

# 2008 GRANTS SUMMARY

APPLICANT	GRANT PURPOSE	AWARD
1. Adaptive Community Approach Program, Inc.	Diagnostic Clinic: Conduct a comprehensive organizational assessment	Fund \$5,500
2. Association for the Rights of Citizens with Handicaps	Board Development: Facilitate a Board/staff retreat and activate the Board committees	Fund \$3,000
3. BoardStar	Board Development for Waukesha organizations	Fund \$7,500 (Initiative)
4. Caring Place, Inc.	Legal: Review personnel policies and update employee handbook	Fund \$2,000
5. Christos Ministries, Inc.	Restructuring: Reconfigure staffing and program revenue options	Fund \$4,375
6. Cooperating Congregations of Waukesha	Planning: Facilitate a strategic planning process	Fund \$4,000
7. Donna Lexa Community Art Centers, Inc.	Board Development: Interview Directors and make recommendations to strengthen the Board.	Fund \$4,000
8. Family Service of Waukesha County	Diagnostic Clinic: Conduct a comprehensive organizational assessment	Fund \$5,500
9. Food Pantry of Waukesha, Inc.	Technology: Update database	Fund \$1,500
10. Habitat for Humanity of Waukesha	Planning: Facilitate a strategic planning process	Fund \$4,000
11. Hebron House of Hospitality, Inc.	Legal: Act as fiscal agent for incorporation of the Housing Action Coalition	Fund \$1,500
12. Hebron House of Hospitality, Inc.	Human Resources: Detail emergency and planned succession strategies	Fund \$6,480
13. Interfaith Senior Programs, Inc.	Technology: Purchase design software to produce new promotional materials	Fund \$3,070
14. Mental Health Association in Waukesha County, Inc.	Planning: Facilitate phase 1 of the strategic planning process	Fund \$4,000
15. Old World Wisconsin Foundation	Technology: Purchase program equipment	Fund \$1,800
16. Prairie Hill Waldorf School	Diagnostic Clinic: Conduct an organizational assessment	Fund \$5,500
17. Prevention & Protection of Abused Children, Inc.	Fundraising: Consultation to increase and diversify private contributions	Fund \$7,000
18. Sharon Lynne Wilson Center for the Arts	Planning: Facilitate a strategic planning process	Fund \$5,000
19. Sharon Lynne Wilson Center for the Arts	Fundraising: Conduct a fund development audit	Fund \$5,000
20. St. Joseph's Medical Clinic, Inc.	Technology: Conduct an assessment and begin implementation	Fund \$6,000
21. Ten Chimneys Foundation	Marketing: Design a brand identity for the Foundation and redesign the look of the tour book	Fund \$7,500
22. TYME OUT Youth Ministry Center, Inc.	Board Development: Conduct a staff/Board retreat	Fund \$1,500
23. Waukesha Choral Union, Inc.	Marketing: Produce a coordinated corporate image with audience development strategies	Fund \$3,000
24. Wisconsin Nonprofits Association	Marketing: Recruit Waukesha groups to WNA & the Nonprofit Summit	Fund \$2,500

## SAMPLE EVALUATIONS

### Old World Wisconsin Foundation

While Old World Wisconsin honors the past, effective museum administration requires the use of modern-day technology. The new video donor board allows the museum to acknowledge its supporters, educate visitors, and promote its programs.

### Interfaith Senior Programs Inc.

The result of new promotional materials, based on a new logo, is a cohesive look and feel for the agency's messaging and overall image, which will lead to a greater community awareness of the mission: responding to community needs through volunteerism. The materials also expand the outreach for several programs, encouraging more partnerships with community groups.

### Hebron House of Hospitality Inc.

The organization learned that it had a good system in place to focus on the mission beyond the executive's involvement, but the process could be enhanced through several recommendations, which were implemented. This grant enabled the Board Chair and Executive Director the opportunity to develop a succession plan that reflects their main concern of perpetuating the agency's mission and culture beyond the founder's departure.

### Sharon Lynne Wilson Center for the Arts

A comprehensive fund development assessment has encouraged the Wilson Center to target constituencies more specifically, broaden the support of the Board in fundraising, focus more on annual giving rather than special events, and create a Development Committee with real oversight.

### Waukesha Symphony Orchestra

While strategic planning is never easy, the best process is one that prompts uncomfortable questions and generates passionate discussions. The Board and Staff of the Symphony had some painfully in-depth discussions, made some difficult decisions, and produced a three-year plan with strategies and objectives to achieve four overarching goals.

### Family Service of Waukesha

A comprehensive overview of the agency's strengths and weaknesses produced a series of recommendations aimed at building the capacity to serve more clients with more efficient operations.

### Association for the Rights of Citizens with handicaps

The organization learned the importance of the Good to Great adage about getting "the right people on the bus". The Board and managers are clear on how to ensure a quality workplace for the future. The efficiency improvements in operations are directed towards improving the organization's ability to achieve its mission.

## 2008 Evaluation Ratings

Grant Ratings	
5	0
4	2
Met Expectations	11
2	4
1	0

Consultant Ratings	
Excellent	10
Good	5
Fair	1
Poor	0
No Rating	1

16 Organizations

17 Grants evaluated

\$79,585 Awarded

\$40,486 Cash match

\$45,000 In-kind match

## EVALUATION REPORT HIGHLIGHTS

Seventeen grantee reports from 16 organizations were received in 2008. Some key accomplishments are highlighted from the evaluation reports and the accompanying work products.

- ❖ Five nonprofits increased understanding of the Board's governance responsibilities and enhanced the Board's participation.
- ❖ Six groups clarified organizational direction, identifying goals to achieve.
- ❖ Six grantees increased understanding of staff functions as distinct from the Board's roles and responsibilities.
- ❖ Three organizations increased efficiency and staff productivity through implementation of a technology upgrade.
- ❖ Four groups understand the organization's strengths and weaknesses and have a plan to address their challenges.
- ❖ Three agencies identified new funding opportunities and have a plan to diversify revenues.
- ❖ Three grantees became more aware of the fiscal health of their organizations and are now implementing recommendations to become more financially stable.
- ❖ Five nonprofits have implemented activities to build community awareness and promote their programs.

## ADVICE TO THE FUND

In addition to praise for the straightforward funding process and overall flexibility, several suggestions were made for the funding partners.

*"The application process was efficient and the consultant's service excellent, with the exception of meeting some preliminary deadlines and presentation demeanor."*

*"Your organization provides excellent administrative support and your application is very user friendly. The fast turnaround for grant applications is helpful and appreciated."*

*"I wish there was a way to have consultants recommended. The register gave us names (maybe too many) but it was the NMF staff that really made the difference between a mediocre experience and the excellent one we had."*

*"We were pleased with the responsiveness and encouragement of the Fund as well as the insights and recommendations of the consultant. We would be pleased to provide a testimonial of support on behalf of the Fund."*

*"As always, we would appreciate the opportunity for Waukesha County organizations to apply more frequently. However, we are very grateful for the opportunity to access funds for capacity building, and appreciate it whenever it is offered."*



## Nonprofit Management Fund of Waukesha County

### 2008 OVERVIEW

In September 2008, over 100 guests joined representatives of the Fund at Ten Chimneys to celebrate a decade of strengthening the nonprofit sector in Waukesha County. At the anniversary event, four funders in Waukesha County launched a "Strategic Alliance Fund" for local nonprofits pursuing formal organizational collaborations. Grants will begin in 2009.

Twenty-three grants for nine distinct purposes were awarded to 21 organizations last year. The technical assistance grants totaled \$93,725. In addition, the Fund awarded \$7,500 to BoardStar. The majority of grants went to human service agencies, followed by arts & culture, education, and a civic group.



Now in its fourth year, BoardStar continues to make a difference in nonprofits in Waukesha. Participants state that training they received will make a difference in their effectiveness as Board Directors, and that they will share new knowledge with their Boards, creating a secondary effect that goes beyond the actual numbers enrolled.

Generally, Waukesha represents about 15% of BoardStar's service, as reflected in membership, general contacts, web visitors, Board Doctor on Call, Greater Milwaukee on Board, and class attendees. A few organizations were represented at multiple classes, such as TYME Out, Summer Stage, ACAP, Interfaith Seniors Program, and the Waukesha Symphony. Phone consultation was made on topics ranging from using the Board matching service Greater Milwaukee on Board to firing an Executive Director. Four educational sessions and events were held in Waukesha locations; a total of 52 Waukesha Board Directors participated in BoardStar training.

### Grants By Mission

Mission	#	%
Human Services	15	63
Arts & Culture	6	25
Education	2	8
Civic	1	4
<b>Totals</b>	<b>24</b>	<b>100%</b>

### Grants By Purpose

Purpose	#	%
Board Development	4	17
Planning	4	17
Technology	4	17
Diagnostic Clinics	3	12
Marketing	3	12
Fundraising	2	8
Legal	2	8
Human Resources	1	4
Restructuring	1	4
<b>Totals</b>	<b>24</b>	<b>100%</b>

2008 Grants Summary	CYCLE 20	CYCLE 21	TOTALS
<b>Subtotal TA Grants</b>	\$48,225	\$45,500	\$93,725
<b>Subtotal Initiative Funding</b>	\$7,500	-0-	\$7,500
<b>Grants Totals</b>	<b>\$55,725</b>	<b>\$45,500</b>	<b>\$101,225</b>