Thriving
Waukesha County

Sussex

Menomonee Falls

Waukesha

2013 Report

Thriving
Waukesha County

2013 Report

Thriving Waukesha County Initiative

Lead Sponsoring Organizations

United Way in Waukesha County

United Way's mission is to build a stronger community by creating opportunities to give, advocate and volunteer. United Way in Waukesha County uses an approach called "Community Impact". This approach improves peoples lives from a community-wide perspective. It identifies, focuses on and impacts the root or underlying causes of problems existing in the community. The goal of Community Impact is to make lasting changes in community conditions. United Way currently funds 64 local programs addressing a variety of health and human service issues. Annual funding levels are determined by local volunteers who review the impact and results of each individual program.

Waukesha County Community Foundation

The Waukesha County Community Foundation was established in 1999 to improve the daily lives of people in Waukesha County by matching philanthropic individuals and institutions with a broad range of needs. WCCF is a public charity that enables individuals and qualified organizations to establish or contribute to permanent charitable funds. These funds are combined for investment purposes to ensure efficiency and long-term growth. The funds provide annual earnings, which are directed to charitable needs in the community by established donors' wishes and the Board of Directors.

Greater Milwaukee Foundation

Since the Greater Milwaukee Foundation began in 1915, it has been guided by three tenets - helping donors create personal legacies of giving that last beyond their lifetimes; investing donor funds for maximum return with minimum risks and playing a leadership role in tackling the community's most challenging needs. These guiding principles continue to serve the Foundation, our donors, and the community well.

County Executive's Office

Waukesha County's mission is to promote the health, safety and quality of life of citizens while fostering an economically vibrant community. We are committed to delivering effective, high quality programs and services in a courteous and fiscally prudent manner.

About Kohls Group Consulting - Project Facilitator

Kohls Group Consulting is a management-consulting firm founded in 1998 to provide solutions to strategic, organizational and operational challenges for clients ranging from nonprofits and small businesses to Fortune 500 corporations. Kohls Group brings years of senior level business experience to create practical, effective and measurable solutions that deliver value for its clients. Since its founding, Kohls Group has worked with the Waukesha County nonprofit community to help guide strategic planning, organizational reviews and mergers. Kohls Group brings experience and knowledge from its work with human services organizations across the country.

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THRIVING WAUKESHA COUNTY INITIATIVE ORIGIN

Nonprofit organizations are an essential part of Waukesha County and play an important role in providing critical and needed services, employing local residents and improving the quality of life for members of the community. In 2008, the economy began to have a major impact on the capacity of Waukesha County nonprofits to serve the community and accomplish their missions. Unfortunately, the economic environment continues to test the resiliency of our nonprofits. For almost five years, we have seen increasing demand for services coupled with decreasing revenues from government funding at the federal, state and local level combined with a flat or decreasing rate of charitable giving. During this same time, United Way in Waukesha County began to receive calls from nonprofit agencies inquiring about "emergency funding" to assist them. From the effects of the recession, nonprofits were tapping reserves to meet budget shortfalls. It was realized that this trend will continue for multiple years and place considerable strain on the nonprofit infrastructure and service delivery.

Starting in 2011, discussions about ways to address these challenges began with the Impact Leadership Council, a group of executives representing funded partners of United Way in Waukesha County. The purpose and intent of the Impact Council is to enhance communications amongst all partners, discuss current issues within the community related to partners and United Way and increase collaborative efforts. The Council also plans and coordinates agency executive meetings and communication for all United Way funded partners on an as needed basis.

The Impact Leadership Council members spent several months meeting and discussing potential strategies for coping with these economic times and rallied around a central theme: how can nonprofits thrive in the new reality of fewer dollars and more demand for their services. Recognizing that bold steps needed to be taken to meet this dramatically new economic landscape and that the nonprofit sector could not accomplish this alone, the Leadership Council reached out to additional stakeholders such as funders, government and community leaders. Collectively, this group discussed and debated the following: ways to develop innovative responses to community needs, how to further define the advocacy role of nonprofits, raise the profile of funding issues and focus on strategic partnerships and collaboration as well as consider key public/private partnerships.

As a result, conversations with these groups opened up a wider community dialogue which ultimately led to a decision and commitment to undertake a process to ensure the long term sustainability of efficient, effective and accessible services in our community. In support of that commitment, United Way in Waukesha County, Waukesha County Community Foundation, Waukesha County Executive's Office and The Greater Milwaukee Foundation brought together a diverse Task Force of community leaders with the purpose of *"Building a Thriving and Sustainable Nonprofit Community in Waukesha County."*

EXECUTIVE SUMMARY

The Burning Platform: Need for Change

The great recession of recent years resulted in the increased need for services and decreased funding for many human service organizations. It revealed the vulnerability of the social safety net and the need to make it stronger, more efficient and more effective. The United Way in Waukesha County, the Waukesha County Community Foundation, the Greater Milwaukee Foundation and the Waukesha County Executive's Office commissioned the Thriving Waukesha County Task Force. **The purpose was to review the current nonprofit health and human service structure and delivery system, explore new approaches and make recommendations that will result in a long term, sustainable and thriving nonprofit community.**

The Task Force of community leaders and agency executives convened in early 2012. It narrowed the focus from many hundreds of not-for-profit organizations in Waukesha County to 81 key agencies at the center of the health and human service network. These agencies were surveyed to evaluate individual and collective strengths and weaknesses in meeting current service demand, threats to future viability and opportunities to strategically collaborate for greater efficiency and effectiveness. **The survey and subsequent focus groups revealed wide variability amongst agencies in size, financial stability, management and board capacity and interest in and willingness to strategically collaborate.** They also suggested significant gaps in certain services (e.g. transportation and case management). In addition, despite the perception of a history of collaboration among agencies, it became evident that awareness of services offered in Waukesha County is suboptimal and collaboration at the level of program coordination and/or consolidation, though evident, is infrequent.

Searches for national best practices disclosed that **we are not alone**. Communities across the nation are responding to funding shortfalls and increasing service needs with initiatives aimed at closing service gaps and improving the efficiency and effectiveness of service delivery. Successful community initiatives have focused on 1) coordinating funders and donors to increase agency accountability for efficient operations and demonstrated outcomes, 2) ensuring that core community services have continuity through multiyear revenue streams, 3) agencies focus on core competencies and strategically collaborate to enhance effectiveness and efficiency of service delivery, and 4) building capacity through management and maintaining governance excellence as much as or more than revenue increases.

The **Preface to the Findings and Recommendations sets the context** for the report and articulates the principles by which the Task Force believes our human services sector must operate to function effectively in the uncertain future. **The Findings and Recommendations that follow are the necessary first steps** in the evolution of the human services sector that may challenge individual agencies but assure the collective strengthening of the system to meet growing and increasingly complex human service needs.

This process has engaged and focused on a group of agencies playing significant roles in the delivery of human services for Waukesha County. However, the fabric of the social safety net is woven from threads comprised of hundreds of separate interacting agencies funded by thousands of diverse funders and individual donors. **This report and the recommendations that follow are directed to all nonprofit organizations, foundations, corporate and individual philanthropists, community and governmental leaders and the citizens of Waukesha County.** It is only through the concerted actions of the collective community that the vision of a truly thriving Waukesha County will be realized for generations to come.

Findings & Recommendations

The following summarizes five key recommendations that will provide the long-term systemic changes necessary to create a sustainable and thriving nonprofit community. Lead champion organizations will implement these recommendations in unison, as they are all integrated and important to the final community outcome. (Detailed recommendations and success measures are highlighted in the full report.)

1. **Capacity Building - Management Efficiency:** National research and local funders and agencies have identified the need for capacity building to improve management effectiveness and efficiency of nonprofit organizations so that agencies will become more effective in serving clients and managing limited resources. Capacity building is defined as the ability of nonprofit organizations to fulfill their missions by increasing or enhancing their capabilities to efficiently meet their client's needs. Strategies include promoting the importance of capacity building to boards of directors, agency leaders and funders; improving agency access to existing capacity building resources; and encouraging nonprofits to voluntarily assess current programs with mission alignment (core services) and outsourcing non-core services.

2. **Capacity Building - Systems and Infrastructure:** Nonprofit executives state their administrative costs are very low. However, these same agency leaders indicated that there are greater efficiencies and operational capacity to be gained from partnering on back office or administrative services. Strategies include consolidation of back office services; fostering co-location among organizations; and increasing effective planning and implementation of technology tools, which create efficiencies.

3. **Community Performance Measures:** The promotion and use of common community performance measures will provide the opportunity to report the current state and impact of the local nonprofit sector and encourage increased collaboration and efficiencies. Strategies include promoting the vital role and economic impact of the nonprofit health and human service sector and using best practice indicators to measure capacity, efficiency, sustainability and stability.

4. **Role of Funders:** Research into best practices indicated that funding organizations play a significant role in fostering financial capacity, long-term sustainability and in some cases instability, inefficiencies and the development of incidental services in the organizations they support. Strategies include increasing funding for capacity building while maintaining the expectations for improved community outcomes; shifting more funding from "new and innovative" programs to funding of core mission services of agencies and/or longer-term sustaining grants; creation of year-round funder forums to share information and increase funder collaboration; and increasing expectations related to nonprofit reserve policies and implementation. In the future, nonprofit organizations requesting emergency funding will undergo a comprehensive review of the organization and will implement recommendations from the review findings.

5. **Increased Awareness of Services:** Information on nonprofit service providers is often fragmented, incomplete and out of date. There is no updated or central and searchable database, which is considered to be a reliable tool to assist service providers, donors or funders with community navigation or to avoid duplication of services. Strategies include: creating facilitated forums for the specific purpose of agency leaders moving towards more meaningful collaboration; enhancing the present 211 system to create a continually updated central and easily searchable database for all stakeholders; and exploring the development of an online case management system for the purpose of improving community navigation.

As the final step in their work, the Thriving Waukesha County Task Force has created a Thriving Alliance of funders and community leaders who will ensure implementation of these recommendations and strategies simultaneously. This implementation will demand perseverance, nonprofit organizations that are willing to pilot new ideas and learning and a long-term commitment of resources to achieve collective impact that effectively mobilizes community resources and meets the health and human service needs of Waukesha County.

PREFACE TO THE FINDINGS AND RECOMMENDATIONS

Pewaukee

The Social Safety Net

Nonprofits embody the best spirit and values of our nation. They help millions of individuals and families daily. They protect, feed, heal, shelter, educate, and nurture our bodies and spirits. Nonprofits also give shape to our boldest dreams, highest ideals, and noblest causes. They turn our beliefs into action - as promoters of democracy, champions of the common good, incubators of innovation, laboratories of leadership, protectors of taxpayers, responders in times of trouble, stimulators of the economy and weavers of community fabric.

National Council of Nonprofits (Faces of the Nonprofit Sector)

The community fabric is woven in two layers. The threads on the tapestry's surface are spun with excellent jobs, thriving commerce, arts, education, churches, parks, recreational offerings, responsive government, efficient transportation and all that goes into an appealing quality of life for a community. As important but not as apparent, is the lining: The Social Safety Net. Nonprofit human service agencies, churches, governmental programs, volunteers and philanthropists combine in a uniquely American way to provide the charitable support that may be needed by any community member at any given time.

Our community could not truly thrive without the many excellent agencies and organizations that have woven Waukesha County's social safety net. This report is first and foremost a testament to the important work they do. At the same time, however, it is also a call to action to mend the worn spots, strengthen the threads and tighten the weave in the safety net of our Thriving Waukesha County Community.

The Rising Need

Adequate capacity in the social service sector has never been more crucial. A number of factors underscore the need to build service capacity in the nonprofit sector at both the organizational and the community levels. First, service demand has undoubtedly increased because of the devastating economic conditions of recent years. At the same time, emergence from the recession has not yielded expected decreases in unemployment. Many middle class manufacturing and public sector jobs appear to have been replaced by lower wage service sector jobs, often without benefits. Low skilled and poorly educated immigrants, returning veterans and unemployed youth have presented additional service needs. These factors have severely strained the health and human service infrastructure. Finally, service agencies, understandably, are concentrated in Waukesha, the geographic and population center of the county. Access throughout the county remains a significant concern.

Waukesha: Our Capacity to Respond

The number of nonprofits in our community, the services available or amount of charitable funds provided cannot be the sole measures of the capacity of our human services system. We must also consider the effectiveness of the services, the efficiency with which they are delivered, and the cohesiveness of agencies working on multiple intertwined individual and community issues.

Waukesha County has a well-earned reputation for a wonderful constellation of excellent social service agencies—for profit, nonprofit and governmental. Unfortunately, the obvious wealth of the community that has supported the social service network has also obscured rapidly expanding economic hardship and all-too-often inadequate access to needed services. Despite agencies redoubling efforts to raise additional funds, strengthen existing services and start new ones, we do not appear to be keeping pace with increasing need.

Established and respected organizations have struggled to keep core services solvent. New organizations have been created and new programs initiated. The search for financial support of these initiatives has intensified. Comments from philanthropists and business leaders suggest uneasiness with the proliferation of requests for support. Arguably, Waukesha County human service agencies, attempting to respond to increasing needs by competing for new revenues, are on a collision course with chronic and increasing funding shortfalls. Increased capacity cannot be synonymous with increased revenue alone. Capacity must also be enhanced through innovation, strategic collaboration and reduced duplication of effort.

The Collective Will

The Waukesha County community has benefited from capable agency management and board leadership, dedicated program staff, generous donors, pro-active and supportive government and engaged civic leaders. Individual agencies have provided excellent service to their clients and have a strong history of collaborating in recognition of multiple complex clients needs that more often than not cross agency boundaries. As a result, the issues before our community are daunting and growing but not yet of such magnitude as to be impossible to stem. It is becoming clear that combating those issues through individual agency efforts and loose collaborations will not be sufficient in the long term.

The current method of distributing funds to agencies based on historical program successes may not reward cost-effective service. Further, funding to individual agencies may not address issues spanning the continuum of care. A collective effort that is both broad and deep will be required to assure that our growing needs do not become insurmountable.

The **Thriving Waukesha County Task Force Report** is intended to stimulate collective thinking about how we respond to present and future human services issues. It also proposes some specific action steps for both the immediate future and the longer term to reweave our human service safety net. Summarized below are some of the essential tenets of a collective effort to improve our human service system that is both broad and deep.

Seeing the Broad Horizon

This report proposes regular summit meetings of the nonprofit agencies collectively and of smaller groups of agencies providing similar services or serving like clients. These summits will serve as a platform for seeking substantive strategic collaboration, integration of services and other systemic efficiencies. They will be a useful step toward positive collective impact.

Agencies, boards and funders must share a community-wide focus. While Boards have a fiduciary responsibility to their agency, they must also share a responsibility for the system as a whole. They should openly discuss the role of their agency in meeting client needs that goes beyond their agency's capacity or expertise. Funders must work with and encourage agencies to strategically collaborate on programs or consolidate them entirely, as a means to increase efficiency and/or reduce gaps in the continuum of care.

Looking Deep Within

"Nonprofits have an obligation to seek new and even more effective ways of making tangible progress towards their missions, and this requires building organizational capacity. All too many nonprofits, however, focus on creating new programs and keeping administrative costs low instead of building the organizational capacity necessary to achieve their aspirations effectively and efficiently…This must change: both nonprofit managers and those that fund them must recognize that excellence in programmatic innovation and implementation are insufficient for nonprofits to achieve lasting results. Great programs need great organizations behind them."

Effective Capacity Building in Nonprofit Organizations, Report for Venture Philanthropy Partners by McKinsey & Company (2001)

To effectively participate as a trusted component of the continuum of care, each service provider must first look deep within it to be confident it is a worthy partner. Such introspection should boldly and honestly challenge assumptions regarding management and board competency in leadership and governance. Adequacy of management policies and procedures and regularly reported dashboard metrics addressing, for example, efficiency of service, staff turnover and satisfaction and client satisfaction survey results are a place to start. Board fiscal policies including reserve funds, restricted accounts, budget accuracy and compliance with audit recommendations should be thoroughly evaluated. Are regular educational programs in place to increase understanding of financial management procedures and governance responsibilities? Are the Board and key executives regularly provided opportunities for education on agency programs and leadership topics?

The look deep within must go beyond evaluating the efficiency of existing programs. It should challenge their very existence. Boards and management should ask whether other providers could do a better job of providing the service, no matter how long a history they have or how favored they may be to staff, board or donors.

Looking From the Outside In

This report is a challenge to funding organizations, philanthropists and agency boards to serve as advocates for collective impact and strategic collaboration. Nonprofit charitable organizations by their nature depend upon the largess of donors who see the organization as representative of their altruistic interests. Too rarely, however, do donors receive or ask for evidence that their funds are being used to their maximum advantage. This is not to say thanks are not given, anecdotal stories of great success not shared or year-over-year statistics not included in annual reports. But how much more revealing might it be to know the comparative cost per unit of service delivered by similar agencies or the level of satisfaction by clients? Further, would it not be in the best interests of clients, agencies and donors alike to know that multiple agencies serving the same clientele are strategically collaborating to improve service effectiveness and efficiency? The challenge is to invest in organizations that demonstrate efficiency and effectiveness of service delivery; to support elimination of unnecessary duplication; and to encourage meaningful collaboration up to and including cost-effective consolidation of programs and agencies.

Conclusion

The report that follows contains specific action steps to implement the direction and principles contained in this preface. The success, indeed the basic value of this report, will only be determined through a manifest collective will to boldly challenge and then aggressively enhance the capacity of our nonprofit sector.

METHODOLOGY/ TASK FORCE PROCESS

The purpose of the Task Force project was to review the current nonprofit health and human services structure and delivery system, explore new approaches and make recommendations that will result in a long term, sustainable and thriving nonprofit community.

Task Force Vision:

To build a thriving and sustainable nonprofit community that effectively mobilizes community resources and meets the health and human service needs of all who call Waukesha County home. (It also serves as a model for other communities across the country.)

Project Leadership Team:

The Thriving Waukesha County study combined the resources of three key stakeholder groups:

- **Thriving Waukesha County Task Force**
  These individuals (19) were chosen for their professional and community experience, knowledge and expertise to the process. From this task force, small Action Teams were developed as needed. Action teams included: Client Experience, Success Measures, Service Inventory and Collaborations, Best Practice Research, Communication and Resource Development and Survey Action Team.

- **G4 Operations Team**
  The Task Force sub-committee was responsible for ensuring implementation of the Task Force decisions.

- **Kohls Group Consulting**
  The resources of Kohls Group Consulting were utilized to facilitate the process and work of the project.

Timeline:

January - March 2012:

Task Force formation, roles determined, creation of action teams, develop detailed project monitor.

March - August 2012:

Best Practice Research Action Team: Research was conducted locally and nationally regarding nonprofit collaborations and community collaboration initiatives. Research results were shared with Task Force members in order to develop a common understanding of non-profit community collaborations. This best practice research also contributed to the development of the nonprofit agency leaders survey. Through an extensive interview process, this action team evaluated and summarized existing collaborations already occurring in Waukesha County. An inventory of these collaborative agencies was documented which includes the purpose, background, partners and benefits to the community.

Communication and Resource Development Action Team: This group of volunteers developed and implemented communications about the project and purpose to use with different audiences to create awareness and engagement and ask for support, participation, feedback and resources.

New Berlin

Services Inventory and Collaborations Action Team: The compilation of public and private databases was conducted for purposes of attempting to inventory all Health and Human Services providers and programs provided in Waukesha County. There are multiple sources containing elements of this information that are created and maintained for different purposes. By combining the multiple databases, the Task Force identified over 2,000 providers of services including agencies, churches, government and hospitals that comprise the overall network of nonprofit health and human services in Waukesha County. The information contained in the databases was determined to not be complete, up-to-date or easily searchable for accurately assessing what services are available and provided by each organization. The information served as a starting point for manual review and analysis to identify the agencies included in the online survey.

Success Measure Action Team: In May and June surveys and interviews were conducted to gain further insight regarding how each Task Force member and local nonprofit leaders would define their vision and measures of long-term community success from the work of the Task Force. Subsequently, the Success Measures Action Team was formed and charged with using the survey responses in formulating recommendations to the Task Force regarding long-term success goals and how the community can quantifiably measure long-term success as the project recommendations are implemented. The team used the "success survey" responses from agency leaders and Task Force members and information from best practices research, project surveys and focus groups in the development of success measures.

September - October 2012

Client Experience Survey: The Client Experience Action Team (CEAT) was created by the Task Force to focus on client experience. During the June-October timeframe, surveys and interviews were conducted to gain further insight on client experience data and best practices. Utilizing information gathered from both clients and healthcare providers, the CEAT gained perspective on matters related to Client Experience survey design and implementation that will more accurately and consistently measure whether client experience is improving over time.

Agency Survey: (Survey Action Team) Through electronic and manual sorting of multiple service provider databases, a list of 81 active nonprofit agencies (not including hospitals, government, churches) providing services in Waukesha County were identified. An electronic survey was sent to the identified agencies and was conducted for four weeks from mid-September to mid-October. Of the 81 agencies identified, 69 agencies responded to the survey (85% participation rate).

The survey results were used to identify broad findings (not statistical data) in areas including:
- Services and program offerings provided
- Community needs
- Challenges faced by agencies
- Funding and revenue composition
- Agency partnerships and interrelationships
- Organizational capacity and efficiency opportunities

November - December 2012:

Analyze and Present Survey Data: Data from the survey was analyzed and summarized by Kohls Group Consulting. They also presented the summary information to the participating agencies and Task Force on December 5th. Broad findings from the survey were used to develop agency focus group topics and guide additional local and national research. Data from the survey was also used to create a resource inventory of services provided by the 69 respondents.

Focus Groups: Kohls Group Consulting conducted focus groups with small, medium and large agencies. Information from the focus groups was presented to the G4 in late December.

Mukwonago

January - March 2013:

Key Findings and Recommendations: Kohls Group Consulting identified key findings and recommendations from all information gathered including:
- National and local state of the industry reports
- Best practice research-collaborations and community initiatives
- Existing Waukesha County collaboration review
- Inventory of existing services research
- Agency post survey focus groups and interviews
- Success measures information from Task Force and Action Team work
- Client Experience Action Team findings

These key findings and recommendations were reviewed and further refined by the G4 Operations Team and Task Force.

March - May 2013:

Measurement and Roadmap Development: The G4 Operations Team, Task Force members and Kohls Group Consulting developed suggested success measures and three-year roadmaps for each recommendation.

KEY FINDINGS STATEMENT, RECOMMENDATIONS, SUCCESS MEASURES AND ROADMAP

#1 CAPACITY BUILDING: MANAGEMENT EFFICIENCY

CHAMPIONS: Waukesha County, United Way Leadership Impact Council

National research and local funders and agencies have identified the need for capacity building to improve management effectiveness and efficiency of nonprofit organizations so that agencies will become more effective in serving clients and managing limited resources. Capacity building is defined as "the ability of nonprofit organizations to fulfill their missions by increasing or enhancing their capabilities to efficiently meet their client's needs." In addition, focus groups and surveys of Waukesha County agencies indicated that many organizations are performing incidental or "non-core" services, which are not directly related to the fulfillment of their primary missions but considered necessary in order for some clients to receive important services.

Transportation is one of the best examples of an incidental service. Many agencies have created their own solutions for transportation because there is no central system, network or coordination that meets their needs. Task Force research has indicated that agencies that went through a voluntary self-assessment process to refocus their resources on their core services increased their organizational capacity and efficiency and their impact on social issues.

RECOMMENDATIONS	SUCCESS MEASURES
A. Develop and implement a communication plan to share with and educate Board members, funders, donors, agency leaders, and other stakeholders in the Health and Human Services sector regarding the importance of capacity building.	1. Develop communications plan by end of 2013. 2. Successful communication with 20 nonprofits by June 2014.
B. Promote, connect and improve agency access to existing capacity building resources. (i.e.: trainings, workshops, best practice resources, nonprofit management fund, resource libraries, online education, business coaching)	1. Create communication plan to promote and increase access and understanding of local capacity building resources. 2. Ensure centralized access point for promoting/posting resources and learning opportunities.
C. Identify and mobilize existing community resources to improve performance in building nonprofit sustainability, effective board governance, financial management, CEO competencies, internal operations, volunteer engagement and other areas identified by nonprofits.	1. Business community demonstrates commitment by sharing in-kind resources and expertise. 2. Identify in-kind hours and value. • Hours and value increase year over year by 10%

D. Encourage each agency to voluntarily self-assess the extent to which incidental or non-core programs are detracting from the cost effective delivery of core services. Further, encourage agencies to outsource services or divest services should that be the case. Provide and direct agencies to tools to accomplish this process. (This is a voluntary process that cannot be imposed on individual agencies by funders; however, third party facilitation would be encouraged at a minimum with a report back to Champion organizations on results and learning)	1. Nonprofit agencies conduct core assessment: a) 25% by 2014 b) 50% by 2015 c) 75% by 2016 2. By 2014, quantitative measures are established to track improvement in financial performance and sustainability. 3. By 2015, participating agencies are using tracking measures and demonstrating improvements.
E. Create a pilot program with a cohort group of agencies. The purpose of the pilot is to test and refine a process that seeks to realign noncore services from one agency to another agency in which the service is core to their mission.	Among pilot cohort group: 1. No agency program is less than 5% of its total budget 2. Noncore or incidental services are reduced by 75% among pilot agencies by 2015 3. 20% decrease in unit cost across 2-3 targeted service categories by 2015

IMPLEMENTATION / ROADMAP

Recommendation	6 Months (July – Dec. 2013)	1 Year (2014)	2 Years (2015)	3 Years (2016)
A	1. Develop a communication plan regarding the importance of capacity building to include a common understanding and approach to building nonprofit capacity. 2. Develop strategic educational discussions to create a shared model and definition of capacity building; overview of capacity building process, framework for successful capacity building and best practices with diverse stakeholders – nonprofit leaders, board directors, funders and business community. 3. Tailor strategic educational discussions to each target audience.	1. Convene stakeholders for strategic educational discussions about nonprofit capacity building. Create a structure for the educational component of capacity building as well as to come together to discuss needs, assets and resources in the community (can reference Thriving Waukesha County project findings). 2. Identify/recruit agencies willing to participate in a pilot program and have a readiness to assess which areas can benefit from capacity building. 3. Provide orientation/training to agencies on how to conduct an initial assessment of the organizational capacity of their nonprofit. (Several tools are currently in use for assessing the capacity of nonprofits and identifying capacity building priorities.) 4. Compile inventory of agencies' capacity building areas.	1. Create leadership teams in the participating agencies to include board and staff members who will be responsible for driving the capacity activities forward. 2. Develop a plan for capacity building including priority areas and measurable targets for improvement for participating agencies. 3. Provide assistance and facilitation on the assessment tools and plans for participating agencies. 4. Invite organizations to meet on a regular basis to exchange information and shape the capacity building plan. 5. Results of the pilot program are reviewed and teams identify a framework for capacity building activities.	1. Pilot program processes are adjusted or amended. 2. Recruit agencies for participation.

B	1. Create a shared vision of access to quality local and national capacity building resources. 2. Identify which areas of capacity building are most needed.	1. Recruit agencies who participated in the pilot program to provide feedback to develop a centralized access to capacity building resources and content that is relevant and tailored to the unique needs of nonprofits in the community. 2. Identify vehicles viewed as the most valuable to address access: online resources, low cost consultants, facilitated collaboration among nonprofits, peer learning, networking and training. 3. Develop centralized access to repositories of information and resources such as databases, libraries, and web sites through Thriving Waukesha County Alliance.	1. Develop and implement a process for the ongoing maintenance for the centralized access of information and resources for capacity building. 2. Elicit initial feedback from the key community stakeholders regarding "what is working best" in accessing capacity building information. 3. Establish a method for ongoing feedback and improvement to the system.	1. Review and assess plans as necessary.

C	1. Establish initial meetings with Waukesha County Business Alliance to identify potential businesses, which may have an interest in engaging skilled employees in volunteering with nonprofits. 2. Identify volunteer programs that can assist with a capacity building role. 3. Identify funding sources to support capacity building initiatives and determine baseline of current state of total capacity building investment. (Coordinate with Role of Funder recommendation A.) 4. Identify peer networking among nonprofits. 5. Meet with Leadership Waukesha to review potential areas of collaboration. 6. Develop the measures for hours and values of in-kind support.	1. Develop a pool of professional volunteers with the skills, knowledge and expertise for consulting and coaching by attracting the business community and retired professionals. 2. Develop skills-based volunteering approach with the corporate sector which is a driver of social impact and business value. 3. Engage the business community to provide capacity building/ training for the pilot nonprofits to ensure sustainability. 4. Establish meetings with funders to better understand their perspective and align with funders' initiatives to increase investment in capacity building. 5. Align with Leadership Waukesha to identify specific projects that would support capacity building.	1. Develop strategic partnerships with the business community that align with the nonprofit objectives and provides in-kind resources and expertise. 2. Demonstrate a commitment to build infrastructure of nonprofits for a strong and sustainable community. 3. Invest in multi-year goal to increase capacity building grants. (Coordinate with Role of Funders recommendation A.) 4. Add to the repository of resources. 5. Align, review and refine the process of the business community.	1. Review and assess plans as necessary.

D	1. Develop presentation and other communication that explain Thriving Project findings and encourages nonprofit human service organizations to conduct reassessments of their aspirations, vision and strategies including a mission alignment assessment.
	
	 2. Identify the tools, material, and training on best practices, that are available to executives and board members to conduct their reassessments, including:
	
	    a. Potential measures to screen activities and programs for alignment to core mission.
	
	    b. Potential dashboards for agencies to use in monitoring their programs and their progress as a result of any realignment.
		1. Communicate the availability of two "tracks" for pursuing mission alignment assessments; one involving teams as part of a pilot project and the other being independent efforts by individual agencies.
		
		 2. Provide assistance, and if necessary, facilitation on the use of these tools as individual agencies pursue their own re-assessments.
		
		 3. Monitor progress of agencies against key measures and communicate lessons learned to both individual and pilot project agencies.
		
		 4. Create a mechanism or resource by which individual or pilot project agencies are supported in approaching proposed divestitures, transfers of services to another agency and identifying ways to provide necessary but incidental services not currently aligned with another agency's core mission.
			1. Conduct a review of all progress to date, make modifications to program best practices as necessary.
			
			 2. Issue invitations for Phase 2, to encourage human service organizations which have not yet participated to conduct reassessments.
			
			 3. Initiate Phase 2 incorporating lessons learned in Phase 1 of individual agency's independent assessments and from team cohort pilot program.
				1. Monitor and reassess.

E	Identify/recruit agencies willing to participate in a pilot program in which the agencies complete their re-assessments as a cohort group.	1. Teams attempt to identify services that may be "incidental" to their core mission.	1. Pilot program processes are adjusted or amended.	1. Implementation of Phase 2.
	1. Create "teams" of agencies with similar core missions.	a. Incidental services are placed in a team "parking lot" for later review.	2. Proposal prepared for Phase 2 expanded project employing "lessons learned" strategies.	
	2. Train or provide assistance to teams in the use of tools for reassessment.	b. Review of parking lot services to determine their necessity and whether they might be better provided by another agency.	3. Recruit agencies for participation.	
	3. Teams explore and identify the strengths and weaknesses of their respective agencies.	c. Other incidental services may be identified as necessary but temporarily not aligned with another agency's core mission.	4. Create Phase 2 teams.	
		2. Agencies engage funders in process related to possibly eliminating or moving services.		
		3. Teams attempt to identify existing "homes" for services that are necessary but not currently aligned with another agency's core mission.		
		4. Teams make recommendations for divestiture, transfer of services to another agency, or elimination of services or creation of a new entity to provide necessary but incidental services.		
		5. Participating agencies develop budgets and pro forma for prospective post realignment scenarios.		
		6. Results of the pilot program are captured and reviewed.		

#2 CAPACITY BUILDING: SYSTEMS AND INFRASTRUCTURE

CHAMPIONS: Waukesha County Community Foundation

Our research indicates that nonprofit executives consider their administrative costs as being very low. The nonprofit executives who participated in our focus groups supported that finding. However, those same agency leaders indicated that there are greater efficiencies and operational capacity to be gained from partnering on back office or administrative services. Our broader research indicates that the greatest returns would be realized in large-scale efforts involving multiple organizations and large numbers of employees. Organizations benefit most from sharing spaces in terms of cost-effectiveness and increased service capacity. Clients experience access to many services in one place and higher quality service provision.

RECOMMENDATIONS	SUCCESS MEASURES
A. Pursue consolidation of back office services through initiatives that involve multiple organizations and to reach the economy of scale that produces substantial returns.	1. Reduce current back office cost by 10% by 2016 and/or gain 10% more time for client centered mission or core activities of the entity. 2. Staff members are spending more time on matters reflecting their expertise rather than being jacks-of-all-trade.
B. Foster appropriate co-location that benefits both organizations and clients.	1. Identify a pilot site and perform swot analysis for costs and benefits. 2. 1 test site active in 2013-2014.
C. Develop a capital improvement plan. Embrace a state of the art mentality with technology.	1. 20% of nonprofits will have 3-5 year budget for capital expenditures including technology replacement annually. 2. 20% of nonprofits utilize Techsoup and/or other avenues to get the most current software for free or at discounted prices.

IMPLEMENTATION / ROADMAP				
Recommendation	6 Months (July – Dec. 2013)	1 Year (2014)	2 Years (2015)	3 Years (2016)
A	1. Identify the specific types of back office services that may be subject to consolidation. For example: Purchasing, Health Insurance, Financial Services, and Human Resource Management. 2. Create a list of candidate organizations with substantial back office expenses for those types of services. 3. Invite candidate organizations to attend working sessions where the feasibility of consolidation of back office services by attendees will be explored.	1. Develop an inventory of the types of back office services provided by each organization and the technological or software tools used to provide those services. 2. Review the inventory to identify the use of the same, similar and/or compatible tools and technologies to provide back office services. 3. Inform organizations of potential "opportunities" as identified and invite those organizations to attend a working session to review and explore those opportunities. 4. Create key measures of success.	1. Provide facilitation of the working session for the purpose of evaluating the opportunities and identifying all of the potential obstacles to potential consolidation. 2. Assist agencies with research directed at removing the obstacles, including but not limited to, alternative technologies, practices or systems that might allow the organizations to share resources and services. 3. Assist agencies in evaluating the potential savings to be realized utilizing the key measures of success for potential consolidations. 4. Work with agencies to develop plans and timetables for transitions toward shared services.	1. Monitor and review agency progress against key measures at selected intervals. 1. Report, review and realign plans as necessary.

| B | 1. Recruit a small cadre of facilitators to explore interest in co-location among local agencies.

2. Identify the key characteristics that make any organization a strong candidate for co-location.

3. Conduct a short survey to determine which organizations have those characteristics. | 1. Invite organizations with those characteristics to working meeting(s) and/ or session(s) where the potential opportunities for co-location are explored.

   a. Attempt to identify 'clusters' of interrelated services that would benefit both the organizations and their clients, for example, a transportation service co-located with counseling or healthcare organizations.

   b. Assist participants in defining key measures of success.

   c. Identify, contact and recruit organizations that have not participated to date but which might serve as needed compliment to any given cluster.

   d. Assist participants in the identification of obstacles to co-location. 2. Facilitate the development of a description of needs in terms of co-location properties and/or sites.

2. Facilitate the development of a description of needs in terms of co-location properties and/or sites.

3. Identify and contact potential partners in the real estate industry and establish a network of key contacts and a single clearinghouse for the identification of co-location properties and/or sites. | 1. Ensure that all information provided to the network is updated on a regular basis and needs, interests and opportunities change.

2. Identify and recruit professional service providers and resources, such as attorneys, accountants and builders who can provide services and support to potential co-locators.

3. Facilitate the agencies' review of opportunities against the description of needs. Assist them in the development of projections estimating the costs/benefits of any potential co-location for each of the agencies involved.

4. Coordinate the inquiries of potential participants in the due diligence exploration of opportunities. Facilitate the elimination of obstacles identified in the review of opportunities.

5. Assist agencies in the development of plans and timelines for potential relocation and co-location. | 1. Monitor agency progress against key measures of success. Assist in the revision of plans as needed.

2. Review and report on costs and benefits realized or lessons learned to the entire network. |

C			
	1. Identify local resources and professional services expertise capable of evaluating nonprofit capital expenditure and technology needs. 2. Conduct a review or survey of organizations as to the effectiveness of the capital expenditure plan, technological tools and skills currently in use. 3. Create a GAP analysis to identify current state versus desired state.	1. Recruit organizations who participated in the survey to participate in a pilot project designed to move a select group of agencies from the current state to the desired state. 2. Develop a specification for capital expenditure plan, technological tools and training most likely to facilitate success in achieving the desired state. 3. Assist in the development of key measures indicating success or failure in the pursuit of the desired state. 4. Create projections on the estimated costs (capital needs) association with implementing the specifications in pilot project agencies. 5. Facilitate discussions on the pros and cons, obstacles and opportunities necessary for allowing each participant to make an intelligent decision on participation in the implementation of each project. 6. Assist agencies in the development of capital improvement plans, timelines and budgets.	1. Provide troubleshooting support for the roll-out and transition. 2. Conduct periodic assessments of project progress against the key measures. 3. Assist agencies in the interpretation and reporting of their progress. 4. Review and report on accomplishments or setbacks. Make programmatic adjustments or revisions as necessary.	1. Open a second invitation for participation in a second phase project.

#3 COMMUNITY PERFORMANCE MEASURES

CHAMPIONS: United Way, Waukesha County, Business Alliance

Waukesha County's nonprofit executives suggest that greater awareness of and appreciation for the services they provide to the Waukesha County community would enhance the stability and sustainability of their organizations. The promotion and use of common community performance measures will provide the opportunity to report the current state and impact of the local nonprofit sector and encourage increased collaboration and efficiencies.

RECOMMENDATIONS	SUCCESS MEASURES
A. Promote the vital role and economic impact of the Nonprofit Health and Human Services sector in maintaining a thriving community.	1. Collective impact of Waukesha County's nonprofit sector is defined by December 31, 2013, and promoted annually through various communication and advocacy channels.
B. Use best practice indicators to measure client experience, capacity, efficiency, sustainability and stability across the nonprofit Health and Human Service sector.	1. Finalize indicators by December 31, 2013. 2. Piloted by 10 nonprofit organizations in 2014.
C. Develop common measures that can be used to compare the efficiencies of services among affinity groups.	1. Development of indicators by December 31, 2013. 2. Piloted by 10 nonprofit organizations in 2014.
D. Implement a Thriving Waukesha County client experience standardized survey that will be supplemental to current agency surveys.	1. Create survey tool by December 31, 2013. 2. Piloted by 10 nonprofit organizations in 2014 to establish baseline.

IMPLEMENTATION / ROADMAP				
Recommendation	6 Months (July – Dec. 2013)	1 Year (2014)	2 Years (2015)	3 Years (2016)

A	1. Identify and recruit members from multiple sectors to join committee focused on promoting the role and economic impact of Nonprofit Health and Human Services agencies. Together work to:
	
	   a. Define indicators of economic impact.
	
	   b. Gather information on the role and economic impact of Nonprofit Health and Human Services agencies.
	
	   c. Identify how to measure committee impact by setting specific communication goals and outcomes.
		1. Create "report" (form may vary) on the impact of Nonprofit Health and Human Services agencies.
		
		   a. Create supporting materials.
		
		   b. Identify audiences/ stakeholders with whom to share information.
		
		   c. Identify opportunities to share "report."
		
		   d. Identify channels to share information.
			1. Share information ("report" and supporting documents) through various channels targeting each audience/ stakeholder group.	1. Conduct a review to evaluate report findings, audiences/ stakeholder groups and communication channels and determine best and most effective way to proceed. Determine if goals and objectives for program impact were reached.

B	1. Identify and recruit members from multiple sectors to join committee focused on creating best practice indicators for capacity, efficiency, and stability. Together work to:
	
	   a. Collect best practice research.
	
	   b. Identify surveying methods currently taking place in multiple sectors.
	
	   c. Finalize indicators to be used in creating performance measures.
	
	   d. Create tool to measure indicators.
		1. Create communication plan to share goals and methods of collecting performance measure data.
		
		2. Identify pilot group of agencies to implement created tools and communicate goals, objectives and how to utilize tools for greatest impact and success.
		
		3. Assist pilot group in implementing tool.
			1. Review data yielded from created tools and determine how to move forward.
			
			2. Adapt tools as necessary, communicate findings and share tools with larger audience.
			
			3. Identify next steps and next group to utilize tools.
				1. Implement phase 2 of project as determined by data yielded from pilot.

C	1. Identify affinity group and survey to evaluate group. Using committee from Recommendation B, develop common measures to evaluate nonprofit affinity group's performance.	1. Identify pilot affinity group to evaluate performance using generated measures specific to group. 2. Apply measurement process to track and report.	1. Review data yielded from pilot group and determine next steps.	1. Implement phase 2 of project as determined by data yielded from pilot.

D	1. Building upon the recommendations from the "Thriving Waukesha Client Experience Action Team:
	
	   a. Locate, collect and analyze surveys currently utilized both nationally and in Waukesha County to evaluate client experience.
	
	   b. Determine survey best practices and develop "Thriving Waukesha Client Experience Survey."
		1. Create and implement plan to communicate the value of the survey tool.
		
		2. Identify group to pilot use of survey tool and implement the survey with 10 nonprofit organizations.
			1. Analyze results from survey tool to develop baseline data and create plan for phase 2 of the project.	1. Implement phase 2 of project as determined by data yielded from pilot.

#4 ROLE OF FUNDERS

CHAMPIONS: United Way in Waukesha County, Waukesha County Community Foundation, Greater Milwaukee Foundation, Waukesha County

Research into best practices indicated that funding organizations play a significant role in fostering financial capacity, long- term stability and in some cases instability, inefficiencies and the development of incidental services in the organizations they support. This finding was supported by nonprofit leaders who participated in our focus groups and who are seeking longer term sustainable funding for their operations and core services.

RECOMMENDATIONS	SUCCESS MEASURES
A. Provide more funding for agencies to increase their operational capacity while continuing to maintain the expectations for improved community outcomes. Even without additional funding, agencies should take steps to allocate budgets toward operational capacity.	1. Determine baseline of current state of total capacity building investment by December 31, 2013. 2. Establish multi-year goal to increase capacity building grants . 3. 10% of nonprofit boards certify commitment to capacity building through agency budget allocations; 25% in 2015 and 50% in 2016.
B. Provide more funding for community issues that impact outcomes on a community basis (collective impact). Decrease funding for individual agencies that drives competition for funding and causes agencies to move off their core mission.	1. Determine baseline of current state of total collective impact by December 31, 2013. 2. Establish multi-year goal to increase collective impact investment grants .
C. Shift more funding from "new and innovative" programs to funding of the core mission services of the agency. (Not intended to stifle innovative or new services responding to emerging or unmet needs)	1. Determine baseline of current state of new program funding (short-term) and core mission funding by December 31, 2013. 2. Establish multi-year goal to increase core mission funding.
D. Provide "longer-term sustaining grants" to agencies who become eligible by participating in a process with other agencies to realign services across the sector and also conduct a realignment/efficiency process within their agency.	1. 10% increase in the number of sustaining grants by 2015.
E. Funders should undertake actions to continually communicate and work together to understand their role and the impact of their actions to affect the stability and efficiency of both individual agencies and the sector.	1. Hold two meetings a year in 2013 to achieve and monitor the above recommendations. 2. Hold three meetings a year in 2014 to achieve and monitor the above recommendations. 3. Hold four meetings a year in 2015 and 2016 to achieve and monitor the above recommendations. 4. Create a website to share information.

F. Funders should take actions to streamline the funding process for agencies.	1. Annual agency survey indicating 25% improvement on rating scale by 2016.
G. Funders should undertake a process similar to that recommended to agencies whereby they seek to minimize incidental or noncore programs and services and refocus on and strengthen their core services.	1. Two funders conduct process in 2014. 2. Four funders conduct process in 2015.
H. Consider including in funding agreements the stipulation that if an agency makes a request for emergency funding, they will undergo a comprehensive review of the organization and will abide by the recommendations of the review process.	1. 100% of key health and human service funders add to agreements by end of 2015 (determine review process).
I. Funders need to educate local nonprofit leaders on the importance of establishing reserve policies and how funding decisions are impacted in a positive way if an organization demonstrates fiscal stability.	1. Annual percentage increase in agencies with board approved reserve policies 2014 (10%), 2015 (25%) 2016 (50%). 2. 20% increase in agencies with reserves of 3-6 months or longer by 2016.
J. Make nonprofit leaders aware of local training and resources available for their Boards of Directors regarding financial stability and planning.	1. 20% increase in agency leaders and Board of Directors using local resources as self-report in annual survey 2014. 2. 50% by 2015. 3. 75% by 2016.

IMPLEMENTATION / ROADMAP				
Recommendation	6 Months (July – Dec. 2013)	1 Year (2014)	2 Years (2015)	3 Years (2016)
A	1. Determine baseline of current state of total capacity building investment. 2. Prepare case statement that can be used to demonstrate the impact of capacity building (various stakeholder groups: donor community, agency boards and staff leadership).	1. Reaffirm goal to increase capacity building grants based on review of baseline. 2. Communicate multi-year goal with nonprofit organizations and "shared responsibility". 3. Create measurement tool and certification process through funding organizations.	1. Measure success.	1. Measure success.
B	1. Determine baseline of current state of total collective impact investment. 2. Prepare case statement that can be used to demonstrate the impact of capacity building (various stakeholder groups: donor community, agency board and staff leadership).	1. Reaffirm goal to increase capacity building grants based on review of baseline. 2. Communicate goal with community. 3. Create measurement tool to ensure progress.	1. Measure success.	1. Measure success.
C	1. Determine baseline of current state of new program funding (short-term). 2. Determine baseline of current state of core mission funding.	1. Reaffirm goal to increase sustaining grants based on review of baseline. 2. Communicate goal. 3. Create measurement tool to ensure progress.	1. Measure success.	1. Measure success.
D	1. Align activities with Lead Champions on Recommendation D & E.			

E	1. Establish initial meetings with Thriving Waukesha County lead sponsors to determine membership. 2. Discuss potential meeting topics. 3. Establish meeting calendar for 2013. 4. Recruit new members.	1. Finalize recruitment efforts. 2. Hold meetings. 3. Report to Thriving Alliance Steering Committee.	1. Hold meetings. 2. Report to Thriving Alliance Steering Committee.	1. Hold meetings. 2. Report to Thriving Alliance Steering Committee.
F	1. Align with Rec. E as part of 2013 meeting agendas for funder forums.			
G	1. Align activities with Lead Champions on Recommendation D & E.			
H	1. Align with Rec. 3. E as part of 2013 meeting agendas for funder forums to establish agreement and define common process.			
I	1. Prepare case statement that can be used to demonstrate the impact of establishing reserve policies. 2. Create measurement tool and certification process through funding organizations.	1. Communicate case statements with nonprofit organizations (board leadership and executive directors). 2. Communicate reserve/ reserve policy goals.	1. Ongoing Communication. 2. Measure success.	1. Measure success.
J	1. Review existing trainings and resources specific to financial stability and planning. 2. Ensure alignment with champions leading capacity building.	1. Secure resources to ensure access to these trainings emphasizing "shared responsibility." 2. Establish partnerships with existing community groups who provide these specific trainings. 3. Promote trainings. 4. Launch training in 2014.	1. Measure effectiveness of trainings. 2. Implement continuous learning and improvement.	

#5 INCREASED AWARENESS OF SERVICES

CHAMPIONS: United Way Impact Leadership Council, Local 211 Stakeholders, Waukesha County Public Health Division (CHIPPS)

Information on nonprofit service providers is often fragmented, incomplete and out of date. There is no central updated or central and searchable database which is considered to be a reliable tool to assist service providers, donors or funders with community navigation or inform those attempting to understand which services are available and provided by what agencies. Nonprofit leaders expressed the need for a tool that would more easily allow them to refer clients to needed services, improve community navigation and the continuum of care and avoid duplication of services.

A recent communication from the 211 US Steering Committee stated, "We have experienced phenomenal successes in the 211- network: rapid expansion, quality service, disaster response and strong utilization despite low awareness. However, the reality is that 211 is not operating in an optimal environment. We are at risk from competitors and from our own lack of capacity. Challenging circumstances require us to work together to create a new future".

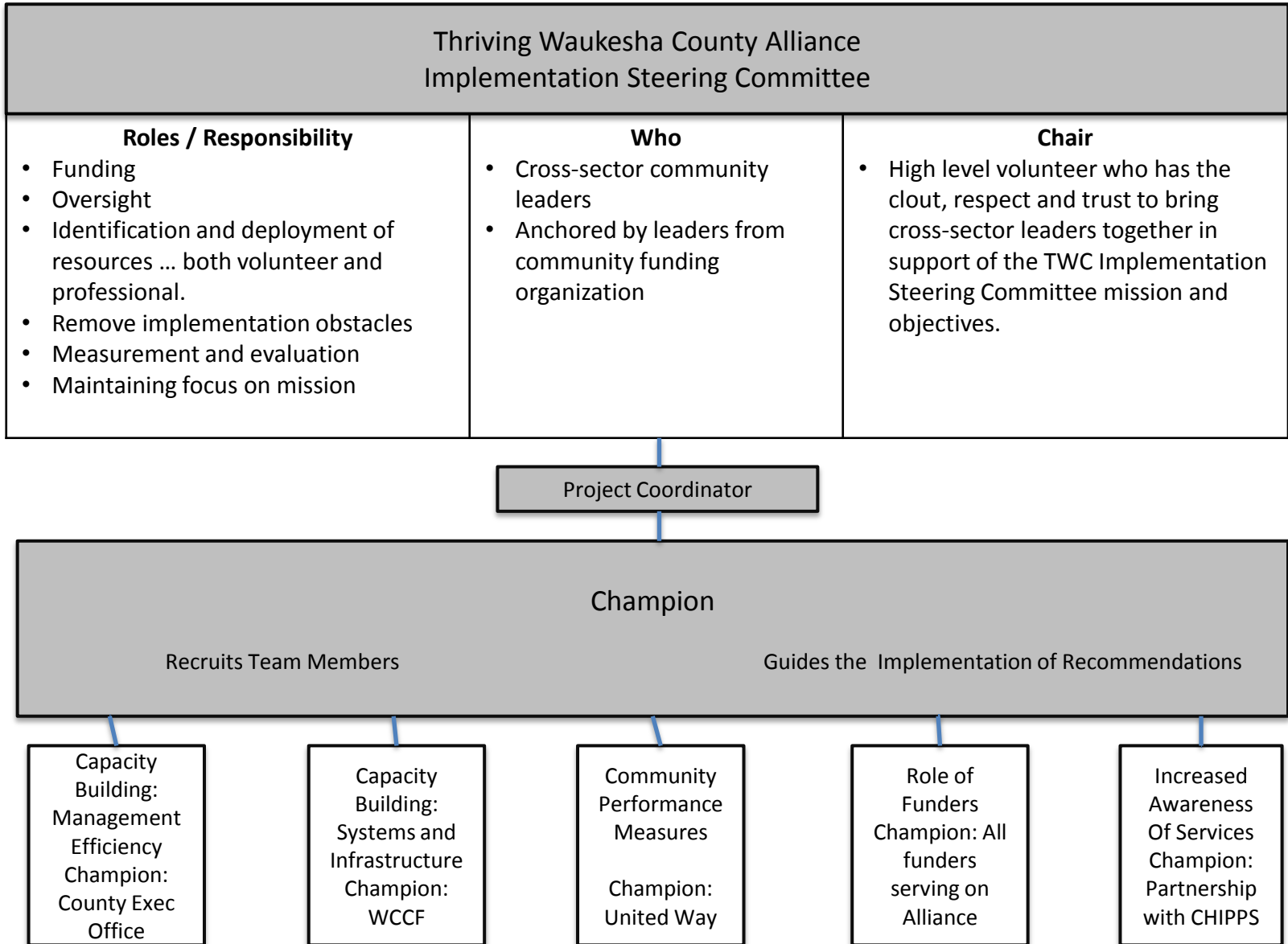| RECOMMENDATIONS	SUCCESS MEASURES
A. Create facilitated forums for the specific purpose of agency leaders gaining a deeper understanding of other agencies, the services they provide, possible duplication of services and collaborative opportunities.	1. 2 facilitated forums specific to an issue area launch in 2014. 2. Determine how to measure and monitor the impact of facilitated forums by December 31, 2013. 3. 2 additional facilitated forums specific to an issue area launch by 2015. 4. 2 additional facilitated forums specific to an issue area launch by 2016.
B. Enhance the present 2-1-1 system to create a continually updated central and easily searchable database of health and human services that is accessible to all stakeholders. It would include all nonprofit, for profit, churches, hospitals, educational and government organizations providing a health and human service in Waukesha County.	1. Sustainability plan determined by end of 2014. 2. Improved system is operational by 2015. 3. Comprehensive communications plan to increase awareness of 2-1-1 is determined by end of 2014 in alignment with improved system launch timetable. 4. By 2016, 75% of organizations featured on the 2-1-1 database update their information annually (determine consistent process for updating database).
C. Use the database for developing community initiatives, collaborations and to screen applications for funding based on redundancy, in addition to simple information and referral.	1. Operational by 2015.
D. Utilize an online client case management system for the purpose of improving community navigation, coordination of services, and client need tracking that can be accessed by service providers.	1. Determine best practice case management system for local implementation and resource requirements by December of 2014. 2. Identify organizations to pilot the case management system in 2015 for learning and further refinement.

IMPLEMENTATION / ROADMAP

Recommendation	6 Months (July – Dec. 2013)	1 Year (2014)	2 Years (2015)	3 Years (2016)
A	1. Determine agencies or issues of greatest potential impact/prioritize. 2. Recruit agencies for first two pilot groups along with lead facilitator/s (Executive Directors from the identified pilot group). 3. Have group identify topics for discussion and meeting calendar for 2014 (ensure topics align with Thriving Waukesha County recommendations). 4. Determine how to measure and monitor the impact of facilitated forums.	1. Launch first pilot groups. 2. Define reporting timetables for groups to report discussions and progress to Thriving Waukesha County Alliance. 3. Recruit agencies for second year groups along with lead facilitator/s (Executive Directors from the identified group). 4. Have groups identify topics for discussion and meeting calendar for 2015. 5. Measure impact.	1. Launch second year groups. 2. Define reporting timetables for groups to report discussions and progress to Thriving Waukesha County Alliance. 3. Recruit agencies for third year groups along with lead facilitator/s. (Executive Directors from the identified group) 4. Have groups identify topics for discussion and meeting calendar for 2016. 5. Measure impact.	1. Launch third year groups. 2. Define reporting timetables for groups to report discussions and progress to Thriving Waukesha County Alliance. 3. Measure impact. 4. Review results of recommendation and determine enhancements. 5. Prepare communication that highlights results of these forums.

B	1. Align with CHIPP Steering Committee to discuss common recommendations and collaborate on efforts to enhance community navigation. 2. Form community-wide working group to address 211 and community navigation. 3. Define what an enhanced 211 system looks like; what are the attributes of an enhanced 211? 4. What are we working towards? 5. In partnership with 211 Wisconsin and 211 US, identify best practice models for possible local application.	1. Determine all necessary resources to improve community navigation and build 211 enhanced system. 2. Create a long-term 211 sustainability plan. 3. Create comprehensive communications plan for 211 to be launched in 2015. 4. Create and conduct a semi-annual process to update resource database to ensure accuracy of data. 5. Define how to measure stakeholder satisfaction.	1. Launch enhanced 2-1-1.	1. Measure stakeholder satisfaction.
C	1. Work in collaboration with champions within recommendation #3 Role of Funders; ensure discussed and addressed within funder forums.			
D	1. Work in collaboration with CHIPP Steering Committee and align their recommendations with Thriving Waukesha County Alliance recommendation. 2. Develop roadmap together.			

Thriving Waukesha County
Implementation Structure

Thriving Waukesha County Alliance Implementation Steering Committee		
Roles / Responsibility	**Who**	**Chair**
• Funding • Oversight • Identification and deployment of resources … both volunteer and professional. • Remove implementation obstacles • Measurement and evaluation • Maintaining focus on mission	• Cross-sector community leaders • Anchored by leaders from community funding organization	• High level volunteer who has the clout, respect and trust to bring cross-sector leaders together in support of the TWC Implementation Steering Committee mission and objectives.

Project Coordinator

Champion

Recruits Team Members   Guides the Implementation of Recommendations

Capacity Building: Management Efficiency Champion: County Exec Office	Capacity Building: Systems and Infrastructure Champion: WCCF	Community Performance Measures Champion: United Way	Role of Funders Champion: All funders serving on Alliance	Increased Awareness Of Services Champion: Partnership with CHIPPS

SUPPORTING RESEARCH FINDINGS

COMMUNITY SERVICES AND NEEDS

Dousman

1. It is difficult for service providers, funders and clients to determine all the available service providers and specific services available in the community. This lack of understanding manifests itself when:

    a. Agencies attempt to guide clients to needed services and coordinate their services with other providers.

    b. Incidental or duplicate services are created by agencies trying to address perceived needs.

    c. Funders seek information to make funding decisions on new programs and services and allocate funding to current service providers.

    d. Clients attempt to access and navigate the available services. *(Source: Waukesha County nonprofit agency focus groups, Dec. 11-12, 2012, local services inventory research and development, Thriving Waukesha County Success Measures Survey of Task Force Members and United Way in Waukesha County Agency Directors, June 2012, Service Inventory and Collaborations Action Team)*

2. Leaders expressed a need for more comprehensive, accurate and updated information on what services are provided by what agency. They want this information to more efficiently refer clients to needed services and improve the community navigation system or continuum of client care. *(Source: Waukesha County nonprofit agency focus groups, Dec. 11-12, 2012, local services inventory research and development, Thriving Waukesha County Success Measures Survey of Task Force Members and United Way in Waukesha County Agency Directors, June 2012. Supported by national research; reference "Effective Capacity Building in Nonprofit Organizations", prepared for Venture Philanthropy Partners, by McKinsey 2001, Service Inventory and Collaborations Action Team)*

3. Most agencies are providing some level of case management or coordination of services for clients. These services that were once provided by social workers have been significantly reduced or may no longer be available due to funding reductions. The result is fragmentation of the case management process that in turn results in confusion and inefficiency. It may also compromise outcomes and client satisfaction. *(Source: Waukesha County nonprofit agency focus groups Dec. 11-12, 2012, Thriving Waukesha County Success Measures Survey of Task Force Members and United Way in Waukesha County Agency Directors, June 2012)*

4. Agency leaders frequently expressed that they were not aware of specific services being provided by another agency or that the agency even existed. *(Source: Waukesha County nonprofit agency focus groups Dec. 11-12, 2012 and Thriving Waukesha County Success Measures Survey of Task Force Members and United Way in Waukesha County Agency Directors, June 2012)*

5. Information on nonprofit service providers is often fragmented, incomplete and out of date. There is no central updated or central and searchable database which is considered to be a reliable tool to assist service providers, donors or funders with community navigation, or inform those attempting to understand which services are available and provided by what agencies. *(Source: Service Inventory and Collaborations Action Team)*

6. It is possible that agencies may be doing more branding of their services when faced with the need to promote themselves to their constituent donors by distinguishing themselves from their competition. This practice may create the impression that there is more diversity of service than actually exists. *(Source: Waukesha County nonprofit agencies survey, focus groups Dec. 11-12, 2012 and Thriving Waukesha County Services Inventory Action Team)*

7. If agencies position their services as being unique, it could be an obstacle toward greater coordination and collaboration and also impact the effectiveness of client referral, client navigation and funding decisions. *(Source: Waukesha County nonprofit agencies survey, Sept.-Oct. 2012, Kohls Group Consulting)*

8. Information and referral was at the top of the list of services provided for almost all agencies, however, in most cases this does not reflect a "funded" or "core" service of the agency. Rather, it indicates that agencies are providing information to clients and referrals to other community services to help clients meet identified needs and navigate the community services available. *(Source: Waukesha County nonprofit agencies survey, Sept.-Oct. 2012 and focus groups, Dec. 11-12, 2012)*

9. "Incidental" or "non-core" services are being provided by agencies primarily as a result of agencies trying to address perceived needs that are often "discovered" by agencies' first line service providers. Thereafter, the lack of knowledge of other services that already exist leads agencies to start their own services. Transportation is one of the best examples of the creation of incidental services. Many agencies create their own solutions for transportation because there is no central system, network or coordination that meets the majority needs. The lack of transportation solutions is an underlying issue that has an impact on overall sector efficiency and outcomes in other service areas. It is a fragmented system. *(Source: Waukesha County nonprofit agency focus group, Dec. 11-12, 2012)*

10. Research and case studies have proven that agencies that went through a process to refocus their resources on their core services increased their organizational capacity and efficiency, and, as a result, can have a greater impact on the social issue associated with their mission. *(Source: "Effective Capacity Building in Nonprofit Organizations", prepared for Venture Philanthropy Partners, McKinsey, 2001)*

11. There is strong agreement among survey participants that transportation and homelessness are two community needs that are not adequately addressed or served. *(Source: Waukesha County nonprofit agencies survey and focus groups, Dec. 11-12, 2012)*

12. Agency leaders are not aware of any formal process or single source of determining needs and gaps in services across Waukesha County. *(Source: Waukesha County nonprofit agencies focus groups Dec. 11-12, 2012)*

13. Agency leaders determine areas of community need primarily from their staff's and volunteers' direct interaction with the clients they serve. The clients receiving a primary service make known their additional needs through conversations or via staff assessments. If the agency representative is not able to refer them to another source in the community to meet the need, it is noted as an unmet need. Agency leaders validate their findings informally in discussions with other agencies. *(Source: Waukesha County nonprofit agencies focus groups, Dec. 11-12, 2012)*

14. Further determination of need by agency executives is garnered from interactions with other organizations and a variety of data sources that include, but are not limited to: county, state and federal health and human service reports (i.e. HUD reports/Point in Time, Wisconsin Service Point, Waukesha County CHIPP teams), census data, national associations, foundations/funders, 211 data, hospital community health assessments and the Waukesha County Board budgeting process. *(Source: Waukesha County nonprofit agencies focus groups, Dec. 11-12, 2012)*

THE ROLE OF FUNDERS

1. Funder and donor policies may create instability and inefficiencies in the organizations they support. Funders need to understand their role and impact in this regard. *(Source: Waukesha County nonprofit agency focus groups Dec. 11-12, 2012)*

2. Agency leaders continue to make the argument for steady funding of their core services. The request by funders to have new or innovative programs to fund is viewed by agency leaders contributing to the inefficiency in the sector as the agencies repackage current programs and service in new ways to meet the funders' need. *(Source: Waukesha County nonprofit agency focus groups, Dec. 11-12, 2012)*

3. Foreshadowing of the issues that would appear in our Thriving Task Force findings locally, and in national and local studies over the last ten years, were seen as early as 2003 in a large study by the Canadian Council on Social Development involving funders, nonprofit agencies and government stakeholders. The objective of the Canadian study was to document the changing funding landscape and assess the impact of these changes on the *"financial capacity and long-term sustainability"* of nonprofit and voluntary organizations (similar to Thriving objective). Their key findings are as follows:

    a. Divergent funding policies and practices work singly or in combination to facilitate or hinder nonprofit and voluntary organizations in pursuit of their mission.

    b. Trends in funding appear to threaten the continued viability of the sector. The shift away from core funding… has heightened competition… for increasingly scarce resources.

    c. Much organizational time is now devoted to chasing short-term sources of funding, often at the expense of the organization's mission and core activities.

    d. Many organizations are now dependent on a complex web of unpredictable funding; short-term, targeted project funding that may unravel at any time.

    e. This shift has resulted in greater "volatility, mission drift, loss of infrastructure, reporting overload and human resource fatigue." *(Source: "Funding Matters: The Impact of Canada's New Funding Regime on Nonprofit and Voluntary Organizations", Scot, Katherine, Canadian Council on Social Development, 2003)*

4. Funders have historically focused primarily on funding services and generally don't see capacity as a legitimate expense that leads to greater efficiencies and community impact. *(Source: "Research Findings: Augmenting Leadership and Management Planning Project", 2011, Kohls Group Consulting for Kresge Foundation)*

5. Larger organizations may be more susceptible to instability due to a dependence on "impersonal" donors and government funding. *(Source: "Bringing Mergers and Acquisitions to the Nonprofit Mainstream", Cortez, Alex, Foster, William, Milway, Katie Smith, The Bridgespan Group, Philanthropy Magazine, 2009)*

6. Smaller organizations have generally been more stable in the economic downturn based in part on their dependence on the "personal" dedication of significant donors. *(Source: "Bringing Mergers and Acquisitions to the Nonprofit Mainstream", Cortez, Alex, Foster, William, Milway, Katie Smith, The Bridgespan Group, Philanthropy Magazine, 2009)*

7. Donors who are personally involved may step up to fund losses. It's possible these relationships with donors may keep many struggling and inefficient organizations in the pool of agencies requesting funding from a shrinking funding pie. *(Source: "Bringing Mergers and Acquisitions to the Nonprofit Mainstream", Cortez, Alex, Foster, William, Milway, Katie Smith, The Bridgespan Group, Philanthropy Magazine, 2009)*

Merton

8. There is a perception among some local nonprofit leaders that funders will not fund agencies or programs with operating reserves. In contrast, funders like United Way are more confident in funding organizations that are financially stable and demonstrate ongoing board commitment towards the achievement of a minimum three-month reserve. *(Source: Waukesha County nonprofit agencies survey and focus groups Dec. 11-12, 2012, and discussions with local funding organizations)*

9. Almost 50% of local nonprofits surveyed indicated they do not have an operating reserve policy. *(Source: Waukesha County nonprofit agencies survey)*

10. "A top priority for nonprofit leaders needs to be maintaining operating reserves at levels adequate for achieving financial stability. While this may seem obvious, preliminary research indicates that many organizations neglect to put aside funds that will help them preserve their capacity to deliver on their missions in the event of unforeseen financial shortages." *(Source: "Maintaining Nonprofit Operating Reserves", A White Paper, by the Nonprofit Operating Reserves Initiative Workgroup, 2008)*

COLLECTIVE COMMUNITY IMPACT

1. The Task Force has identified the best practices from national and local research to apply in successfully creating and implementing a community collective impact, elements of which can be used to create the meaningful community-wide change envisioned by the Task Force. Shifting from isolated impact to collective impact goes beyond encouraging collaboration or public-private partnerships. It requires a systematic approach that focuses on the relationships among organizations and the progress towards shared objectives. *(Source: "Channeling Change: Making Collective Impact Work", Stanford Social Innovation Review, 2012 and Thriving Waukesha County Best Practices Research Action Team)*

2. The critical elements of a successful community initiative include:

   a. Being realistic about the time it will take to get through the initial organizing stages.

   b. Building from what already exists; honoring current efforts and engaging established organizations.

   c. Common Agenda - All participants have a shared vision for change including a common understanding of the problem and a joint approach to solving it through agreed upon actions. Clear boundaries must also be created to accomplish goals.

   d. Shared Measurement - Collecting data and measuring results consistently across all participants ensures efforts remain aligned and participants hold each other accountable. Requires strong leadership, funding and ongoing staffing.

   e. Mutually Reinforcing Activities - Participant activities must be differentiated while still being coordinated through a mutually reinforcing plan of action.

   f. Continuous Communication - Consistent and open communication is needed across the many players to build trust, assure mutual objectives and create common motivation.

   g. Backbone Support - Creating and managing collective impact requires a separate organization(s) with staff and a specific set of skills to serve as the backbone for the entire initiative and coordinate participating organizations and agencies. Funders must be willing to support the backbone organization as part of an open-ended process over many years, satisfied in knowing that they are contributing to large scale and sustainable social impact, without being able to take credit for any specific result that is directly attributable to their funding.

   h. Influential champion - The most critical factor is an influential champion (or small group of leaders) who commands the respect necessary to bring cross sector leaders together and keep their active engagement over time.

   i. Adequate financial resources - To last for 2-3 years, generally in the form of at least one anchor funder who is engaged from the beginning and can support and mobilize other resources to pay for the needed infrastructure and planning processes.

   j. Sense of urgency for change - New approach is needed to address the issue. *(Source: "Channeling Change: Making Collective Impact Work", Stanford Social Innovation Review, 2012 and Thriving Waukesha County Best Practices Research Action Team)*

COLLABORATION

1. The most common forms of collaboration are those that are the least formal and/or complex. Participation in these simple cooperative efforts may be required to develop the trust that might lead to higher levels of cooperation. *(Source: Himmelman, Art as in "Collaborative Solutions" Tom Wolff, 2005)*

2. Best practices research produced findings that indicated collaborations are not the strategy of choice for executives facing reductions in funding. The reasons cited in studies include:

   a. Collaborations are not the first choice of nonprofit executives as strategies for dealing with an increasing scarcity of resources. In a 2011 study involving 68 nonprofits that received substantial funding from government programs that might end only 10% of the executives considered consolidating or collaborating as a strategy for dealing with the cutbacks. *(Source: "The View From the Cliff: Government-Funded Nonprofits are looking out on Steep Cuts and an Uncertain Future", Stid, Daniel, Shah, Vishal, The Bridgespan Group 1.16.12)*

   Hartland

   b. Consolidations or collaborations that might result in leadership changes are perceived as posing a threat to the employment and status of current nonprofit CEO's or leaders. *(Source: Nonprofit Mergers and Alliances, McLaughlin, T, Wiley & Sons, 2010)*

   c. The costs and benefits associated with collaboration remain unclear and unproven. Many organizations don't have the resources to explore and adequately research the true costs, benefits and risks. *(Source: Nonprofit Mergers and Alliances, McLaughlin, T, Wiley & Sons, 2010)*

   d. The entire process of engaging in complex (or intense) and extensive collaboration, such as consolidations and mergers, is difficult, expensive and risky. *(Source: Nonprofit Mergers and Alliances, McLaughlin, T, Wiley & Sons, 2010)*

   e. The majority of mergers that have taken place have been "rescue mergers" in which the end results have been perceived as less than satisfactory. (Strong plus weak: 1+ 1 = 1 and a half instead of two or three. And the proposed synergies never realized. *(Source: Nonprofit Mergers and Alliances, McLaughlin, T, Wiley & Sons, 2010)*

   f. The risk of losing control of "their" organization outweighs their concern for financial or operational efficiencies. *(Source: Nonprofit Mergers and Alliances, McLaughlin, T, Wiley & Sons, 2010 and "After the Fall: Financial Crisis is Affecting Nonprofit Groups in Myriad Ways", Gose, Ben, Wasley, Paula, Wilhelm, Ian, 2008)*

   g. "Nonprofit executives will do almost anything, deplete their reserve, defer facilities upkeep and reduce services and salaries before considering a merger or consolidation. When they do, it's often because they are financially desperate." *(Source: Venture Philanthropy Partners, Morino, Mario, Jan 2012)*

3. The implications of the findings noted in #5 above align with Task Force findings from survey, focus groups and interviews with Waukesha County agencies on the subject of collaboration including:

   a. Funders and board members might be more amenable to considering collaboration as a productivity tool than agency executives would be.

   b. Agency leaders are not likely to offer cost savings through collaboration as a preferred strategy for coping with financial cutbacks. *(Source: Waukesha County nonprofit agencies survey, Sept.-Oct. 2012, and focus groups Dec. 11-12, 2012)*

4. The characteristics which enhance the chances of successful collaborations commonly include, but are not limited to:

    a. Knowledge of what the organization wants to accomplish.

    b. Clarity as to the organization's mission.

    c. Understanding and agreement on strategic challenges.

    d. The ability of the organization's various parts to speak in one voice. *(Source: Nonprofit Mergers Workbook, La Piana, David, 2005)*

5. Local and national resources area readily available that provide education, processes and toolkits to aid in fostering collaborations that can be used by agency leaders, board of directors, funders, and community. *(Thriving Waukesha County Best Practices Action Team research)*

6. Survey and focus group findings indicate that leaders of medium size agencies (defined in our survey as agencies with operating budgets of $250,000 - $999,999) may be in the best position to lead the way in greater collaboration and resource sharing. Leaders of medium size agencies believe they have the characteristics that allow them to do more collaboration including sharing similar needs and challenges of smaller agencies but with slightly more time and interest to interact with other service providers. They have more flexibility than larger agencies to consider collaboration. *(Source: Waukesha County nonprofit agencies survey, Sept.-Oct. 2012 and focus groups Dec. 11-12, 2012)*

7. "Most, if not all, nonprofit leaders consider their administrative costs as being very low. They may therefore be of the opinion that the overall gains from forming collaborations which share back office or administrative services are not worth the effort required to develop and manage them." *(Nonprofit Mergers and Alliances, McLaughlin, T, 2010).* This point of few, however, focuses on the gains to be earned on small-scale efforts in one or two cooperating organizations. If more organizations were to be involved in a shared services platform for back-office support functions such as finance, information technology, human resources, payroll, insurance and purchasing, the possibility for greater the efficiencies and returns can be realized. *(Kohls Group Consulting and "Case Study: Change Comes at a Cost", Stanford Social Innovation Review, Haider, Donald and Wohlgezogen, Franz, 2012)*

8. Most Waukesha County agency leaders indicated that there are greater efficiencies and operational capacity to be gained from partnering on back office or administrative services, including information technology management, payroll processing, facilities and joint purchasing. *(Source: Waukesha County nonprofit agencies survey and focus groups Dec. 11-12, 2012)*

9. Participants found great value in structured, well-focused forums like the focus group sessions that brought together different agencies to address a particular topic. *(Source: Waukesha County nonprofit agency focus groups Dec. 11-12, 2012)*

10. Research indicates that co-location benefits both organizations and clients. Organizations benefit most from sharing spaces in terms of cost-effectiveness and increased service capacity. Clients experience access to many services in one place and higher quality of service provision. *(Source: "Building Co-location", Collaboration of Local Organizations, Prepared for Marion County Coalition on Youth and the Early Intervention and Prevention Initiative, 2011)*

ACKNOWLEDGEMENTS

APPENDIX

DEFINITION OF TERMS

- **Back office expenses:** These expenses are generally regarded as administrative and include (but are not limited to) human resource management including benefits administration, accounting, information technology management, payroll processing, facility maintenance and purchasing.

- **Case management:** The coordination of services and treatment plans for a client to ensure the appropriate care is provided.

- **Capacity building:** The ability of nonprofit organizations to fulfill their missions by increasing or enhancing their capabilities to efficiently meet their client's needs.

- **Champion:** A leader, or small group of leaders, who commands the respect necessary to bring cross sector leaders together and keep their active engagement over time.

- **Collaboration:** A mutually beneficial relationship entered into by two or more organizations to achieve results they are more likely to achieve together than alone. (Note: While "Collaboration" is also commonly used to refer to a merger of two or more nonprofit entities, for the purposes of the Task Force's work, we strived to differentiate "collaboration" from "merger".)

- **Collective impact:** The result of a systematic and disciplined approach that occurs when organizations agree to solve a specific social problem (or achieve large-scale social impact) using a common agenda, aligning their efforts and using common measures of success.

- **Co-location:** A type of collaboration in which two or more partner agencies share physical space on a regular basis, ranging from providing programming in a common space to sharing permanent offices. Although the missions of these agencies may differ, they are connected by a shared service focus.

- **Community:** Social groups of any size whose members reside in a specific locality, share government and often have a cultural and historical heritage.

- **Community Navigation:** The ability of stakeholders (agencies, clients, funders and others) in the nonprofit sector to identify service providers available in a given community or geographic area and understand the nature of the services they provide.

- **Core Mission:** Defines the primary purpose of nonprofit agency.

- **Core Services:** Programs and services essential to meet the nonprofit agency's core mission.

- **Donor:** A donor is a person or organization who contributes funds to a nonprofit entity directly or through a funder organization.

- **Efficiency:** Providing client services that meet needs and create the desired community impact with minimal waste of resources.

- **Funder:** A nonprofit organization that receives and manages funds from donors and directs them to nonprofit entities individually or collectively.

- **Health and Human Services Sector:** All nonprofit, for profit, churches, hospitals, educational and government organizations providing a health and human service in Waukesha County.

- **Incidental (or non-core) services:** These are services that are not fundamental to the core mission of the nonprofit agency.

- **Merger:** A process by which two or more organizations become formally linked by organizational and legal agreements that change their legal identities. For the purposes of this project, mergers generally involve combining the resources of two separate organizations into one whole.

- **Organizational Capacity:** The ability of an organization to provide and sustain the delivery of its core services.

- **Program:** An organized initiative or groups of initiatives designed to address specific needs.

- **Service:** The direct output from a program that is intended to be of benefit to the end users or clients.

- **Service Provider:** An organization that supports, manages and administers to the delivery of programs and services.

- **Stability:** The ability of an organization to cope with environmental changes, internal or external, without loss of control or diminution of service delivery.

- **Sustainability:** The ability to provide client services (that may change over time) over a long period of time.

PROJECT RESOURCES AND REPORTS

Background Reports/State of the Industry

1. "After the Fall: Financial Crisis is Affecting Nonprofit Groups in Myriad Ways", Gose, Ben, Wasley, Paula, Wilhelm, Ian

2. "Bringing Mergers and Acquisitions to the Nonprofit Mainstream", Cortez, Alex, Foster, William, Milway, Katie Smith, The Bridgespan Group, Philanthropy Magazine, 2009

3. "Building Co-location", Prepared for Marion County Coalition on Youth and the Early Intervention and Prevention Initiative, Collaborations of Local Organizations, 2011

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12. "Research Findings: Augmenting Leadership and Management Planning Project", Prepared for the Kresge Foundation, Kohls Group Consulting, 2010

13. "The View from the Cliff: Government-Funded Nonprofits Are Looking Out on Steep Cuts and an Uncertain Future", Stid, Daniel, Shah, Vishal, The Bridgespan Group

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14. Best Practice Report (7.17.12)

15. Collective Impact Summary, T. Terrill (1.16.13)

16. "Maintaining Nonprofit Operating Reserves", A White Paper, by the Nonprofit Operating Reserves Initiative Workgroup, 2008

17. Thriving Nonprofit Research Notes (6.13.12)

18. Thriving Waukesha County Community Collaborations Summary

19. Thriving Waukesha County Collaboratives (12.4.12)

20. Transportation Summary of Key Findings

21. Waukesha County Coalitions/Collaborations/Initiatives (5.12)

22. WTP-Interview Questions

Eagle
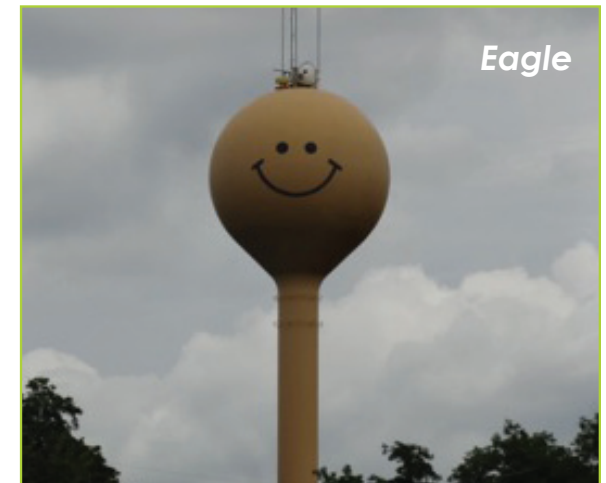
Client Experience Action Team

23. CEAT Oct. 9 TF Report

Definition of Terms

24. Definitions

Focus Groups

25. Lists of Agencies Invited to Participate: Small, Medium, Large

26. Focus Group Discussion Guide

27. Focus Group Key Findings

Services Inventory and Collaborations Action Team

28. Database Evaluation and Samples

Success Measure Action Team

29. Success Measures – Preliminary Questions: measuring sustainability, capacity and effectiveness

    • Report for December 5 meeting

Survey Action Team

30. Agency Service Inventory

31. Agency Survey List

32. Agency Survey Questions

33. Agency Survey Results Summary

Task Force

34. Membership and Action teams

35. Success Measures Survey Summary

    • U Way Agency Director Survey Summary

    • Success Survey comparison

KNOWLEDGE TRANSFER REPORTS AND RESOURCES

Background Reports/State of the Industry

1. "Transitioning 2-1-1 for a Sustainable Future", 211 US Steering Committee
2. "A Strategic Approach to Nonprofit Capacity Building" Northland Foundation
3. "Disruptive Forces: Driving a Human Services Revolution", Alliance for Children and Families, 2011
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7. "Needle Moving Collective Impact Guide", The Bridgespan Group
8. "Principles of Successful Collaboration", Strategic Alliance Fund
9. UWay Thriving Research 4.30.12, (Kohls Group notes)

Client Experience Action Team

10. Client Experience Summary of Focus Groups

Success Measures Action Team

11. Meeting notes

Task Force

12. Diagrams for Strategy Room
13. G4 Meeting Notes
14. Task Force Meeting Notes

Thriving
Waukesha County

Sustaining a thriving nonprofit health and human services community in Waukesha County.

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