

## 2007 GRANTS SUMMARY

APPLICANT	GRANT PURPOSE	AWARD
Adaptive Community Approach Program, Inc.	Technology: Conduct an assessment of the computer system and begin implementation of the technology plan	Fund \$4,000
Association for the Rights of Citizens with Handicaps	Human Resources: Develop a management team through leadership training	Fund \$6,000
Cooperating Congregations of Greater Waukesha, Inc.	Finance: Upgrade accounting system and teach bookkeeper how to maintain it	Fund \$3,200
Family Service of Waukesha	Planning: Facilitate strategic planning process	Fund \$6,970
Habitat For Humanity, Waukesha County, Inc.	Board of Directors: Work with the Board to implement their recommendations from the diagnostic clinic	Fund \$4,000
Interfaith Caregiving Network of Waukesha	Restructuring: Review staffing structure and policies, as well as financial systems and technology for integration with RSVP	Fund \$7,500
Milwaukee Opera Theatre	Fundraising: Training in fundraising and donor record keeping system	Fund \$2,300
Pewaukee Area Historical Society	Fundraising: Develop a plan for operational support	Fund \$5,000
RSVP of Waukesha County, Inc.	Restructuring: Continue process to develop strategic alliance	Fund \$7,500
RSVP of Waukesha County, Inc.	Merger: Continued facilitation of the strategic restructuring process	Fund \$2,000
Stillwaters Center Inc.	Marketing: Update and upgrade web site	Fund \$7,500
Ten Chimneys Foundation	Human Resources: Training for eight staff attending national conference in Chicago	Fund \$6,100
TYME OUT Youth Center	Planning: Facilitate strategic planning process	Fund \$3,000
UP Connection, Inc.	Technology: Purchase and install new computers and printers	Fund \$1,945
Vietnam Veterans Foundation of Wisconsin Inc.	Fundraising: Produce an income plan to raise funds through means different than telemarketing	Fund \$2,500
Volunteer Center of Waukesha County	Technology: Purchase and install computers and a server	Fund \$6,320
Waukesha Civic Theatre	Technology: Purchase and install new donor record keeping software, in addition to upgrading the ticket system	Fund \$4,390
Waukesha Memorial Hospital Foundation, Inc. (Waukesha Hispanic Collaborative Network)	Planning: Facilitate a strategic planning process for the Network	Fund \$2,500
Waukesha Symphony Orchestra	Planning: Facilitate strategic planning process	Fund \$7,500
Wisconsin Nonprofits Association	Marketing: Conduct outreach efforts to engage Waukesha County nonprofits	Fund \$2,142
Women's Center, Inc.	Human Resources: Recommend a revamping of the staffing structure	Fund \$7,500
Women's Center, Inc.	Fundraising: Training for the staff in the fund development software	Fund \$3,942

## GRANTEE COMMENTS

*"The Directors have taken the knowledge and information gained during the retreat and are actually applying it to their duties."*  
Habitat for Humanity

*"Our consultant showed us that one of our first needs was to create uniformity in our computer systems and software to reduce our wasted time and staff frustration."*  
Adaptive Community Approach Program, Inc.

*"[This grant] reaffirmed the importance of developing a solid business plan to enable the emergence of a state association...This firm foundation will encourage membership from nonprofits and support from the philanthropic community."*  
Wisconsin Nonprofits Association

*"By installing new computer hardware and software, the staff has been able to increase effectiveness in meeting job responsibilities through improved and quicker access to data. As a result, clients have been served more effectively and efficiently."*  
Volunteer Center of Waukesha County

*"[We now have a] highly-improved working relationship between the Executive Director and the Board...[There is a] congruence in long-term vision and planning."*  
Waukesha Symphony Orchestra

*"We're looking to examine exciting ideas, review what they're doing and why, and to translate that into ways to more fully accomplish our mission and serve our constituents. The AAM conference has given us new tools and resources to do that work to continually improve."*  
Ten Chimneys

*"MHA has already seen substantial short-term improvements and anticipates these improvements will be the initial steps in building momentum for long-term goals."*  
Mental Health Association

*"Having just made the transition from original founder and director of 26 years to new executive leadership, this strategic planning process was extremely effective in engaging all sectors of our organization in planning for the future."*  
TYME OUT Youth Center

### 2007 Evaluation Reports Ratings Review

Grant Ratings	
5	0
4	4
Met Expectations	15
2	0
1	0

Consultant Ratings	
Excellent	17
Good	3
Fair	0
Poor	1
No Rating	0

(Note: One project involved 3 consultants)

**18 organizations**

**19 grants evaluated**

**\$91,185 awarded**

**\$20,526 cash match**

**\$20,125 in-kind match**

## EVALUATION REPORT HIGHLIGHTS

Nineteen grantee reports from eighteen organizations were received in 2007. One grant reported on three consultants who each conducted an aspect of the technical assistance award. Some key accomplishments are highlighted from the evaluation reports and the 34 work products.

- ❖ Two groups enhanced their Board's participation in governance and fundraising. Three nonprofits reported that their Boards were made more aware of personal resources that could help the organization.
- ❖ Two grantees produced plans that clarified organizational direction and unified the Board and staff with a vision for the future.
- ❖ Three nonprofits verified an expanded audience, improved program delivery, or enhanced public image because of the marketing assistance.
- ❖ Two organizations increased understanding of staff responsibilities and appropriate staff teamwork, resulting in improved staff morale.
- ❖ Four nonprofits enhanced their understanding of technology, and increased overall staff efficiency and productivity.
- ❖ Six groups increased fundraising knowledge, identified new funding sources, and produced plans to diversify their operational revenues.
- ❖ One organization received a comprehensive assessment detailing objectives that would further organizational stability.
- ❖ Two organizations merged with the Fund's support via three grants. Retired Senior Volunteer Programs and the Interfaith Caregiving Network became Interfaith Senior Programs Inc.

## ADVICE TO THE FUND

In addition to kudos for the straightforward funding process, simple application, and overall flexibility, two suggestions were made for the funding partners.

*"We would welcome the opportunity to apply for technical assistance as frequently as our colleagues in Milwaukee!"*

*"Have a funded project give a presentation to the Nonprofit Management Fund [Committee] on the impact of the funding received. [It] may help to further impart how important the Fund's funding is to nonprofit organizations".*



## Nonprofit Management Fund of Waukesha County 2007 Summary

### GRANTS OVERVIEW

In the ninth year of the Nonprofit Management Fund of Waukesha County, the funding partners awarded 22 technical assistance grants to 20 nonprofits through two successful grantmaking cycles. The majority of the awards enabled 14 human service organizations to address a management or governance challenge. Technology, Planning and Fundraising were each the project of choice by four organizations. One consultant was selected to provide guidance on three grants, and another was tapped for two projects. For the first time in many years, no requests were made for a diagnostic clinic.

Mission	#	%
Human Services	14	64
Arts & Culture	5	22
Civic	3	14
Totals	22	100%



In 2007, the Nonprofit Management Fund awarded \$7,500 to BoardStar to continue offering programs to the nonprofits of Waukesha County. The response from nonprofit Boards has been very favorable. Last year, 91 Directors from 42 organizations attended a workshop sponsored by BoardStar. Seven of the 51 workshops were held in Waukesha County, including an *Orientation Express*, a bylaws clinic, and five *"So You Want to Serve..."* sessions. Several workshops featured Waukesha presenters, and two podcasts described the Interfaith Senior Programs merger from the Board and staff perspectives. Five requests from Waukesha Board Presidents for governance consultation were answered by the *Board Doctor On Call*.

Purpose	#	%
Technology	4	19
Planning	4	19
Fundraising	4	19
Human Resources	3	13
Marketing	2	9
Restructuring	2	9
Merger	1	4
Board Development	1	4
Finance	1	4
Totals	22	100%

2007 Grants Summary	CYCLE 18	CYCLE 19	TOTALS
Subtotal TA Grants	\$53,974	\$44,835	\$98,809
Subtotal Initiative Funding	\$7,500	-0-	\$7,500
Grants Totals	\$61,474	\$44,835	\$106,309