

## EXECUTIVE SUMMARY

### REPORT ON THE EVALUATION OF COMMUNITY MEMORIAL FOUNDATION'S BUILDING ORGANIZATIONAL EFFECTIVENESS INITIATIVE, 2014-2016

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The mission of the Community Memorial Foundation (CMF) is to improve the health of people who live and work in its service area, the western suburbs of Cook County and southwestern DuPage County. CMF carries out its mission and vision through the following strategies: Building Organizational Effectiveness (BOE) Initiative, Responsive Grant Program, Healthcare Access Program, and Regional Health and Human Services Agenda.

Through the BOE Initiative, CMF provides nonprofit organizations with a coordinated set of resources for leadership and organizational development designed to build capacity and strengthen CMF grantee organizations. From its outset, the BOE Initiative was designed in conversation with the foundation's community partners to address unmet organizational needs. The evaluation of the BOE Initiative is a new and important strand of this conversation. Its findings provide a detailed and multi-perspectival view of the BOE Initiative's impacts across grantee organizations and ongoing challenges.<sup>1</sup>

#### KEY FINDINGS

- CMF's partnership with its grantee community enables it to learn about and respond to capacity-building needs in a timely fashion to strengthen individual organizations and the local nonprofit sector.
- The BOE Initiative substantially impacts participant organizations by increasing capacity across levels of leadership and areas of operation.
- Participants in the BOE Initiative express high levels of satisfaction with the quality of BOE programs and appreciation for CMF's commitment to strengthening the capacity of their organizations.

#### CMF's Investment in BOE Initiative

- CMF tripled its investment in BOE capacity building programs between 2014 and 2016.
- CMF demonstrates the importance it places on building the capacity of nonprofit organizations in its service area by allocating 20% of its grantmaking expenditure for 2014-16 to the BOE Initiative.
- CMF allocated its investment in the BOE Initiative across three areas: Leadership Development (38%); Organizational Development (31%); and Challenge Grant for funds used at recipient's discretion (31%).

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<sup>1</sup> CMF's 2018 capacity building plan aligns with the findings of the evaluation with its continued focus on investing in people. Topics highlighted in the 2018 plan include succession planning, organizational mergers and sustainability, and preparing the next generation to principles and practices of philanthropy and community stewardship through the establishment of a program to support CMF's new Youth Board.

### **Organizational Participation in BOE Initiative**

- 77.4% of all CMF grantee organizations for 2014-16 participated in the BOE Initiative.
- 79 organizations participated in one or more BOE program between 2014 and 2016.
- The 79 participant organizations have budgets totaling \$600 million and nearly 4,700 full-time equivalent (FTE) employees.

### **Impacts of Participation in BOE Initiative**

- Participation in the BOE Initiative creates a community of practice across and within CMF grantee organizations.
- Organizational assessment identifies the need to increase diversity among board members and leads to restructuring and strengthening board; supports the transition of new ED/CEOs into their leadership role; and leads to more efficient staffing and distribution of supervision and leadership.
- Required board attendance at BOE's Leadership Institute increases board's knowledge and skills, and provides a shared framework and vocabulary for leadership and board.
- Board governance and leadership improve through board's involvement in BOE organizational development activities.
- Executive coaching provides ED/CEOs and their organizations with a valued resource across the phases of an executive's career and organization's development.
- Executive coaching increases the capacity of ED/CEOs to interact positively and productively with their board.
- Organizations experience tangible benefits from expansion of participant's skill set during and after completion of the 16-month leadership development program.
- Leadership development for middle managers assists organizations in meeting the need for career pathways for future leaders in the nonprofit sector.

### **RECOMMENDATIONS**

- Consolidate and extend the impact of the BOE Initiative by continuing to solicit and respond to the capacity-building needs of community partners at every stage of their organizational development.
- Continue to identify and support access to high quality capacity building resources, such as training programs, consultants, and executive coaches.
- Explore interest among CMF partners in using digital media and other technologies for accessing capacity building resources and building peer-based learning communities, including webinars, digital conferencing, and social media.
- Advocate across the philanthropic, public, and nonprofit sectors for a significant increase and sustained commitment to the allocation of resources for building leadership and organizational capacity at nonprofit organizations.
- Support organizations to assess opportunities for strategic partnerships and social enterprise.
- Build the capacity of CMF partners for organizational learning and evidence-based decision making by providing resources to institutionalize rigorous organizational assessment and program evaluation.