Member Bootcamp*" workshop, and held four sessions in 2018. The Small Business Administration (SBA) held a five-session *QuickBooks 101 for Nonprofits* training program as part of the Hartford Public Library's Nonprofit Series in Fall 2018. There were 119 participants across all 7 workshops, although the evaluation does not have data on the number of participants from small agencies (vs. larger nonprofits).
 2. The **Consultation Workgroup** organized a *Small Nonprofit Information Fair* on May 16, 2018 at the Hartford Public Library. The event was organized like a college fair, where small nonprofits had introductory discussions and consultations with 12 participating Community Partners. Twenty (20) participants attended and most rated the Fair highly – reporting a diverse set of resources and helpful staff. The Community Partners are planning a second Information Fair in May 2019.
 3. The **Information Sharing Workgroup** implemented a *Google Groups listserv* in November 2017 to enable community partners to share information across all 15 partners. Community partners can forward this information to their email distribution lists or via other distribution channels (e.g., social media). Through December 2018, 9 of the 14 partners had initiated or participated in the listserv discussions. Not including Community Partner meetings and surveys, a total of 35 emails were exchanged on 12 topics (e.g., upcoming workshops, requests for advice, grant announcements).

The Foundation also produced a "*Nonprofit Resources in the Greater Hartford Area*" listing that features 15 community partners (including the Foundation), their contact information, and a description of their services to small nonprofits. The Foundation has been sharing this resource listing with small nonprofits, and at least 6 community partners reported using the listing to help direct nonprofit agencies to relevant services.

Community Partners provided feedback on their experience via an online survey in May 2018 (see Appendix C-11), a focus group at the December 2018 meeting, and by email (for those who could not

attend the focus group). Twelve (12) individuals completed the survey and 8 participated in the focus group or responded via email. Themes included the following:

- Networking / learning about each other’s services.** All partners learned new information about Community Partner services, and many reported sharing the Nonprofit Resources listing with nonprofits and referring nonprofits to other community partners. As one partner noted, the most important accomplishment was the “networking and information sharing among all the Partners. We know each other and our services better and can therefore better help our audiences.” Another noted the benefit of “getting in the room with everyone. I didn’t know half of the folks before.” Another reported, “I didn’t know there were so many organizations available to help small nonprofits.” On the survey, 5 of 12 partners reported collaborating with other Community Partners to deliver services to nonprofits.
- More resources / formal commitments.** Reflecting on the first two years of the program, a number of partners wanted to move beyond the initial “moderate” efforts to a more targeted and well-resourced effort to support small agencies. Several suggested that the larger organizations at the table commit substantial resources to the effort, while the smaller organizations commit in-kind resources (e.g., staff time). One partner suggested, “this program feels like a token effort.” Another partner noted, “a stronger strategic initiative is needed to be developed to sustainably support small agencies within partner group. This has been a start, yet informal. Should consider more strategic commitments by partners.”
- Support for communications.** Many partners do not have databases that differentiate small agencies, which limits abilities to share information (i.e., do not want to send a grant announcement when most of mailing list is not eligible). This could be a project going forward (connecting data systems to identify small agencies).
- More “cross-fertilization” of program components to achieve greater impact.** Several partners suggested engaging small agencies involved in other components (i.e., BOS, Small Grants) in Community Partner efforts and assessing the longer-term impact of efforts on agency capacity. Existing resources such as the Nonprofit Workshop Series could have a greater impact if combined with other supports for small agencies. Community Partners that engage small agencies could also help build the pipeline for future participants in BOS (see sidebar for potential framework). “We can take a more targeted approach to help small nonprofits and build a broader group over time.”
- Additional goals.** Partners suggested a range of future goals, including expanded communication efforts to inform small agencies of existing and new resources (e.g., use of media to reach small



agencies), more emphasis on fund development and finance, and “seed” grants to all-volunteer agencies to develop initial capacity.

e. Small Agency Advisors

The Small Nonprofits Advisors Group was formed to review and provide feedback on Small Agency Program plans, and include the voice of small nonprofits in the development of the program. The Advisors Group was initially composed of small nonprofits that participated in roundtable discussions in 2015 during the planning for the program. In 2017, the Advisors Group was expanded to include all agencies participating in BOS, and later to include grantees.

The Advisors Group met four times during the program period, in May 2016, March 2017, January 2018, and November 2018. Participants from at least 32 small agencies participated in meetings, including 10 of 12 BOS agencies, 17 of 32 Small Grants recipients, and 12 agencies that have not received Foundation funding to date. Advisors provided feedback in the following areas:

- **Program design.** Participants provided positive feedback on the four program components.
- **Advisors Group.** Participants suggested a range of vehicles for communicating with the Advisors Group, including meetings, a newsletter and a Facebook page.
- **Small Grants.** Participants gave positive feedback on the Small Grants program, particularly the general operating grants. Foundation staff agreed that funding could be shifted between the mission support and project grants based on the number of applications for each. Participants also suggested establishing different categories of small nonprofits (e.g., annual budgets below \$50,000, budgets between \$50,000 and \$100,000, and budgets above \$100,000). The Foundation has not distinguished grants by agency budget during this first phase of the program.
- **Community Partners.** Participants gave generally positive feedback on planned activities of the Community Partners, including new workshops and an Information Fair for small nonprofits. Participants cited the Board Member Bootcamp and Quick Books trainings as particularly useful. Participants also suggested additional workshops to support small agencies: board diversity; engaging volunteers, donors and the local community; marketing and social media / branding; and more options for fundraising (e.g., evening classes, funding trends, individual donors). The Foundation is considering these topics as it plans future program years.

“My first reaction is: where was the QuickBooks training when we started!”

Advisor Group Participant

The November 2018 meeting featured an update on the program and a focus group (facilitated by the evaluators). Themes from the focus group include:

- **Connection to the Foundation and other nonprofits.** Participants appreciated having a personal connection to Foundation staff, access to Foundation funding through both the Small Grants Program and improved access to donor-advised funds, and opportunities to meet and learn about

other agencies. Several also noted the program as validation for small agencies and appreciated the Foundation’s willingness to listen to the views of small agencies.

- **Connect program components to extend support.**

Several participants suggested providing opportunities beyond the individual components (e.g., BOS, Small Grants) to continue support for small agency development. There are opportunities to connect agencies to continued training and technical assistance through the Community Partners (including the Foundation’s Nonprofit Support Program).

“It was great having access to and help from Doug and Yvette.”

“In the past, the Foundation seemed daunting and huge. You needed to know somebody. But now, they feel less daunting — it’s inspiring. Now we do know people. Even if we don’t always get the grant, we know people.”

[The program] “made us feel validated, strong, on track, and recognized. We’re part of the bigger picture.”

Advisor Group Participants

- **Expand networking opportunities.** Many participants suggested providing more opportunities for

“If the Foundation is working with other organizations in town, then maybe they can train all of us, or bring us together. We didn’t know that our neighbor, [a BOS grantee], was connected to the Foundation until recently.”

Advisor Group Participant

networking with participants across all Small Agency Program components, and saw potential for expanded collaboration. These opportunities might take different forms: rotating locations of meetings, having evening social events or more structured networking opportunities, meetings or workshops by geographic area or by affinity group, or bringing in a guest speaker (e.g., Jay Williams) to encourage attendance.

- **Support for board diversity.** Several participants asked for increased Foundation support to meet board diversity requirements, noting the high cost of existing resources such as the Minority Inclusion Project.

- **Report back on how Advisors have influenced the program.** Several participants appreciated that specific suggestions were incorporated into the program, and suggested the Foundation report back on how they’ve utilized the group’s suggestions.

“At the end of the program, can we see the ways that the Advisors Group work specifically impacted or influenced the Small Agency Program?”

Advisor Group Participant

- **Publicize the program and small agencies.**

Several participants suggested that the Foundation publicize the program through the media to attract new agencies and to raise the profile of small agencies participating in components.

“If this set of programs were pitched to the Hartford Courant by the Foundation, we’d get publicity about our organizations and those with other small agencies would learn about the program.”

Advisor Group Participant

4. Conclusions and Considerations

The Small Agency Program has made substantial progress in supporting small agencies:

- **Successful implementation.** The Foundation successfully implemented all four program components, closely following the original implementation timeline with some mid-course modifications based on formative evaluation feedback. BOS successfully implemented its learning sessions and consultation. The Community Partners met consistently and made progress in expanding resources for small nonprofits. The Small Grants program was successfully launched in 2017. The Advisors Group provided feedback on the overall program design and individual program components.
- **Positive feedback on the program from small nonprofits.** Participants have given generally positive feedback on the program. Most BOS participants rated learning sessions as “good” to “excellent” and half cited the consultants as the most valuable aspect of BOS. Most agencies seeking Small Grants rated the grant-seeking process positively. Advisors Group members appreciated the Foundation’s focus on small nonprofits and developing a personal connection to the Foundation.
- **Using data and feedback to guide implementation.** Program staff and consultants have used stakeholder feedback and evaluation data to improve the program and make mid-course adjustments through regular planning and debriefing sessions. Lessons from BOS informed the design of the Small Grants application process. BOS participant feedback and staff / consultant observations informed the planning of future BOS sessions (e.g., different topics and activities) and the design for the next BOS cohort.

The Foundation may also consider the following options for improving the program:

- **Integrate components.** The Foundation can expand opportunities to connect small agencies across components and connect small agencies with Community Partners. At program meetings in Fall 2018, many participants appreciated seeing the list of all agencies by component. Participants saw opportunities to connect small agencies to existing resources, and connect and network within communities or by program area. For example, small agencies completing BOS can engage with Community Partners to support continued organizational development, Community Partners can identify potential candidates for BOS among fledgling nonprofit clients, and the Foundation can support periodic networking events that bring together all participants and identified small agencies.
- **Assess BOS modifications.** The Foundation can continue to assess BOS (via after-action reviews for each learning session), with particular attention to planned adjustments in the application and vetting process, learning sessions, and use of strategic planning to guide consultation.
- **Agree on future plans for Community Partners.** The Foundation can facilitate a planning session with Community Partners to explore suggestions for formal commitments that achieve greater results for small agencies. What resources can the Foundation contribute and leverage with its

partners? For example, one partner could help others identify small agencies within their databases for targeted communications. Or the partners could focus efforts on small agencies that are connected to the Small Agency Program but not receiving direct supports. If the partners decide to not move beyond initial efforts, does it make sense to continue meeting (e.g., use Google Group listserv to continue to share information and resources)?

- **Engage additional small agencies.** As noted above, it is challenging and time-consuming to utilize the IRS database to identify small agencies. One approach is to publicize the Small Agency Program and its grantees using traditional media and social media. This approach could help small agencies “find” the Foundation vs. the Foundation finding small agencies. In addition, Small Agency Program networking events and/or alumni groups could also be used to help identify additional small agencies.
- **Create a track for alumni.** The Foundation can consider creating an optional “pathway” or process for BOS and Small Grants alumni. This may simply be an annual meeting, a quarterly email, or something more robust. Creating an alumni track would respond to participant questions about any “next steps” with the Foundation, and with networking events would create opportunities for past and present small agencies to collaborate.
- **Assess long-term results.** The Foundation can assess long-term impacts of BOS and Small Grants via annual surveys collected on-line and/or in conjunction with program events and meetings (e.g., networking events, reunions). While the organizational assessment used in BOS had limitations, it may make sense to utilize components of the assessment to track progress over time. To what extent are improvements in organizational capacity being sustained? To what extent have agencies improved their services? What resources have agencies drawn on to improve services? What opportunities exist to support agencies beyond direct Foundation investment?