

PARTNERS FOR SUCCESS

2008 Evaluation Summary

Ratings: 1 (Poor) - 5 (Excellent)

Session 1: **Opening Session and Board Development:**

Jeff Wahlstrom, Starboard Leadership

Average : 4.37

One thing learned:

- Our current board functions well and is on the right track, according to the criteria discussed
- Importance of evaluating the effectiveness of board meetings
- A reminder that board members are with the agency for a reason, and need a reason to stay
- Organizational core strength helps assure survival
- It is more common than not for people to not know how to read and understand budgets
- Our strategic planning is on the right track

Is there anything you have applied or tried with your board?

- Consent agenda
- Created job descriptions, governance committee, subcommittees with volunteers outside board, set up orientation for new board members, sharpened program and financing plans
- More active listening and more frequent communication
- Board meeting evaluations
- Brought back the handouts to distribute to board members

Is there anything you learned that you plan to use with your board?

- Consent agendas and evaluations
- The snapshot assessment
- Plan to develop board orientation packet/material
- Board nominating grid
- We need to focus more on strategic planning

How could this training have better met your needs?

- Boundaries on ED's support of and for the board. (I'm not sure how much I should do for them.)

Session 2: Survival Skills in the Age of Declining Resources:
Jim Patterson & Carole Martin

Average: 4.37

One thing learned:

- Importance of interaction with other nonprofits
- Many very useful handouts to refer to later
- Rethinking the organization and looking for opportunities to condense or collaborate
- Everyone worries about \$
- Be sure the board members are the right people “Get the right people on the bus and in the right seats”

Is there anything you have applied or tried with your organization?

- Collaborated with other organizations on an event
- We reordered and reorganized one agency program, integrating it more with other programs

Is there anything you learned that you plan to use with your organization?

- Money inventory
- Rethink board members for next annual meeting
- Still sorting through info!
- Ways to collaborate with other organizations in the future
- Increase involvement with other nonprofits

How could this training have better met your needs?

- Excellent

Session 3: Strategic Planning Using the Drucker Foundation Self-Assessment Tool:
Gary Friedmann

Average: 4.37

One thing learned:

- Need for self assessment. Evaluation of programs
- Strategic plan needs to be kept in the forefront
- The theory
- Importance of self-evaluation: mission, customer, plan

Is there anything you have applied or tried with your organization?

- We have engaged Carol Carriuolo as a consultant to help us reorganize or board structure and plan for the future
- The five Drucker questions
- Initiated strategic plan process
- Strengthened the plan

Is there anything you learned that you plan to use with your organization?

- Focus on results, self assessment, learning styles and Best Practices
- The five questions
- We are working on real strategic plan!
- Working to strengthen evaluation

- How could this training have better met your needs?
- Drucker model not necessarily useful but general strategic planning helpful
- Great

Session 4: Creating a Case for Support & Fundraising Training:
Penny Harris & Lisa Wahlstrom

Average: 4.28

One thing learned:

- Not to be apologetic when asking for money!
- The need to develop a Case for Support
- The connection between marketing and fundraising
- Why donors give

Is there anything you have applied or tried with your board or organization?

- Love the worksheets
- Drafted case
- Reordering the content of agency materials
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Is there anything you learned that you plan to use with your organization?

- We plan to have a more active and experienced marketing and fundraising committee
- Sample case for supports handouts
- Case for support
- Letter to potential donors
- How could this training have better met your needs?
- Penny Harris wandered badly and seemed to lose train of thought. Lisa was excellent. Good materials
- Another session on the actual process/writing of the Case for Support. I kept feeling overwhelmed and finding it difficult to focus and make it happen

Session 5: Dynamic Board/Executive Director Relationships:
Carol Carriuolo & Deb Burwell

Average: 4.0

One thing learned:

- Need to have an engaged leader
- I learned what an executive director's role should be, and that our organization does not really have an Executive Director! (An Artistic Director is not the same thing.)
- The importance of respect
- My board chair is fabulous!
- Carol is a former board member, and Deb our strategic planning facilitator. Both have been very motivating for me and our board.
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Is there anything you have applied or tried with your board?

- Scheduled meetings with board chair
- More communication, more often

Session 6: Financial Management:
Chip Bradstreet

Average: 3.3

One thing learned:

- Can put building depreciation in a state contract
- I appreciate the hard work involved in building a good budget

Is there anything you learned that you plan to use with your organization?

- That I have very little knowledge about budgets
- Yes
- No

How could this training have better met your needs?

- The presenter was difficult for me to stay focused with -- too simple and basic in the morning so I lost interest
- Reading the 990 was listed, but no time left. The information in this training is very important, and it's dry, so if some way to instill a bit of dynamism could be found, it would improve it.

Session 7: Leadership Development in Nonprofit Organizations:
Jim Patterson & Carole Martin

Average: 4.28

One thing learned:

- Importance of knowing and accepting my own strengths and weaknesses
- How the behaviors and attitudes of the board chair impact the ability of the board to function effectively
- Integrity flows around here!
- Leaders in the background are often good leaders
- Leadership can be learned

Is there anything you have applied or tried with your organization?

- “feedback, practice, feedback, practice.”

Is there anything you learned that you plan to use with your organization?

- Better communication to the board
- Great leaders are great teachers
- We are working (with Carol Carriuolo) on Leadership Change, and plan to make full use of all the notes and handouts from this session

How could this training have better met your needs?

- For me, one of the best sessions
- Much too much preliminary reading to get done in a few days

Session 8: Federal Grantwriting:

Anne Gass

Average: 4.33

One thing learned:

- It's a difficult process
- Great examples of proposals and budget formats
- At this point, we are probably better off to be a part of some larger org. Fed. Grant!
- Seemed structured for larger organizations
- Hire a consultant for your first attempt, at least

Is there anything you have applied or tried with your organization?

- Making periodic checks of Fed. Register

Is there anything you learned that you plan to use with your organization?

- Some of the advice can be applied to our "smaller" grant writing
- Some possible web resources
- If federal grants are applied for, yes.

How could this training have better met your needs?

- I had our assistant director attend. He shared with me the presenters were unprepared at the beginning – papers not complete. Information on federal grant writing not helpful – not discussed enough. The afternoon was not informative enough

Session 9: Marketing:
Gary Friedmann

Average: 4.6

One thing learned:

- Find the money to do marketing
- An expanded vision of the audience
- We need to do more!
- Marketing must be maintained regardless of income cuts

Is there anything you have applied or tried with your organization?

- Affirmed direction agency going on

Is there anything you learned that you plan to use with your organization?

- Implementing an over-all plan, including fundraising
- Redo brochure and conduct annual campaign
- We need a website ASAP. Use the marketing work plan

How could this training have better met your needs?

- Excellent presentation

Session 10: Final Session & Managing Volunteers:

Nancy Veihmann

Average: 4.2

One thing learned:

- Who makes great volunteer for your organization
- Volunteers are the most valuable asset we have!
- The importance of tracking time of volunteers
- Always say “Thank you.”

Is there anything you have applied or tried with your organization?

- Ideas for support and thanks

Is there anything you learned that you plan to use with your organization?

- Always say “Thank you.”
- More carefully recruit

Collaborations, Strategic Alliances & Partnerships:

Since starting Partners for Success, have you reached out to or worked with other members of the group? If so, why and how?

- Some contact, but not yet as working partners. It's not clear at this point how our particular organization (a theater) might collaborate with any of the others. We have been cooperating in small ways with The Game Loft.
- Our members made dog bones for the Animal Rescue
- Phoned, emailed; plan to cross-train and share goals
- New Hope for Women collaboration, WERU radio spot
- I did a presentation for the staff of NHFW about LV and the learning Center
- Yes. Plan to partner for board members, meet individually with Partners
- We have worked with Coastal Family Hospice Volunteers in the past and have sent bereavement children to the Game Loft for additional support. We will continue our relationship with Coastal Family and Game Loft, approach Maskers for help with adult bereavement via tickets or help

Partners Program – Overall:

What changes would you make to enhance your learning? (timing, facility, number of programs, location, etc.)

- None
- I would make many of the sessions half day. I think 7-8 hours is too long with too much info to absorb! The folding chairs are NOT comfortable!
- Build in even more opportunities for sharing among participants
- I was fine with the time and place. I appreciate being fed and not having to worry about that, and I truly thank everyone involved with this for putting it together and making it so easy to learn. You all deserve kudos, kudos, and more.
- Mondays are difficult day for me to be out of the office, once a month was terrific during the “school year” but summer months are challenging for me with morning camps, etc. Location was fabulous!

CQ Assessment:

Was the CQ assessment helpful to your organization?

- I was very hopeful for this assessment to be useful and helpful to our organization. However, I am really discouraged because not all board members completed the survey with constant prodding. At this time, we haven't even had our debriefing . . .most board members who completed the survey are no longer on the board and new board members haven't completed the survey. It doesn't seem like it's important to the board and I'm frustrated because I don't know what else I can do to . . .

- We have not yet had the CQ assessment since we're in a state of transition right now (with Carol's guidance).
- Yes. Got board thinking, raised issues that need to be addressed
- Yes, as a baseline for us as a learning organization
- Yes. Helped us focus on the important few issues rather than the trivial many
- Yes. It let me know that overall my board understands the mission and how we accomplish it! We are developing a "real" strategic plan, completed a board orientation manual and case for support. Thanks, Lori!
- Yes. Pointed out what volunteers did not understand and where work is needed. Language needs to be lowered and jargon dropped in places for average reader to respond correctly – e.g. "subordinate the mission."

Future training:

What other opportunities might we offer in the future that would help you develop as a leader and help your organization become more effective?

- An opportunity for these Partners as well as future participants to meet (annually or semi-annually) to maintain and foster exchanges
- More on leadership, more on board/staff relationships, and an idea exchange/support group for EDs
- Training that the entire board would engage in
- More on annual appeals, increasing donor list
- Donor base management/software

Creating Your Action Plan

Please use your answers to Question 2 under each session to create your Action Plan

| What | When | By Whom |
|---------------------------------|---------------------------------|-----------------------|
| Carefully select board members | Prior to January annual meeting | Current board members |
| Annual Appeal | September to November | Committee |
| Strengthen evaluation process | Summer | Subcommittee |
| Check Federal Register | Beginning in Fall | Pat Pierson |
| Rewrite brochure | November | subcommittee |
| Assign volunteer coordinator | January | Current board members |
| Drucker Self-Assessment Tool | Over the next year | Board and ED |
| Basic Infrastructure Check List | By January 2009 | ED and Board |
| Learning styles with staff | By October | ED and staff |