

STRENGTHENING AND SUSTAINING CALIFORNIA'S NONPROFIT SECTOR:

Profiles of Success



A Five-Year Retrospective
of the Organizational
Development Services
Program



A Center of the Public Health Institute

OVERVIEW

In 2002, The California Wellness Foundation (TCWF) provided a grant to the Center for Civic Partnerships (the Center) to conduct an assessment of the needs of TCWF grantees and to develop a technical assistance model in response. Based on the findings, its own research into best practices, and its substantial experience in the field, the Center developed a capacity-building model called the Organizational Development Services (ODS) program. After a successful pilot version of the year-long program provided support to nine nonprofit organizations based in Los Angeles, TCWF awarded grant funding to the Center to expand the ODS program statewide in 2004 and provide customized support to twenty Foundation grantees each year for five years.

In 2005 the Center was invited by TCWF to expand its capacity-building work with grantees into the area of organizational learning and evaluation. Subsequently, a technical support component was implemented which provided more in-depth and tailored support to a subgroup of the ODS program participants around evaluation and organizational learning.

The Center's work with the 109 participants in the ODS program has provided it with a unique and valuable perspective regarding the opportunities and challenges facing nonprofit leaders in California. The ODS program concluded in 2009 and this report provides a retrospective of the program and lessons learned.

ORGANIZATIONAL
DEVELOPMENT



ORGANIZATIONAL ASSESSMENT

CAPACITY-BUILDING MODEL

The Center's Organizational Development Services capacity-building model comprised the following components:

- 1 ORGANIZATIONAL ASSESSMENT AND WORK PLAN –** The organizational assessment tool examined major aspects of the organization such as board governance and strategic planning. Based on the findings from the assessment and information gathered at an initial site visit, the technical support provider and participating executive director created a mutually agreed-upon work plan for the year.
- 2 CUSTOMIZED SUPPORT –** Because one size does not fit all, the Center created customized support tailored to each individual executive director based on his or her needs and style. The support was provided through in-person meetings and electronic communications
- 3 SUSTAINABILITY TOOLKIT –** All participants received a copy of the Center's *Sustainability Toolkit: 10 Steps to Maintaining Your Community Improvements*. In addition to the *Toolkit*, participants could also receive a complimentary on-site sustainability workshop. Webinars were also provided for groups of participants.
- 4 PEER LEARNING –** Executive directors often feel isolated and many welcomed the opportunity to speak candidly about their challenges, listen to ideas and gain valuable insight. The cornerstones of the peer learning component were an executive director retreat and an executive director gathering.
- 5 GROUP TRAINING AND FACILITATION –** Program staff provided group training and/or facilitation, when appropriate, to address organizational development goals. Staff worked diligently to create customized sessions suited to each group.
- 6 E-NEWSLETTERS –** To impart up-to-date resource information to all participants, the Center published a weekly e-newsletter. The e-newsletters covered a wide range of topics such as human resources practices, on-line fundraising, nonprofit ethics and board development.
- 7 MINI-GRANT –** To help participants accomplish their organizational development objectives, the program participants were offered small mini-grants. Mini-grant funds were used for such things as staff development, board training and specialized consulting expertise.

“In my thirteen-year career, I felt that it was the most helpful support. It was a significant year of change and I [am thankful] ODS was there to hold my hand.”

**Wenonah Valentine, Executive Director,
Pasadena Birthing Project**

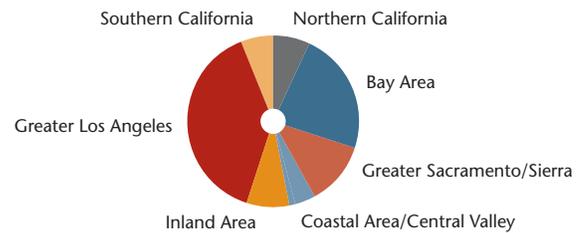
PHILOSOPHY AND APPROACH

The following tenets form the foundation of the Center's philosophy and approach to providing technical support:

- 1 BUILD CAPACITY** – Leaders and organizations taking part in capacity-building programs should be stronger after participation.
- 2 BE FLEXIBLE AND RESPONSIVE** – A one-size-fits-all approach does not yield maximum results for the participants. The key is to customize the program to suit participants' needs while setting realistic expectations about the capacity-building work.
- 3 SET CLEAR EXPECTATIONS** – Setting clear expectations is paramount to success. Executive directors need to know what is expected of them and technical support providers need to communicate what executive directors can expect from them.
- 4 ENCOURAGE TRUST** – It is important to take time to build relationships that encourage trust and to become familiar with the staff, dynamics and culture of each organization. It is only in a space of trust that participants feel comfortable discussing critical issues facing their organizations.
- 5 MAKE THE PROGRAM VOLUNTARY AND CONFIDENTIAL** – To maximize success, grantees should feel they are being offered the capacity-building program as an added benefit. Once an organization is selected to participate in the program, it is important to offer a certain level of confidentiality so that participants feel free to disclose issues without fear of jeopardizing future funding by the foundation.
- 6 PRACTICE CONTINUOUS QUALITY IMPROVEMENT** – The use of internal feedback mechanisms, external evaluation data, participant feedback, and research on best practices will enhance and refine the capacity building work.

SUMMARY OF PARTICIPATING EXECUTIVE DIRECTORS AND ORGANIZATIONS

During the pilot version and five years of the ODS program, the Center worked comprehensively with 109 nonprofit organizations across California as follows:



- The majority of participant organizations (55%) had budgets of less than \$1M and would be considered small- to medium-sized organizations.
- Participant organizations reflected the diversity of health issue areas funded by The California Wellness Foundation.
- The level of experience of the executive directors ranged from no previous executive director experience to thirty-two years of experience as an executive director. The average number of years (median) as an executive director was 5.75 years.

ACCOMPLISHMENTS AND EVALUATION

The ODS program achieved the following:

- Over 4,075 individual technical support contacts (in-person, phone, mail, fax and e-mail).
- Over 650 board and staff members trained on organizational development topics.

The Center for Community Health and Evaluation conducted the evaluation of the program. The evaluation team measured both satisfaction with the program and outcomes or changes for the participants. Because of the Center's interest in and commitment to sustainability, legacy evaluations were conducted with executive director participants one year after completing the program. The legacy evaluations were designed to measure how well the changes that took place during the program were sustained.

PROGRAM SATISFACTION AND OUTCOMES EVALUATION FINDINGS

Of executive directors surveyed:

98%	agreed that the ODS program helped build capacity in their organizations.
96%	agreed that the Center for Civic Partnerships' staff provided support that was responsive to their needs .
96%	expected the changes that occurred while in the ODS program to lead to long-lasting improvements in their organizations.

PROGRAM LEGACY EVALUATION FINDINGS

Of executive directors surveyed:

88%	continued to rate the program as beneficial to their organizations and beneficial to themselves as executive directors one year after ending their participation .
87%	said that their participation in the ODS program directly or indirectly contributed to their organizations' 2 – 3 most important accomplishments in the past year .
89%	said they would continue to apply what they gained in the ODS program in the coming months/years.



PROFILES

“Often, it doesn’t feel appropriate to discuss sensitive issues with the Board or the staff. The ODS support person is a sounding board for good advice and it really helps that our conversations are confidential.”

Christina Zapata, Executive Director – Centro Laboral de Graton
(The Graton Day Labor Center)

1 DELIVERING CUSTOMIZED TECHNICAL SUPPORT

Christina Zapata, Executive Director

Centro Laboral de Graton (The Graton Day Labor Center) – Graton, CA

Christina became Centro Laboral de Graton’s first executive director shortly before participating in the ODS program. She needed assistance moving her organization from an all-volunteer, grassroots organization to a nonprofit with clearly defined roles for the executive director and the board. For her, the customized technical assistance was tremendously valuable. “Often, it doesn’t feel appropriate to discuss sensitive issues with the board or the staff. The ODS support person is a sounding board with good advice and it really helps that our conversations are confidential.” With guidance from her technical support provider, Christina gained more confidence as an executive director and worked with her board to develop better defined roles and responsibilities. She added, “When we started the ODS program, I would describe our organization as feeling things out, taking baby steps, feeling hesitant or cautious. Now I would describe us as growing with confidence and trust.”

2 CREATING A LEGACY OF CAPACITY-BUILDING

Terry Stone, Former Executive Director

The Center Orange County – Santa Ana, CA

Terry, a veteran executive director, was fairly new to his position at The Center Orange County when he began participating in the ODS program. Almost six months into his position, Terry realized that he had inherited a set of challenging circumstances. He said that the individualized technical support and the on-site sustainability training were some of the most helpful aspects of the program. “The work that [our technical support provider] did around sustainability was very helpful, for example asking difficult questions and having a hard conversation about our programs. Her way of letting the staff come to the information and helping them make their own decisions made all the difference.” Now as executive director of CenterLink, Terry provides his own technical support and training to LGBT centers across the country. He commented, “The things I learned in the ODS program really...affected the way I carry out my job. For example, I was doing some board training about six or eight months ago. We were looking at the role of the board and we started looking at what they wanted to do and what was do-able. In the list of what they were doing, I asked ‘Does this create revenue? Does the community buy into it? Is the program achieving the desired results?’ This was what I learned in the ODS program.”

3 CULTIVATING STRATEGIC PLANNING AND EVALUATION

Lisa Culp, Executive Director

Women's Empowerment – Sacramento, CA

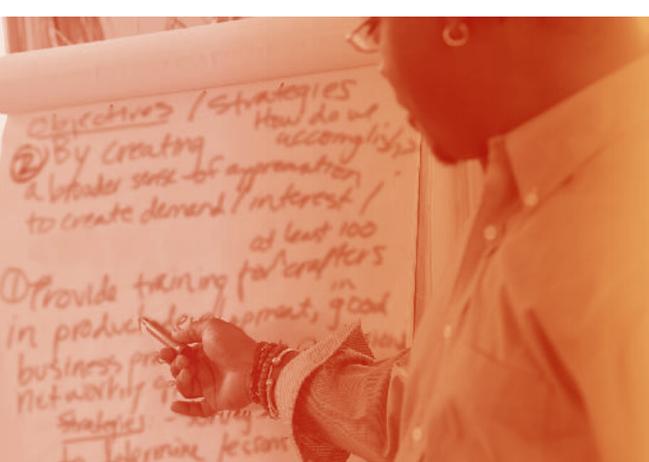
During her year of participation, Lisa accomplished a great deal with the help of her technical support provider, including developing a strategic plan. Lisa was able to leverage her strategic plan into a wonderful achievement for the organization. "In May 2009, we were named Nonprofit of the Year by the Nonprofit Resource Center. One of the criteria was having a strategic plan. We would not even have been considered without a strategic plan, which we did through the program." Lisa also greatly benefitted from attending the executive director retreat. "When we met as executive directors, it gave us the opportunity to look at other innovative ideas and not reinvent the wheel. Executive directors are expected to be experts. I was reminded that I didn't have to know everything; I just needed to know who to ask." Lisa also built capacity in the area of organizational learning and evaluation through the development of a logic model. She said, "We were doing evaluation, but we were doing it in a grassroots way. The logic model gave us a more methodical, logical way to look at things and to see if we were coming up with the same results."

4 STRENGTHENING SUSTAINABILITY

Dori Rose Inda, Executive Director

Watsonville Law Center – Watsonville, CA

In 2004, the Watsonville Law Center (WLC) was a program of an organization participating in Cohort #1 of the ODS program. As part of the technical support provided to that organization, a sustainability work plan was developed that proved critical to the growth of WLC. It incorporated as its own nonprofit and Dori Rose Inda, now the executive director of WLC, participated in Cohort #5 of the ODS program. Reflecting back on its progress, Dori noted, "without a doubt, I wouldn't have been able to get capacity-building funding without that plan. We were able to leverage hundreds of thousands in capacity-building funds by having our sustainability plan. Without those funds, we couldn't have done all that growth. It made a huge difference." In 2008-09 when Dori participated in the ODS program, the WLC was facing different challenges, but her technical support provider was equally successful in bringing board and staff together to effectively plan for the organization's future. Dori said her staff also derived benefits from the program just by knowing that Dori was working with an outside group to strengthen the organization. When asked what makes the Center's approach so valuable, Dori replied, "We usually work with consultants with very specific expertise. The Center for Civic Partnerships is way more 'big picture'. It's about sustainability and organizational development and how all the pieces such as fundraising, board development and staffing fit together."



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Dori Rose Inda, Executive Director – Watsonville Law Center

LESSONS LEARNED

- 1 It is important that participation in this type of program be voluntary and that organizations have the opportunity to choose organizational development activities that may not be related to their grant.
- 2 Executive directors should participate in an assessment and receive assistance to determine their organizational development needs.
- 3 Technical support staff members should anticipate playing many roles in this type of program, including facilitator, trainer, coach and broker.
- 4 Support providers need to invest time to build trusting relationships with participants.
- 5 Executive directors desire and benefit greatly from time with their peers to share resources and support each other; many do not have access to peer support outside of this type of program.
- 6 Technical support providers must be flexible and adaptable as situations may arise which cause the organization's priorities to change.
- 7 Assistance with executive transitions has become increasingly requested and valued.
- 8 While participants can easily identify areas where assistance would be helpful, they are often not sure what support to request. Not all participants have a shared understanding of what technical assistance is and in some cases executive directors need coaching on how to be consumers of technical support services.
- 9 It can be difficult for many organizations to break through the "urgent" to plan for the future. This can be even more critical for early career executive directors who find themselves in this environment for the first time. Additional support from outside the organization can help executive directors focus strategically.
- 10 Not all participants will engage in a technical support program at the same level. The frequency of contact desired by executive directors varies.

ATTRIBUTIONS



Center for Civic Partnerships
1851 Heritage Lane, Suite 250
Sacramento, CA 95815
Tel: (916) 646-8680
Fax: (916) 646-8660
Website: www.civicpartnerships.org
Email: ccp@civicpartnerships.org

The Center for Civic Partnerships (the Center) is a support organization that strengthens individuals, organizations, and communities by facilitating learning, leadership development, and networking. The Center's main areas of focus are community-building and organizational development with a cross-cutting emphasis on sustainability. The Center is part of the Public Health Institute.

The Public Health Institute promotes health, well-being and quality of life for all people through research and evaluation, training and technical assistance, and by building community partnerships.

The California Wellness Foundation (TCWF) is a private, independent foundation created in 1992, with the mission of improving the health of the people of California by making grants for health promotion, wellness education and disease prevention.

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