



# BOOST Assessment 2010

## A Look at Cohorts 1 and 2

### Rose Community Foundation

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# EXECUTIVE SUMMARY

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## INTRODUCTION

Rose Community Foundation completed the second round of the BOOST program (e.g., BOOST 2) in September 2010. Corona Insights was retained to conduct a two-part assessment of this three-year capacity building program. Corona also conducted the assessment of BOOST 1. The 2010 assessment focused on:

- ➔ A final assessment of the BOOST 2 grantee cohort that completed the program. The goal was to identify capacity improvements made over the three-year program, the impact of the economic recession and the critical success factors.
- ➔ A visit with BOOST 1 grantees to determine the extent to which BOOST had contributed to sustained capacity improvements three years after the completion of the program.

Both assessments utilized the *Nonprofit Lifecycles Model* developed by Dr. Susan Kenny Stevens as a framework to assess capacity improvements. BOOST 1 and BOOST 2 grantees assessed their organizations along the lifecycle model during the first year of their respective programs and at their respective conclusions. In both cases the review was a facilitated self-assessment, designed to foster reflection and learning. The BOOST 2 assessment consisted of group interviews with leadership team representatives from each of the four organizations that completed the program: Children’s Museum of Denver, Invest in Kids, Rebuilding Together Metro Denver and The Jewish Experience. Corona interviewed a representative from each of the eight BOOST 1 grantees.

While the final assessment of BOOST 1 revealed four main conclusions the consultants were careful not to force the BOOST 2 findings into that rubric, nor to assume that the earlier conclusions for BOOST 1 still held true. Rather, after listening to and reflecting on numerous interviews, Corona revisited the conclusions to determine if they were correct. The discovery? The original conclusions are relevant today *for both cohorts*. Organizational readiness, capacity balance, financial health and effective governance remain hallmarks of BOOST graduates that achieved significant capacity development. This discovery was amplified by a new insight regarding strategic programming.

This executive summary reports progress along the five capacity builders presented in the *Nonprofit Lifecycles Model*: programs, management, governance, financial resources and administrative systems. As with BOOST 1, grantees that completed BOOST 2 made real progress along the lifecycle continuum.

This executive summary and its companion report bring these assessment findings to life in more detail.

“There’s no way to know this for sure, but we may not still be here without BOOST. Don’t want to be overly dramatic, but we really needed it. What I do know, even if we were still here, we would not be doing the kind of work we are doing now at the level we are doing it without BOOST.”

## KEY FINDINGS

### READINESS

**BOOST 2** – BOOST 2 organizations referred to readiness without prompting – they realized how important it was to getting the most out of a program like this one, especially given the sustained effort required during the three years. They reiterated some of the findings in BOOST 1 regarding a psychic preparedness and being on the cusp of organizational change: “We were perfectly poised for this effort.”

Three of the four BOOST 2 grantees interviewed for this assessment also underwent changes in executive leadership during BOOST. In all three cases, the respondents indicated that the BOOST program most likely helped to hasten those departures. These were fine leaders who were particularly passionate about the missions of their organizations, but they were not committed to focusing on planning and strengthening organizational fundamentals to the degree necessary to enact transformational change.

One BOOST 2 respondent cautioned that the organizations selected for a BOOST-type program need to be suitable for the process. S/he noted that start-ups might not be ready for the process and that organizations should be in a more advanced stage to better absorb and participate in the process.

**BOOST 1** – These organizations reflected on their readiness for BOOST and, in some cases, their moment of transformational change. The organizations that particularly thrived during and after BOOST were already in the midst of or were psychologically ready for change. BOOST was less effective for organizations unwilling to face and answer the difficult questions that could propel them from just surviving to really thriving, most notably in the areas of financial health and board ownership.

One BOOST 1 respondent suggested that characteristics of readiness for a BOOST-type program include: already having opportunities for growth; being a certain size, in order to be able to absorb and move the work forward; and being open and willing to take this on.

### BOARD ENGAGEMENT

**BOOST 2** – Overall, BOOST 2 organizations demonstrated a high level of board engagement in the organization and spoke about this engagement moving from a tactical and operational focus to more of a strategic and policy focus. They also cited their use of the tools for effective board governance, such as targeted and ongoing board recruitment, policies and procedures, and effective board committees. The new executive directors spoke of being supported and mentored by their boards as they took on their new roles and engaging board members judiciously in areas that would have the greatest impact for the organization.

**BOOST 1** – Higher functioning boards of directors were identified across most BOOST 1 grantees as an area of the most sustained capacity since BOOST. Boards of directors are more sophisticated in their approach to governance and more appropriate in their support of executive leadership and in focusing on strategic issues of the organization. Boards are stepping up to support fundraising and ensure that they have the kinds of skills and representation on the board to best serve the needs of the organization. One organization had not made significant strides in this area despite efforts at more effective recruiting and other approaches, and continues to strive for more effectiveness in this area.

### FINANCIAL MANAGEMENT

**BOOST 2** – Disciplined financial management was essential for BOOST 2 organizations to survive the over past three years during the economic downturn. Indeed, this was probably the most important

organizational capacity element for both BOOST cohorts. With the exception of one of the interviewed organizations, which now has the leadership in place to enact effective financial management, all of the BOOST 2 organizations demonstrated increased capacity in financial planning and control.

**BOOST 1** – BOOST 1 grantees also mentioned and exhibited financial discipline in their discussion of lasting impact of BOOST. Long-term financial tools, such as cash reserves and endowments, were mentioned, as was the use of disciplined budgeting and financial reporting. The organizations that did not demonstrate financial discipline during or after their BOOST tenure found themselves exposed and financially vulnerable with the economic crisis and are still trying to survive and/or rebuild.

## ORGANIZATIONAL BALANCE

**BOOST 2** – Organizations have internalized the primary organizational capacity framework of a strong table top and supporting legs and have moved away from the table analogy and now express the concepts in language that resonates with them. “Balance,” “symmetry” and “interconnectivity” were mentioned by more than one organization in describing organizational sustainability.

**BOOST 1** – Organizations mentioned balance repeatedly in discussing long-term sustainability. They seem to have internalized the importance of the interconnectedness of the organizational support systems of management, governance, financial resources and administrative systems. Organizations that thrived after BOOST seem to understand alignment and speak in particular about the linkages between programs and financial planning. Examples of the importance of balance were also identified between the board and management and between administrative systems, programming and financial resources. If dimensions of one or the other of these organizational areas were off kilter, the effect was felt in other areas of the organization.

## STRATEGIC PROGRAMMING

Organizations in both cohorts that exhibited organizational strength as a result of BOOST were committed to delivering high-quality programs that achieved defined community outcomes. In many cases, organizations are developing and piloting programs before they are implemented and in most cases organizations are implementing programs that support both mission and financial sustainability. Strong organizations have the confidence to say “no” to programming opportunities that do not fit within their strategic priorities or their business plans. Strong organizations are market-focused, always assessing the needs of their current and potential customers and ensuring that programs are assessed for both programmatic and financial outcomes. Organizations repeatedly spoke of understanding the economic fundamentals of programs, particularly earned revenue potential, as part of their program development process. Even organizations that had not yet been able to implement this approach in full, spoke of their understanding of and intention to adjust and implement their programs according to these principles. These are all key tenets of BOOST.

## THE ECONOMY

**BOOST 2** – Grantees started in 2007 when the US economy was flush. Even though there were troubling signs emerging by the end of 2007, BOOST grantee organizations could not have anticipated what was about to happen with the financial crisis and its ripple effects throughout all sectors. Given these unprecedented challenges, all but one of the BOOST 2 organizations that were interviewed have survived these turbulent times relatively well – some with flying colors.

The organizations attributed much of their success in surviving in this economy to BOOST. Some organizations had to slow down on initiatives, such as hiring new staff, and had to shift to “reaction” mode to stay afloat, but they noted that BOOST planning helped them focus on the most important aspects of their organizations and find ways to handle the challenges.

**BOOST 1** – Grantees had completed the BOOST program before the start of the economic downturn. The tools they gained through BOOST helped them prepare for and manage during the recession. A few grantees have experienced no financial downturn, but rather, have grown in mission impact and service despite the economy. These grantees noted a variety of financial practices that supported them, ranging from more conservative budget projections and exercising financial discipline to laying a good foundation for fundraising and cultivating potential donors so that when the economy started to recover they were poised to give. Those organizations also have effective leadership at the staff and board levels.

## SUMMARY

In summary, BOOST 2 provides the following insights.

### LIFECYCLE CAPACITY DEVELOPMENT

- ➔ Grantees made notable progress along the lifecycle model in strengthening all five capacity dimensions. All except one organization moved from mid- to late growth stages or into maturity. Progress might have been even more measurably dramatic, as organizations noted, since having learned more about the lifecycle model and the five dimensions of capacity throughout BOOST, they realized they were generous in where they placed themselves in 2007.
- ➔ BOOST 2 organizations were delighted with their progress along the continuum and demonstrated a nuanced understanding of the lifecycle model. While they were eager to achieve the sustained capacity of a mature organization, they were also mindful of keeping the innovation and energy that are characteristic of start-up and growth organizations. This awareness will enable them to continue to be reflective and perhaps on guard about moving towards decline.
- ➔ Organizations in BOOST 2 not only made progress along the lifecycle continuum, but the capacity areas of management, governance, financial resources and administrative systems became more aligned with one another and with program and mission. This alignment and balance are hallmarks of sustained nonprofit capacity as defined by Dr. Susan Kenny Stevens and utilized as a framework for the BOOST program.

### BOOST TOOLS

- ➔ Participating organizations found value in the BOOST tools. For BOOST 2 organizations, the initial self-assessment, the capacity building grant and the consultants were the most valuable components of the program, though the other tools, such as the plan, financial pro formas, the leadership team, program-based budgeting and the lifecycle model framework, were also considered useful. The cohort sessions and use of a common language centered on the lifecycle model received more mixed reviews. These findings track with those from the assessment at the end of BOOST 1. Indeed, in asking BOOST 1 organizations now about their use of five of the key tools from BOOST 1, they all were still employing to varying degrees a strategic business plan, financial pro formas and program-based budgeting, and many talked about these tools and approaches as now simply being a part of the organization’s culture or DNA.

## IN CONCLUSION

The previously identified success factors of organizational readiness, board engagement, financial management and organizational balance still resonate across the cohorts, and a deep application of these concepts is evident in many of the organizations. It continues to define those organizations that achieved the most sustained capacity improvements.

A focus on strategic programming is a new success factor emerging across the BOOST cohorts. Successful organizations are implementing high-quality programs with defined outcomes for their communities as they become more market-focused in program design and development. BOOST organizations understand the interconnectedness of successful program and financial outcomes on long-term sustainability. They know they have to not only meet, but be one step ahead of their mission market to remain relevant and viable, particularly in a challenging external environment.

BOOST has created positive change and made a marked difference for the participating organizations. Many organizations would not have survived and/or thrived without BOOST. Even organizations that were likely on a positive path of growth and sustainability got there faster and stronger because of BOOST.

The following comments summarize BOOST's impact on both cohorts.

### BOOST 2 Grantee Comments

- ➔ “Has challenged me personally and professionally. I have worked in a lot of nonprofits, and I now look at things differently.”
- ➔ “I really don't think I would have taken this job without BOOST.”
- ➔ “It's the greatest thing ever.”
- ➔ “We are the poster child for this program.”
- ➔ “We are not a big organization for planning. It was exactly what we needed to give us the language, structure, and deadlines to get this work done.”

### BOOST 1 Grantee Comments

- ➔ “BOOST was the catalyst.”
- ➔ “It was a life-changing experience for the organization.”
- ➔ “It was transformational – picked us up where we were and set us on a new track. Gave us a lot of credibility with who we were and where we wanted to go.”
- ➔ “Have never seen an organization change as much and in such positive ways.”

“[I] would give this an ‘A’ as far as return on investment – Rose really got its money's worth. [I] have never seen a grant from a foundation that has been as effective.”



# INTRODUCTION

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## BACKGROUND

In 2007, the Rose Community Foundation launched the second round of a capacity building initiative, Building Organizational Operating Support Together, or BOOST. This three-year program engages a select cohort of nonprofit organizations in business planning, consulting, peer learning and strategic investment grants.

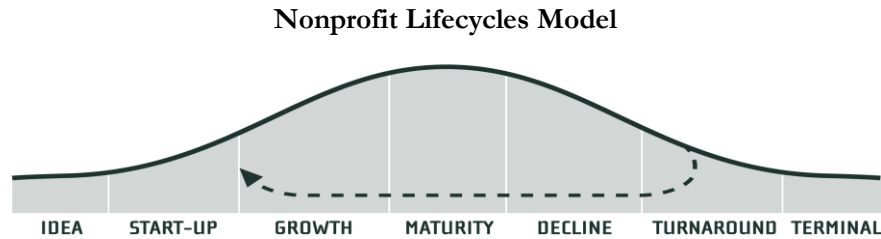
BOOST 2 organizations were chosen from among Rose Community Foundation grantees who were invited to apply. Eight organizations were selected, representing a mix of organizational lifecycle stages along Dr. Susan Kenny Stevens' *Nonprofit Lifecycle Model*, the capacity framework that undergirds the BOOST program. Four of the original eight organizations completed the program and were interviewed for this final assessment report.

This report also takes a look at the first BOOST cohort that participated in the initiative between 2004 and 2006. The Rose Community Foundation was interested in revisiting the BOOST 1 cohort and learning to what extent the BOOST program contributed to sustained capacity improvements more than three years after these organizations had completed the program.

The BOOST program, in its design and implementation for both cohorts, along with the strategic investment grants, is intended to have a positive impact on grantee learning and capacity building as expressed in the following goals:

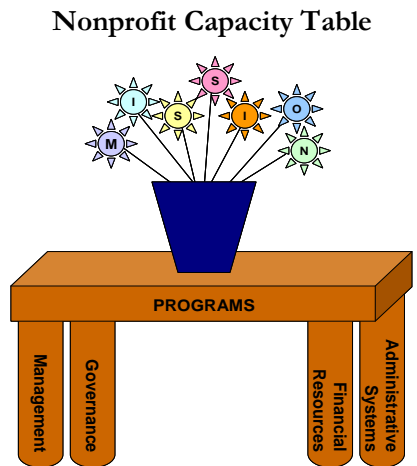
- 1) Develop organizational capacity in governance, management, program and administrative issues beyond the capacity starting points outlined in grantee self-assessments.
- 2) Understand their individual program economics and the financial levers or benchmarks needed to attain financial success, and use this knowledge to aid future financial planning, budgeting and decision making.
- 3) Value financial health and adhere to sound financial practices as evidenced by annual revenues that exceed expenses.
- 4) Develop a network of peers to serve as an ongoing support and resource, and thus break the sense of isolation.
- 5) Develop a common vocabulary for use among peers and within their organizations.
- 6) Use business plans as a holistic “master plan” within which all programmatic, operational and financial decisions are made.
- 7) Effectively learn to use a leadership team concept to promote organizational change, champion business planning strategies and implement organizational changes necessitated by the plan. The leadership team reinforces the fact that organizational sustainability cannot rest on the shoulders of one or two staff members alone.

As noted above, BOOST incorporates the lifecycle theory developed by Dr. Susan Kenny Stevens. The theory presumes that nonprofit organizations, like people, develop through stages. Dr. Stevens' *Nonprofit Lifecycle Model* has seven stages, as outlined in the diagram below.



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Dr. Stevens' book also presents the concept of internal capacity that is both stage appropriate and balanced. The model recognizes that an organization's capacity needs vary by stage of development. The concept of capacity balance is illustrated by the table diagram below, which shows that strong mission and programs rest on "strong legs" of management, governance, administrative systems, and financial resources.



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BOOST is designed to "take organizations where they are," as Dr. Stevens notes regularly. The original eight BOOST 2 grantees represented a variety of stages along the lifecycle model, with varying degrees of strength in their "table top" and "legs." Overall, BOOST 2 organizations ranged from the late start-up to late growth stage, with individual organizational components representing an even a wider range from early start-up to mid maturity. This report addresses the changes – both in advancement along, and alignment within, the lifecycle model.

## ASSESSMENT APPROACH

Ongoing assessment of BOOST 2 was conducted throughout the three-year project, with different approaches taken at the end of each year. Corona Insights was engaged to conduct these diverse assessment tasks throughout BOOST 2, culminating with this final assessment of BOOST 2 along with a comparative look at how BOOST 1 organizations are faring today.

The Year 1 assessment of BOOST 2 used a case study approach to document and understand the experiences of two nonprofit organizations going through the program – one in the start-up and the other in the growth stage of the *Nonprofit Lifecycles Model*. The experiences and learnings from the case studies represented the challenges, insights and critical choices that are central to each stage of the lifecycle development. Indeed, the case studies affirmed Dr. Stevens' premise that start-up and growth stage nonprofits have distinct capacity building needs.

The Year 2 assessment of BOOST 2 took a less formal approach by gathering structured feedback from the organizations and their consultants. Organizations completed a simple report asking them to reflect on the progress of their own organizational learnings, improvements to the organization's functioning due to BOOST, interactions with the consultants and overall benefits to date of BOOST. The Year 2 assessment highlighted and confirmed capacity progress and allowed organizations to identify benefits from BOOST and reflect on what they were learning about themselves and the implications for changed approaches going forward.

This final, Year 3 BOOST 2 assessment focuses on the following:

- ➔ A final assessment of the BOOST 2 grantee cohort that completed the program. The goal was to identify capacity improvements made over the three-year program, the impact of the economic recession and the critical success factors.
- ➔ A visit with BOOST 1 grantees to determine the extent to which BOOST had contributed to sustained capacity improvements three years after the completion of the program.

Both assessments utilized the *Nonprofit Lifecycles Model* developed by Dr. Susan Kenny Stevens as a framework to assess capacity improvements. BOOST 1 and BOOST 2 grantees assessed their organizations along the lifecycle model during the first year of their respective programs and at their respective conclusions. In both cases the review was a facilitated self-assessment, designed to foster reflection and learning.

The BOOST 2 assessment consisted of group interviews with leadership team representatives from each of the four organizations that completed the program: Children's Museum of Denver, Invest in Kids, Rebuilding Together Metro Denver and The Jewish Experience. The other four organizations either had transitioned out of the initiative earlier when it was determined that it was not the right time for them to participate in the program or were unable to participate in the final assessment due to unanticipated organizational challenges that prohibited effective involvement in the assessment process.

The participating consultants also completed a questionnaire asking them to reflect on their work and eliciting their feedback on BOOST 2 programmatic components and design

Finally, Corona interviewed a representative from each of the eight BOOST 1 grantees. A list of BOOST 1 interviewee organizations, BOOST 2 interviewees (and all BOOST 2 organizations), as well as consultants, is included in the Appendices.

# BOOST 2 (2007-2010) SUMMARY OF LEARNINGS

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## CAPACITY ADVANCEMENT SINCE 2007

BOOST 2 grantees were asked to describe areas in which they built or strengthened organizational capacity during the past three years, from the beginning of BOOST 2 in 2007 through the end of the program in 2010. Grantees assessed their progress using the *Nonprofit Lifecycles Model* of a table top of programs being supported by organizational capacity legs related to management, governance, financial resources and administrative systems. The findings are categorized below.

### PROGRAMS

BOOST 2 grantees were fairly consistent regarding changes in programming and capacity built over the past three years. They all talked about being much more strategic rather than opportunistic about programming, which was manifested by:

- ⇒ Using data more in programming decisions.
- ⇒ Having a better understanding of all dimensions of program development and implementation, including content quality, financial implications and staff capacity.
- ⇒ Saying “no” to a program if it does not meet certain criteria. One grantee mentioned using the rubric of “mission, resources and time” to assess any new program opportunities.

Only one organization had not been able to apply this thinking to program development and management due to strains on the organization from a difficult executive transition and the financial crisis, but spoke of understanding the importance of this and aspiring to it.

Other areas of noted program capacity included:

- ⇒ Expanding the work (including both scope and scale – more programming and in a potentially larger footprint).
- ⇒ Having programs with more vitality, depth, and distinction.
- ⇒ Demanding quality and integrity – conducting more rigorous evaluation of programs and piloting programs before they are implemented.
- ⇒ Aligning and hiring staff with advanced or specialized skills to deliver higher quality programs.

### MANAGEMENT

There was a change in executive leadership at three of the four BOOST 2 organizations interviewed for this assessment. Two of the three new leaders were chosen from within the organization, and the transition in leadership was considered quite smooth. The third transition had been completed relatively close to this interview process, but the organization was positive about the new leadership style and skills that were being brought to the organization.

The advancement in management capacities for the three of the four BOOST 2 grantees clusters around the following results:

- ⇒ Organizations have strengthened the management staff bench – grantees have hired people with more advanced skills, particularly in the following areas:
  - > Financial management
  - > Fundraising
  - > Chief operating officer functions
  - > Marketing
- ⇒ Executive directors have delegated day-to-day management to senior staff and were able to focus on external relations for the organization. As an example, one executive director noted that s/he is now copied on e-mails more, rather than being sent them directly for response or action.
- ⇒ Revised organizational charts, clearer roles and responsibilities and expectations for performance have been articulated.
- ⇒ Leadership is managing staff to their strengths and being conscious of not over-extending them.
- ⇒ A team approach has emerged that provides management staff a sense of purpose and creates opportunities for staff input and dialogue.
- ⇒ There is a better understanding of overall organizational culture and the expectations of performance related to the new cultural norms.

## GOVERNANCE

BOOST 2 grantees cited a number of tools and strategies that they had put in place to help build governance capacity during participation in BOOST, including:

- ⇒ Board self-assessment tools
- ⇒ Succession planning
- ⇒ Board development and nominating processes, particularly identifying board members with specific desired skills
- ⇒ Newly empowered board committees
- ⇒ Conflict of interest policies and methods to enforce compliance
- ⇒ Revised bylaws
- ⇒ More structured board meetings
- ⇒ Increased strategic engagement of the board rather than engagement at the operational level

Given the executive leadership transitions noted above, two of the organizations involved in such changes described a high degree of support from the board in ensuring a smooth transition, which included:

- ⇒ Mentoring of executive directors from board members.
- ⇒ Assistance with an external transition consultant.
- ⇒ Freedom for the new executive to run the organization and to establish themselves as leaders and achieve mission outcomes with some degree of flexibility around budget constraints. For example, one organization’s new executive was allowed to go “into the red” if necessary, particularly during the economic crisis, in order to give her/him flexibility to do what was necessary programmatically and organizationally.

More than one organization noted more balance between staff and board roles as a result of their participation in BOOST 2.

- ⇒ There have been major shifts in the board delegating what’s appropriate to the executive and staff.
- ⇒ As one grantee noted: “The board and staff are now in sync. They used to be out of sync. They now have a process for addressing issues before they become major.”

Of interest from a broader governance perspective, two of the organizations noted ambivalence about traditional board expectations and commonly held best practices regarding governance. One organization was working with a board that was functioning at a high level, even though they may have lacked many of the traditional indicators of effective governance. The other organization commented about not buying into the kinds of prescribed expectations about board behavior that are often recommended by external assessors, such as consultants and funders.

The only exception to demonstrated capacity built in the governance area with the BOOST 2 grantees was the organization that was still struggling due to both internal and external challenges unrelated to BOOST. Board members with this organization expressed frustration in always feeling as though they were in a financial crisis, with the board constantly having to step up financially. They were also concerned about ensuring an effective orientation for new board members, given both the organization's financial challenges and the novice experience related to nonprofit governance of many of the new board members.

## FINANCIAL RESOURCES

Three of the four BOOST 2 grantees demonstrated strengthened financial capacity as a result of BOOST. They have internalized financial discipline and stayed on course with their overall financial health. Examples of this included:

- ⇒ Better understanding of the current financial situation coupled with increased financial planning for the future, including the development and maintenance of reserves and working capital funds.
- ⇒ Deeper staff capacity regarding fundraising and financial management, including new hires to focus on these areas.
- ⇒ More effective tools to analyze, report, and track financial data.
- ⇒ More sophisticated conversations at the board level regarding finances and financial planning.
- ⇒ Increased diversification of income – both earned and contributed, with individual giving a particular focus at almost all of the organizations.
- ⇒ Empowered staff to take more ownership of fundraising and of income growth in their own programmatic areas.

“There is a healthy competition between the earned and contributed revenue efforts within the organization.”

Regarding the one outlier organization, the departure of the development director and the transition in the executive director position hindered its ability to develop sustained capacity in this area. In addition, once the board and new executive director were able to dig into the organization's financial structure in more depth, they realized that the financial model was not sustainable. This organization feels as though they still have a way to go with both the board and staff regarding more robust financial management, but they are optimistic about the future given the board's awareness and focus in this area and the talents of the new executive director, coupled with a strong finance director already in place.

## ADMINISTRATIVE SYSTEMS

On the subject of administrative systems, grantees spoke about improvements in the following areas:

- ⇒ Technology upgrades
- ⇒ New databases and software programs, including financial management, donor and constituent management, and a program to streamline internal communications
- ⇒ Increase in support staff
- ⇒ Streamlined office processes
- ⇒ Standardized staff performance appraisals
- ⇒ Facility upgrades or plans for such (at applicable organizations)

## AREAS OF GREATEST SUSTAINED IMPROVEMENT

When BOOST 2 grantees were asked about areas of the organization that demonstrated the most sustained improvement during the BOOST process, two of the respondents indicated a “balanced” advancement in all organizational areas. They commented that all legs of the table were strengthened and could not necessarily single out any one or two areas given the interconnectedness of them all. Another organization mentioned more specifically that financial systems and the executive leadership had been strengthened.

“Being more critical and honest has been a key approach to really moving forward.”

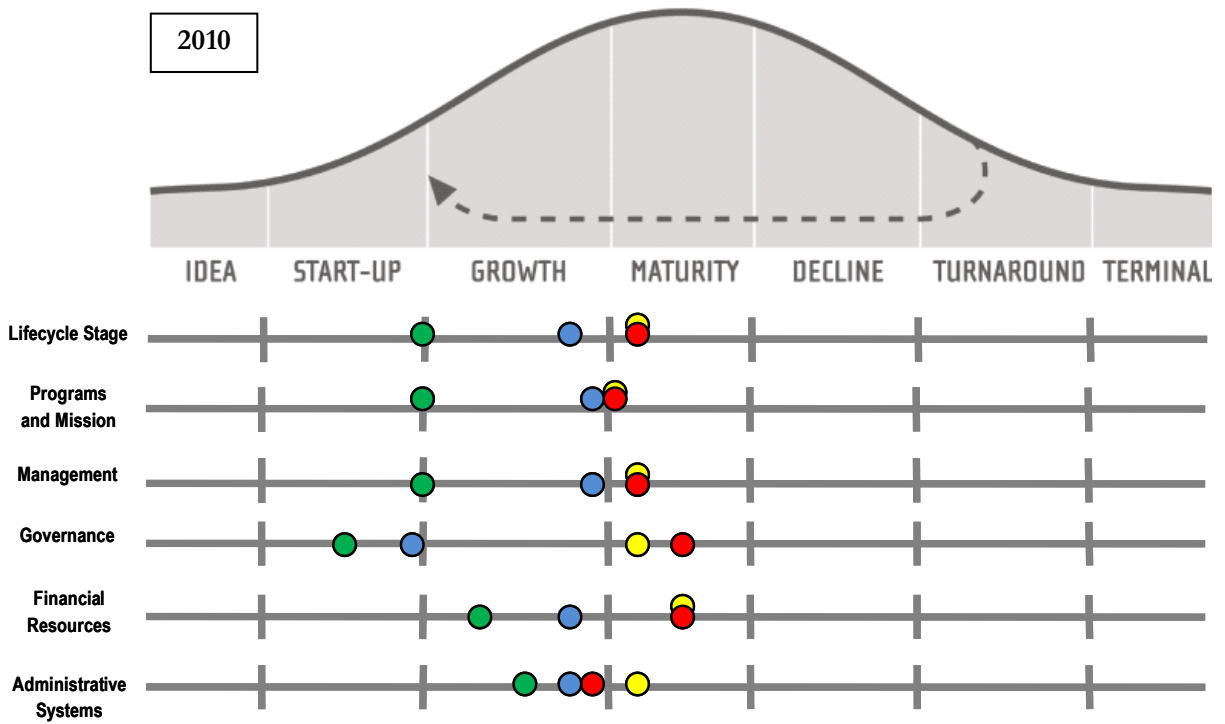
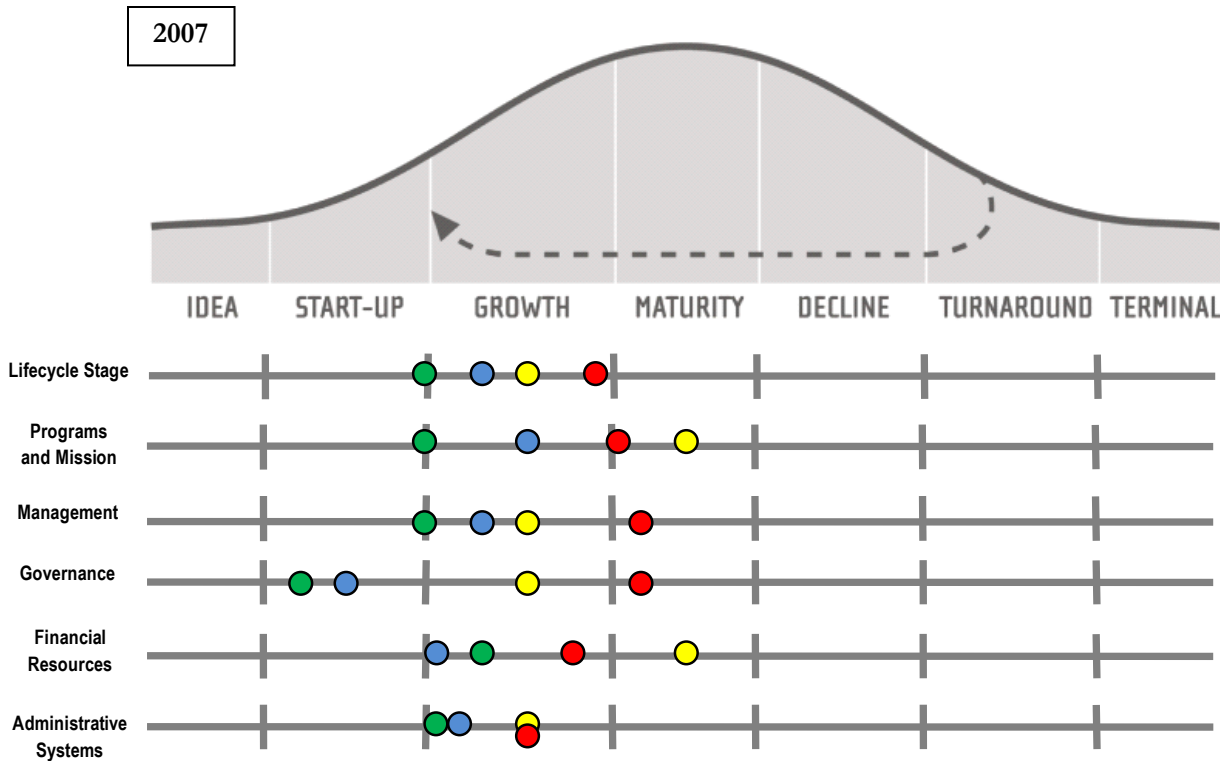
“We have been able to accomplish our strategic initiatives due to a much more intuitive and disciplined process. [We have] become much more disciplined and strategic in our actions and we continue to utilize these planning tools to accomplish our future goals.”

## LIFECYCLE PLACEMENT

During the initial self-assessment at the beginning of BOOST, organizations were asked to place themselves on the lifecycle continuum for each of the five capacity dimensions of the organization and for the organization overall. They were asked to do so again at the end of BOOST. The two charts below depict these lifecycle self-assessments. The charts clearly depict the alignment gained across the capacity areas by the end of BOOST.

Nearly all of the organizations made progress along the continuum. However, they all mentioned that knowing what they know now, having gone through BOOST, they would have placed themselves differently at the beginning of BOOST. Organizations felt that in some areas, they were too generous with their initial placements, implying that progress would actually track more dramatically along the continuum than what is represented. In other words, the progress in many areas felt more robust than the lifecycle placements may illustrate. Indeed, one organization realized that it was not as far as it thought at the beginning of BOOST and the final placement made it appear as if it hadn’t moved at all.

# LIFECYCLE PLACEMENT – CAPACITY IMPROVEMENT THROUGH BOOST





## ASSESSMENT OF BOOST TOOLS

For the BOOST 2 assessment, grantees were asked to indicate if each tool used in the program was helpful and in what ways. BOOST 2 grantees assessed the tools similarly as the BOOST 1 grantees did during their BOOST experience.

The following received the highest praise (listed in alphabetical order):

- ⇒ Capacity-building grant
- ⇒ Consultants
- ⇒ Self-assessment

Followed closely by:

- ⇒ Financial pro formas
- ⇒ Leadership team
- ⇒ Nonprofit lifecycles
- ⇒ The plan
- ⇒ Program based budgeting

The feedback was mixed regarding the value of the cohort sessions and whether organizations had built a common vocabulary.

### Feedback on the BOOST Tools (listed in alphabetical order)

<p><b>Capacity building grant</b></p>	<p>Very helpful:</p> <ul style="list-style-type: none"> <li>• Could lose the momentum without the grant.</li> <li>• Targeted the investment in priority areas, and then used organization’s dollars for some of the other items they identified that weren’t priorities.</li> <li>• Invested the dollars as they went along in key areas.</li> </ul> <p><i>“It would have been difficult to go through BOOST without the money.” “Didn’t have to vision it without taking action.”</i></p>
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<p><b>Cohort Sessions</b></p>	<p>Useful:</p> <ul style="list-style-type: none"> <li>• Good to hear from peers about their issues (“misery loves company”), and beneficial not to be working in a vacuum.</li> <li>• Peer learning provided thoughtful ideas that they could apply to their organization.</li> <li>• Good for networking.</li> <li>• Nice cross-pollination with different kinds of organizations.</li> </ul> <p>Not useful:</p> <ul style="list-style-type: none"> <li>• Sessions were too long and not tailored to the different needs of the grantees.</li> <li>• The applied learning was not helpful, and didn’t learn much from the other organizations.</li> <li>• More one-on-one time with Susan would have been more helpful than the group setting.</li> <li>• Could have used this time more constructively for their own work.</li> </ul> <p><i>“Felt like a class where the students are all on different levels.”</i></p>
<p><b>Common vocabulary based on Nonprofit Lifecycles Model</b></p>	<p>Somewhat useful:</p> <ul style="list-style-type: none"> <li>• Have used the table analogy with staff – conceptually, it’s interesting to keep an eye on lifecycles for organizational context.</li> <li>• Use some of the nomenclature with staff, particularly: table top and legs, lifecycles, discipline, the accountability measure, program-based budgeting and income-based budgeting.</li> </ul>

<p><b>Consultant</b></p>	<p>Very helpful:</p> <ul style="list-style-type: none"> <li>• Consultant was great – worked well with the board, helped address difficult issues, and provided insight.</li> <li>• Consultant was the best part of BOOST – the most progress they made was through the consultant, rather than through the other program components.</li> <li>• Consultants did an amazing job – they brought a process that was seamless and got them where they needed to go.</li> <li>• Consultant was helpful through the self-assessment and business planning process; then weren't sure what to do with the consultant. Were able to deploy the consultant to help with the new development director.</li> </ul> <p><i>“Our consultants were very helpful performing a difficult balancing act of challenging us as well as supporting us.”</i></p>
<p><b>Financial pro formas</b></p>	<p>Helpful:</p> <ul style="list-style-type: none"> <li>• Use “safe bets and happy surprises” as identifiers.</li> <li>• Have made strides with these tools.</li> <li>• Using them more consistently and “taking them up a notch.”</li> <li>• Now looking at both the mission and margin side of things.</li> <li>• Asking staff to develop mini pro formas/business plans for both earned and contributed income programs.</li> </ul>
<p><b>Leadership team</b></p>	<p>Worked well:</p> <ul style="list-style-type: none"> <li>• Created upfront buy-in from board members for BOOST with a clear understanding of the three-year commitment.</li> <li>• Working with the leadership team allowed them to “own” the results – now have more robust conversations at the board and executive staff level from having gone through the process together.</li> <li>• Helped provide continuity for what is a complex process, but also promoted burnout for those involved.</li> <li>• Valuable to have a core group that could speak the same language, but difficult to “keep the torch” burning for the length of the time commitment.</li> </ul> <p><i>“Without this, you would fail in this process.”</i></p>

<p><b>Nonprofit lifecycles model</b></p>	<p>Use it as a reference:</p> <ul style="list-style-type: none"> <li>• The concept of the table and legs was useful in framing conversations with the board.</li> <li>• The lifecycle component was more conceptual and less helpful in a concrete way.</li> <li>• More powerful as an aspirational tool – provided a way to understand where you were and where you want to be.</li> </ul>
<p><b>Plan</b></p>	<p>A good resource:</p> <ul style="list-style-type: none"> <li>• Accomplished everything in the strategic business plan ahead of schedule – now planning on a regular basis and keeping the Gantt chart moving forward.</li> <li>• Have an action plan that gets used and updated regularly.</li> <li>• Created a master plan that was helpful.</li> </ul>
<p><b>Program-based budget</b></p>	<p>A useful tool:</p> <ul style="list-style-type: none"> <li>• Board and staff find it useful; provides a realistic picture.</li> <li>• Helpful in framing conversations regarding mission fit and viable business options.</li> <li>• Use income-based budgeting more.</li> </ul>
<p><b>Self-assessment</b></p>	<p>Considered very helpful:</p> <ul style="list-style-type: none"> <li>• Good for comparison with the original application and at the end of BOOST.</li> <li>• Eye opening and painful, but purposeful.</li> <li>• Good to pause and reflect about what to focus on.</li> <li>• It's a motivator – it helps you see where you want to go.</li> </ul> <p><i>“Without the BOOST program, organizations would not do them [self-assessments].”</i></p>

## IMPACT OF THE ECONOMY

BOOST 2 started in 2007 when the US economy was flush. Even though there were troubling signs emerging by the end of 2007, BOOST grantee organizations could not have anticipated what was about to happen with the financial crisis and its ripple effects throughout all sectors of the economy. Given these unprecedented challenges, all but one of the BOOST 2 organizations that were interviewed have survived these turbulent times relatively well – some with flying colors.

For example, one organization was in the process of preparing for two major organizational changes before the financial crisis hit full force: a planned leadership change and the end of a major multi-year foundation grant commitment. This BOOST grantee described itself as already being in a high state of awareness and planned change so that when the economic downturn hit it “didn’t knock them out.” The organization noted that BOOST was key in getting them through – it gave them a place for the executive director transition to take hold and for fundraising to take root.

Factors that helped BOOST 2 organizations weather the financial storm included:

- ⇒ Solid financial position and/or a high level of financial discipline.
- ⇒ Heightened sense of the interplay between programs and the organization’s financial model.
- ⇒ Courage and self-confidence to stay the course and not compromise mission integrity and program quality.
- ⇒ Efforts already underway, most due to BOOST planning, to diversify revenue options, particularly increasing earned income streams.
- ⇒ Openness to difficult examination of issues and finding creative solutions to challenges.

The organizations attributed much of their success in surviving in this economy to BOOST. Some organizations had to slow down on initiatives, such as hiring new staff, and had to shift to “reaction” mode to stay afloat, but they noted that BOOST planning helped them focus on the most important aspects of their organizations and find ways to handle the challenges. The following comments reflect the sentiments of the grantees regarding BOOST and the economy.

“No way would we be where we are today without BOOST.”

“We would not be in a position today to talk about expansion and a capital campaign if it weren’t for BOOST.”

“We had available patience because of BOOST.”

“We didn’t panic as much as we might have, with BOOST.”

And the organization that struggled more through the BOOST process due to a number of organizational issues noted:

“Once the economy is no longer your friend, it highlights the weaknesses.”

## BOOST 2 ORGANIZATIONS AND SUSTAINABILITY

Common themes that ran through the responses about the effect of BOOST and how BOOST 2 organizations thought about organizational sustainability focused on the notion of balance and connectivity. Organizations have internalized the primary organizational capacity framework of a strong table top and supporting legs, and have moved away from the table analogy and now express the concepts in language that resonates with them. “Balance,” “symmetry” and “interconnectivity” were mentioned by more than one organization in describing organizational sustainability. As one organization also noted, “You stop calling it BOOST and just do the work of BOOST.” It simply becomes inculcated into the culture of the organization.

Other thoughts from grantees on sustainability included:

- ⇒ Leveraging all of the talents and resources of the organization and understanding the skills needed at the leadership level.
- ⇒ Operating with precision, planning and thoughtfulness.
- ⇒ Defining success by both programmatic and financial outcomes.
- ⇒ An infrastructure that keeps everyone (board and staff) on track and accountable to one another.
- ⇒ Asking the tough questions.

“Haven’t lost anything, even given the economy and the leadership transition.”

“[Being in BOOST] was like we went from a sole proprietorship where you just do everything organically. Now we’ve gone to school for four years and we can start our enterprise. The conversation going on from here is going to be different. It’s about how to use everything we’ve learned.”

## ADDITIONAL COMMENTS FROM BOOST 2 GRANTEES

There was some expression of weariness about the length of and amount of work involved in BOOST, and all acknowledged that it was an intense process. One respondent indicated that while it seemed long, three years wasn’t too long to get the work done, but suggested the time period could be divided by two years on, one year off, and one year back on again. On the other hand, one organization weighed in that BOOST was actually too short and that the organization needed more time to implement its business plan.

“This was a tremendous amount of work, but we were ripe for it, and it was so relevant.”

“BOOST drained the guts out of the organization. Too much process – just want to get back to the mission.”

“Think about making the process shorter – maybe 18 months.”

Finally, every grantee organization interviewed expressed an overall positive experience with BOOST and its impact on the organization, even the one organization that felt as though it had not advanced as far as it hoped given its extenuating challenges. Comments from respondents capture these sentiments:

- ⇒ “Has challenged me personally and professionally. I have worked in a lot of nonprofits, and I now look at things differently.”
- ⇒ “I really don’t think I would have taken this job without BOOST.”
- ⇒ “It’s the greatest thing ever.”
- ⇒ “We are the poster child for this program.”
- ⇒ “We are not a big organization for planning. It was exactly what we needed to give us the language, structure, and deadlines to get this work done.”

# **BOOST 1 (2004-2006) – THREE YEARS LATER**

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## **LONG-TERM SUSTAINABLE CAPACITY**

Interviews with BOOST 1 grantees revealed a variety of examples and perspectives on how capacity has been maintained in the years since their participation in the BOOST program. A few high-performing organizations continued to thrive in all of the defined capacity areas and indeed were likely poised to do so even going into BOOST seven years ago. BOOST also occurred during transformational times for at least two BOOST 1 organizations, one of which was undergoing a change in name and focus and the other a structural reorganization as it split off from a partner entity. Both of them indicated that BOOST helped them make smooth transitions into their new organizational identities. In addition, five of the eight BOOST 1 organizations have undergone an executive leadership transition in the three intervening years since the end of BOOST. These circumstances inform many of the reflections on sustainable capacity.

All but one organization were positive about their overall BOOST experience and most have maintained or built capacity in key organizational areas since BOOST. There was one outlier organization within the BOOST 1 cohort that experienced a change in leadership, which set the organization back a few steps, but seems to be on track for a recovery. Indeed, the assessment interview revealed that the organization was likely “tunneling through to decline” along the lifecycle continuum after BOOST, but is now in the midst of a turnaround under new leadership.

“One of the biggest effects from BOOST was giving us the nerve and the confidence.”

“BOOST work has permeated the organization.”

## **PROGRAMS**

The most often cited way in which organizations have created long-lasting capacity in programs was by continuously looking at and adjusting programming based on market need and staying relevant. BOOST 1 organizations understand that program – and ultimately financial – sustainability will be gained through more robust fee for service options and less dependence upon grant funding, particularly one or two large funding sources. Respondents talked about using financial pro formas as a tool in program planning and also of moving towards more sophisticated and high-quality programming in order to meet market demand and capture a willingness to pay for value and quality.

Nearly all organizations indicated that programming was one of the areas in which sustainable capacity has been built since BOOST. To achieve this organizations have had to work better and smarter, often with fewer staff than they had during BOOST, but maintaining or even building programming momentum. Organizations are transitioning to more “evidence-based” program models and defined program outcomes to drive program design and implementation.



## MANAGEMENT

Given the change in executive leadership described previously at five of the eight BOOST 1 organizations, management issues have been on the minds of the respondents, but many still felt as though there were positive signs of management capacity that were or could be sustained. A few of the organizations indicated they were moving forward along the lifecycle continuum in this area, with strong staff and in some cases volunteers, ready to take the next strategic steps for the organization.

A few organizations have had to reduce staff due to the financial crisis, but some were still able to grow programs. Strong management teams have emerged from the BOOST process, and at least one organization is faced with needing senior staff with deeper skills and content expertise in order to match the more sophisticated and robust programming that they are planning, an example of organizations practicing balance and alignment between the table legs.

## GOVERNANCE

Governance was cited by nearly all organizations as the area with the most sustained improvement since BOOST. A few organizations indicated that they had the “best board ever.” Sustainable practices included:

- ⇒ Better nomination/recruitment process to meet specific skill needs.
- ⇒ New board orientations and succession plans.
- ⇒ More effective board meetings.
- ⇒ More robust and active board committees.
- ⇒ Clearer roles between the board and executive leadership – board engaging more in policy and strategic thinking.

“All of this knowledge and confidence of what you can ask your board members comes directly from BOOST.”

## FINANCIAL RESOURCES

Most of the BOOST 1 grantees seemed to demonstrate financial discipline since their engagement with BOOST. Only a couple of organizations reflected that they had not built the long-term discipline needed, and were struggling to survive the downturn in the economy. A few organizations mentioned that they have strengthened their fundraising, particularly in individual giving and special events, which seemed to be a focus for many organizations as they work to diversify contributed income and reduce reliance on large foundation grants. The loss, or reduction to part-time, of dedicated development staff have hindered some of these efforts. One organization noted that the board set an aggressive fundraising goal with the understanding that they needed to step up to make it happen.

A few organizations mentioned examples of long-term financial discipline, such as maintaining a reserve fund to be able to take risks as necessary and raising endowment dollars that also include permission from donors to use on current operations if necessary. One organization built a robust cash reserve during BOOST, due in large part to assistance from the BOOST consultant, whom they kept on after BOOST with their own dollars.

“Protecting and building these financial resources are now just in our DNA.”

“Financial discipline and the cash reserve – it was necessary to survive – we might have gone out of business without this.”

## ADMINISTRATIVE SYSTEMS

For the most part, organizations described examples of how they are operating differently than they did during BOOST. Upgraded technology and new software programs related to donor tracking, financial accounting and database management were mentioned. A few organizations have also implemented new or updated personnel policies and procedures considered hallmarks of effective nonprofit human resource management. Two organizations with facilities have had to put facility planning and related capital campaigns on hold until the economy recovers. One organization mentioned that the lack of a dedicated donor database has been detrimental to its ability to cultivate and track donors.

## AREAS OF GREATEST SUSTAINED IMPROVEMENT

Capacity areas that have changed for the better or have demonstrated the biggest sustained improvements since BOOST were:

- ⇒ Governance
- ⇒ Financial management and fundraising
- ⇒ Program development and quality

The linkage between program and financial planning was again emphasized in the context of sustained capacity, with one organization noting that BOOST taught them to look at programs differently, with an eye towards market potential and more awareness around consumer needs and program value.

Organizations also seemed to have internalized the momentum from BOOST and the understanding that all areas are interrelated. The concept of balance across all areas of the organization and the importance of interconnectedness for sustained capacity was mentioned frequently.

“Best part [of BOOST] has been that it’s bringing everything into alignment.”

“It is less about the pieces now than the sum of the parts. The organization has really come into itself.”

“If you fix one thing then you have to shore up everything else.”

“We are an entirely different organization now.”

## BOOST 1 GRANTEES USE OF BOOST TOOLS SINCE 2006

<p><b>Business plan</b></p>	<p>A majority of the organizations used the business plan developed during BOOST through its useful life. They found the plan to be very helpful in guiding the organization and providing the basis to have strategic conversations.</p> <p>A few of the organizations had developed a new plan in the three intervening years of BOOST and a majority of the organizations are currently in the process of developing new plans.</p> <p>Regarding current planning, a few respondents noted that they are using their BOOST planning framework and are able to update their plans on their own because of their participation in BOOST. Organizations mentioned that planning is now a part of their organizational culture.</p>
<p><b>Financial pro formas</b></p>	<p>A majority of the BOOST 1 grantees still use financial pro formas and have an advanced understanding of what it takes to be financially sound. Two organizations had used these tools before BOOST.</p>
<p><b>Leadership Team</b></p>	<p>For many organizations, the leadership team construct from the BOOST program has translated into new or more effective executive committees of the board and/or a defined management team on the staff side. Organizations are using these board committees and staff teams for regular meetings focused on higher level policy and more strategic conversations.</p>
<p><b>Nonprofit Lifecycles Model</b></p>	<p>Organizations seemed to appreciate the concepts and framework of the lifecycle model, particularly within an aspirational context of having a sense of where they'd like to be on the lifecycle continuum. Half of the organizations don't use it anymore, though some respondents noted that recently it has been a useful reference to help frame new issues and challenges.</p>
<p><b>Program-based budget</b></p>	<p>A majority of the BOOST 1 grantees found program-based budgeting helpful and still use this tool. As one respondent noted, "The tools couldn't be better." One organization had used this approach before the BOOST program and was referenced as a model during the BOOST process. Another organization never used program-based budgeting, opting for other approaches that better suited the organization's business model.</p>

## IMPACT OF THE ECONOMY

BOOST 1 grantees had completed the BOOST program before the start of the economic downturn. The effect of the economy on these organizations was manifested in the following:

- ⇒ More conservative budgeting and less risk taking.
- ⇒ Freezing planned staff hires and/or reducing staff.
- ⇒ A decrease in contributed income.
- ⇒ More involvement by the board in aspects of the organization that were handled by staff.
- ⇒ Stalled plans for facility expansion.
- ⇒ Serving more people with less earned revenue.
- ⇒ Allowing an organization to face the facts of previous long-term financial mismanagement while under cover of the larger economic crisis.

The organizations identified the following BOOST tools and learnings or other activities that have helped them survive and in some cases thrive through the financial crisis:

- ⇒ Used conservative budget projections.
- ⇒ Laid a good foundation for fundraising and kept cultivating potential donors so that when the economy started to recover they were poised to give.
- ⇒ Had a reserve fund.
- ⇒ Followed a process and financial discipline.
- ⇒ Didn't panic or approach the situation from a place of crisis.
- ⇒ Utilized the business plan.
- ⇒ Put in more structure to be well positioned to continue to survive, regardless of changes in internal or external factors.

## OTHER LONG-TERM IMPACTS OF BOOST

The idea of a “halo” effect from BOOST resonated with only a few BOOST 1 organizations. Respondents mostly noted that they were recognized as being stronger organizations (with business plans, robust financial documents, etc.) rather than simply being a BOOST organization. While BOOST seems to be recognized and respected in the nonprofit community, one respondent noted, “It’s more like you got a Masters degree so it means you are competent.”

Regarding whether BOOST improved organizations’ self esteem, one or two organizations emphatically agreed. The prestige of being chosen by the Rose Community Foundation was gratifying. Most organizations mentioned the fact that BOOST gave them confidence. Whether it was giving the executive confidence in general, giving the organization confidence to implement change, confidence to say “no” to things that didn’t align with where they wanted to go, or confidence because they were operating with a good plan – the confidence boost was important and lasting. Finally, BOOST provided a few of the executive directors a support network that reduced a feeling of isolation as they were trying to implement significant change.

“Gave us a chance to talk about ‘what do we want to be’ instead of just being reactionary.”

“We deal with issues more systematically and are better at initiating things on our own.”

Comments from the BOOST 1 grantees are the most powerful way to summarize how BOOST has had an impact on their organizations.

- ⇒ “BOOST was the catalyst.”
- ⇒ “It was a life-changing experience for the organization.”
- ⇒ “It was transformational – picked us up where we were and set us on a new track. Gave us a lot of credibility with who we were and where we wanted to go.”
- ⇒ “Have never seen an organization change as much and in such positive ways.”
- ⇒ “Would give this an ‘A’ as far as return on investment – Rose really got its money’s worth. Have never seen a grant from a foundation that has been as effective.”
- ⇒ “BOOST helped us get from the growth stage to the mature stage without too much angst.”
- ⇒ “Somewhat disappointed [in themselves] – there was great momentum, but given the factors [executive director transition and the economy], we went backwards.”
- ⇒ “It made a big impact on our agency. BOOST gave us the courage to grow and make more risky decisions. We are bolder now.”
- ⇒ “Things were going to change anyway – it just put us on a different trajectory. We were able to change more rapidly because of BOOST.”

# BOOST 1 AND BOOST 2 COHORTS – FINDINGS AND COMPARISONS

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## FACTORS PROMOTING LONG-TERM CAPACITY

One of the key questions in looking back at BOOST 1 organizations was to determine long-term impact from BOOST participation and if sustainable capacity had been built. In addition to the summary descriptions of information gathered from the organizations described in this report, we wanted to use the findings from the original BOOST 1 assessment as a frame of reference for examining these organizations four years later.

The BOOST 1 assessment revealed that four factors were pivotal to building capacity and potential long-term sustainability: readiness; board engagement; financial management; and organizational balance. Do these factors still hold up? What other factors are at play in building long-term sustainability? And do these apply to BOOST 2 organizations?

### READINESS

**BOOST 2** – BOOST 2 organizations referred to readiness without prompting – they realized how important it was to getting the most out of a program like this one, especially given the sustained effort required during the three years. They reiterated some of the findings in BOOST 1 regarding a psychic preparedness and being on the cusp of organizational change: “We were perfectly poised for this effort.”

Three of the four BOOST 2 grantees interviewed for this assessment also underwent changes in executive leadership during BOOST. In all three cases, the respondents indicated that the BOOST program most likely helped to hasten those departures. These were fine leaders who were particularly passionate about the missions of their organizations, but they were not committed to focusing on planning and strengthening organizational fundamentals to the degree necessary to enact transformational change.

One BOOST 2 respondent cautioned that the organizations selected for a BOOST-type program need to be suitable for the process. S/he noted that start-ups might not be ready for the process and that organizations should be in a more advanced stage to better absorb and participate in the process.

**BOOST 1** – These organizations reflected on their readiness for BOOST and, in some cases, their moment of transformational change. The organizations that particularly thrived during and after BOOST were already in the midst of or were psychologically ready for change. BOOST was less effective for organizations unwilling to face and answer the difficult questions that could propel them from just surviving to really thriving, most notably in the areas of financial health and board ownership.

One BOOST 1 respondent suggested that characteristics of readiness for a BOOST-type program include: already having opportunities for growth; being a certain size, in order to be able to absorb and move the work forward; and being open and willing to take this on.

### BOARD ENGAGEMENT

**BOOST 2** – Overall, BOOST 2 organizations demonstrated a high level of board engagement in the organization and spoke about this engagement moving from a tactical and operational focus to more of a strategic and policy focus. They also cited their use of the tools for effective board governance, such as

targeted and ongoing board recruitment, policies and procedures, and effective board committees. The new executive directors spoke of being supported and mentored by their boards as they took on their new roles and engaging them judiciously in areas that would have the greatest impact for the organization.

**BOOST 1**– Higher functioning boards of directors were identified across most BOOST 1 grantees as an area of the most sustained capacity since BOOST. Boards of directors are more sophisticated in their approach to governance and more appropriate in their support of executive leadership and in focusing on strategic issues of the organization. Boards are stepping up to support fundraising and ensure that they have the kinds of skills and representation on the board to best serve the needs of the organization. One organization had not made significant strides in this area despite efforts at more effective recruiting and other approaches, and continues to strive for more effectiveness with its board.

## FINANCIAL MANAGEMENT

**BOOST 2**– Disciplined financial management was essential for BOOST 2 organizations to survive the over past three years during the economic downturn. Indeed, this was probably the most important organizational capacity element for both BOOST cohorts. With the exception of one of the interviewed organizations, which now has the leadership in place to enact effective financial management, all of the BOOST 2 organizations demonstrated increased capacity in financial planning and control.

**BOOST 1**– BOOST 1 grantees also mentioned and exhibited financial discipline in their discussion of lasting impact of BOOST. Long-term financial tools, such as cash reserves and endowments, were mentioned, as was the use of disciplined budgeting and financial reporting. The organizations that did not demonstrate financial discipline during or after their BOOST tenure found themselves exposed and financially vulnerable with the economic crisis and are still trying to survive and/or rebuild.

## ORGANIZATIONAL BALANCE

**BOOST 2**– Organizations have internalized the primary organizational capacity framework of a strong table top and supporting legs and have moved away from the table analogy and now express the concepts in language that resonates with them. “Balance,” “symmetry” and “interconnectivity” were mentioned by more than one organization in describing organizational sustainability.

**BOOST 1**– Organizations mentioned balance repeatedly in discussing long-term sustainability. They seem to have internalized the importance of the interconnectedness of the organizational support systems of management, governance, financial resources and administrative systems. Organizations that thrived after BOOST seem to understand alignment and speak in particular about the linkages between programs and financial planning. Examples of the importance of balance were also identified between the board and management and between administrative systems, programming and financial resources. If dimensions of one or the other of these organizational areas were off kilter, the effect was felt in other areas of the organization.

## STRATEGIC PROGRAMMING

Organizations in both cohorts that exhibited organizational strength as a result of BOOST were committed to delivering high-quality programs that achieved defined community outcomes. In many cases, organizations are developing and piloting programs before they are implemented and in most cases organizations are implementing programs that support both mission and financial sustainability. Strong organizations have the confidence to say “no” to programming opportunities that do not fit within their strategic priorities or their business plans. Strong organizations are market-focused, always assessing the needs of their current and potential customers and ensuring that programs are assessed for both programmatic and

financial outcomes. Organizations repeatedly spoke of understanding the economic fundamentals of programs, particularly earned revenue potential, as part of their program development process. Even organizations that had not yet been able to implement this approach in full, spoke of their understanding of and intention to adjust and implement their programs according to these principles. These are all key tenets of BOOST.

## **ECONOMIC CONTEXT**

Both BOOST cohorts felt the impact of the recession. BOOST 2 organizations were grateful that they had started the program during a time of economic health, as it allowed them to face difficult questions from a place of openness and gave them at least a positive foundation upon which to address their internal and external challenges. Being in BOOST gave them a relatively safe place – and valuable grant dollars – to absorb the impact and continue planning. It also provided a live-time crisis, so to speak, during which organizations could practice the kinds of organizational capacity fundamentals that were being promoted through BOOST.

BOOST 1 organizations were glad they had completed BOOST well before the financial crisis hit, and expressed concern about their BOOST 2 colleagues. Most of the BOOST 1 grantees had strong and balanced capacity throughout all areas of their organizations, which has enabled them to survive. Those that have struggled (including one BOOST 2 organization) were going through a leadership transition during this time and also had underlying organizational issues that had never been addressed during the BOOST process and were subsequently exposed by the economic crisis.

As mentioned throughout this report, organizations in both cohorts have survived the economic crisis by practicing financial discipline, focusing on strategic programming and continuing to cultivate donors. And those that really thrived approached the situation with openness, confidence and creativity. As one respondent noted, there is no wringing of hands, instead the conversations are more positive such as, “What new direction can we take? Who can we reach?”

## **EXECUTIVE LEADERSHIP**

A new theme that began emerging from the assessment interviews centered on executive leadership. As has been noted throughout this report, a number of BOOST organizations from both cohorts have experienced leadership changes in the past three years: 3 of the 4 organizations interviewed for BOOST 2 and 5 of the 8 organizations interviewed for BOOST 1.

### BOOST 2 Organizations with new executive directors during BOOST

Invest in Kids

Children’s Museum of Denver

Rebuilding Together Metro Denver

### BOOST 1 Organizations with new executive directors since the end of BOOST

Boulder Jewish Community Center

Colorado Association for Jewish Education

Colorado Bright Beginnings

Hillel of Colorado

Metro Volunteers



Most of the organizations that underwent leadership transitions have come out strengthened by the change. In many cases organizations have gained different and/or more advanced leadership capacity to better match the direction in which the organization is headed. A few of the new leaders were promoted from within so had the institutional memory, particularly related to BOOST, to keep the momentum going. They were able to build a management style based upon both lessons learned from their predecessors as well as their own vision and strengths.

A few organizations did not fare as well, due primarily to leaders who were not as open to self-examination as their peers and/or were not ready to embrace BOOST in full. While these leaders may no longer be with their organizations, their lack of accountability has had lasting impact. These are the organizations that have struggled the most, indicating the importance of leadership, accountability and systems metrics. The management leg of the table must not only be strong, but strong in ways that may be more difficult to assess through some of the capacity defined diagnostic characteristics.

## **FINAL THOUGHTS**

The previously identified success factors of organizational readiness, board engagement, financial management and organizational balance still resonate across the cohorts, and a deep application of these concepts is evident in many of the organizations. It continues to define those organizations that achieved the most sustained capacity improvements.

A focus on strategic programming is a new success factor emerging across the BOOST cohorts. Successful organizations are implementing high-quality programs with defined outcomes for their communities as they become more market-focused in program design and development. BOOST organizations understand the interconnectedness of successful program and financial outcomes on long-term sustainability. They know they have to not only meet, but be one step ahead of their mission market to remain relevant and viable, particularly in a challenging external environment. Indeed, BOOST might be best for growth-stage organizations with robust programs but in need of stronger legs.

BOOST has created positive change and made a marked difference for the participating organizations. Many organizations would not have survived and/or thrived without BOOST. Even organizations that were likely on a positive path of growth and sustainability got there faster and stronger because of BOOST.

# SUMMARY OF FEEDBACK FROM CONSULTANTS

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Consultants were asked to provide feedback at the end of Year 3 as part of the final assessment of BOOST 2. The assessment questions were designed to take a broad look at the full three years of the program, including satisfaction with progress made by the organization, usefulness of the BOOST tools and impact of organizational leadership during BOOST.

## GRANTEE PROGRESS

Consultants reflected on their work for the past three years and described their level of satisfaction with the progress their grantees have made as well as their own involvement in that progress. Consultants were generally satisfied with their organizations' progress. One consultant noted in particular that his/her organization made significant advances in multiple areas, such as financial discipline, management and staffing and board enhancement. Some consultants also noted an ebb and flow in satisfaction of their grantees' advancement, particularly related to those organizations undergoing leadership transitions. One consultant also noted that his/her personal satisfaction as a consultant was much greater, and that s/he had taken the learnings from the BOOST work and applied them to other nonprofit organizations with success.

“Participation in BOOST shifted the organization’s focus away from the ‘shiny object’ of the moment, and was instrumental in them identifying critical capacities in need of attention. . .”

“This grantee was a classic example of how the good got better with the right kind of guidance and supports.”

## BOOST TOOLS

The table below captures consultants' feedback on how helpful each of the BOOST tools was in their work with their organizations. Their responses track similarly with those of the grantees' with the self-assessment and capacity-building grants noted as particularly helpful. The consultants also found some of the approaches a bit more helpful to their own work in guiding the organizations than the grantees might have perceived them to be, such as the *Nonprofit Lifecycles Model* and program-based budgeting. Consultants also agreed with grantees on the usefulness of the cohort sessions, though they would consider re-designing them rather than jettisoning them altogether. Finally, consultants appreciated the coaching opportunity with Dr. Susan Kenny Stevens.

**Consultant Feedback on the BOOST Tools (listed in alphabetical order)**

<p><b>Capacity building grant</b></p>	<p>Grants were significant for the organizations:</p> <ul style="list-style-type: none"> <li>• Organizations were able to use these funds for key capacity areas, such as technology upgrades, branding and communication, new fundraising efforts, new facilities and more advanced staff – areas for which organizations might otherwise have been hard-pressed to spend dollars without the grant and given the economy, but which ended up being essential to their capacity progress.</li> <li>• One consultant noted that it was largely the carrot that attracted some of the organizations – it may not be 100% necessary up front, but could be left as a loose commitment to fund things as needed.</li> </ul> <p><i>“Great as an incentive to meet deadlines and produce the products of assessment and planning.”</i></p>
<p><b>Cohort Sessions</b></p>	<p>Marginal value:</p> <ul style="list-style-type: none"> <li>• Lots of reporting and not really a cohort learning environment.</li> <li>• Important for creating a sense of purpose and community over the long haul.</li> <li>• They felt “light,” but instead of not doing them – beef them up.</li> <li>• Perhaps tie the grants to attendance.</li> </ul>
<p><b>Consultant convenings with Susan Kenny Stevens</b></p>	<p>Moderately useful:</p> <ul style="list-style-type: none"> <li>• Enjoyable but not necessarily helpful – it might have been more helpful to have consultants resource each other – share challenges and brainstorm solutions.</li> <li>• Enjoyable – but not critical to the success of the engagement.</li> <li>• Seemed like more reporting than trouble shooting – would have appreciated a more formal mechanism for raising issues and getting real help in resolving troubles.</li> <li>• A rare opportunity for consultants to get professional development – it was targeted and helpful.</li> </ul> <p><i>“Susan’s sense of humor and deep knowledge was a delight.”</i></p>

<p><b>Financial pro formas</b></p>	<p>Useful:</p> <ul style="list-style-type: none"> <li>• Projections were useful, though really the job of a good CFO to monitor and manage this throughout the fiscal year.</li> <li>• This approach felt a bit forced.</li> <li>• Organization struggled with this, but ultimately came to see the value.</li> <li>• Good use of this structure – it helped them do something they intuitively understood anyway.</li> </ul>
<p><b>Leadership team</b></p>	<p>Useful at first:</p> <ul style="list-style-type: none"> <li>• A few consultants noted that the leadership team was particularly useful during the first 18 months of the project, and then its role became murky.</li> <li>• Some leadership teams morphed into a strategic planning committee, but then they lost the original leadership team identity. For others, the line of authority between the leadership team and executive committee of the board became confusing.</li> <li>• Another noted that s/he mostly worked with the staff members of the leadership team and had minimal contact with board members, but it did not end up being a problem.</li> <li>• One consultant noted that the grantees did not seem sold on the leadership team and the team lost momentum after the assessment – could have used assistance on how to handle transitions and “demotivation.”</li> <li>• At least two consultants use this concept in their own practices, so are used to working with a staff/board leadership approach.</li> </ul>
<p><b>Nonprofit lifecycles model</b></p>	<p>A great model:</p> <ul style="list-style-type: none"> <li>• Helped create a climate for change.</li> <li>• Very helpful for a number of crucial conversations.</li> <li>• Great for depersonalizing issues.</li> <li>• A great model with direct applicability and insight throughout the process.</li> <li>• The tool gives a framework for everything the grantee undertakes.</li> </ul> <p><i>“Love it – it is the perfect tool for both demystifying growing pains and depersonalizing issues. I use it all the time.”</i></p>

<p><b>Plan</b></p>	<p>Important:</p> <ul style="list-style-type: none"> <li>• Plans varied from detailed action plans to address capacity issues, to strategic business plans.</li> <li>• Planning process was important and the plans fostered consensus as the organizations made important decisions for the future.</li> <li>• One-year action plan was a good fit for what the organization needed and could absorb.</li> <li>• Some frustration with organizations that neglected to refer to them once adopted – needed more time and coaching with the grantees on how to implement the plan.</li> <li>• Other organizations have demonstrated integrating planning into their annual work and have even driven it down further into the organization.</li> </ul> <p><i>“Along with the Lifecycles Model itself, it is the single most effective tool in the box.”</i></p>
<p><b>Program-based budget</b></p>	<p>A very useful tool:</p> <ul style="list-style-type: none"> <li>• Board and staff at almost all organizations resisted this at first and struggled “mightily” in using it, but once they did, it was overwhelmingly helpful.</li> <li>• It was an “eye-opening” tool.</li> <li>• Almost all of the consultants use this with their other clients and find it very helpful across the board.</li> </ul> <p><i>“This tool is critical and eye opening for each organization. It sheds light on important underlying cost structures and helps board members ask tough questions.”</i></p>
<p><b>Self-assessment</b></p>	<p>Very helpful:</p> <ul style="list-style-type: none"> <li>• Assessments identified critical issues.</li> <li>• This was often a difficult process but essential – required organizations to look at themselves honestly.</li> <li>• Helped organizations understand the importance of paying attention to their capacity areas before they can expand or take on new initiatives.</li> </ul>

	<ul style="list-style-type: none"> <li>• Great framework.</li> <li>• Could have used this more to have the tough conversations on the front end of planning.</li> </ul> <p><i>“Couldn’t have done it without this piece.”</i></p>
<p><b>Susan Kenny Stevens coaching and resources</b></p>	<p>Helpful:</p> <ul style="list-style-type: none"> <li>• Susan is always responsive and to the point.</li> <li>• Only rarely had occasion to need extra help with this grantee.</li> <li>• Never quite knew how much time was allowed with Susan, so was thoughtful about not overextending the time – would have liked to know more specifically how much was budgeted for each consultant.</li> <li>• Appreciated the sharing of articles, tips and tools.</li> </ul> <p><i>“Susan is great. Her depth of experience and spot-on assessment of challenges was a great asset.”</i></p>

## LEADERSHIP ROLES IN BOOST

Consultants were asked how their organization’s board and executive leadership helped or hindered progress and results in the BOOST program. The results were mixed.

Regarding board involvement, consultants noted that boards were almost neutral at best or both helped and hindered the process at varying times. Many boards signed on in principle at the beginning, especially given the prestige and the potential grant dollars, but delegated responsibility to the staff or the leadership team. This made it difficult to get full board buy-in to address important challenges or decisions that arose along the way. Some boards did not take the process seriously until later, when they gained a better sense of BOOST and its potential impact on the organization. Some boards were well-intentioned but did not know how to contribute and were too lightly engaged for any meaningful contributions.

For organizations in which there was leadership change at the board level, BOOST was not a personal commitment for the new board leadership, nor did they understand the expectations of the program. One consultant suggested that a brief “boards only” orientation and training early in BOOST would help boards better understand the program and their roles and responsibilities in the process.

Regarding the executive staff leadership during BOOST, consultants noted the numerous executive transitions. For most of these organizations, the transition left the organizations better than before, but the timing of the change and the degree to which the new executive had had a chance to pick up the BOOST mantra and implement the BOOST program determined organizational advancement. In two cases, consultants noted that executives actually hindered the process. These executives were hiding issues rather than addressing them directly, which meant that deeper challenges were buried and not addressed until there was a change in executive leadership. These executive directors were also not interested in or skilled at implementing the kinds of transformational change that was necessary for the organizations to advance.

In another case in which the executive director changed during BOOST, the first executive was wary of change and innovation and started the program with a veneer of compliance. The new executive took over and made sure that the organization was taking full advantage of the program and meeting its commitments.

## FINAL THOUGHTS FROM CONSULTANTS

Consultants’ final thoughts about the program confirmed their assessment of the value of BOOST and its impact on organizations that are ready and willing to participate in such an intensive capacity building program. Consultants noted that some of the greatest challenges were in managing difficult situations that arose during BOOST, including a few executive leadership transitions, and maneuvering through these challenges while also keeping the organizations on track with their BOOST commitments. Open and clear dialogue with the Rose Community Foundation from both the grantees and the consultants can help these situations as could clearer expectations about the extra and uncompensated time and resources that were necessary for the consultants to meet these unanticipated needs. Ultimately, consultants experienced first-hand the value in BOOST and its potential for sustainable organizational capacity.

“I believe in BOOST. For organizations that are ready, willing and able it is a tremendous opportunity – a springboard to greater results.”

## APPENDIX A: PARTICIPANTS IN THE ASSESSMENT PROCESS

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The following organizations and individuals participated in this assessment and provided information through interviews or written reports.

### BOOST 2 ORGANIZATIONS THAT STARTED THE PROGRAM

B'nai B'rith Youth Organization  
Children's Museum of Denver\*  
Clínica Tepeyac  
Colorado Statewide Parent Coalition  
The Jewish Experience\*  
Invest in Kids\*  
Rebuilding Together Metro Denver\*  
Stepping Stones to a Jewish Me

*\*Organizations that participated in the final assessment*

### BOOST 1 ORGANIZATIONS

Boulder Jewish Community Center  
Center for African American Health  
Colorado Agency for Jewish Education  
Colorado Bright Beginnings  
Hillel of Colorado  
Metro Volunteers  
The Senior Hub  
Women's Bean Project

### CONSULTANTS

#### Master Trainer and Lead Consultant

Dr. Susan Kenny Stevens  
*Larson Allen Public Service Group*

Bourge Hathaway  
*Ordinary Magic*

Karla Raines  
*Corona Insights*

Steve Schack  
*Clear Blue Associates*

Kimberly Sherwood  
*Third Sector Group*

Michael Whitehead-Bust  
*Foxhall Consulting*



# APPENDIX B: BOOST 2 GRANTEE INTERVIEW PROTOCOL

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Rose Community Foundation BOOST Program / Final Grantee Assessment – 2010

Conducted by Karla Raines, Corona Insights

## Instructions

- Please review the following questions and background materials in advance of the interview.
- Come to the interview prepared to share your perspectives and examples.
- Please allow 90 minutes for this interview.

## Assessment Questions

Note - All interviews are confidential and findings will be reported in aggregate. Selected comments will be shared as anonymous quotes. Corona Insights will transcribe notes during the interview for use in creating the report of findings for Rose Community Foundation.

1. Let's conduct a brief review of issues you identified through BOOST.
  - a. Briefly review the critical juncture/issues described in your BOOST application
  - b. Briefly review the detailed set of issues identified through your BOOST self-assessment
  - c. Refer to your lifecycle placement in 2007
2. Please describe the areas in which you have built or strengthened organizational capacity since 2007.
  - a. Programs
  - b. Management
  - c. Governance
  - d. Financial resources
  - e. Administrative systems
  - f. Where have you seen the biggest sustained improvement? Why?
3. Lifecycle placement in 2010
  - a. Place your nonprofit on the lifecycle model as of today
  - b. How does it compare to the 2007 placement?
4. Let's review the various tools provided through BOOST. How helpful was each? Why?
  - a. Self-assessment
  - b. Plan – Let's confirm the type of plan you used. To what extent did you use it as a “master” plan to guide decisions?
  - c. Nonprofit Lifecycles Model

- d. Program-based budget
  - e. Financial pro formas and the identification of certain, likely and risky revenue streams – To what extent does your organization have a better understanding of what it takes to be financially sound?
  - f. Capacity building grant
  - g. Leadership team – To what extent did you use the leadership team to champion strategies and implement organizational changes?
  - h. Consultant
  - i. Cohort sessions
  - j. Did you build a common vocabulary based on the Nonprofit Lifecycles Model?
5. We realize that leadership is instrumental to a three-year capacity building process like BOOST.
- a. How did your board's leadership help (or hinder) progress and results?
  - b. How did your staff's leadership help (or hinder) progress and results?
6. Let's explore the impact of the economy.
- a. What impact has the economy had on your organization?
  - b. Where would you be today if it weren't for BOOST?
7. What effect did BOOST have on how you think about organizational sustainability? How you will promote it going forward?
8. Are there any other comments you'd like to share?

# APPENDIX C: BOOST 1 GRANTEE INTERVIEW PROTOCOL

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Rose Community Foundation BOOST Program / BOOST 1 Grantee Assessment – 2010

Conducted by Karla Raines, Corona Insights

## Instructions

- Please review the following questions and background materials in advance of the interview.
- Come to the interview prepared to share your perspectives and examples.
- Please allow 60 minutes for this interview.

## Assessment Questions

Note - All interviews are confidential and findings will be reported in aggregate. Selected comments will be shared as anonymous quotes. Corona Insights will transcribe notes during the interview for use in creating the report of findings for Rose Community Foundation.

9. Let's check in and see how you've been using the BOOST tools since 2006.
  - a. Business Plan – To what extent have you use your plan as a “master” plan to guide decisions? How has it been updated?
  - b. Nonprofit Lifecycles Model – To what extent have you referred to your final lifecycle placement? Used the model to assess progress? Build a common vocabulary within the organization?
  - c. Program-based budget – To what extent have you used this tool since BOOST? What has helped or hindered its use in your organization?
  - d. Financial pro formas and the identification of certain, likely and risky revenue streams – To what extent does your organizational have a better understanding of what it takes to be financially sound?
  - e. Leadership team – To what extent did you use the leadership team to champion strategies and implement organizational changes?
10. Please describe the areas in which you have built sustained (long-lasting) organizational capacity since 2006.
  - a. Programs
  - b. Management
  - c. Governance
  - d. Financial resources
  - e. Administrative systems
  - f. Where have you seen the biggest sustained improvement? Why?
11. Other long-term impacts of BOOST

- a. Did you experience any “halo effect” as a result of BOOST? For example, did other funders view your organization more favorably?
  - b. To what extent did your organization’s sense of self-esteem increase as a result of BOOST? Did you feel more a “master of your own destiny” as a result? Please elaborate.
12. Let’s explore the impact of the economy.
  - a. As you recall, we were in a boom economy during BOOST and we have experienced a bust since BOOST ended. What impact has the economy had on your organization?
  - b. Where would you be today if it weren’t for BOOST?
13. As you look back on where your organization was in late 2003 to early 2004, what can you credit to your experience in BOOST? How has your organization changed?
14. Are there any other comments you’d like to share?

# APPENDIX D: CONSULTANT FEEDBACK QUESTIONNAIRE

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Rose Community Foundation BOOST Program / Final Consultant Assessment – 2010

Conducted by Karla Raines, Corona Insights

## Instructions

- Please answer the following questions and submit your responses electronically to [karla@coronainsights.com](mailto:karla@coronainsights.com)
- Karla will follow up with you via phone if additional input is needed to clarify a response or further explore an idea or suggestion

## Assessment Questions

Note - All interviews are confidential and findings will be reported in aggregate. Selected comments will be shared as anonymous quotes.

1. Reflecting on your work over the past three years, please describe your satisfaction with the progress your grantee has made as well as your own involvement in that progress.
2. Let's review the various tools provided through BOOST. How helpful was each in working with your grantee? Why?
  - a. Self-assessment
  - b. Plan – Please remind me of plan created for your nonprofit.
  - c. Nonprofit Lifecycles Model
  - d. Program-based budget
  - e. Financial pro formas and the identification of certain, likely and risky revenue streams
  - f. Capacity building grant
  - g. Leadership team
  - h. Consultant convenings with Susan Kenny Stevens
  - i. Susan Kenny Stevens coaching and resources
  - j. Cohort sessions
3. We realize that leadership is instrumental to a three-year capacity building process like BOOST.
  - a. How did your nonprofit's board leadership help (or hinder) progress and results?
  - b. How did your nonprofit's executive staff leadership (ED/CEO) help (or hinder) progress and results?
4. What problems, if any, have you encountered in working with Susan Stevens or Rose Community Foundation over the past three years? What suggestions do you have to address each one?
5. Please share any final comments you would like to make to Rose Community Foundation.