

SUMMARY REPORT OF VNR EVALUATION ACTIVITIES 2012 - 2013**Program Overview**

Launched in 2007, VNR offers capacity-building services to the more than 4,500 nonprofit organizations in the San Fernando Valley region of Los Angeles. It is operated through a partnership of Human Interaction Research Institute (HIRI; lead agency and fiscal agent), California State University Northridge and MEND.

VNR has developed a multi-faceted information and service program for Valley nonprofits of all sizes, their staffs and boards - including a website with many information resources (including more than 400 free downloadable publications), a learning community (offering more than 100 educational workshops), technical assistance (much of it focused on strategic planning), the annual MENDING Poverty conference and other activities designed to give a community voice to Valley nonprofits, and information and referral services. A 19-person Advisory Committee chaired by long-time Valley leader Joy Picus provides guidance to the program. Grants from local and national foundations, local businesses, and a private donor support VNR's activities. More details for the period covered by this evaluation are in the *VNR Business Plan 2012-2013*.

VNR also includes three special initiatives: (1) a *Glendale Initiative* for nonprofits in that city, which to date has conducted a Glendale Nonprofit Day in 2010 and a City of Glendale-funded capacity building program - carried out by VNR and Flintridge Center; (2) a *Latino Initiative* which has presented events like a leadership development seminar for young Latinas held in December 2011; and (3) a *Burbank Initiative* which started with Burbank Nonprofit Day in January 2012, attended by more than 100 people including the Mayor and City Council President (a follow-up event in July 2012 introduced Burbank nonprofits to foundations). And VNR received a two-year special grant from Weingart Foundation to run the Northeast Valley Nonprofit Network, which provides training and technical assistance on philanthropic fundraising to a cohort of 12 nonprofits in the Northeast sector of the Valley.

VNR is one of a dozen Los Angeles region Management Support Organizations participating in a Capacity Builders Network, which provides contextual input to evaluation activities. And VNR participated in an initiative operated by Special Services for Groups and supported by California Community Foundation, aimed at helping to increase the evaluation capacity of local MSOs.

Evaluation Overview

VNR was designed to include an evaluation component, both to estimate the program's impact and to improve it over time. The evaluation component builds on HIRI's long-standing work in program evaluation (going back to national studies conducted in the 1960s) and more recent projects focused on evaluation of nonprofit capacity building (including a 2010 study for Kellogg Foundation of foundation-sponsored capacity building evaluation methods). Because personnel and financial resources for evaluation are very modest, VNR's activities are low-cost and many of them involve gathering informal, "soft" data that nonetheless can be useful in meeting evaluation objectives.

VNR's evaluation component has six main activities:

- 1 - post-event surveys of participants' overall reactions to VNR workshops and other learning events
- 2 - critical incident reports on specific outcomes from VNR workshops and technical assistance consultations
- 3 - special studies of VNR activities, such as a 2014 "frequent flyers" evaluation based on input from Valley nonprofit leaders who've attended five or more educational workshops
- 4 - informal data gathered through post-event interaction with participants in VNR learning events
- 5 - rosters summarizing basic operations for VNR's workshops and community events, information & referral activities and technical assistance consultations
- 6 - website statistics gathered automatically by Google Analytics and through a pop-up website user satisfaction survey

Consultation on VNR's evaluation activities was offered by Special Services to Groups, as part of a Los Angeles County Management Support Organization Evaluation Initiative, supported by the California Community Foundation, which also provided limited resources to implement an enhanced evaluation system, including this website section.

To provide context for VNR's evaluation activities, consult VNR's Feasibility Study and the VNR Business Plans 2007-2009, 2010-2011 and 2012-2013. Evaluation findings in the categories described above are presented in evaluation reports for 2007-2009, 2010-2011, 2012-2013, and a separate report evaluating VNR's Strategic Planning work. Evaluation activities for the Raising the Bar and Latino Multifamily Group projects are reported separately - see their respective pages in Resources.

Evaluation Results

Results based on analysis of data gathered through these six evaluation activities follow.

1a. Workshop Evaluation Surveys

Using a standardized four-item form, deliberately kept very brief to minimize response burden on the busy participants in VNR workshops, input is gathered at the end of these events on overall participant reactions and suggestions for future activities. Workshops co-offered with other organizations, or in which the workshop is focused on brainstorming without a specific educational component, are not included in these VNR evaluation activities. A summary follows of responses from survey responses for 22 workshops given in 2012-2013. Workshop sizes ranged from 4 to 66 participants, with the typical workshop size about 27.

(Not all sections total 100% because some people did not answer every question in the survey)

Overall, did you get what you wanted to from this workshop?

Definitely 48%
For the most part 43%
Somewhat, but less than I hoped 8%
No 1%

How would you rate the workshop speakers?

Excellent 65%
Good 32%
Fair 3%
Poor 0%
N/A 0%

How would you rate the workshop content, including handout materials?

Excellent 51%
Good 43%
Fair 7%
Poor 0%
N/A 0%

In all, 94% of participants rated workshop content as excellent or good, and 91% got most or all of what they wanted from the event, with 97% rating workshop speakers as excellent or good. As in the previous 2010-2011 evaluation, participants want more of everything that VNR workshops have to offer - more handouts (most were excellent, participants say), longer duration, more case studies and detailed examples (particularly for the financially-oriented workshops), and more time for give and take between participants.

Participants also suggested some possible improvements that could be made: (1) making handouts and workshop content available online before and after workshops, (2) sharing speakers' contact information at the workshops or in follow-up e-mails, (3) encouraging more in-depth interaction and discussion instead of broad topic coverage, and (4) offering both basic and advanced levels of workshop on the same topic. Participants would like the opportunity to introduce themselves (this is done in most workshops), and to be able to contact each other after the event (participant lists are shared for some workshops already).

Specific topics on which future workshops are desired include finance/ budgeting, grantwriting, and sustainability. Participants also asked for workshops about starting up small nonprofits and more advanced workshops on topics covered in past years.

Other suggested topics for future workshops include: cause marketing, grantwriting, strategic planning, and encouraging individual donors to support a nonprofit.

Most participants were satisfied with the logistics and physical aspects of the workshops, but there were a few suggestions for improvement, such as holding workshops in smaller settings and breaking up workshop participants into smaller discussion groups for a part of the workshop.

1b. NEVNN Project Evaluation

In 2011 VNR received a two-year grant from the Weingart Foundation to provide technical assistance and training to a cohort of 12 nonprofits in the Northeast San Fernando Valley, focused on building their capacity to seek and receive funding support from foundations, corporations and individual donors. After an intensive selection process including an initial learning event, the 12 nonprofits were selected, and the cohort was provided both individualized TA (which will be evaluated in the future) and a series of learning events. All learning events were evaluated, and a telephone interview study with the 12 participating nonprofits was conducted in 2013 when the project ended, emphasizing the TA component.

Taken together, evaluation findings from both the post-event surveys and telephone interviews show that NEVNN participants obtained four types of value from the learning events and from the individualized TA:

1 – **Information** about specific philanthropic funders and funding opportunities was provided, sometimes as supplements to considerable background the nonprofit already had, but sometimes as new input. Several of the participating nonprofits had never before considered getting a grant from a foundation, for instance. Almost all of the 12 indicated they learned about funding opportunities they would not have known about without NEVNN.

NEVNN participants highlighted the value of learning more about the “philanthropic landscape” – the number and types of funders; the differences between private, community and family foundations; and the relatively distinctive profiles all these funders have (expressed in the philanthropic truism, “when you’ve seen one foundation, you’ve seen one foundation”). As difficult as it may be due to limited time of staff and Boards, NEVNN nonprofits recognized that success on this complex landscape requires a lot of “custom-tailoring,” and repeated contacts with funders for relationship development, not just submitting a proposal.

2 – All 12 nonprofits found value in the **strategy assistance** provided by the project – helping with strategic plans and fundraising strategies. For example, several of the NEVNN nonprofits had done little to structure staff and Board time commitments specifically for fundraising, and have since re-organized at both levels so that regular time is available to make contacts, write LOIs and proposals, and develop an overall fundraising strategy.

Also, a number of the nonprofits in this cohort primarily provide services to youth, but none of them had considered creating a youth advisory council to support and direct their activities. Such a youth body also might help shape a social media fundraising effort.

While some of the participating nonprofits were quite sophisticated in their overall fundraising efforts, there appeared to be room for improvement in their work with all three categories of philanthropic funders – foundations, corporations and individual donors. Just as one example, several of the NEVNN nonprofits did not have a regular program for re-contacting prior donors who had been inactive for a period of time, despite the likelihood (based on fundraising research) of obtaining further funding from some of them if approached. For some of the NEVNN nonprofits, their initial level of sophistication about philanthropic fundraising was rather low. Said one participant: “We didn’t even *have* a

fundraising strategy so it has all been eye opening.” Another noted that her agency now has a coordinated focus on three main goals – “previously, we were all over the map.”

Other participants re-shaped their entire approach to philanthropic funders – “we went from what do we need to know, to what does a funder need to know,” as one put it. Investing effort in regular contacts with current and potential funders, so that there is an ongoing relationship, also was a new strategy for some of the nonprofits, sometimes because they had previously been concerned that they might “bother” a funder with too much contact.

Assistance provided with the nonprofit’s strategic plan often was both basic and comprehensive – preliminary meetings to determine what the organization needed, scheduling a Board/staff retreat to draft the plan, and sending it through several stages of review so that it was shaped to meet the particular organization’s needs. The language used in the plan often was critical in setting forth the right organizational objectives, crafting the mission statement, etc. A good completed plan then set the stage for working on a comprehensive fundraising strategy.

3 – All 12 also found value in the **peer networking** offered through NEVNN, particularly what occurred informally before and after the learning events. Relationships were developed or strengthened, although no formal partnerships (e.g., for joint funding applications) have as yet matured. In some cases, the value of networking was just becoming more familiar with the operations of other nonprofits in their geographic area – and learning from the fundraising successes others have had with foundations, corporations and individual donors. It also helped, several participants reported, to see that other nonprofits were struggling with the difficulties of seeking philanthropic funding.

4 – The NEVNN nonprofits said the value of the project ultimately was in providing a broader **context** for their fundraising operations, and overall program strategy. Helping them with context issues often required VNR to provide assistance beyond specific project goals, e.g., as described above, to help participating nonprofits deal with organizational changes that occurred in 2012 and 2013 – departure of a leader, purchase of a building, etc.

1c. Overall Statistics on Educational Workshops

From the beginning VNR has kept statistics on participation in educational workshops. Following are cumulative statistics for VNR workshop attendees from VNR’s inception through December 31, 2013. A total of 1,041 people have participated in VNR workshops, broken out as follows:

- 1 Workshop - 828
- 2 Workshops - 130
- 3 Workshops - 34
- 4 Workshops - 13
- 5 Workshops - 10
- 6 Workshops - 8
- 7 Workshops - 1
- 8 Workshops - 3

- 9 Workshops - 5
- 11 Workshops - 2
- 12 Workshops - 4
- 15 Workshops - 1
- 16 Workshops - 2

These statistics do not include participants in the Raising the Bar and Latino MFG project workshops, or in workshops hosted by other organizations, such as the annual MENDING Poverty conference (which VNR co-hosts but MEND does the evaluation data-gathering, and VNR prepares a separate evaluation summary).

2. "Frequent Flyer" Workshop Participant Interview Study

As indicated above, a total of 37 participants have attended five or more workshops, and 25 of them were interviewed by telephone to obtain their input about how VNR workshops are structured and what impact they have.

Question 1: Overall, did you get what you wanted from these workshops?

Definitely 76%

For the most part 24%

Somewhat 0

No 0

Question 2: How would you rate the workshop speakers?

Excellent 68%

Good 28%

Fair 0

Poor 0

No answer 4%

Question 3: How would you rate the workshop content, including handout materials?

Excellent 68%

Good 28%

Fair 0

Poor 0

No answer 4%

Question 4: What suggestions do you have for future workshop topics, speakers or formats?

Nearly every interviewee wants more information in future workshops about fundraising and effective nonprofit operation. They ask for workshops about all aspects of grantwriting,

planning and sustainability. A few requested fundraising workshops geared toward new nonprofits (Fundraising 101 – fundraising examples and tips, grantwriting language/trigger words to use and what data to provide, how to plan fundraisers, what has worked for peers) or very experienced nonprofits (What has changed over the decades? What is the cutting edge?)

Topics requested by a number of interviewees included HR (hiring and firing practices, creating an employee manual, how to prevent personnel problems and deal with situations that do arise), efficient self-management by nonprofit leaders (time management, organizing priorities, office organization), effective staff and board management (board development, legalities for the board, ethical leadership, basic and advanced financials, in-house program evaluation), and connecting/reaching out to the community (social media, advocacy).

Other topics requested by individual respondents were: marketing, building reserves and diversifying funding streams, direction in running capital campaigns and organizing donor data.

A few interviewees also asked for workshops targeted to nonprofits in their sub-field – animal welfare or healthcare (particularly dealing with the Affordable Care Act implementation), or common shared situations (basics of starting and sustaining a small nonprofit, branding and marketing).

Interviewees expressed their appreciation for VNR workshops with great fervor. With few exceptions, they liked the workshop format, locations, lack of cost, timing, length and informational content. Many liked having funders as speakers for content and networking reasons. Others liked the mix of attendees from many types and sizes of nonprofits and they felt that introductions at each workshop were helpful. They liked the smaller-sized workshops because there was more time for audience participation. They praised the VNR Executive Director's facilitation of the events - introducing the topic but then letting the speakers present without his editorializing. Wrap-up comments at the end also were of value because they provided a context for what had been learned.

Interviewees were generally satisfied with VNR workshop logistics, but one interviewee asked whether VNR could also hold morning workshops. Another suggests allowing a little more time for Q&A at these events.

A number of those interviewed suggested that VNR devote more attention to helping Valley nonprofits develop and implement collaborations - both through workshops and direct intervention. These collaborative efforts could be between two nonprofits, or could involve a larger community of them - e.g., through creating a "hub" of shared services such as grantwriting assistance and administrative services for small nonprofits.

Interviewees are most interested in hearing more from speakers about fundraising and creating collaboration possibilities. They would like to hear more from funders and local politicians. From funders, interviewees would like to know about how to optimize their use of data in grantwriting. From politicians, they would like to know what they are looking for when appropriating funds or collaborating with nonprofits. Interviewees also would like to hear more from their peers - for instance, one suggests having a panel of Executive Directors talk about their successes as well as about their mistakes and what they've learned from them.

3. Capacity Builders Network

From its beginnings, the VNR Executive Director has participated actively in the Capacity Builders Network, which brings together about a dozen local MSOs. These meetings provide opportunity for informal sharing of best practices, as well as for presentations from funders and experts on various topics. VNR also was a participant in the Special Services for Group's evaluation initiative, supported by the California Community Foundation, which analyzed and provided suggestions for improving each MSO's evaluation systems. Results from this project were used to enhance VNR's evaluation system.

4. Analysis of VNR's Technical Assistance Consultations and I&R Activities

VNR's technical assistance consultations increased slightly from 34 in 2010-2011 to 36 in 2012-2013. In 2012, there were 8 TA consultations, of which 5 were for strategic planning. In 2013, there were 28 TA consultations of which 8 were for strategic planning. A variety of other topics were covered in these TA consultations.

In 2012, VNR responded to 14 contacts and in 2013, to 31 contacts asking for information and referral services. Topics ranged widely, and included help in finding a volunteer, fundraising, legal and accounting referrals, and information about VNR's services.

5. Rosters

A computer-based roster with basic operations data is maintained for each of the following major categories of VNR activity and outcome: Workshops/Community Events, Technical Assistance Consultations and Information & Referral Activities. The roster for I&R activities conducted to date includes some outcome data as well - specific information resources provided (sometimes including actual document copies) and/or people or organizations the requestor has been referred to. These are updated weekly.

6. Website Statistics

Monthly reports are compiled from Google Analytics about the visitors who come to the VNR website. These reports show that in 2012 the average number of visits monthly was 542, and the time on site averaged 1 minute 29 seconds. In 2013, the average number of visitors per month was 421 and the average time on site was 1 minute 57 seconds. There is an online evaluation form website users can fill out, but it is seldom used. The website is continually upgraded.

Overall Evaluation Results and Evaluation Shortfalls

VNR's evaluation activities for 2012-2013 shows, as did the previous evaluation reports 2007-2009 and 2010-2011, that VNR is successfully providing a range of activities that are valued by nonprofit staff and boards in the San Fernando Valley. The focus is more on process and immediate outcomes than on impact, but since VNR funder support specific to

evaluation has been extremely limited, this is not surprising - the evaluation strategy of simple and small-scale because that's all the available resources will support.

Nonetheless, some suggestions emerged from the evaluation data for future VNR activities and for some re-shaping of activities already underway - all of which can be used to direct VNR's operations in 2014-2015. Examples include the following:

1 - VNR will make more workshop materials and information available online, both before and after its learning events.

2 - Workshops will be created on financial management, human resources, marketing and branding, and other topics suggested in this evaluation.

3 - VNR will explore how more educational events and more direct intervention could be provided regarding collaboration among nonprofits in the San Fernando Valley (and about collaborations between nonprofits and funders). This might include efforts to create subject-focused collaborations, as well as to utilize existing collaboratives such as the Glendale, Burbank and Latino Initiatives, more creatively.

4 - VNR will continue to explore formatting and scheduling options, and to encourage more peer networking as a part of its educational events.

VNR will continue to make its evaluation design and results (including this report) publicly available, through a section on the VNR website. This is part of the VNR commitment to evaluation as a key aspect of MSO operation.

Future Evaluation Plans

In 2014-2015, the same main activities of VNR's evaluation component will be continued. Another small-scale evaluation of strategic planning consultations will be undertaken, as will a further evaluation of the NEVNN project, which has recently been re-funded for an additional year of operation.

Based on findings from this evaluation, and analysis of other MSOs such as Ventura County Community Foundation's Center for Nonprofit Leadership, VNR will in the next year refine and present on its website a briefly-stated theory of change to guide how it will do its work in the future. Since VNR is undergoing major changes with a move to the California State University Northridge campus, this is an appropriate time to make such a conceptual shift.

Likely components of the theory of change include (a) VNR's mission focus on small and medium-sized nonprofits in the San Fernando Valley, which affects both business model (mostly no-cost or very low-cost services) and types of services offered; (b) VNR's "workshop plus" model, which assumes that significant change for nonprofits will be more likely to occur if educational workshops are tied to follow-up, individualized technical

assistance consultation offered by the same experts who conducted the workshop; and (c)VNR's regional emphasis, bringing the Valley nonprofit community together as a significant part of its service model, e.g., through the Burbank and Glendale Initiatives (this requires resource allocation - it cannot be done under a pure fee-for-service model).

VNR has already developed a 2014-2016 Business Plan, outlining its overall planning, program, resource development and evaluation strategy for its first two years on the CSUN campus. Based on findings from this evaluation and analysis of other MSOs such as the VCCF Center for Nonprofit Leadership and Long Beach Nonprofit Partnership, VNR also will develop an annual topical area strategy for its educational workshops, starting from an analysis of the workshops it already has offered from 2007-2013. Likely topics in this strategy include nonprofit management, fundraising & grantwriting, marketing & communications, Board leadership & governance, technology & social media, financial literacy and strategic planning.

prepared by Thomas E. Backer, PhD and Kathryn Groves, 2014