

**BUILD TOOLS FOR NONPROFIT SUSTAINABILITY
AND INNOVATIVE GIVING APPROACH**

EVALUATION REPORT OF THIRD NETWORKING MEETING

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BACKGROUND

March 23-25, 2004, the W. K. Kellogg Foundation (WKKF) Philanthropy and Volunteerism (P&V) program area hosted the third of several networking meetings for a cluster of grantees within the “Build Tools for Nonprofit Effectiveness and Innovative Giving” approach of its Unleashing New Resources initiative. The 21 invited grantees represent roughly half of the grants made to date within the Tools approach; they were selected to participate in cluster activities because of their potential for productive interaction, joint programming, collaboration, and developing a community of practice. If these potentials could be realized, the cluster would make a significant contribution to the ability of nonprofit organizations to sustain themselves and to creating new avenues for more citizens to give their time, money, and know-how to improving the quality of life in communities.

The networking meeting was held at the Loews Philadelphia Hotel in Philadelphia, PA. The site was selected to make it possible for a number of the cluster members to attend both the networking meeting and the N-Ten Conference from March 25-28, also in Philadelphia.

Representatives from 20 cluster member organizations attended the meeting; the final attendee roster consisted of 58 individuals – 37 leaders from the 20 cluster member organizations, 9 speakers, 7 representatives of intermediary organizations (both cluster and initiative-level) and 5 representatives from WKKF (program directors and P&V impact services staff). Of the 37 leaders from the cluster member organizations, 16 (43%) had attended both of the prior networking meetings (in March and October, 2003) and 10 (27%) had attended only the second networking meeting. There were 11 new participants (30%) at the networking meeting. All 37 cluster member attendees were asked to complete the post-conference assessment; 30 completed assessments were received; the response rate was 81%.

The Program

The program for this third meeting in the series was designed by a planning team of cluster members in conjunction with the cluster leadership team (WKKF and CenterPoint). The meeting’s objectives are listed below, along with the program elements that were intended to contribute to each objective.

- Objective 1. Members strengthen and increase working relationships and continue building a community of practice. Program elements included:
- Construction Crew meetings.
 - Off-site dinner.
 - Venture Fund for Continued Collaboration.
- Objective 2. Members explore engaging communities of color in order to further out social impact goals as well as our sustainability goals. Program elements included:
- The New Demographic Realities, Martha Farnsworth Riche.
 - Beyond Race and Gender: 21st Century Diversity Dynamics, Juan Johnson.
 - Relationship Marketing: Building Longstanding Partnerships, Alfred Ramirez.
 - Boards and Staff: Diversity as a Strategic Necessity, Berit Lakey.
 - Online Engagement, e-Philanthropy, and 21st Century Diversity Technology, Randal Pinkett.
 - Donors of Color: Practices and Dreams, Eugene Miller, Felinda Mottino, Jessica Chao.
 - Engaging Diverse Donors: Outreach and Education: Jessica Chao and Erica Hunt.
- Objective 3. WKKF clarifies its vision for the engagement of communities of color, the Tools community of practice, and the Unleashing New Resources initiative and helps the Tools organizations explore connections with the Unleashing Resources initiative. Program elements included:
- Opening comments, WKKF.
 - Evolution of the Tools Cluster: the Road Ahead: WKKF.

For reference purposes, the program schedule is attached at the end of this report (see Appendix A).

Evaluation Design

The primary purpose for the networking meeting evaluation was program development; specifically to gather information that would allow the planning teams to understand the effectiveness of their work on the networking meeting. The evaluation instrument used several types of questions in an attempt to understand how the members responded to the meeting's learning objectives and methodologies. The types of questions included a) Likert-type scales to assess satisfaction with meeting objectives, usefulness of information provided, meeting communications and materials, informal interaction, and new member orientation, and b) open-ended questions to gather information on how participants felt about the program and to seek suggestions for program and communications improvements.

FINDINGS

Participants in the networking meeting held March 23 – 25, 2004 were asked to provide feedback regarding achievement of learning objectives, indicate usefulness of information provided through various components of the program, and provide information to aid in development of future networking meetings. The findings and discussion are organized according to the questions asked. Not all comments received from the members are represented in the body of the report. Instead, selected quotes that represent those provided by respondents have been shared.

Achievement of Program Outcomes

Members were asked to assess the extent to which they were satisfied that the following program features or outcomes had been achieved (see Table 1; a five-point Likert-type scale was used where 1 = Very Satisfied, 3 = Satisfied, 5 = Not Satisfied).

Table 1: Ratings of Importance and Performance on Program Learning Objectives

	n	Mean Score	Range
Learn something that will help me in my work.	30	1.8	1-4
Learn something that will help my organization be more effective.	29	2.0	1-4
Learn something that will help my organization to be more effective in engaging communities of color.	30	1.9	1-4
Meet other cluster members/become more familiar with other people and organizations in the cluster.	30	1.5	1-4
Build relationships with others in the cluster whom I would feel comfortable contacting.	30	1.5	1-4
Increase understanding of W. K. Kellogg Foundation vision for the engagement of communities of color.	29	2.3	1-4
Increase understanding of W. K. Kellogg Foundation vision for the community of practice.	28	2.6	1-4
Increase understanding of W. K. Kellogg Foundation vision for connections with others in the Unleashing Resources Initiative.	28	2.4	1-4

Overall, the ratings indicate that members were satisfied that the program outcomes had been achieved, though members felt less satisfied with their understanding of the components of the Kellogg Foundation vision.

Usefulness of Program Aspects for Relationship Building

In order to build a community, prospective members of that community need to learn about one another and their similarities/differences. The cluster leadership team, aided by a planning team of cluster members, planned components of the program that would help increase members' understanding and knowledge of one another. Members were asked to indicate the usefulness of

these program components (see Table 2; a five-point Likert-type scale was used where 1 = Very Useful, 3 = Useful, 5 = Not Useful).

Table 2: Level of Usefulness for Relationship Building

	n	Mean Score	Range
Construction Crews (group)	30	2.0	1-4
Off-site Dinner and Program (Rotunda – Tues. evening)	28	2.0	1-3
Optional dinner grouping (Wednesday evening)	24	2.0	1-5

Overall, the ratings indicate that members found the program components to be useful in developing their knowledge and understanding of other cluster members.

Usefulness of Program Components for Providing Information

Much of the planning team’s focus was on identifying the type of informative sessions concerning engagement with communities of color that would be useful for members in this third networking meeting. The team was interested to learn whether cluster members were satisfied with the sessions that were planned to address this topic.

Members were asked to indicate how useful they found the information from the following plenary sessions (see Table 3; a five-point Likert-type scale was used where 1 = Very Useful, 3 = Useful, 5 = Not Useful).

Table 3: Level of Usefulness for Providing Information

	n	Mean Score	Range
The New Demographic Realities (Tuesday afternoon)	28	1.89	1-4
Leadership and Diversity (Tuesday afternoon)	28	1.86	1-4
Women’s Funding Network/VolunteerMatch case studies (Wednesday morning)	29	2.59	1-4
Workshop Sketches	29	2.00	1-5

Overall, members found the plenary sessions useful.

The members selected workshops to attend concerning ‘engaging communities of color’. The ratings for the individual sessions are listed in Table 4 below (a five-point Likert-type scale was used where 1 = Very Useful, 3 = Useful, 5 = Not Useful).

Table 4: Level of Usefulness by Workshop Topic

	n	Mean Score	Range
Relationships Marketing	7	4.29	3-5
Boards and Staff	8	2.63	2-4
Online Engagement, ePhilanthropy, and 21 st Century Diversity	16	1.75	1-4
Engaging Diverse Donors	5	1.60	1-3
Beyond Race and Gender	9	2.22	1-4

Overall members found the information from the individual workshops to be useful, with the exception of the relationship marketing session. While many respondents did not rate the second set of workshops resulting in a small set of respondents, there was consistency among the ratings for each session.

Rating of Registration Information

Members were asked to rate the registration information provided in advance of the networking meeting on two dimensions: quantity and quality. Scores for quantity were: 1 = Too Much, 2 = Just Right, 3 = Too Little; scores for quality were: 1 = High, 2 = Medium, 3 = Low. See Table 5 below.

Table 5: Rating of Registration Information

	n	Mean
Quantity	30	1.97
Quality	20	1.45

Overall members felt that pre-meeting communication was approaching “just right” in terms of quantity and medium to high in terms of quality.

Rating of Reading Packet Materials

An extensive reading packet was provided in advance of the networking meeting. Members were asked to rate the items in the reading packet in terms of how useful they found the information. Scores for reading packet materials were: 1 = Very Useful, 2 = Useful, 3 = Not Useful, 4 = Didn’t Read. See Table 6 below.

Table 6: Rating of Reading Packet

	n (Readers)	Mean Score for Readers	Didn’t Read
Reading Packet rating	27	1.93	2

The majority of respondents read the items in the reading packet and found the information useful.

Rating of Time Available for Interaction with Cluster Members

Networking among members is a desirable outcome for the networking meetings. The leadership team was concerned that the program was very full and might not allow sufficient time for members to interact with one another. Members were asked to rate the amount of time available to interact with other cluster members during the networking meeting. Scores for amount of time available were: 1 = Too Much, 2 = Just Right, 3 = Too Little. See Table 7 below.

Table 7: Rating of Time for Informal Interaction

	n	Mean Score
Quantity of Time	29	2.07

Overall members felt they had an adequate amount of time available for interaction with other cluster members; one respondent felt they had too much time for interaction and three felt they had too little.

Rating of New Member Orientation

The leadership team knew that there would again be several individuals attending this third meeting who had not attended prior meetings. Since part of the purpose of these meetings is to build a community, the program included an orientation to provide new members with the same understanding and background about this community as those who attended previous meetings. New members were asked to rate the New Member Orientation session. The rating scale for rating the session was: 1 = Very Useful, 2 = Useful, 3 = Not Useful, 4 = Didn't Attend. See Table 8 below.

Table 8: Rating of New Member Orientation

	n (Attendees)	Mean Score for Attendees	Didn't Attend
Usefulness of Orientation	9	1.9	1

All but one of the attendees rated the orientation useful.

The next sections of this report present findings from the open-ended questions. Not all comments received from the members are presented. Instead, quotations that are representative of the group are included.

Follow-up Needed to “Get the Most” from the Meeting

Ten members responded to the question, “What follow-up is needed to help you get the most out of this meeting?” The responses fell into two general categories – personal efforts that need to be made and access to knowledge resources.

Six members described efforts they need to make on their own:

Phone calls or visits to others with my construction crew.

Construction crew follow-through as agreed.

Two members described specific knowledge resources that would help them get the most from the meeting:

Slides from presentations.

Listserv that as tools cluster members, we can contribute to easily and share resources and information (new).

One member indicated that connecting with other grantees in the initiative would help them get the most from this meeting. One other member commented:

The notion of networking – figuring out connections from one project to another in an organic way (meaning us figuring out for ourselves) is a good approach – but it would be helpful if WKKF, CenterPoint, etc. would more intentionally knit together our projects based upon their collective understanding of our work – could speed us along.

What Members Liked Most

Twenty-three members shared their views regarding what they liked most about the networking meeting.

When discussing what they liked most, members described specific program/meeting elements. Among the elements described were the networking time/relationship building (11), plenary speakers (10), workshops (10), construction crews (8), dinner at the Rotunda (2), the setting/location (2), and the workshop sketches (1).

Continued professional development and networking with cluster members – there’s a lot of talent and TONS to learn from folks here.

Excellent plenary and workshop speakers.

Construction crews were lively and productive.

What Members Liked Least

Eighteen members shared comments regarding what they liked least. When discussing what they liked least, cluster members also described specific program/meeting elements. Among the elements described were the long day on Wednesday (5), the workshop sketches (3), combining the meeting with the N-Ten conference (1), volume of information (1), large plenary sessions (1), construction crews (1), lack of unstructured time (1), too much time spent on cluster business (1).

One participant commented on the fact that organizations do not always send the same representatives to the meetings:

Changing cast and more junior people – good for training but not good for deal making because not decision makers.

One participant described the level of information provided as remedial:

Much of the teachings/learnings on internal diversity seemed remedial (101). Presenter skills highly variable; e.g. Randall had 100+ slides for 45 minutes of presentation time!

One participant felt the theme for the meeting had been diffused:

I feel like the theme ‘communities of color’ was lost or diffused. ‘Communities of color’ seems to have been replaced with the term ‘diversity’ which was broadened to include diversity in all senses. While manager-associate diversity issues are important, they are different than racial ethnic issues and should have been addressed at a different conference. I also would have liked to have heard more speakers from the nonprofit sector.

One participant, a new member who attended the orientation session and found it useful, did not understand the concept of the cluster:

Didn’t get clarity on goal of the meeting until arrival. Still don’t see ‘tools cluster’ concept. Seemed to be meeting on diversity, and many connections with others to promote diversity in philanthropy.

Other Comments

Additional comments written in the margins which were not represented elsewhere included ideas for future networking meetings:

More on this topic of engage people of color in next session so it is not one-shot and we can build on knowledge. Set expectation to share results and actions taken or not.

Share members’ products that have potential applicability for others. Carefully select – not a show and tell.

I'd like to see a Tools marketplace next time, so I can view all these cool tools I'm hearing about and think about the possibilities.

Conclusion

The third networking meeting for the “Build Tools for Nonprofit Sustainability and Innovative Giving” cluster provided a challenge to allow cluster members to continue building relationships and finding opportunities for partnering while attending to the Foundation’s values concerning engaging communities of color.

The program for the meeting focused on three objectives:

- Members strengthen and increase working relationships and continue building a community of practice.
- Members explore engaging communities of color in order to further social impact goals as well as sustainability goals.
- WKKF clarifies its vision for the engagement of communities of color, the Tools community of practice, and the Unleashing New Resources initiative and helps the Tools organizations explore connections with the Unleashing Resources initiative.

Responses to this evaluation indicate that significant progress was made on all three objectives. Comments from the open-ended questions indicate that members found value for themselves or their organizations in the focus on communities of color.

Appendix A –

Schedule for March 2004 Networking Meeting

Tools Cluster Networking Meeting Objectives and Schedule

Objectives

1. We strengthen and increase working relationships and continue building a community of practice.
 - a. Construction Crew meetings.
 - b. Off-site dinner.
 - c. Venture Fund for Continued Collaboration.

 2. We explore engaging communities of color in order to further our social impact goals as well as our sustainability goals.
 - a. The New Demographic Realities, Martha Farnsworth Riche.
 - b. Beyond Race and Gender: 21st Century Diversity Dynamics, Juan Johnson.
 - c. Case Studies: Women's Funding Network and VolunteerMatch.
 - d. Relationship Marketing: Building Longstanding Partnerships, Alfred Ramirez.
 - e. Boards and Staff: Diversity as a Strategic Necessity, Berit Lakey.
 - f. Online Engagement, e-Philanthropy, and 21st Century Diversity Technology, Randal Pinkett.
 - g. Donors of Color: Practices and Dreams, Eugene Miller, Felinda Mottino, Jessica Chao.
 - h. Engaging Diverse Donors: Outreach and Education: Jessica Chao and Erica Hunt.

 3. WKKF clarifies its vision for the engagement of communities of color, the Tools community of practice, and the Unleashing New Resources initiative and helps the Tools organizations explore connections with the Unleashing Resources initiative.
 - a. Opening Comments, WKKF.
 - b. Evolution of the Tools Cluster: the Road Ahead: WKKF
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Schedule

Monday, March 22

Various times		Early arrivals. Dinner on your own (reimbursable).
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Tuesday, March 23

		Breakfast on your own for early arrivals (reimbursable).
10:00 a.m. – 1:00 p.m.	<i>Third Floor Foyer</i>	Meeting registration.
11:00 a.m. – 12:00 p.m.	<i>Washington A-B</i>	New Members' Orientation. For members who did not attend previous meetings.
11:30 a.m. – 12:45 p.m.	<i>Washington C</i>	Lunch (included in the conference package). Members need name badge.
1:00 p.m. – 1:30p.m.	<i>Washington A-B</i>	Opening General Session. <ul style="list-style-type: none"> ▫ Welcome and Introductions. ▫ Opening Remarks.
1:30 – 2:30 p.m.	<i>Washington A-B</i>	The New Demographic Realities Martha Farnsworth Riche, Farnsworth Riche and Associates.
2:30 – 3:00 p.m.	<i>Third Floor Foyer</i>	Break
3:00 – 4:00 p.m.	<i>Washington A-B</i>	Leadership and Diversity Juan Johnson, Vice-President, The Coca-Cola Company and President, Diversity Leadership Academy.
4:00 – 4:20 p.m.	<i>Washington A-B</i>	Assemble Construction Crews (Small, informal, member-led discussion groups)
4:20 – 5:00 p.m.	<i>Breakout Rooms</i>	Construction Crew Meetings
6:00 – 6:15 p.m.	<i>12th Street Side of Hotel</i>	Board Bus/Van for Off-Site Dinner
6:15 p.m.		Bus Departs
6:30 – 8:45 p.m.	<i>The Rotunda, 4014 Walnut Street, Philadelphia</i>	Dinner and Entertainment
8:45 p.m.		Optional: Board Bus/Van to Return to Hotel.

**Wednesday,
March 24**

7:00 – 8:00 a.m.	<i>Washington C</i>	Breakfast Buffet.
8:15 – 8:30 a.m.	<i>Washington A-B</i>	Business of the Day.
8:30 – 9:00 a.m.	<i>Washington A-B</i>	Case Studies: Women’s Funding Network; VolunteerMatch
9:00 – 10:00 a.m.	<i>Washington A-B</i>	Short Sketches: Relationship Marketing: Building Longstanding Partnerships, Alfred Ramirez, Senior Consultant, Policy and Outreach, Maya Advertising and Communications. Boards and Staff: Diversity as a Strategic Necessity, Berit Lakey, Senior Consultant, BoardSource.
10:00 – 10:30 a.m.	<i>Third Floor Foyer</i>	Break.
10:30 – noon	<i>Washington A-B</i>	Short Sketches: Online Engagement, e-Philanthropy, and 21 st Century Diversity: Connecting with People of Color, Randal Pinkett, President and CEO, BCT Partners. Donors of Color: Practices and Dreams; Engaging Diverse Donors: Outreach and Education, Jessica Chao, Philanthropic Consultant. Beyond Race and Gender: 21 st Century Diversity Dynamics and Implications for Organizations and Communities, Juan Johnson, Vice-President, The Coca-Cola Company and President, Diversity Leadership Academy.
Noon – 1:15 p.m.	<i>Washington C</i>	Luncheon Buffet.
1:30 – 3:00 p.m.	<i>Breakout Rooms</i>	First Round of Workshops.
	<i>Tubman</i>	Relationship Marketing: Building Longstanding Partnerships.
	<i>Anthony</i>	Boards and Staff: Diversity as a Strategic Necessity.
	<i>Adams</i>	Online Engagement, e-Philanthropy, and 21 st Century Diversity: Connecting with People of Color.
	<i>Parlor P1</i>	Donors of Color: Practices and Dreams.
	<i>Parlor P2</i>	Beyond Race and Gender: 21 st Century Diversity Dynamics and Implications for Organizations and Communities.
3:00 – 3:30 p.m.	<i>Third Floor Foyer</i>	Break.

**Wednesday,
March 24,
continued**

3:30 – 5:00 p.m.	<i>Breakout Rooms</i>	Second Round of Workshops.
	<i>Tubman</i>	Relationship Marketing: Building Longstanding Partnerships.
	<i>Anthony</i>	Boards and Staff: Diversity as a Strategic Necessity.
	<i>Adams</i>	Online Engagement, e-Philanthropy, and 21 st Century Diversity: Connecting with People of Color.
	<i>Parlor P1</i>	Engaging Diverse Donors: Outreach and Education.
	<i>Parlor P2</i>	Beyond Race and Gender: 21 st Century Diversity Dynamics and Implications for Organizations and Communities.
5:00 – 6:00 p.m.	<i>Breakout Rooms</i>	Construction Crew Meetings
Evening	<i>Various Locations</i>	Dinner “on your own” – optional groupings. Up to \$40.00 per person reimbursable with receipt.

Thursday, March 25

7:15 – 8:15 a.m.	<i>Washington C</i>	Breakfast Buffet.
8:30 – 9:00 a.m.	<i>Washington A-B</i>	Venture Funds: <ul style="list-style-type: none"> ▫ For Communities of Color; Q and A. ▫ For Continued Connections; Q and A. Announcement about Members’ Assessment of the WKKF/CenterPoint Team; Q and A.
9:00 – 10:00 a.m.	<i>Breakout Rooms</i>	Construction Crew Meetings.
10:00 – 10:30 a.m.	<i>Third Floor Foyer</i>	Break.
10:30 – 11:00 a.m.	<i>Washington A-B</i>	WKKF Comments: <ul style="list-style-type: none"> ▫ Evolution of the Tools Cluster. ▫ What Lies Ahead: Goals for “Net4.” ▫ Connecting with Other Unleashing Resources Organizations.
11:00 – Noon	<i>Washington A-B</i>	Discussion and Feedback: <ul style="list-style-type: none"> ▫ Reflections on “Net3” (this meeting). ▫ Responses to WKKF Comments. Closing.
Noon	<i>Meeting Adjourns</i>	