



Nonprofit Capacity Building In Dunn County

Nonprofit Summit Outcomes Paper

Prepared by
The Community Foundation of Dunn County
The United Way of Dunn County

**Results from the Dunn County Nonprofit Summit
Menomonie, Wisconsin
July 12, 2016**

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I. Introduction

For any nonprofit or charitable organization to effectively serve the community, it is important to fully understand it, especially as it changes over time. As of 2016, a large strategic discussion had not taken place in Dunn County in over five years. Area nonprofit leaders felt it was time to bring the people and agencies of Dunn County together to ensure the changing needs of the community are being met effectively, together.

It is part of the mission and role of the Community Foundation of Dunn County and the United Way of Dunn County to stimulate community dialogue and informed decision-making to help solve crucial problems for our area. A collaboration was formed between these two agencies to host a Nonprofit Summit discussion event for area nonprofit leaders, civic groups, and passionate citizens to come together to exchange ideas, be inspired, and build capacity. The overall goal of the event was to better understand our nonprofit partners so that together we can improve our collective impact to best serve Dunn County.

In preparation for the event discussion, area nonprofit partners and community leaders were asked to complete a comprehensive online survey, asking them to take an in-depth look into the particular organization they serve and to rate its capacity on a variety of elements. The capacity elements were grouped into four key dimensions, focusing on the organization's leadership, adaptiveness, management, and operational capacity. The survey questions were based on The Marguerite Casey Foundation Organizational Capacity Assessment Tool (www.caseygrants.org).

In the survey, 58 survey participants identified areas that need strengthening in their organization, and this data was used to develop relevant and focused discussion topics for the event.

At the Dunn County Nonprofit Summit in July 2016, 131 participants; representing 60 organizations, engaged in a strategic discussion event (see Appendix A for participant listing). Staff members from the Community Foundation of Dunn County and the United Way of Dunn County took notes and documented feedback during the event. The notes and background documents were consolidated and this outcomes paper produced.

II. Setting the Stage: Organizational Capacity Survey

Often in community capacity-building efforts, the first course of action is building capacity at the organizational level - bringing an individual organization to the next level of operational, programmatic, financial, or organizational development, so it may more effectively and efficiently advance its mission today and into the future.

In order to assess the capacity of the nonprofit and civic organizations currently serving Dunn County, the Community Foundation and United Way of Dunn County utilized a variation of The Marguerite Casey Foundation Organizational Capacity Assessment Tool, which is a self-assessment instrument that helps nonprofit organizations identify capacity strengths and challenges and establish capacity building goals.

In the assessment, respondents were asked to take an in-depth look into the capacity of their individual organization, providing an overall rating of Poor, Fair, Good or Excellent, on a series of questions which were categorized into four key dimensions of nonprofit organizational capacity:

1. Leadership Capacity
2. Adaptive Capacity
3. Management Capacity
4. Operational Capacity

Results helped the Nonprofit Summit event organizers determine areas of greatest strength and weakness for the respondent organizations, allowing the discussion framework for the event to relate directly to the expressed needs of the nonprofit community.

The following two pages show a compilation of data points collected from the survey results, with 58 total respondents completing the full survey. This data was shared with event attendees as a handout and a reference for discussion.

The final question on the survey asked respondents to choose up to three capacity elements which their organization is most interested in strengthening. The results were then used to help determine the focus areas to be offered for the workshop seminars offered at the Nonprofit Summit event. Results demonstrated four top areas which area nonprofits were most interested in strengthening: **Goals/Strategic Planning, Partnerships & Alliances, Fundraising, and Communications & Outreach.**

III. Nonprofit Summit: Building A Stronger Community Together

The Dunn County Nonprofit Summit took place on July 12, 2016, with 131 participants representing 50 organizations which serve Dunn County. Facilitators Georgina Tegart, of the Community Foundation of Dunn County and Ashley DeMuth, of the United Way of Dunn County, welcomed the participants to the Summit and provided a short framework. See the Event Handouts, Appendix B.

Following introductions, moderator Dave Williams led a panel discussion session which included Executive Directors and Board Presidents of the hosting Community Foundation and United Way organizations. The panel was focused on an overall theme of Community Connectedness – A Value Proposition. Questions which the panel addressed included:

- How and why do non-profits collaborate?
- How can we create collaborative efforts to drive lasting change?
- How is the concept and practice of philanthropy changing? How is giving changing? Are donors and fundraisers shifting their behaviors?
- How do nonprofits balance and prioritize accountability to different constituencies? How do we know when a nonprofit is effective? What kind of programs are thriving or failing and why?
- How can we foster and engender community? What is the definition of community? How is it changing?
- How can we help each other?

Summit Session 1: Guided Table Discussion on Capacity Building

Upon conclusion of the panel, the event then broke out into its first of two sessions, with the first being a guided discussion opportunity at each table. This first session allowed participants to analyze a series of capacity-related questions relevant to our community, together. Discussion questions were prepared by Foundation and United Way staff and were designed to touch on each of the four areas which nonprofits were most interested in strengthening, as identified in the Capacity Self-Assessment survey results: Goals/Strategic Planning, Partnerships & Alliances, Fundraising, and Communications & Outreach.

Tables consisted of five to eight attendees, with one individual assigned as table leader to lead discussion and record discussion points to be shared with the full group later in the Summit. Table leaders were assigned by event staff and given an instructions sheet, outlining their role as leader.

Examples of questions which tables discussed include:

- How are your organization's goals communicated within the organization? How are they used to direct actions and priorities? Are your goals made public to the community?
- Discuss whether your organization has collaborated or is interested in collaborating with another organization. What have been some successes? Challenges?
- Many survey respondents expressed a limited ability to involve the organization's Board of Directors in fundraising. If your organization's board actively fundraises, share what methods the organization practices to keep them involved.
- Today, advocacy is an important function of most nonprofit organizations, and allows us to promote our mission, educate the public, influence the attitudes of the community, and even influence policy-making at the local, state or national level. Describe how your organization currently practices advocacy.

At the end of the discussion session, table leaders filled out index cards, recording the key discussion points which their table identified in each of the four discussion topics. Event staff then collected the cards and read through them during the second session to determine common themes in responses to share during the final feedback portion of the event. The key observations recorded from the table discussions are listed below:

Goals and Strategic Planning

- A mediator from outside the organization is key to strategic planning.
- Involving front-line employees in the process can be extremely helpful for buy-in and completion of goals
- It is important for all aspects of goals or mission to be communicated
- Main goals tend to be measurable or data-driven. Most of the struggle is with non-measurable goals. Surveys are critical tool to do this
- Use quantitative benchmarks to indicate qualitative progress; using robust surveys to gain important feedback"
- Often measurement is budget-based. Need to move beyond that to impact

Fundraising

- Board could be more active. Include fundraising in board member job description
- Fundraising is more like 'interest raising' and the funds created are a bonus
- Stories help fundraising, but it's a big challenge
- The more engaged people feel and the more stake they have in what you're about the more they'll want to contribute and be invested
- Lack of sufficient human resources to devote to fundraising
- Know donor's desire for impact and educate board on this. Education helps donors best make philanthropic decisions
- Follow-up with what money is being used for. Donor retention is key.
- Collaborate

Communications and Outreach

- How do we understand what type of web and social media is best for our organization?
- Can't underestimate the importance of face-to-face communication
- Utilize community resources – university, tech college, for volunteer or intern support to help manage communications, keep more up to date, takes the burden off staff
- Participate more in village and community meetings
- Need more networking opportunities; form informal relationships for future outreach
- Need to recruit more volunteers from a wider scope to avoid burnout

Partnerships and Alliances

- Government organizations, private businesses, social clubs, schools, media, even 'competitors
- Challenge to think outside of the box for collaboration
- Alliances are sometimes found in unexpected places, do not stick to the usual suspects
- Student expo for UW-Stout career services is NGO and non-profit for career purposes
- Be open to contribute and develop partnerships and work as a group to meet common goals, rather than looking at it as competition
- Get to know the capacities of other non-profits and how they align with yours
- Need an arena for educating one another

Summit Session 2: Capacity Building Workshops

For the second session, attendees were able to participate in one of three 1-hour professional workshops with a choice as to which workshop best meets their organization's needs. Participants pre-registered for the workshop of their choice as part of the event confirmation process, and were assigned accordingly to one of three rooms. Based on survey results, the three workshops offered included:

- **Getting the Most From Your Board: Leadership, Fundraising and Oversight**
Lead by Lisa Zellmer, Senior Consultant, Aurora Consulting
- **What to Consider When Considering Partnerships and Alliances**
Lead by Judy Alnes, Executive Director, MAP for Nonprofits
- **Strategy for the Times: Aligning Mission, Capabilities and Capacity to Achieve Impact**
Lead by Gordon Goodwin, Senior Strategy Consultant, MAP for Nonprofits

On the event exit survey, participants overall were satisfied with the Workshop Session, describing it as "very useful - educative and informative." Some noted that it felt rushed and more time could have been beneficial.

Nonprofit Summit: Regroup, Feedback, Questions

The Nonprofit Summit event concluded with a full group feedback session. The moderator shared themes and notable points compiled from the group discussion feedback cards and asked table leaders to provide insight and feedback regarding the specific points. Participants were also able to ask additional questions and present new ideas and take-aways for the day. Several requested continuing

conversations such as these with fellow organizations who share similar interests, needs, etc. A summary of the overall feedback is included in the next section.

IV. Summary Observations and Recommendations

The Dunn County Nonprofit Summit was designed to provide area nonprofit leaders, civic groups and passionate citizens a space to come together, exchange ideas, be inspired, and build capacity. With so many organizations working to meet the various needs of the community, we felt as the Community Foundation and United Way, it was part of our role to convene these agencies and help lead discussion to help make us stronger as a sector.

The final session of the Nonprofit Summit gave participants an opportunity to offer ideas, make suggestions, and ask questions about where we go from here, to keep the momentum and dialogue of the event going. The following list captures the overall trends in participants' observations and recommendations which stem from the Summit event:

- Dunn County needs a visible, updated resource guide listing all nonprofit agencies and information
 - Example given: dunncounty.wix.com/resourceguide
- Need for a sector-wide platform for sharing information, matching missions, and collaboration, almost like a "Match.com" to establish nonprofit partners and opportunities
- Need to approach our work less as competitive and more as collaborative
- Identified need for a public listing beyond that of the local university so faculty/volunteers/teachers/etc. can find resources and link agencies
- Recurring "Nonprofit After-Hours", similar to the business version, to include social gatherings, informal networking opportunities that are topic specific.
 - Or similarly, have agencies host Brownbag Lunch sessions for nonprofits
- Cross community organization board member education
- On-demand opportunities for training online
- Seek potential collaborations, grouping together to pay fees/services

All of the table discussion feedback, workshop presentations and handouts, as well as the final feedback notes were compiled and shared with event attendees, along with a contact list of participants via email. Participants were also able to provide their direct contact information if they were interested in supporting future efforts for convening similar nonprofit networking and capacity building opportunities. Eleven participants provided their contact information and event staff are working to reach out to these individuals to form a work group to keep the momentum of the event going.

V. Acknowledgements:

Thank you to the Community Foundation of Dunn County and United Way of Dunn County staff and board members who helped plan and implement the Nonprofit Summit: Georgina Tegart, Samantha Phillipps, Bruce Siebold, Tony Hoffman, Jade Peterson, Ashley DeMuth, Angela Yudes, Diane Simon, and Dave Williams for moderating.

Thank you to our Workshop Sponsors: WESTconsin Credit Union, Wipfli Hewins, Bremer Bank, and Peoples State Bank, all of Menomonie, WI, who helped make the workshop portion of the Summit event possible, and also provided freebies to event participants.

Thank you to UW Stout Event Services for working with us to help provide a space and catering for the event.

VI. Appendix A: List of Summit Participants

1. **3m** – Kim Porter
2. **Alliance Church of Menomonie** – Brent Costello
3. **Arbor Place, Inc.** - Kathy Asper, Erin Johnson, Sheli Metzger, Hillary Swoboda
4. **Arc of Dunn County, Inc., The** - Audun Mikkelson, Tina Joiner
5. **Aurora Consulting** - Lisa Zellmer
6. **Big Brothers Big Sisters of NW WI** - Wesley Escondo, Nicole Benson, Ashley LaVick
7. **Bremer Bank** - Brice Medin
8. **The Bridge To Hope** - Tracy Glenz, Becky Kneer, Naomi Cummings, Julie Furst-Bowe, Mame Gale, Deb Meyer
9. **Cedarbrook Church** - Stephanie Demers
10. **Center for Independent Living of Western WI** - Kay Sommerfeld, Tammy Grage, Denise Larson
11. **CESA - AmeriCorps VISTA** - Shelby Schuppe
12. **Children's Museum of Eau Claire** - Mike McHorney, Phil Recheck
13. **Chippewa Valley Council Boy Scouts** - Andrea Blaeser
14. **Chippewa Valley Habitat for Humanity** - Aaron Czappa
15. **Colfax Health and Rehabilitation Center** - Jill Gengler
16. **Colfax Merry Mixers** - Vicki Hendricks
17. **Colfax Municipal Building Restoration Group** - Sue Hill, Joan Scharlau
18. **Colfax Railroad Museum, Inc.** - Herb Sakalaucks
19. **Community Foundation of Dunn County** - Anthony Hoffman, Jade Petersen, Samantha Phillipps, Georgina Tegart, Bruce Siebold
20. **Crossroads Community Center/DCPY** - Madison Olson
21. **CVTC Foundation & Alumni Association** - Holly Bembenek, Aliesha Crowe
22. **Dunn County** - Lindsey Field, Sara Benedict, Jenae Brantner, Mary Solberg
23. **Dunn County Economic Development Corp** - Eric Turner
24. **Dunn County Health Department** - Wendy MacDougall, Anna Smugala
25. **Dunn County Historical Society** - Dustyn Dubuque, Rose Mary Stoll, Frank Smoot,
26. **Dunn County Humane Society** - Josh Dalton, Jon Kroening
27. **Eau Claire Community Foundation** - Erin Dayton
28. **Family Resource Center for Eau Claire County** - Suezette Baysinger
29. **Farmer to Farmer Inc.** - Paul Helgeson
30. **Feed My People Food Bank** - Emily Moore
31. **Fierce Freedom** - Jenny Almquist, Jodi Emerson
32. **Free Clinic of the Greater Menomonie Area** - Elizabeth Ritz Witt
33. **Goodwill Industries of North Central WI, Inc.** - Nancy Heykes
34. **Grace Episcopal Church** - Bill Broughton, Jacalyn Broughton, Dick Rueckl
35. **Grassroots Wellness Peer Run Respite** - Kate Laird, Erin Seever, Victoria Welle
36. **Indianhead Enterprises Inc** - Mike Beaupre
37. **Junior Achievement of WI, Inc.** - Susan Peterson
38. **Literacy Chippewa Valley** - MaryJo VanGompel
39. **Mabel Tainter Center for the Arts** - Steven Renfree, Marni Waznik

40. **Main Street of Menomonie** - Darrek Orwig
41. **MAP for Nonprofits** – Judy Alnes, Gordon Goodwin,
42. **Menomonie Area Senior Center** - Becky Berg, Donna Collins, Ruth Potter
43. **Menomonie Community Gardens** - Mary Lotten
44. **Menomonie High School** - David Munoz
45. **Menomonie Police Department** - Becca Brents, Brenna Long
46. **Menomonie Public Library** - Dayle Mandelson, Lisa Murray, Ted Stark, Patricia Eggert
47. **Menomonie Theater Guild** – Marion Lang
48. **Our Saviors Lutheran Church** - Amy Loker, Sarah Miller, Heather Wigdahl
49. **Partners for Resilience** - Gary Johnson, Bonnie Scheel, Lori Smith
50. **Positive Alternatives** - Jeremy Hernandez, Kelli Kamholz
51. **Soft Landing Transition Services, LLC** - Bill Lamb, Dena Mattausch
52. **St. Joseph Catholic Church** -Fr. James, Arturo Viguera, Julie Bendel
53. **Stepping Stones of Dunn County** - Katherine Dutton, Kris Pawlowski, Jill Seichter, David Williams
54. **Sustainable Dunn** - Margaret Hagaman
55. **The Community Table** - Lynn Standorf
56. **The Neighbors of Dunn County** - Tony Manzella
57. **United Way of Dunn County** - Ashley DeMuth, Diane Simon, Angela Yudes
58. **University of Minnesota** - Glenn Pederson
59. **UW Extension Office** - Kristen Bruder
60. **UW Stout - Mandela Fellows Coordinator** - Meriem Chida
61. **UW Stout Career Services** - Mickey Berkoben, Bethany Henthorn, Bryan Barts, Melody Manteufel
62. **Watch Us Grow Children's Village** - Melissa Miller, Margaret Holzhueter, Marcia Wolf
63. **West Wisconsin Land Trust** - Bob Fitzwilliam
64. **WestCAP** - Robyn Thibado
65. **WESTconsin Credit Union** - Niki Yarrington
66. **Wilson Place Mansion** - Melissa Kneeland
67. **Workforce Resource, Inc.** - Justin Arnold

Appendix B: Event Handouts

2016 Dunn County Nonprofit Summit

July 12th, 2016



- 8:30AM – 9:00AM **Registration, Light Breakfast**
- 9:00AM – 9:05AM **Welcome**
Ashley DeMuth, Executive Director, United Way of Dunn County
Georgina Tegart, Executive Director, Community Foundation of Dunn County
- 9:05AM – 9:35AM **Community Connectedness – A Value Proposition**
Angela Yudes, Board President, United Way of Dunn County
Ashley DeMuth, Executive Director, United Way of Dunn County
Bruce Siebold, Board Chair, Community Foundation of Dunn County
Diane Simon, Executive Director (Ret.), United Way of Dunn County
Georgina Tegart, Executive Director, Community Foundation of Dunn County
Moderated by Dave Williams, Vice Chancellor (Ret.), University of Wisconsin-Stout
- 9:40AM – 10:30AM **Session 1: Guided Table Discussion on Capacity Building**
- 10:30AM – 10:45AM **Break**
- 10:45AM – 11:35AM **Session 2: Capacity Building Workshops**
- Ballroom A – Getting the Most From Your Board:
 Leadership, Fundraising and Oversight
Lisa Zellmer, Senior Consultant, Aurora Consulting
- Ballroom B – What to Consider When Considering
 Partnerships and Alliances
Judy Alnes, Executive Director, MAP for Nonprofits
- Ballroom C – Strategy for the Times: Aligning Mission,
 Capabilities and Capacity to Achieve Impact
Gordon Goodwin, Senior Strategy Consultant, MAP for Nonprofits
- 11:45AM – 12:05PM **Regroup, Feedback, Questions**
- 12:05PM – 12:15PM **Closing Remarks**
Bruce Siebold, Board Chair, Community Foundation of Dunn County
- 12:15PM – 12:45PM **Networking Lunch**



GOALS & STRATEGIC PLANNING

Depending on your organization, you likely have a formal set of goals that stem from your mission and vision that describe what your organization aims to achieve.

How are your organization's goals communicated within the organization? How are they used to direct actions and priorities? Are your goals made public to the community?

Does your organization actively measure your progress toward achieving these goals? If so, how? If not, what ways could your organization work toward actively measuring your progress toward achieving your specified goals?

Many organizations may use a formal strategic plan to express specific goals and describe the action steps and resources needed to accomplish them. Describe the success your organization has found with Strategic Planning and how it is used to drive the actions and priorities of the organization.

Is an organization made stronger with a formal strategic plan in place? Why or why not?



PARTNERSHIPS & ALLIANCES

Studies show that today more than ever, organizations are choosing to collaborate in order to address the challenges their organization faces. It can increase efficiency, eliminate duplication, and help each organization re-align their resources to the areas of highest need.

What are some current examples of local partnerships or alliances that work well?

What are some ways in which organizations in Dunn County could collaborate or form partnerships?

Discuss whether your organization has collaborated or is interested in collaborating with another organization. What have been some successes? Challenges?

How could your organization benefit from forming a partnership or alliance?



FUNDRAISING

Most charitable nonprofits rely upon the generosity of donors for some or all of their funding. Discuss what successes and challenges your organization experiences in fundraising.

How can an organization in Dunn County diversify its revenue streams? What resources are available to our area that organizations may be missing or overlooking?

Does your organization have a formal fund development plan in place? What does your organization need to create a stronger resource development plan, if applicable?

Many survey respondents expressed a limited ability to involve the organization's Board of Directors in fundraising. If your organization's board actively fundraises, share what methods the organization practices to keep them involved.

What feedback have board members provided as to why they may not actively fundraise? Are there ways to improve their capacity to fundraise?



COMMUNICATIONS & OUTREACH

Consider your organization’s constituents: the population the organization directly serves, the donors that fund programs, grantors, government programs or agencies and other program partners, as well as the volunteers who carry out the mission. Constituents really are the lifeblood of a nonprofit organization.

What do you do as an organization to keep constituents informed and engaged in your work?

Many survey respondents expressed a limited ability to organize community members around an important issue or cause. Why do you think that is? What success have you experienced that may help an organization mobilize community members around their cause?

Discuss your organization’s current communication methods – direct mail, website, social media, blog, etc. What is your biggest gap? Are there any tips or tricks your organization has developed to help you effectively communicate and market your organization on a tight budget?

Today, advocacy is an important function of most nonprofit organizations, and allows us to promote our mission, educate the public, influence the attitudes of the community, and even influence policy-making at the local, state or national level. Describe how your organization currently practices advocacy.

Who is doing the advocating? What barriers or limitations are they experiencing? What are some ideas that your organization could implement to practice better advocacy?