

*Hearing the Heart of the Matter:
Listening to and Learning from Grant Recipients*

**A Summary Report of the Comprehensive Assessment Process
for the Princeton Area Community Foundation**



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Executive Summary

The Princeton Area Community Foundation contracted *AngelWorks* Consulting, LLC to conduct a comprehensive assessment project which began in September 2011 and concluded in February 2012. The goal of the assessment was to provide substantive feedback from grantees to ensure that the Community Foundation's resources are most effectively utilized. The project sought to identify the unmet challenges faced by grantees along with the barriers to addressing those challenges. Further, the project sought to identify the benefits and drawbacks to the current grant application and grant-funding process along with ways the current guidelines help and/or hinder grantees in addressing their needs and fulfilling their missions.

The assessment encompassed five phases and three primary data collection methods. Nonprofit leaders provided extensive input through focus groups, interviews, and an on-line survey. A representative sample group from 2009-2011 grantees was identified and engaged most extensively in the project. Findings from data gleaned from the sample group were confirmed and expanded upon by a broader set of nonprofits through participation in an on-line survey.

As a result of this comprehensive investigation, the *AngelWorks*' team presents results including dominant themes that emerged from four focus groups, the findings from 44 one-on-one interviews and survey data from 122 nonprofit leaders. Findings reflect organizational priorities, recent accomplishments, use and skill levels of volunteers, boards' functioning levels, challenges faced, and the barriers to addressing those challenges. Grantees rated current grant guidelines and the application process. They expressed opinions regarding funding options and articulated recommendations for changes to the grant guidelines, application, and awards process. Additionally, grantees considered roles and supports needed from the Community Foundation. Several dominant themes surfaced across multiple project phases and are synthesized into four central ideas for consideration by the Princeton Area Community Foundation Board of Trustees and Grants Committee.

Grantees indicated that they are currently functioning in a climate of limited and shrinking resources. They continue to make a tremendous difference in the lives of Mercer County citizens by delivering vital programs and services in spite of diminishing resources. They view the Community Foundation as a philanthropic leader and welcome an expanded role for the Foundation beyond funding. They want multi-year grants for better financial planning, and help with forming productive partnerships where fundable projects develop that can benefit from complementary strengths. Grantees expressed a desire for future opportunities to communicate their accomplishments, challenges, needs, hopes, and dreams to the philanthropic community.

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Project Rationale and Logic

The Princeton Area Community Foundation was created to promote giving as a shared community value and celebrated its 20th anniversary in 2011. The Community Foundation is a secure, well-managed \$80 million consortium of funds overseen by a diverse board of civic leaders, where donors become true philanthropists deploying grants to tackle the region's most urgent challenges and promising opportunities. The Community Foundation's resources improve lives throughout the greater Mercer County region.

The Community Foundation is a public institution preparing for the future, considering the needs of people in the community (as neighbors) and serving as good stewards of donors' gifts. The mission of the foundation is articulated as "promoting philanthropy to advance the well-being of our communities forever." This mission is accomplished, in part, by providing grant funds through the *Greater Mercer Grants Program*.

The *Greater Mercer Grants Program* accepts grant applications twice annually from tax-exempt 501 (C) 3 nonprofits and awards grants three months later. This program is competitive and funds projects benefiting residents of Mercer County, New Jersey and the immediately adjoining areas of surrounding counties. The current grant guidelines have been in place for the past five years and are scheduled for review by the Grants Committee. The Community Foundation engaged in this project in order to make data-driven decisions about future grant guidelines and processes.

Description of the Assessment Initiative

The Community Foundation is examining its current grant making practices to make certain that valuable resources are appropriately utilized in assisting local organizations to fulfill their mission. *AngelWorks Consulting, LLC* was contracted to design and implement a comprehensive assessment process for the Princeton Area Community Foundation. The ultimate goal of the assessment was to provide substantive feedback on the developmental needs of grant applicants in order to ensure that the Community Foundation's grant making is aligned with those needs. The assessment sought to answer the following questions:

- What unmet challenges are funded agencies facing? What are the barriers to addressing those challenges? How can the Community Foundation help organizations address these obstacles?
- In what ways are the current guidelines and processes helping and/or hindering organizations in fulfilling their mission and addressing their developmental needs?
- What are the benefits and drawbacks of the current grant funding process?
- How can grantees utilize financial resources in the most effective ways?
- Where are misalignments (if any) between the Community Foundation's vision of supporting grantees' developmental needs and the current grant funding process?

Evaluation and Data Collection Methods

The assessment included five phases and multiple data collection and analysis processes. Data was collected via phone interviews, focus groups, one-on-one interviews, and an on-line survey. The one-on-one interviews took place mainly on-site at the offices of the nonprofit organizations in the representative sample group.

In phase one, grant awards from the 2009-2011 years were analyzed and stratified into three size categories to determine a representative sample group. Within each category, a sample group was randomly selected. A more detailed description of the selection process for the sample group is outlined in the next section of the report.

In phase two, Executive Directors and Board Chairs from the sample group were invited to one of two role-alike introductory meetings. These ninety-minute meetings prepared nonprofit leaders for participation in the assessment, facilitated focus group data collection and set-up the next phase of the project. An agenda and set of materials used in the meetings is included as Appendix A.

Executive Directors and Board Chairs participated in one-on-one interviews in phase three of the assessment. During this phase, leaders shared recent accomplishments, identified organizational priorities within the next eighteen months, current and recent challenges, pending needs, and their hopes and dreams. Additionally, participants reflected upon ways the Community Foundation has served as a resource to their organizations or to participants in their roles as nonprofit leaders. They made recommendations about the grant guidelines and process, and framed key messages for the Community Foundation. Data was collected on the service areas for the organizations, the size of staff and board, and approximate number of people served annually. A copy of the *Interview Face Sheet* that guided data collection during the interviews is included as Appendix B.

A summary of the data collection activity completed during the first three phases is included as Appendix C. This summary details dates, events, registrations for each activity, the actual attendees at introductory meetings as well as the number of participants in one-on-one interviews.

Data from the first three phases was analyzed and used to formulate an on-line survey. In phase four, invitations to all grantees from 2009-2011 were extended for survey completion. The Community Foundation invited contacts within their data base to complete the on-line survey by clicking the link embedded with their *Constant Contact* communication. The survey opened December 8, 2011 and closed January 4, 2012 and was completed by 122 nonprofit leaders.

The final phase of the project entails submission of a summary report and recommendations to the Board of Trustees and subsequent work with the Grants Committee.

Determination of Participants in the Representative Sample Group

AngelWorks' consultants reviewed data from the Community Foundation's grant award data-base and determined that 131 grants were awarded during the 2009-2011 time period. The recipients were stratified into three categories according to the dollar amount of the grant award received. This categorization ensured a representative sample of organizations who received awards during this time period. The stratified categories and corresponding percentage of grant awards were as follows:

Summary of Grant Awards for 2009-2011

| | | Number of Awards during 2009-2011 | Percentage of Awards for 2009-2011 |
|---------------|-------------------|-----------------------------------|------------------------------------|
| Small | \$ 0-\$15,000 | 74 | 56% |
| Medium | \$15,001-\$30,000 | 51 | 39% |
| Large | \$30,001 + | 6 | 5% |
| Total | | 131 | 100% |



Using a 95% confidence level, with a margin of error of 15%, the sample size was determined based on the total population size of 131 grant awards. Thus, a sample of 32 participants was chosen from awardees. To ensure the sample mirrored the same percentages from the total population, the awardees were randomly selected within the three categories. The number of participants per category was determined using the following formula:

| | | |
|-----------------------------|-------------------------------------|---------------------------------------|
| Total number in sample size | X percentage of awards for category | = Number of Participants to be Chosen |
| Example for Small Category | $32 \times 56\% = 18$ | |

| | | Percentage of Awards for 2009-2011 | Number of Participants to be Chosen |
|--------|--------------------|------------------------------------|-------------------------------------|
| Small | \$ 0-\$15,000 | 56% | 18 |
| Medium | \$15,001-\$30,000 | 39% | 12 |
| Large | \$30,001- \$45,000 | 5% | 2 |
| | | 100% | 32 |

Random selection was used to identify organizations within the strata. In order to maximize the breath of feedback, any organization randomly selected a second time was replaced by a subsequent selection.

Summary of Project Activities

“Participating in this meeting has helped us to measure the impact of what we do and to realize the wealth of other resources that exist in the Mercer area.”

Executive Director during the Introductory Meeting

The project encompassed a series of activities beginning in September 2011 and ending in February 2012. These activities began with the consultants refining a contact list for the representative sample group. Consultants introduced the project and their firm to nonprofit leaders while inviting them to attend an introductory meeting. Next, consultants planned and hosted a series of introductory meetings for role-alike leaders. During the introductory meetings, sample group participants engaged in focus groups which were conducted by consultants as café conversations. The introductory meetings were followed by on-site interviews with Executive Directors and Board Chairs. The project’s data collection activities concluded with the development, posting, completion and analysis of an on-line survey. Finally, consultants presented assessment results to the Board of Trustees and the Grants Committee. A more detailed description of each activity is outlined in the *Assessment Project Timeline* which is included in the report as Appendix D.

Results

The outcomes from the three data collection points are described in this section of the report and are organized into three subsections. The first subsection presents a summary of the themes that emerged during the café conversations/focus groups. The themes are separated into two groupings. The first grouping recaps themes from the two Executive Director meetings and the second grouping recaps themes from the Board Chair meetings.

The second subsection contains a highlight of themes from the one-on-one interviews and also distinguishes between the themes that emerged from Executive Directors and

Board Chairs. Commentary from Executive Directors and Board Chairs regarding the Community Foundation's grant application and grant making process is detailed following the second subsection. The third subsection presents results from the on-line survey. Results are reported by role where relevant and when role-specific views illuminate findings.

1. Summary of Café Conversations/Focus Groups Findings

1.1. Themes from the Executive Directors' Meetings: September 28 and October 4, 2011

"The meeting has helped me to see that we must engage key leaders around the issue of social responsibility."

Executive Director at Introductory Meeting

Commentary during the Café Conversations/Focus Groups held during the September 28 and October 4, 2011 Introductory Meetings highlighted eight challenges facing grantees:

1. Locating, recruiting, and preparing candidates for effective board service. This challenge is amplified when organizations attempt to recruit diverse community members for their boards
2. Functioning in a society that is shifting towards greater polarization along socio-economic lines resulting in an apparent reduction of empathy for people in need
3. Providing services in an urban area that conjures negative perceptions and hampers the ability of nonprofits to engage volunteers in service delivery
4. Lack of internal and external knowledge about the scope and function of their own and other area nonprofit organizations
5. An unmet need to forge partnerships with other nonprofit organizations, governmental agencies, the corporate community, faith-based organizations and colleges and universities
6. Seeking grant funding is competitive and sometimes hinders service delivery. There is a hesitancy to collaborate because of a variety of fears - loss of identity, limited funding for partners and having ideas usurped.
7. Resource scarcity – At present, there is a perception that resources are scarce. There have been decreases in foundation, corporate and government funding resulting in a need to find diverse funding resources.
8. Funding Concerns – Grantees need more stable, long-term funding to get a better return from the time invested in applying for grants. Some larger organizations are working to build a network of donors in efforts to move beyond dependence on grant dollars.

Executive Directors offered the following list of twelve ways the Community Foundation could help nonprofit agencies to address their current challenges:

1. Develop a vision of philanthropy at the local and national level and communicate the vision to nonprofit organizations and the funding community.

2. Provide a structure for collaboration such that nonprofit organizations can work in partnership with other agencies and with faith-based, governmental and higher educational institutions.
3. Conduct and/or commission a social services impact study.
4. Provide differentiated professional development sessions to meet the learning needs of novice and seasoned nonprofit leaders. Topics might include board development, fundraising, strategic planning, cultural competency, mission specific interests, networking opportunities and self-care.
5. Provide consultant services and external experts for staff sharing i.e., development and fundraising expertise.
6. Provide metrics for measuring success.
7. Arrange visits to nonprofit organizations to increase donors' education, exposure and opportunities for future connections.
8. Build a sense of community among nonprofit groups.
9. Utilize funding as incentives for collaboration.
10. Serve as a match maker for donors with other nonprofits, potential board candidates with agencies, partnerships with government, higher education institutions, faith-based and corporate giving officers.
11. Serve as a financial think-tank, listener and problem-solver; help with survival strategies, budgeting, capital campaigns.
12. Serve as a warehouse of in-kind resources – furniture, space and shared staff, especially grant writers.

In reviewing the data from the Café Conversations/Focus Groups, a list of ten recommended and needed roles for the Community Foundation began to take shape. The assessment team agreed to investigate interest in the Community Foundation's assumption of these roles by a wider range of grantees. As a result, the on-line survey presented the role list and instructed grantees to respond to the known roles as well as needed roles for the Community Foundation. The identified roles are listed below.

1.1A Recommended/Needed Roles for the Community Foundation:

1. Advocate: push the envelope with funders; help to change the climate regarding government's role
2. Educator: what it means to be an educated donor, advising donors on effective philanthropy
3. Change Agent
4. Conduit/Match-maker: board members with potential partnerships and donors, linking with the broader funding community, and with individual donors and nonprofit organizations
5. Lobbyist: voice for nonprofit organizations on a broader stage/scale; influence the political agenda so that there is increased compassion and empathy
6. Problem-solver/Listener/Supporter
7. Community Builder: among nonprofit organizations and for donors with nonprofit organizations
8. Professional development and technical assistance provider
9. Organizer: host shared calendar for event planning/scheduling

10. Visionary: keeper/communicator of community needs and how best to meet them

1.2 Themes from the Board Chairs' Meetings – October 5 and 12, 2011

Six challenges facing grantees were articulated in response to queries during the Café Conversations/Focus Groups held during the October 5 and 12, 2011 Introductory Meetings for Board Chairs. These challenges are listed below and include:

1. Identifying, recruiting and retaining quality board members who represent diverse cultures and who understand and will meet expectations for board service
2. There is a reduction/lessening of empathy for clients served by nonprofit organizations. The community is unaware of the scope of existing needs and how nonprofit agencies meet those needs
3. Funding concerns, resource Scarcity; operating in survival mode creates short-term thinking and inhibits systemic planning. Need to move beyond dependency on grants
4. Marketing the impact of services on the community to the citizenry and potential funders/donors
5. Lack of internal and external knowledge about the scope of other area nonprofits and their programs and services
6. Difficulties locating partners for collaboration in program and service delivery as well as knowing how to collaborate effectively
7. Boards/organizations operate in isolation and in a mode of competition vs. cooperation

Board Chairs offered eight ways the Community Foundation could meet the needs of grantees. Their recommendations are specified below.

1. Partner with organizations to enhance marketing capability in the funding and broader community, help to tell the story of the impact of programs and services on the community
2. Offer a cultural competence workshop series for nonprofit leaders
3. Hire a development specialist to serve multiple organizations in a collaborative/cooperative manner; this could potentially increase the number and quality of successful grant applications and lead to more grant awards and collaborations based on complementary programming and client services
4. Identify and connect potential collaborators based on the Community Foundations' knowledge of the organizations
5. Offer training/workshops on how to assess and decide the appropriateness of potential collaborations as well as how to engage in successful collaborations
6. Develop a communication forum (on-line potentially) to facilitate communication between organizations about upcoming events and local developments
7. Host periodic meetings for Executive Director and Board Chair to encourage collaboration, to develop supportive relationships and to foster creative problem solving

8. Offer training for interested community members regarding the roles and responsibilities of board membership and to develop the skills necessary to serve as effective board members; subsequent to trainings, facilitate connections between organizations and potential board members
9. Provide training and support for all organizations in their first year of funding
10. Educate agencies and how to better manage their own endowments, develop better fundraising strategies and how to build a network of donors

Board Chairs identified two roles they would like to see the Community Foundation assume. Both of these roles align with those previously identified by the Executive Directors. Board Chairs also would like the Community Foundation to serve as a:

1. Conduit/match-maker for locating potential board members and donors, for help in forming partnerships with the broader funding community and with local area nonprofit organizations
2. Lobbyist: a voice for nonprofit organizations on a broader stage/scale to influence the political agenda so that there is increased compassion and empathy for their clients and a better understanding of the services provided to them

Introductory meeting participants were asked to review the current grant guidelines and to offer feedback about the guidelines and the grant application process. The bulleted list below summarizes commentary from the Executive Directors and the Board Chairs during the meetings.

1.2A Grant Application/Process Commentary (Executive Directors):

- Funding should be for multiple years
- It is difficult to plan ahead with single-year grant awards
- The Foundation might consider apportioning the dollars available into single-year and multi-year awards
- Overall, the guidelines are clearly written and the process is relatively easy to follow
- The paragraph about funding operating support and capacity-building, needs more amplification and is unclear

1.2B Grant Application/Process Commentary (Board Chairs):

- Multi-year funding would curtail the feeling of being on the edge
- The “additional selection” criteria required for grant funding has been used as a catalyst for good reflective conversation by boards when applying for grants
- We would appreciate additional feedback from the Community Foundation about their view of our organization
- When grant applications are denied, it would be helpful to know why as well as how to get to an affirmative decision on future applications
- We need funding for general operating expenses; the guidelines are unclear about this

2. Summary of Findings from One-on-One Interviews

AngelWorks' consultants conducted a total of 44 interviews during the assessment period beginning on October 6 and concluding on November 9, 2011. One-on-one interviews were conducted mainly on-site in the agencies' offices and included 32 Executive Directors and 12 Board Chairs. Interviews with Board Chairs were generally conducted in their offices at work sites away from their agencies' locations. At two of the interviews, the Executive Directors included senior staff members. Consultants took copious notes during interviews and recorded these notes using an *Interview Face Sheet* which is included in the report as Appendix B.

During each interview, participants were asked to share information about their agency's size based on the annual operating budget. They were also asked to indicate the number of full and part-time employees, the current board size, the number of volunteers engaged in the work of the organization and the approximate number of people served by the organization. Additionally, interviewees were asked to share recent accomplishments, priorities within the next eighteen months, challenges faced, specific organizational needs, and their hopes and dreams (vision) for their organizations. Finally, interviewees were asked to comment on ways the Community Foundation has served as a resource for the agency, recommendations for shifts in grant guidelines and processes, and any messages they deemed important to convey to the Community Foundation. The narrative included in this report section summarizes the findings from the one-on-one interviews.

Nonprofit organizations are challenged to maintain services and programs as well as staffing in a climate of limited resources. Reductions in government funding, a perception of scarcity and the reality of reduced operating expenses intensifies organizational needs in a tight economic climate. As a result, grantees articulated a need for an expanded role for the Community Foundation. The need is well beyond the granting of funds and includes a desire for the Community Foundation to assume a leadership role and serve as a conduit for identifying and preparing board members.

Grantees expressed interest in the foundation's continuation of educational programming which is highly valued and has been well-aligned to their needs. They would like the Community Foundation to extend this role further by providing differentiated capacity-building and technical assistance. Additionally, grantees hope the Community Foundation will serve as an advocate for nonprofits in the broader funding and governmental community.

Executive Directors and Board Chairs elaborated on one of the major themes that emerged during the focus groups. The desire for multi-year, taped funding echoed resoundingly across the participants in the representative sample group. As one interviewee stated, "When we get multiple hits from various funders, it is disastrous! There should be a way for foundations to stagger their non-renewals!"

Further, the challenges of locating and forming partnerships with area nonprofits, potential donors and funders were recurring themes heard from the interviewees. Commentary in this domain aligned with focus group input from the introductory meetings.

Executive Directors and Board Chairs are not fully aware of the services available to them from the Community Foundation. This ambiguity results in some organizations accessing the Community Foundation's staff with more frequency and for a wider variety of purposes. Other agencies are unsure of the appropriateness of reaching out to the Community Foundation during grant periods. Should the Community Foundation want to provide support to grantees, it will be important to define the support it can and/or is willing to provide and how agencies can tap into these resources.

Nonprofit leaders would also value having clearer metrics for measuring the success and for identifying growth areas for their organizations. Such metrics would provide grantees with the tools to articulate and better define their needs as well as to assess if and how well they are meeting those needs.

Adequate staffing is a challenge for smaller agencies with annual operating budgets of less than one million dollars. Several of the Executive Directors and Board Chairs in smaller agencies described their organizations as being severely understaffed, especially on the administrative side of their operation. They further described the staff as being stretched from assuming multiple roles and managing multiple projects. As a result, these agencies face high employee turnover and staff burnout. Ultimately, these agencies face an increased human resource cost which taxes their existing limited resources.

Additionally, the smaller grantees face greater challenges in locating and securing willing and capable board members with the confidence and experience in fundraising and donor networking at a level sufficient to generate desperately needed operational and programming funding. Conversely, larger organizations rarely identified board development as an unmet need. However, they identified locating potential board members as a challenge.

Another distinction between the grantees' size lies in where the intellectual energy of the leadership is focused. For example, the larger organizations view themselves as higher functioning with time to reflect upon their needs in areas beyond daily operations, for example political advocacy, whereas smaller organizations tended to highlight day-to-day functional needs. Further, larger organizations seek more advanced topics and areas of work for professional development and technical assistance. For example, suggestions for these areas of service tended to include management of endowments and cultivation of large donors.

Another theme that emerged is the consideration of collaborations between organizations in order to apply for larger grants for complementary programming and services aligned to their missions. While this theme was primarily raised by larger,

higher functioning (self-classified) organizations, it was echoed by a few smaller ones as well.

Agencies who cannot afford experienced development officers/grant writers are in competition with those agencies that can. This leads smaller organizations to use more human resources to deliver products and services. This dynamic can result in smaller organizations delivering services and programming at a different quality level as they strive to provide the best services possible with the resources available. Some Executive Directors in these smaller organizations long for skilled development and grant writing professionals even if they would need to be shared with other organizations.

One of the Executive Directors described the need for the Community Foundation to support operational expenses by saying, “Funding programs is wonderful and necessary. However, operating support and staffing are critical needs.”

Another area of need expressed by several interviewees is for help in developing capital campaigns and funding much needed facility improvements.

Most of the interviewees expressed sincere gratitude for the role the Princeton Area Community Foundation plays in the Mercer County community. It is a respected and highly valued resource for seasoned and novice nonprofit leaders. They were especially affirmed by the notion of the Community Foundation “listening to and learning from grantees.” One leader commented, “The Princeton Area Community Foundation is the only funder convening conversations like these. We need more and hope they continue to ask their constituents and the nonprofit community for their input.” The Community Foundation is viewed as a powerful voice in the funding and local advocacy community. A Board Chair summed up this point of view by stating, “When the Foundation uses its voice to speak, what it says truly matters”

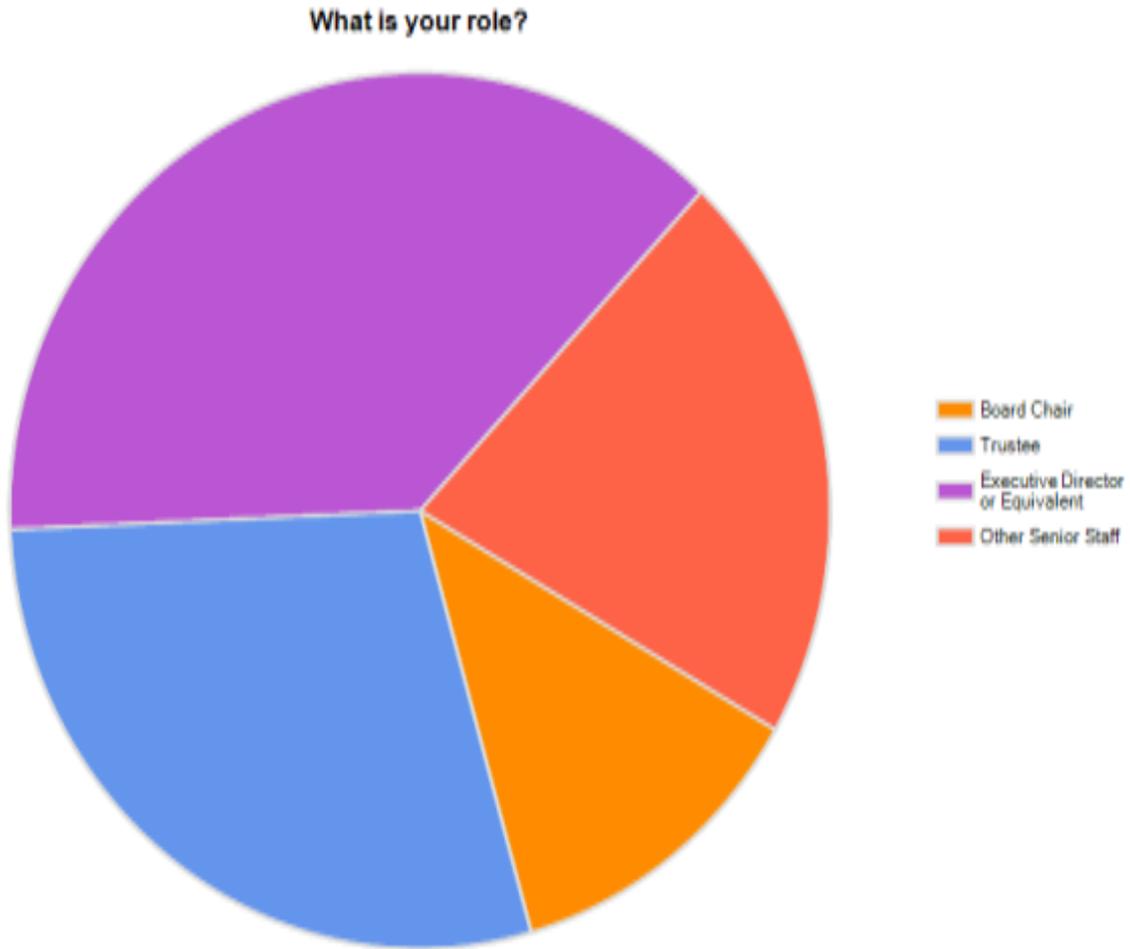
3. Summary Findings from the On-line Survey

3.1 Background Information about Survey Respondents

The on-line survey was completed by 122 participants, 50 of whom were board members and 72 of whom were executive directors and other senior staff. Table One below displays the breakdown of survey completers by role.

Table One: Role of Survey Respondents

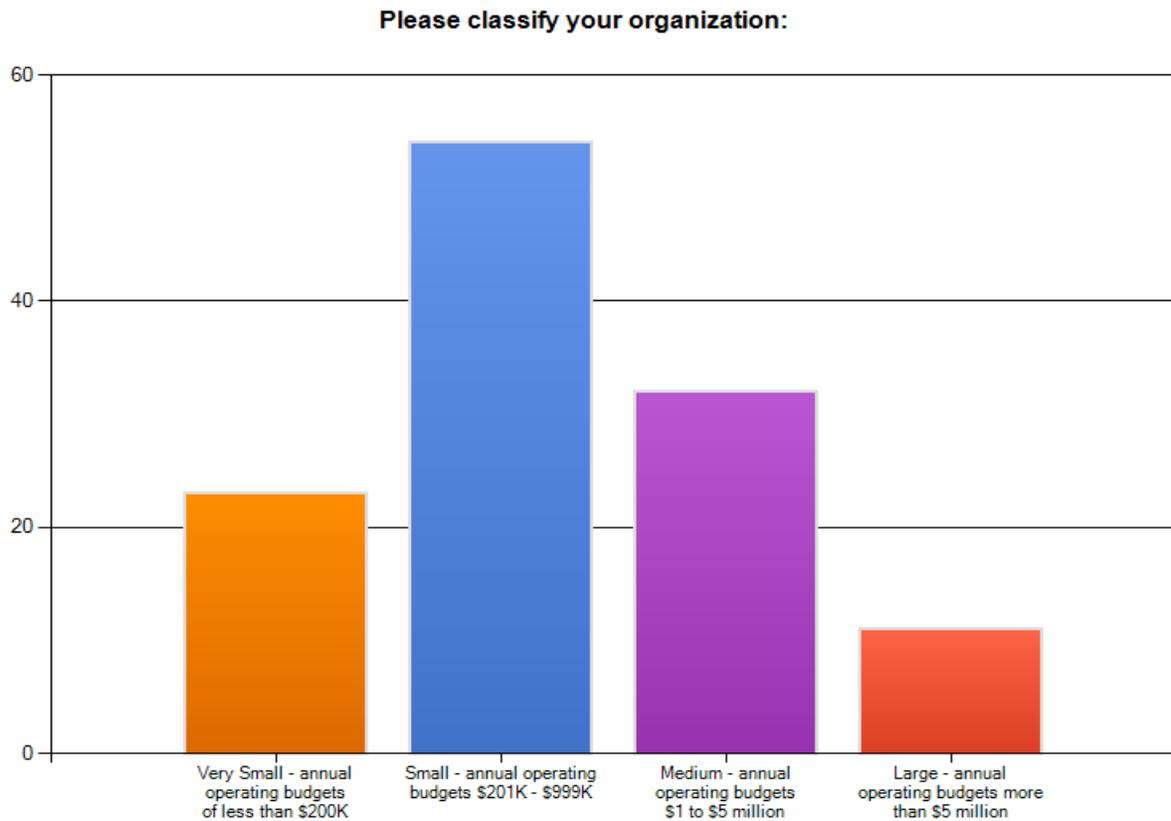
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|---------------------------|-------|-----|
| Board Chair | 12.3% | 15 |
| Trustees | 28.7% | 35 |
| Executive Director | 37.7% | 46 |
| Other Senior Staff | 21.3% | 26 |
| Total | 100% | 122 |



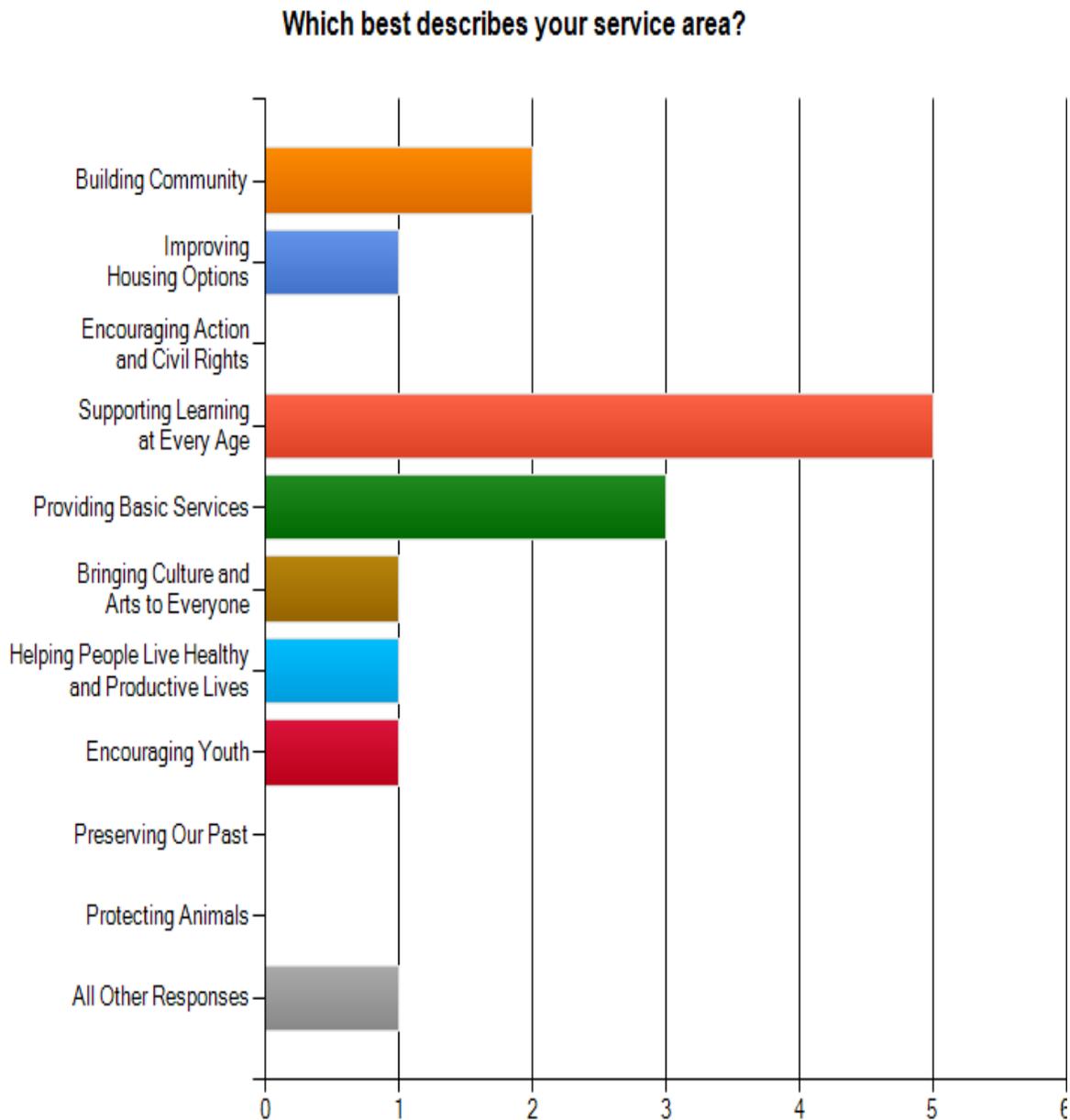
Participants classified their organizations into one of four categories based on annual operating budgets. The largest group of respondents, 45%, has annual operating budgets ranging from \$201K to \$999K. Table Two indicates how survey participants classified their organization's size.

Table Two: Organization Size of Survey Respondents

| | | |
|---|-------|----|
| Very Small – annual operating budgets less than \$200K | 19.2% | 23 |
| Small – annual operating budgets \$201K - \$999K | 45.0% | 54 |
| Medium – annual operating budgets \$1 to \$5 million | 26.7% | 32 |
| Large – annual operating budgets more than \$5 million | 9.2% | 11 |



A range of service areas was represented by the survey participants. Organizations described as providing basic services, bringing arts and culture to everyone, and helping people live healthy and productive lives, were the largest groups of survey respondents. Table Three shows the range of survey participants by service area type.

Table Three: Survey Respondents' Agency Service Area

3.2 Organizational Priorities

The organizational priorities identified by respondents were grouped into two main categories and include focusing on mission and generating supports to achieve missions. Responses that are mission driven include:

- Supplying food and feeding the poor
- Prevention of substance abuse
- Advocating for immigration reform
- Opening a food pantry and a thrift shop
- Providing subsidies to families
- Successful performance seasons
- Health education programs
- Opening a cultural and education center
- Continuing and improving service delivery
- Expanding services and increasing hours of service
- Helping clients to adjust to changes
- Geographical expansion

Responses focused on generating supports to achieve mission include:

- Fundraising, financial solvency, stability, increase private funding
- Increase revenues for sustainability
- Analyze and report outcome measures
- Adapting to changes in funding streams
- Build capacity of staff, staff training, and job restructuring
- Deciding to merge with a larger organization
- Board development
- Recruiting volunteers and increasing volunteer service
- Transition planning for CEO/Director
- Strategic planning
- Improved visibility; publicity and public education about agency services
- Facilities improvement

3.3 Organizational Staffing

Survey respondents indicated that the number of full and part-time employees working in their organizations ranged from less than five to 200 employees. By far, most survey participants were affiliated with nonprofits with less than five full and part-time employees with 44% and 64% respectively. Another 34% of respondents reported their organizations employed less than fifteen full-time employees, while 14% indicated a comparable part-time employee size. The average number of full-time staff in the organizations of survey respondents is seventeen, with an average number of part-time staff reported as thirteen.

3.4 Recent Accomplishments

Survey respondents reported a range of recent accomplishments for their organizations. These included:

1. The ability to maintain and/or increase services
2. Successful collaborations with other agencies
3. Completion of strategic plans

4. The ability to remain fiscally responsible within the constraints of dwindling resources.

Fifty-five of the respondents expressed pride in their ability to maintain and increase their reach through expanded services and/or the numbers of people reached through agency programs. Respondents also listed the ability to improve their financial health through endowments, annual funds and other campaigns as accomplishments. Eight respondents identified successful collaborations with other organizations as accomplishments. Additionally, gaining accreditation appropriate to the agency, hosting events and staff or board enhancements were listed as accomplishments.

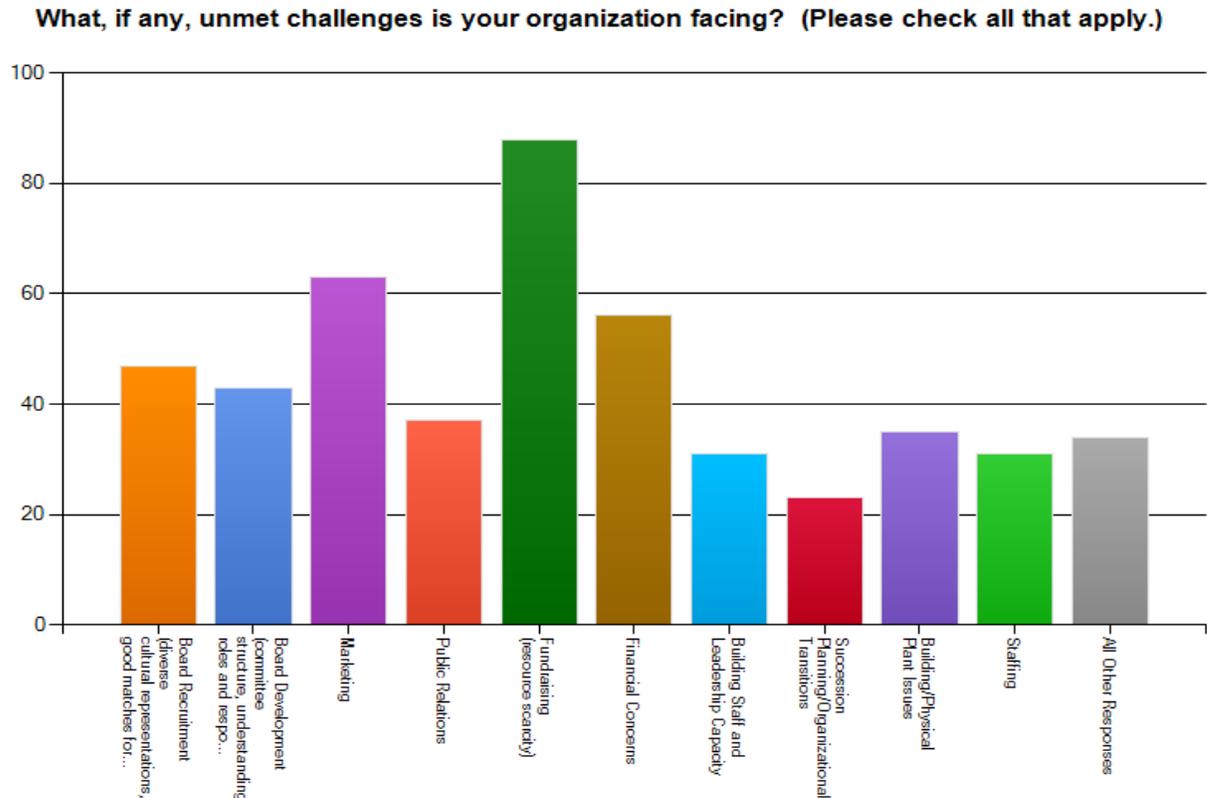
3.5 Use and Skill Level of Volunteers

Ninety-nine percent of the nonprofit leaders who completed the survey report that volunteers are utilized by their organizations. However, only 50% agree that they have enough volunteers with the right skill sets. Respondents reported they use between zero to more than 1,500 volunteers. The most often reported number of volunteers is 30, followed by a range of 100 to 300 volunteers.

3.6 Challenges Faced by Grantees

“We need support to help us grow our organizations and diversify our funding streams”
Executive Director during Focus Groups

Survey data confirmed several of the earlier themes which emerged from the focus groups and one-on-one interviews regarding the identified challenges confronting grantees. They face a myriad of unmet challenges. By far, the greatest challenge is fundraising to counter the scarcity of resources. Eighty-one percent of the respondents identified this as a challenge, followed by marketing (52%) and financial concerns (52%) as challenges. Additional unmet challenges include board recruitment and board development. Table Four presents an overview of the unmet challenges.

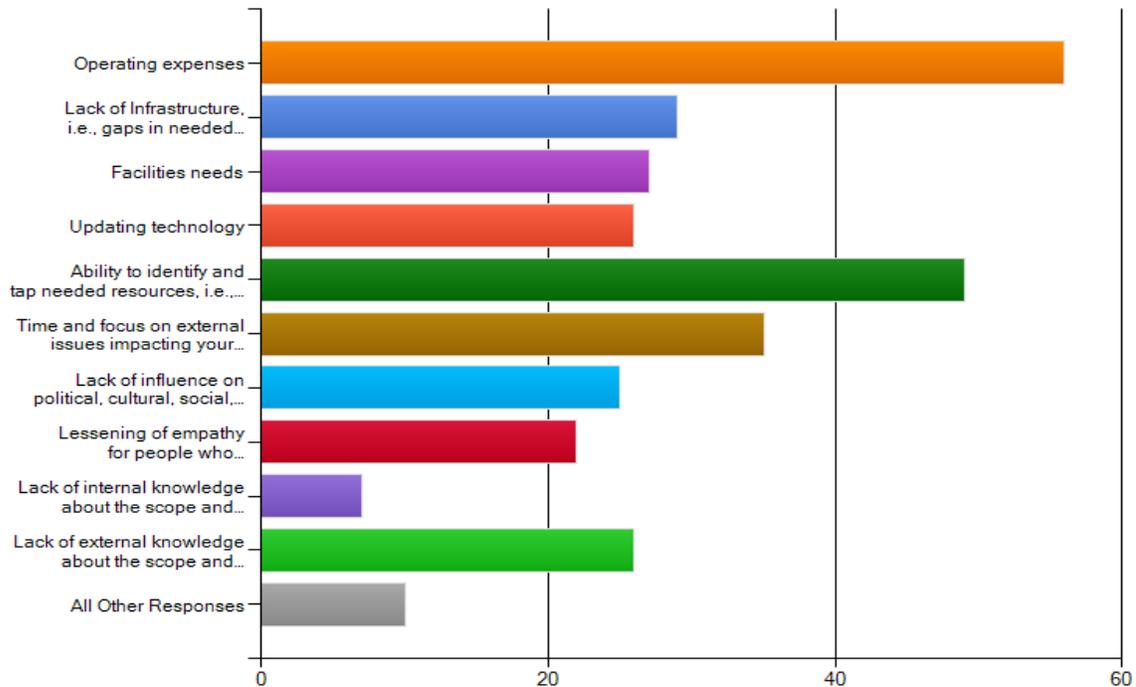
Table Four: Unmet Challenges

3.7 Barriers to Addressing Challenges

The survey results provide some insights into the barriers impeding grantees from addressing the challenges they face. Overwhelmingly, operating expenses was the most selected barrier by 53% of responders. The second highest selection, with 48% of responses, was the ability to identify and tap needed resources, for delivering and /or expanding services. Following closely behind were time and focus on external issues impacting organizations (political, cultural, social, economic shifts), lack of infrastructure (gaps in needed roles and job functions) and a lack of external knowledge about the scope and function of other nonprofit organizations with 34%, 28% and 26% respectively. Table Five illustrates the selections chosen by respondents.

Table Five: Barriers to Addressing Challenges

What, if any, are the barriers to addressing those challenges? (Please check all that apply.)



Please refer to Appendix E (Question #12 on page 3) for the full text of options for this survey item as the full text does not appear in Table Five.

3.8 Impact of Trenton's Image on Volunteer Recruitment

A concern was voiced about the image of Trenton hampering volunteer recruitment for some Trenton-serving nonprofits during the project's earlier focus groups. As such, two questions were included in the on-line survey to gauge the extent of this dynamic. One question asked respondents to indicate if their agency was either based in Trenton, or if not based there, if it provided services to the Trenton community. Survey participants were instructed to skip the next question if they responded negatively to the first question, and to answer the upcoming question if they responded affirmatively to the preceding question. Seventy-seven percent of respondents indicated that their organization was either based in Trenton, or if not based there, provides services to the Trenton community. Fifty-nine percent of respondents answered "no" when asked if the image of Trenton conjures negative perceptions and hampers their organization's ability to recruit and engage volunteers. Table Six and Seven highlight responses to both questions.

Table Six: Agencies Located in or Providing Services in Trenton

Is your organization either based in Trenton, or if not based there does it provide services to the Trenton community?

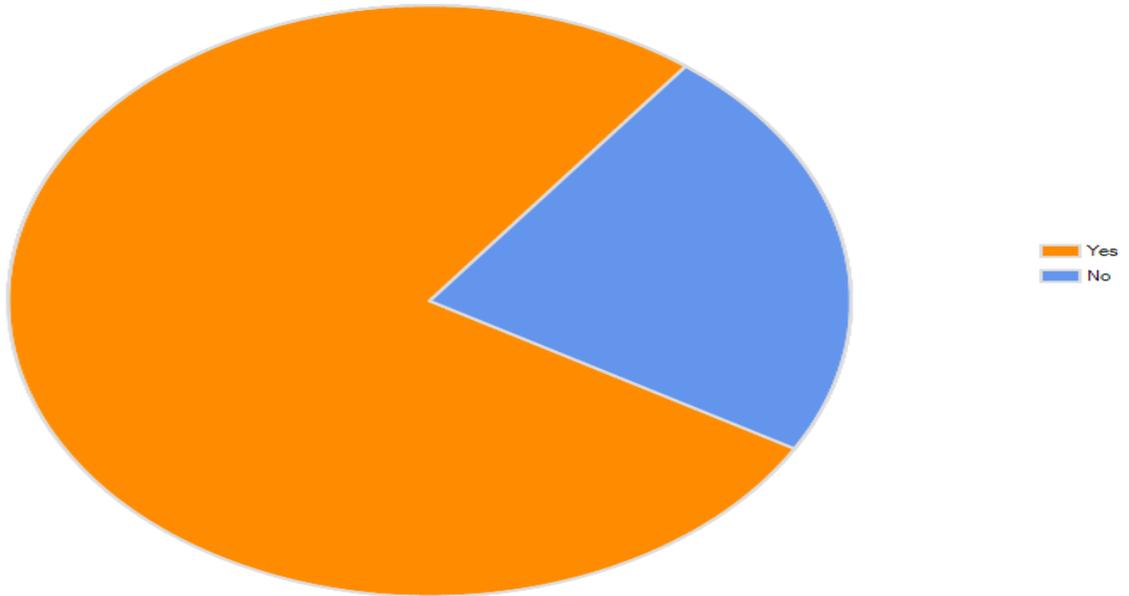
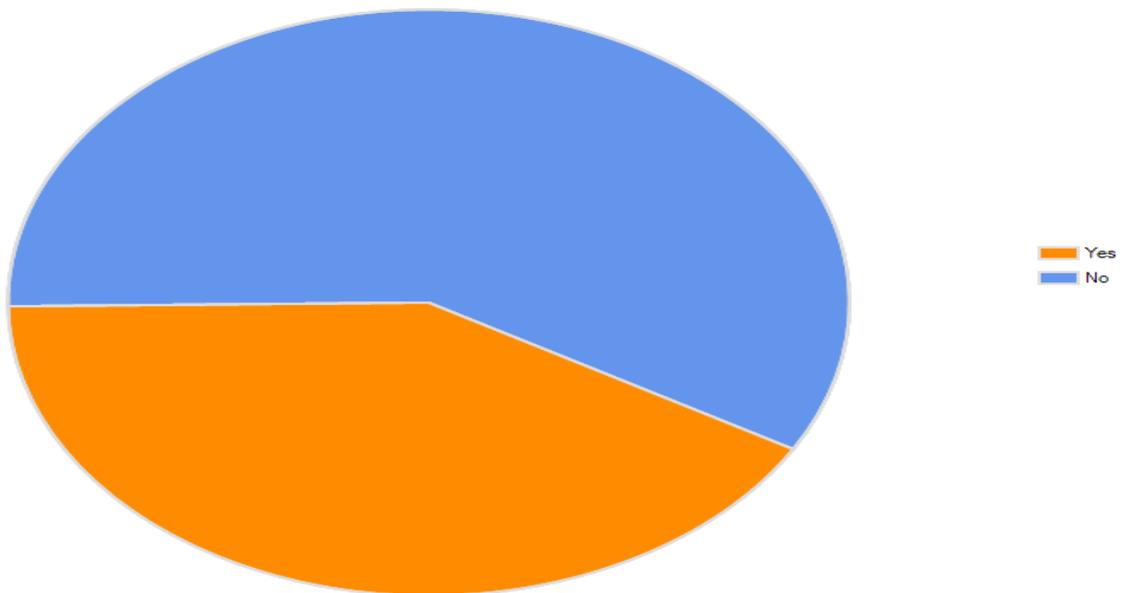


Table Seven: Impact of Trenton's Image on Volunteer Engagement

Does the image of Trenton conjure negative perceptions and hamper your ability to recruit and engage volunteers?

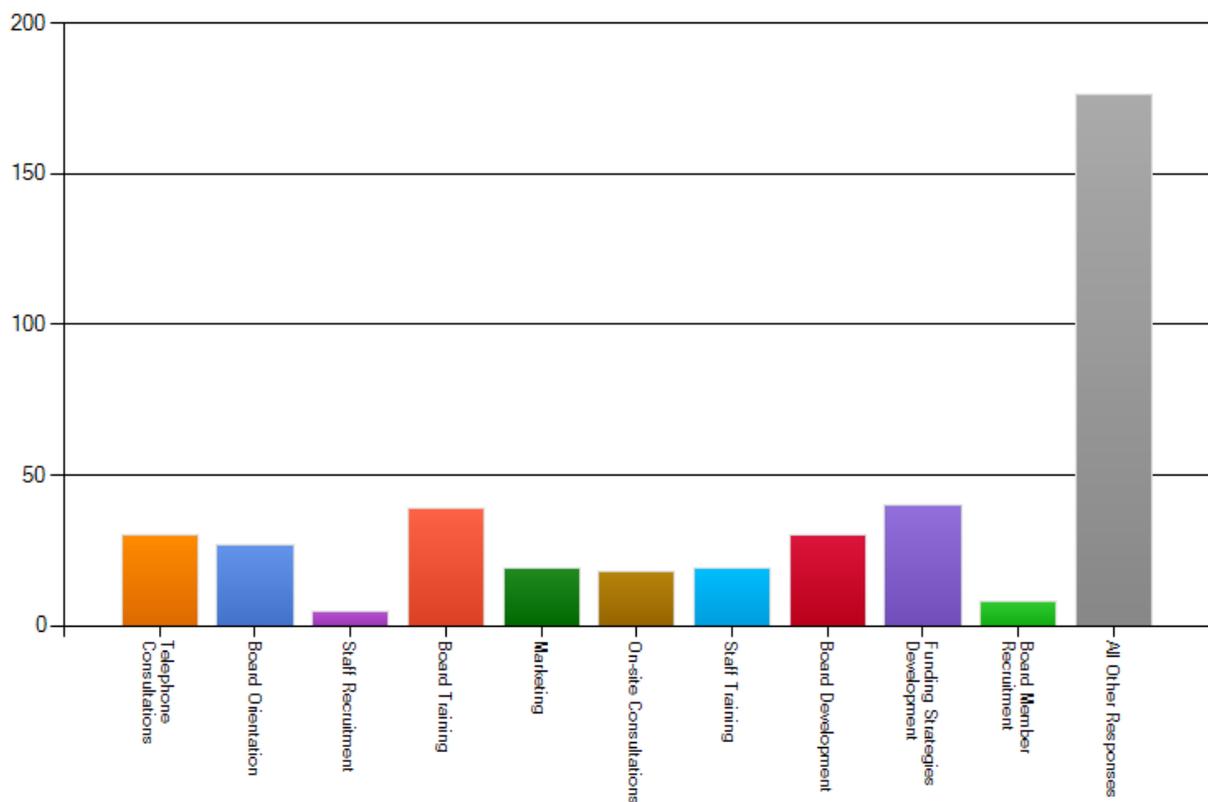


3.9 Known and Utilized Supports Provided by the Community Foundation

The assessment team learned that agencies access supports provided by the Community Foundation at varied levels of frequency and for varied purposes. Some grantees were unaware of when and how to utilize supports as well as the supports available to them. As a result, the assessment team included a survey item requesting that respondents indicate any and all known supports provided. Funding, Portfolio/Endowment Management, and Board Training were the best known supports with 83%, 43% and 42% respectively. Other key areas of support known by grantees include telephone consultations, strategic planning, and financial planning with 32%, 31% and 30% respective response rates. Table Eight reflects responses to this survey item.

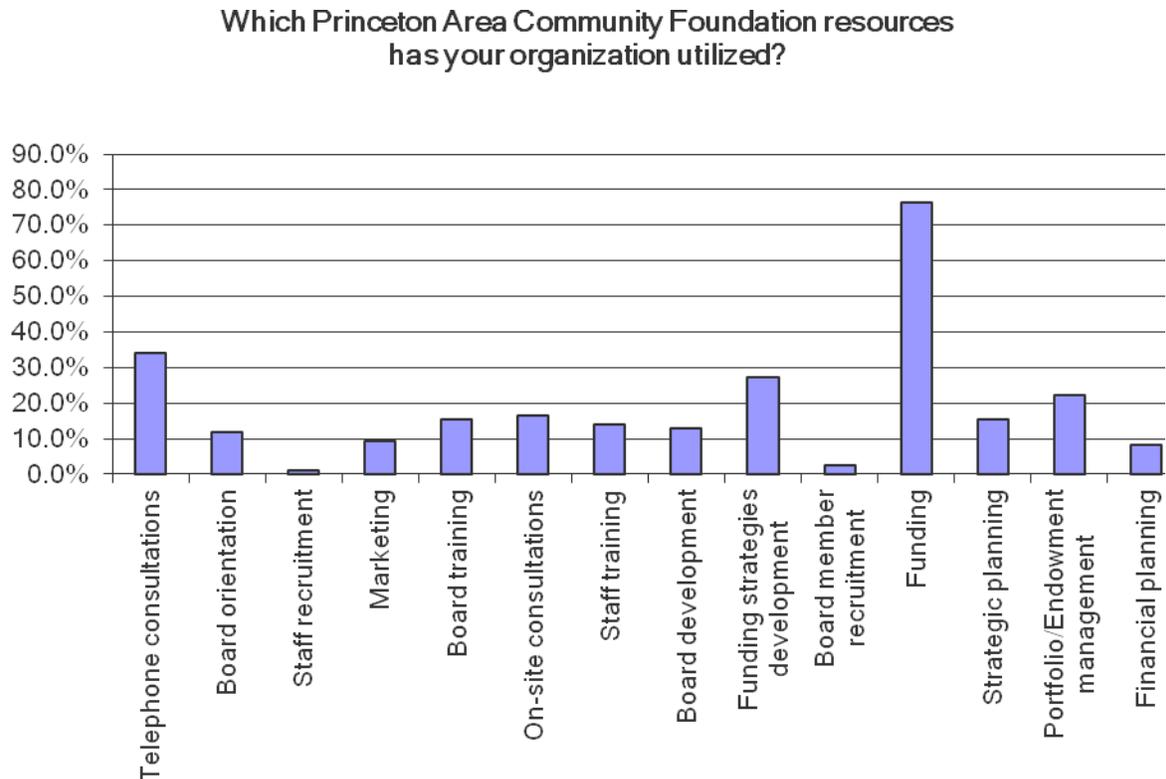
Table Eight: Known Supports Provided by the Community Foundation

The Community Foundation offers support to grantees in many ways. From the list below please select any and all services you know them to provide. (Please note you will be asked about the services your organization has personally utilized in a subsequent question.)

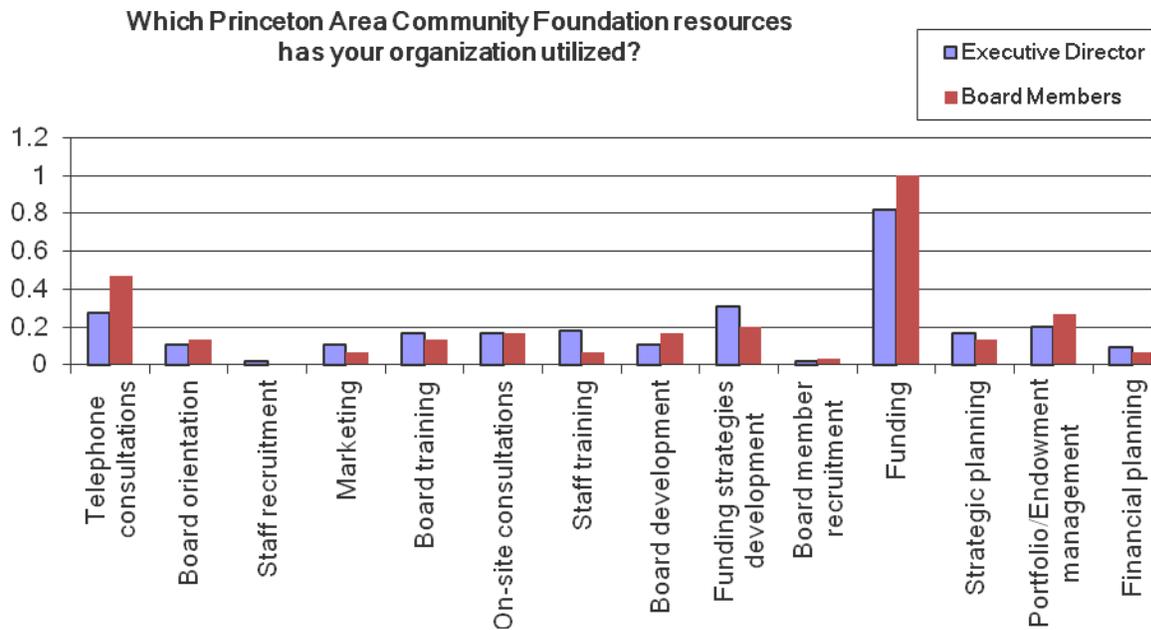


Survey respondents were asked to identify the resources utilized by their organizations as a follow-up question to the known supports provided by the Community Foundation. The majority of respondents indicated funding as the resource most utilized with a resounding 76%. The second most selected response was telephone consultations at 35%, followed by funding strategies development at 27%. Table Nine charts the responses.

Table Nine: Community Foundation Resources Utilized



There is some variance between responses depending upon the role of the respondents. Table Ten highlights distinctions of responses according to role. In Table Nine, Executive Directors and other senior staff are grouped together as are Board Chairs and other Trustees.

Table Ten: Role Specific Utilization of Community Foundation Resources

3.10 Known and Needed Roles for the Community Foundation

“I think that a key role for the Foundation is to provide education to not for profits and donors on funding, including creating endowments, planned giving and other related topics to ensure the future of programs that are crucial to our community.”

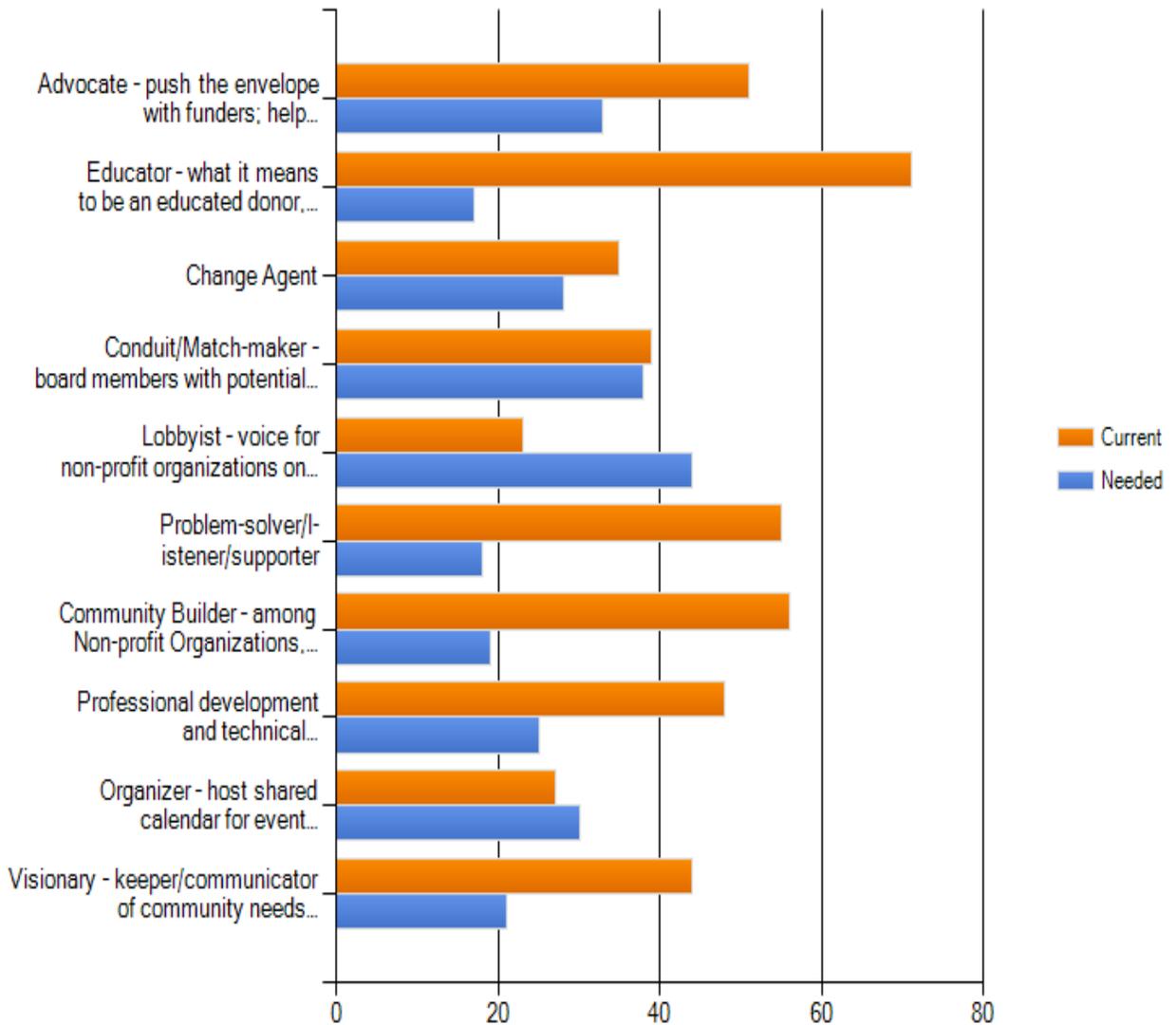
Survey respondent

The list of roles that were developed by the assessment team following the Café Conversations/Focus Groups were embedded within a survey item to assess grantees’ knowledge of existing roles as well as to gauge roles grantees need the Community Foundation to assume. The roles that are most known by grantees include Educator (88%), Problem-Solver (82%), Visionary (71%), Professional Development and Technical Assistant Provider (69%), and Advocate (64%). Current roles with the lowest responses include Change Agent (59%), Conduit/Match Maker (55%), Organizer (49%) and Lobbyist (37%). Respondents chose Lobbyist (71%) as the most needed role, followed by Conduit/Match Maker (53%) and Organizer (53%). Table Eleven below presents the data in chart form.

The assessment team assumes that roles which are currently well-assumed by the Community Foundation have lower responses in the needed option. This assumption is based on data collected during the earlier phases of the assessment.

Table Eleven: Current and Needed Roles for the Community Foundation

The Community Foundation plays many key roles in the community. Please identify any and all known roles of the foundation as well as any needed roles.



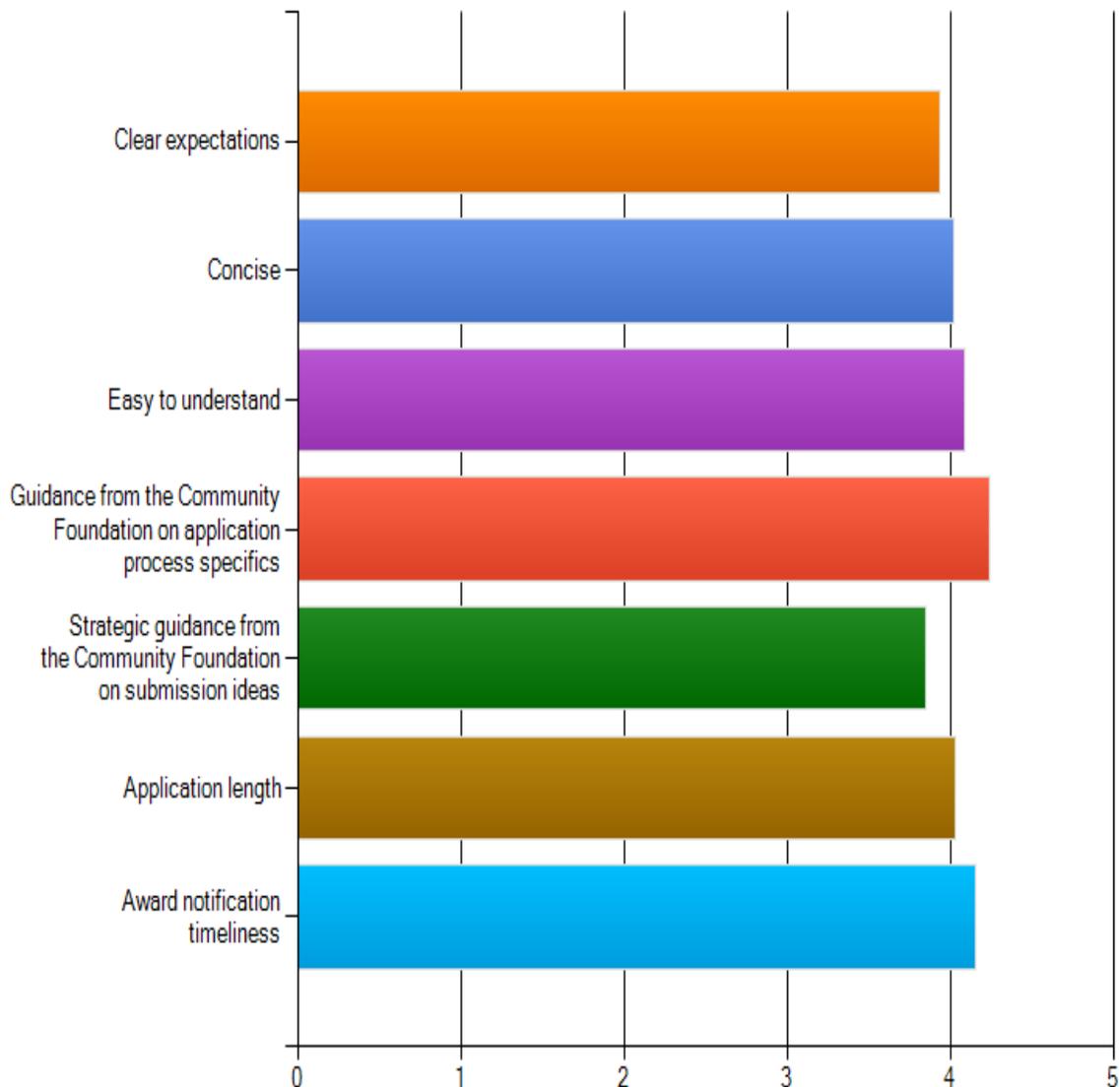
3.11 Rating of Grant Guidelines and Application Process

Respondents were asked to rate the current grant guidelines and application process on a five descriptor scale (poor- 0 to excellent - 5) in seven areas. The seven areas include clear expectations, conciseness, understanding ease and guidance from the

Community Foundation on application process specifics, strategic guidance on submission ideas, application length, and the timeliness of award notification. Overall, respondents rated each factor as good to excellent. The highest ratings were in guidance from the Foundation on application process specifics, conciseness and application length and the lowest ratings were for strategic guidance for submission ideas and clear expectations. Table Twelve details responses to this item.

Table Twelve: Ratings of Grant Guidelines and Application Process

Please rate the grant guidelines and application process using the following:



3.12 Advantages and Disadvantages of Funding More Projects with Smaller Grants or Fewer Projects with Larger Grants

“Broader funding does not always translate into sustainable, in-depth programs. The criteria for funding should focus on quality programs with significant outcomes and not the number of organizations.”

Survey Respondent

Respondents were asked to select between advantages and disadvantages to survey items designed to measure grantees’ opinions about the size and number of grant awards. Most respondents elaborated on their choices with narrative comments. Their comments are listed below in the order of the most frequent responses:

Advantages of Funding More Projects with Smaller Dollar Amounts:

1. More nonprofits would be helped with funding; ability to spread the wealth
2. More people would be helped and served by needed programs and services
3. Able to seed innovative concepts, assess results via low-cost solutions; create a nonprofit “farm team” model
4. Broader impact; useful to organizations with small budgets
5. Increased visibility of the Community Foundation as grantees publicize grant awards; increase influence; attract more donors
6. Allow smaller agencies to prove capability and value of efforts, especially in making the case with other funders
7. Reach more organizations, possibly start-up groups
8. Strengthen the quality of life
9. Longer-term funding possibility
10. Ability to respond quickly to needs and opportunities

Disadvantages of Funding More Projects with Smaller Dollar Amounts

1. Not cost effective for completion of grant applications; too little return on the investment of time spent writing grants; requires more paperwork and follow-up with the Community Foundation
2. Spreading available funds too thin can handicap current grantees by providing insufficient support to operate and provide services; may cause band aid approach rather than system change
3. Projects may not be sustainable or make a substantive impact; smaller grants may be inadequate for projects that span longer than a annual timeframe
4. Requires organizations to seek multiple funders for initiatives which is more labor intensive; doesn’t provide exclusivity of funder recognition
5. Smaller grants may not be feasible for organizations wishing to implement and maintain new projects
6. Less money may mean programs are cut or diminished
7. Smaller grants can be less effective; provides less help to those needing services; quality of programs and services may be adversely affected

8. Measuring the impact of smaller grant dollars would be difficult

Advantages of Funding Fewer Projects with Larger Dollar Amounts

1. The funding has more impact and a greater chance of successful outcomes; The quality of service delivery can be enhanced; Can reach more people for longer periods of time; most serious needs could be addressed on a larger scale
2. Might provide more continuity for smaller organizations, especially if funding is for multiple years
3. Makes financial planning and program planning easier; allows for more long-range planning
4. Existing grantees could expand operations
5. Strengthens existing programs; stronger impact on fewer projects; More project stability particularly if funding can continue for a three-year period
6. Larger grants relieve grantees of some of the pressure to secure the rest of needed funding
7. Stabilization of funding in order to build the infrastructure necessary for long-term health; ability to move towards self-sustainability and less reliance on the Community Foundation
8. Would truly impact a community and promote positive change; Potential for institutional transformation
9. Would provide a real boost to advance innovative organizations from start-up to the next phases of growth

Disadvantages of Funding Fewer Projects with Larger Dollar Amounts

1. Fewer agencies would receive funding and fewer need areas would get addressed
2. Innovative organizations might not get recognized; limits opportunities for new programs
3. May hurt smaller agencies who rely on funding; those agencies may struggle to exist without support
4. Larger projects have a greater burden to produce profound results
5. Less publicity for the Community Foundation; open to criticism for bias; loss of current grassroots identity
6. If the strategy is to move away from larger grants, alert larger grantees in advance and reduce funding over time

This survey item was skipped more than any other by survey respondents. Slightly more than half of the respondents answered the two questions in the survey regarding advantages and disadvantages of funding more or fewer projects with smaller or larger dollar amounts. Those respondents who answered the questions were divided almost equally with 59 indicating advantages and 58 indicating disadvantages for funding more projects with smaller dollar amounts. Similar results were recorded in reaction to the question regarding advantages (60 responses) and disadvantages (54 responses) for funding fewer projects with larger dollar amounts.

3.13 Recommended Changes for Grant Application, Guidelines, Awards

“Make the grant funding process a partnership. Identify those organizations you want to provide multi-year funding and groom them to maximize performance”.

Survey Respondent

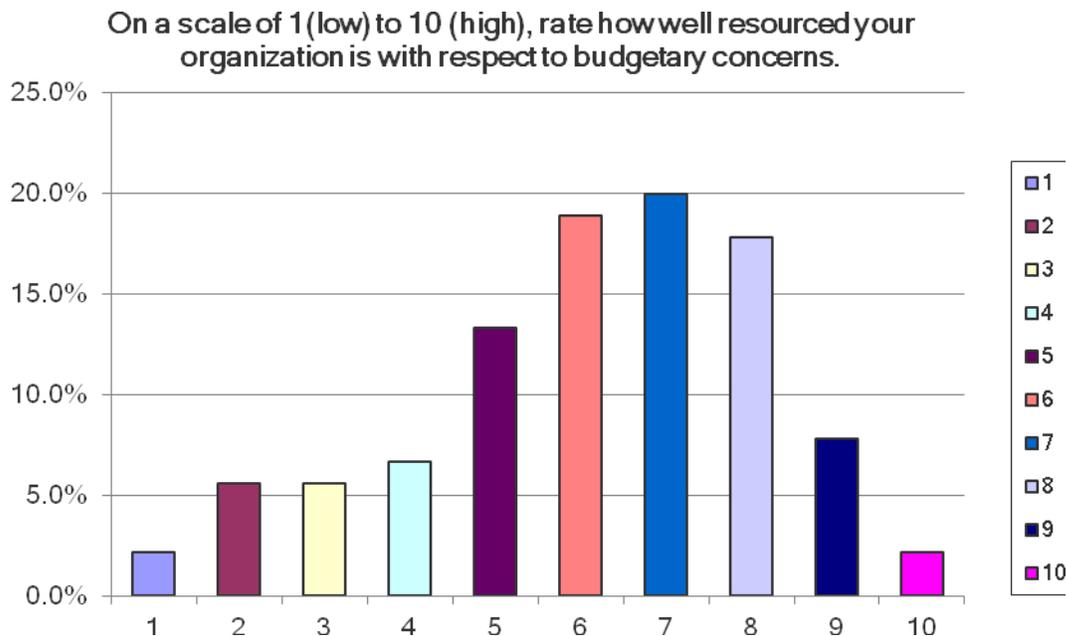
Respondents were asked to choose between annual grant submissions and multi-year submissions. Overwhelmingly, 77% of respondents chose multi-year grant submissions over annual grant submissions (23%). Subsequently, respondents were asked to select the grant award schedule that would be most effective for their needs. The options were one to five years. Respondents chose three years (48%), followed by two years (37%), five years (10%) and one year (6%). Additionally, respondents were asked to make any recommendations they would like to offer for changes to the grant application process and guidelines. Several comments reflect a satisfaction with the current guidelines, application and process. However, the following recommendations for changes were offered:

1. Focus on addressing systemic changes and addressing regional issues
2. Broaden the guidelines so that other nonprofits can benefit from project funding
3. Consider funding capital campaigns
4. Eliminate the mid-year report or make it shorter
5. Increase the size of grant awards
6. Funding operating costs was an important shift for the foundation and the organizations
7. Continue opportunities to consult with the foundation’s staff to ask about process and to seek advice about funding
8. Permit grant submissions more than once a year
9. Hold workshop series for collaborative grants allowing groups to brainstorm together and write a grant together in within the setting of a Community Foundation structured workshop
10. Structure different rounds of funding focused on specific humanitarian needs and communicate this structure to grantees in ample time to seek funds elsewhere
11. Provide clear statements of areas of emphasis in funding decisions
12. Simplify the language of the application
13. Make more site visits to better understand the need for funding
14. Revise and/or replace the spreadsheet currently required for budget and funding input; would like to submit own spreadsheet
15. Guidelines should be consistent; don’t change them after grants are submitted
16. Separate grants funding for arts programs from those for human services
17. Use multi-year grants with interval reporting and new budget submission after first 12 months
18. Consider a balance of multi-year and single-year granting for different purposes, i.e., multi-year for programming and single-year for operating expenses

3.14 Ratings of Resources with Respect to Budgetary Concerns

Respondents were asked to rate how well resourced their organizations are with respect to budgetary concerns using a one to ten scale. Most respondents' ratings ranged from six to eight, with seven as the highest choice selection. Table Thirteen displays the responses to this survey item.

Table Thirteen: Ratings of Resources with Respect to Budgetary Concerns



3.15 Percentage of Staff Time and Energy Spent on Generating Funds

Respondents primarily indicated that greater than 60% of senior staff time is focused on generating funds to support operating expenses and to support programming. However, the range of time spent varied from 10% to greater than 60% across survey responders. There was also a difference in the perception of time spent on generating funds to support programming between Executive Directors and their senior staff members and Board Chairs and other Trustees. Tables Fourteen presents the data from all respondents and Table Fifteen highlights the responses to time spent generating funds for programming by senior staff and board members. Table Fifteen combines responses from Executive Directors and other senior staff into one group, and Board Members and other Trustees into a second group.

Table Fourteen: Percentage of Senior Staff Time and Energy Spent Generating Funds

What percentage of the time and energy of senior staff is focused on...

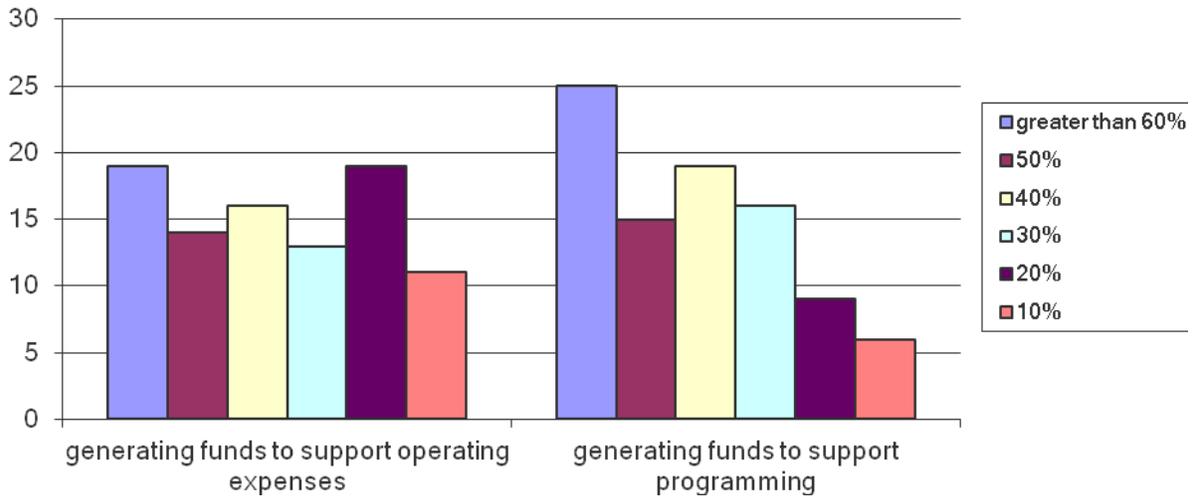
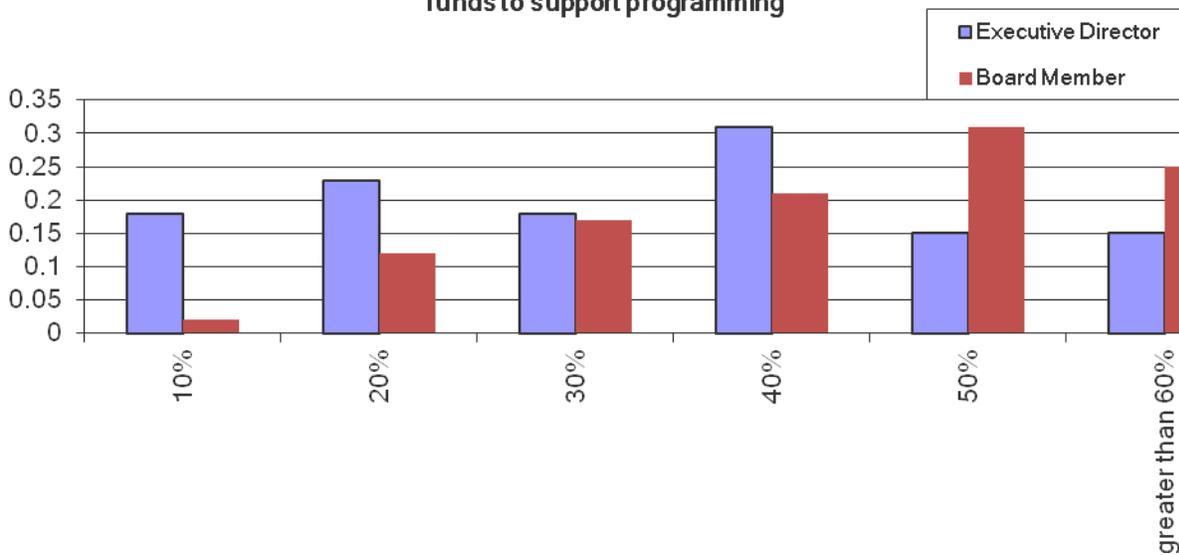


Table Fifteen: Comparison of Senior Staff and Trustees' Perceptions of Staff Time and Energy Spent Generating Funds for Programming

What percentage of the time and energy of senior staff is focused on generating funds to support programming



3.16 Grantees' Boards – Size and Level of Functioning

Respondents had a lot to say about their boards' level of function. Some grantees have highly functional boards and others struggle to recruit board members who understand and effectively fulfill the role and responsibilities. A sampling of respondents' comments is listed below.

1. *"We have a wonderful Board! We have many members who have extensive board experience. The entire Board is thoughtful and asks wonderful questions. The Board seems to have been strong for years, so it is a tradition that has carried on. We are very fortunate – but it is hard work, too!"*
2. *"A few members are responsible for the majority of fundraising. Most members do little to nothing to support the organization other than to offer critiques."*
3. *"Board members are generally very committed and engaged, but we lack structure and leadership."*
4. *"Too many board members are new to the nonprofit sector and new to serving on a board; hard to get adequate board training and full participation in it."*
5. *"Overall, we need greater training and development to allow the Board to function optimally."*
6. *"The Board is too small to do much, but it appears to be difficult to grow; as one joins, another leaves."*
7. *"For the most part, we have a strong and dedicated Board. However, it is difficult to motivate several members and we find that only a fraction of trustees are truly devoting their time, treasure and talent."*
8. *"Our board has been growing in number and influence. The trajectory is very encouraging and we have seen real benefits for the organization."*
9. *"Our board is well organized, has strong yet collegial and collaborative leadership, respects staff, gives money and participates actively in fundraising. Good as it gets".*
10. *"A small number of Board members are extremely effective and show great leadership in strategic thinking, advocacy and fundraising. Many are happy to participate in the discussions but take several steps back when asked to take ownership of Board projects."*
11. *"We have limited expertise on our board."*

12. *“There are several on the Board who are generally not involved. There are several who are very active and do a majority of the work. The others will respond, but are not proactive at all.”*
13. *“About 60% of the Board is high functioning. The other 40% needs to step up!”*
14. *“The Board is available when needed. Good mix of skills, experience and interests.”*
15. *“I believe that our board is high functioning. We have a diverse group of members and have regularly scheduled meetings that are conducted following an agenda and using parliamentary procedure. The Board communicates regularly via email and offer support of the program by attending events and sharing ideas.”*
16. *“I would like to have the Community Foundation provide training for potential board members and connect prospects to organizations.”*
17. *“We cleared out the dead wood on our Board and are now rebuilding with a firmly articulated set of requirements, policies and a clearly written manual.”*

Respondents shared information about their views on the minimum and maximum number of board members needed to function effectively as well as the number of current active board members. The number of board members needed to function effectively varied from a low of four to a high of thirty. The minimum number most often selected was 10 by 18 respondents, followed by 12, 15 and 20 selected by 13 and 8 respondents respectively. Survey respondents indicated that their organizations currently have between four and thirty-five active board members. The most typical responses ranged from nine to sixteen. The range of responses for the maximum number of members needed to function effectively was from a low of three members to a high of thirty members. The most typical responses for maximum number of board members ranged from 12 to 25.

Additionally, respondents were asked to indicate their board’s level of functioning from three choices – low, moderate or high functioning. Fifty-four percent chose moderate functioning, 39% chose high functioning and 7% chose low functioning. This data was further analyzed to determine convergence and divergence of responses by role type. Table Sixteen illustrates the choices by all respondents and Table Seventeen presents data by role type. Executive Directors and senior staff are grouped together, and Board Chairs and other Trustees are grouped together.

Table Sixteen: Board's Level of Functioning

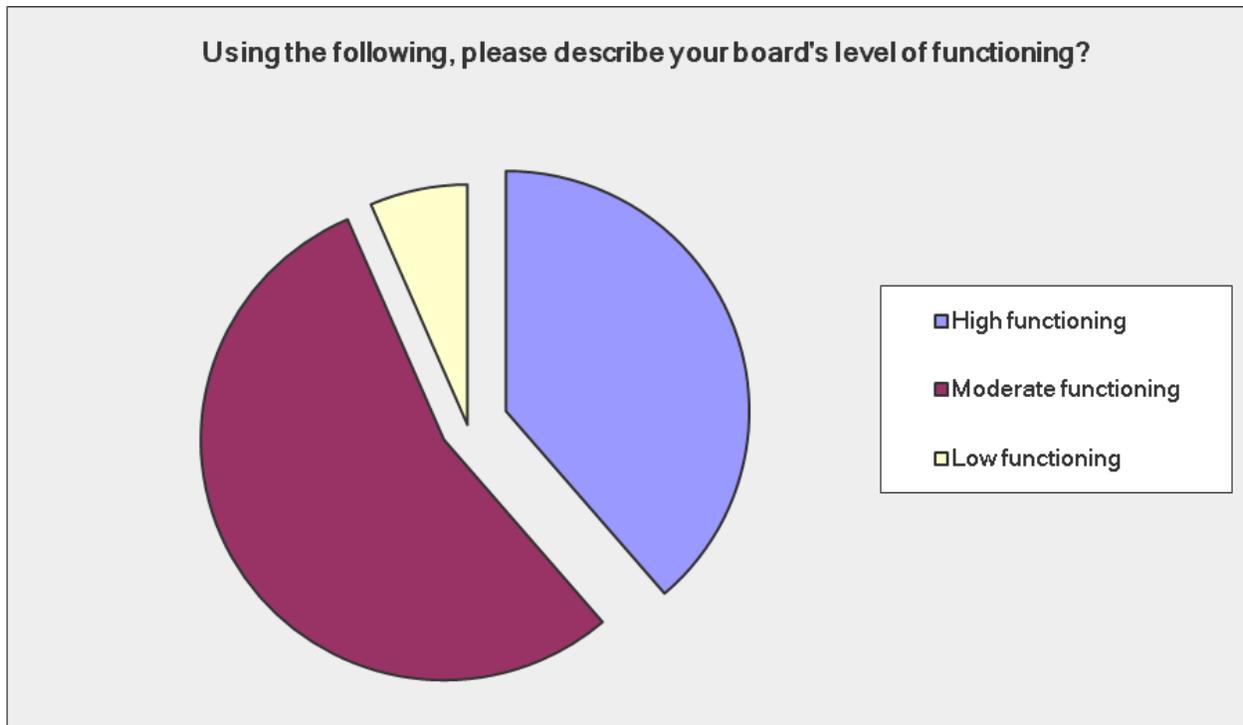
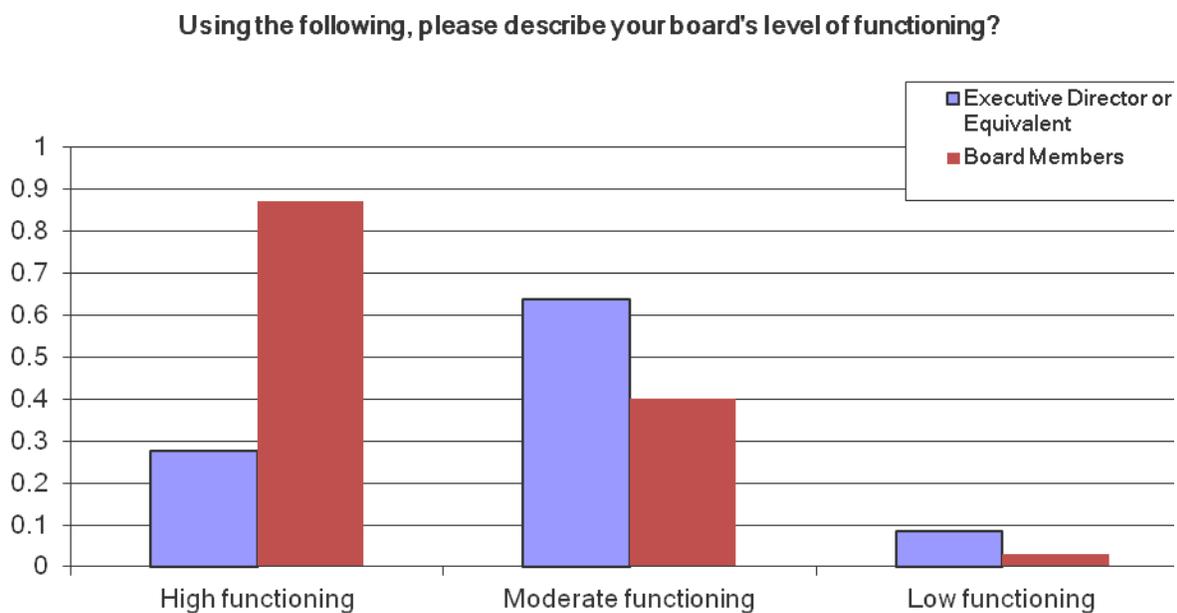


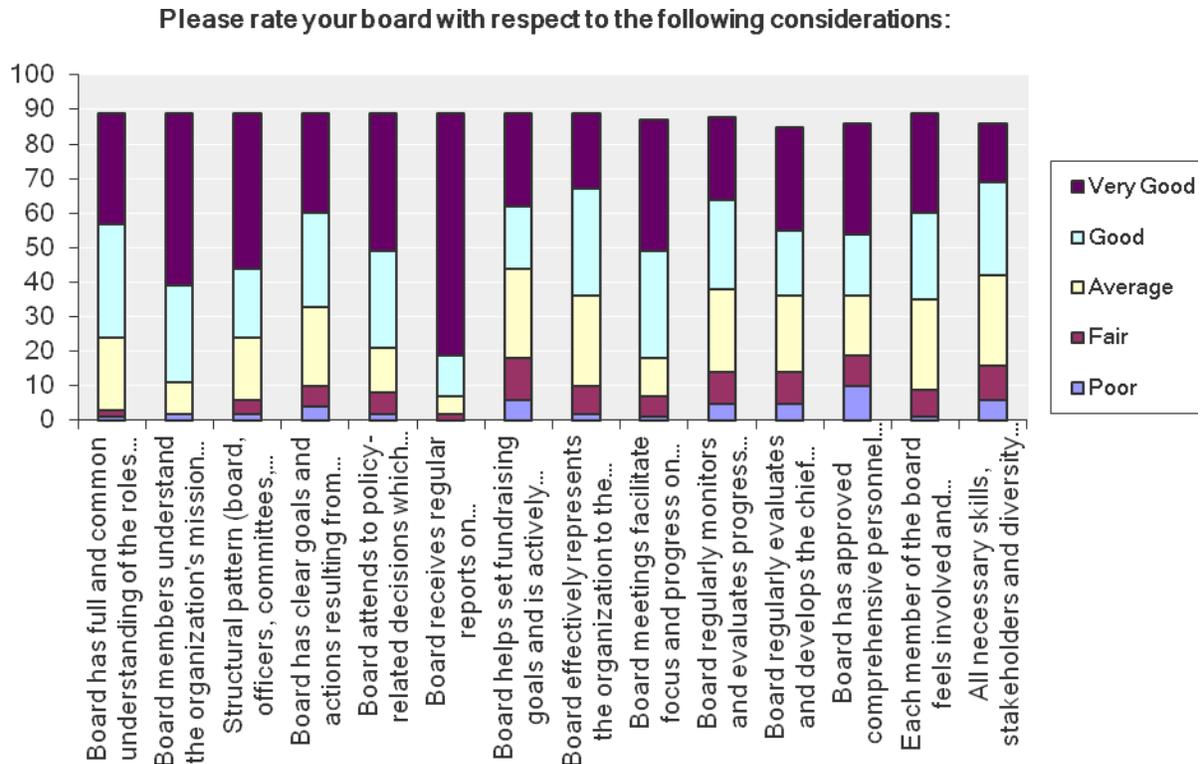
Table Seventeen: Role Type View of Board's Level of Functioning



Respondents further rated their Boards on fourteen elements of generally accepted roles and responsibilities of well-functioning Boards. The fourteen elements were:

1. Board has full and common understanding of the roles and responsibilities of a board
2. Board members understand the organization's mission and its products/programs
3. Structural pattern (board, officers, committees, executive and staff) is clear
4. Board has clear goals and actions resulting from relevant and realistic strategic planning
5. Board attends to policy-related decisions which effectively guide operational activities of staff
6. Board receives regular reports on finances/budgets, products/program performance and other important matters
7. Board helps set fundraising goals and is actively involved in fundraising
8. Board effectively represents the organization in the community
9. Board meetings facilitate focus and progress on important organizational matters
10. Board regularly monitors and evaluates progress toward strategic goals and product/program performance
11. Board regularly evaluates and develops the chief executive
12. Board has approved comprehensive personnel policies which have been reviewed by a qualified professional
13. Each member of the board feels involved and interested in the board's work
14. All necessary skills, stakeholders and diversity are represented on the board

The rating options were from poor to very good. Items one, two, three and six had very good ratings selected by more than 35% of respondents. Item six stood out with the highest percentage of respondents (78%) rating it very good. Items one and two had ratings of good (64%) or very good (77%) of respondents respectively. Items seven and 14 had the lowest ratings. All of the ratings are shown in Table Eighteen.

Table Eighteen: Ratings of Board Assumption of Roles/Responsibilities

3.17 Grantees' Board Priorities within the Next Year

Respondents identified priorities within the next year as they completed the last item on the survey. There was consistency in the responses across the survey respondents. The most often mentioned priorities were Board recruitment and development, fundraising, strategic planning and increasing visibility through enhanced marketing. Additionally, priorities focused on succession planning, networking/ambassador service, advocacy for clients and expanding or improving facilities. Finally, a few respondents mentioned capacity-building, updating technology, decisions about merging with another organization, and staff or program evaluations.

Conclusion

AngelWorks consultants listened intently to the Princeton Area Community Foundation's grantees during this project. We asked lots of questions, collected significant data, and learned about the tremendous differences their work makes in the lives of people in our community. Nonprofit leaders offered substantive feedback on current and needed practices for their organizations, the nonprofit network, and the Community Foundation. It is evident that passionate leaders deliver vital programs and services that have a major impact on the quality of life within the Mercer County region.

As a result of this comprehensive investigation, the *AngelWorks' team* presents findings in this report that answer the questions guiding the assessment along with several dominate themes. These dominate themes emerged across multiple project phases and are synthesized into four central ideas for consideration by the Princeton Area Community Foundation Board of Trustees. They include:

1. Grantees are currently functioning in a climate of limited and shrinking resources
2. Collaboration with other nonprofits is difficult, thus help is needed to form productive partnerships and for development of fundable projects where complementary strengths are utilized
3. Grantees want multi-year and tapered funding for better financial planning and for improved program and service delivery
4. Grantees view the Community Foundation as a philanthropic leader and wants the Community Foundation to expand its role beyond funding

Recommendations

- The Board of Trustees and its Grants Committee should review the assessment findings and reflect upon the implications for the future work of the Princeton Area Community Foundation
- Determine the role the Community Foundation will play in the philanthropic and nonprofit community and clarify that role for the nonprofit community. Decide on the supports the foundation will provide to the nonprofit community and communicate when and how to access those supports.
- Join in partnership with the nonprofit community – help to form and enhance the community by connecting stakeholders within and beyond the community
- Consider a significant grant award for select nonprofits that would elevate the organizations to the next level. Grant those funds and hold the organizations accountable for development of a sustainability plan
- Provide future opportunities for grantees to communicate their accomplishments, challenges, needs, hopes and dreams to the philanthropic community

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