

# *Successful Partnerships*



## **SVP's 2008 Capacity Building Outcomes**

**Social Venture  
Partners International**

Prepared by Aaron Jacobs  
September 2008

# Introduction

Social Venture Partners (SVP) is a network of individuals who combine financial contributions and professional skills with a passion for philanthropy. By leveraging their collective expertise and resources, SVP Partners assist in strengthening nonprofits for maximum community impact. Promoting philanthropy among its Partners is at the core of SVP's mission. This is achieved by engaging Partners in a variety of activities, including philanthropic education through workshops, seminars and panel discussions, participation in grantmaking committees, structured volunteerism and opportunities to network and collaborate with other Partners.

This report pertains to SVP's effectiveness in building capacity among our investees. We build capacity through cash grants and by providing consulting support in ten areas of organizational capacity building. The majority of capacity building work is performed by SVP Partners on a volunteer basis; this is supplemented with additional support, including leadership development opportunities, paid consulting, and connecting investees with additional resources and each other.

As a learning organization, SVP continually seeks to assess its progress and improve its performance. In assessing our impact in capacity building, we have prioritized these outcomes:

- Investee satisfaction with SVP
- Value added by SVP Partners
- Impact of capacity gains on program effectiveness

In June/July of 2008, 13 of the 24 SVP affiliates (54%) administered tools to gather data on investee outcomes. Those affiliates that administered the tools received responses from 65 of 69, or 94%, of their investees.

The results of the capacity building outcomes tools will be used by SVP to improve its capacity building work with investees and to help strengthen the field of capacity building as a whole.

# Key Findings

Based on analysis of the survey results, the following key findings were identified:

- Overall, 100% of SVP investees characterized their relationship with SVP as “excellent” or “good.” (88% excellent, 12% good). No investees characterized their relationship with SVP as “fair” or “poor.”
- Investees were asked to rate the quality of their interactions with SVP according to the specific criteria of *Approachability*, *Responsiveness*, and *Knowledge*. All areas were rated as 4.5 or above out of a possible 5.
- When asked to rate the value of Partner time and talent (strategic volunteering) in helping their organization build its capacity, investees gave an overall rating of 4.8 out of a possible 5.
- The two capacity building areas where investees reported receiving the most value were *Mission, Vision, Strategy and Planning* and *CEO / ED / Senior Management Team Leadership Development*.
- During the period covered by the survey, the non-grant value added by SVP Partners totaled \$2,751,759.
- During this same period, cash grants to these investees totaled \$2,594,985. SVP Partners’ resources of skills, money and connections more than doubled the value of the initial cash grants.
- Indicators of SVP’s *Knowledge, Practices and Reputation* were all rated as “4.5” or higher except for *Impact on public policy*, which is expected as very few SVP affiliates are currently working in this area (27 investees answered “I don’t know” for this question).
- SVP services in all capacity building areas received at least a 3.8 average rating out of a possible 5. However, the areas with the most “1’s” or “2’s” were *Program Design and Evaluation* and *Fund Development*.
- The capacity building areas with the most “N/A’s” (meaning services were not provided in these areas) were *Legal, Financial Management, Human Resources* and *Program Design and Evaluation*.

# Methodology

The following data collection tools were used to generate this report:

- Investee Survey, administered in June/July 2008 by 12 affiliates and March 2007 by one affiliate, generated information related to investee satisfaction, the perceived value of capacity building assistance, and the value added by SVP Partners.
- Most Significant Change Tool, administered in June/July 2008, generated information about SVP's impact on program effectiveness.

These tools are part of the Demonstrating SVP's Impact (DSI) suite of assessment tools and were developed by SVP International (SVPI), the network association, to identify priority outcomes and help SVP affiliates demonstrate their impact. In 2004-2005, three SVP affiliates—Seattle, San Diego and Arizona—worked with SVPI to develop and pilot the original survey. The process was conducted by Blueprint Research and Design, a philanthropy consulting firm, with funding support from the Kellogg Foundation, the Surdna Foundation, the Lodestar Foundation and the Hewlett Foundation.

SVP International commissioned this report of the collective survey findings to further serve as a resource for SVP affiliates. The 13 affiliates that participated in the survey were Arizona, British Columbia, Boulder County, Calgary, Cleveland, Dallas, Denver, Los Angeles, Pittsburgh, Portland, Rhode Island, San Diego and Seattle.

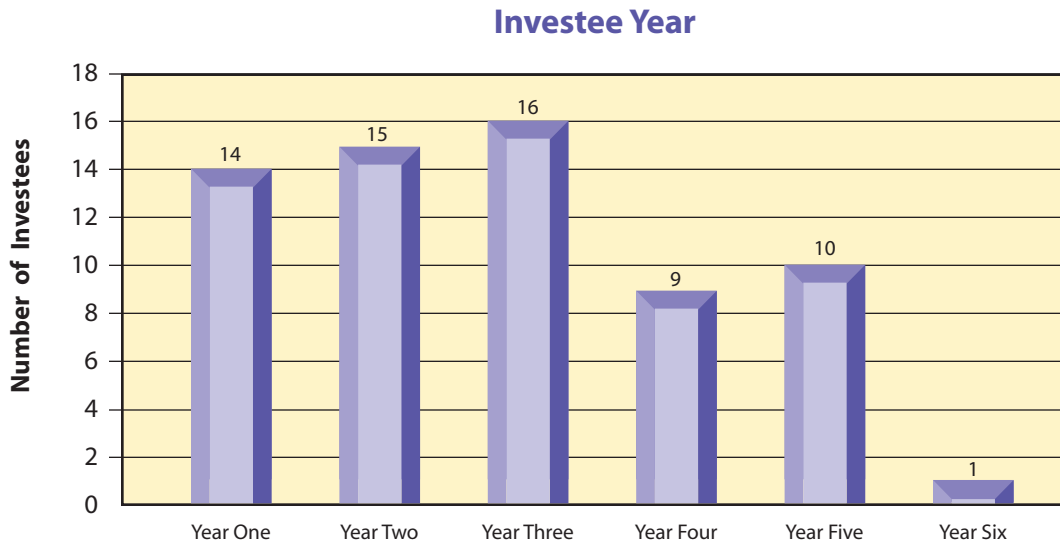
## Limitations to the Data

The data that follows paints a meaningful and important portrait of SVP's impact on nonprofit capacity. It is nonetheless important to acknowledge several aspects of the research methodology that may impact the data, particularly as it relates to the investee survey.

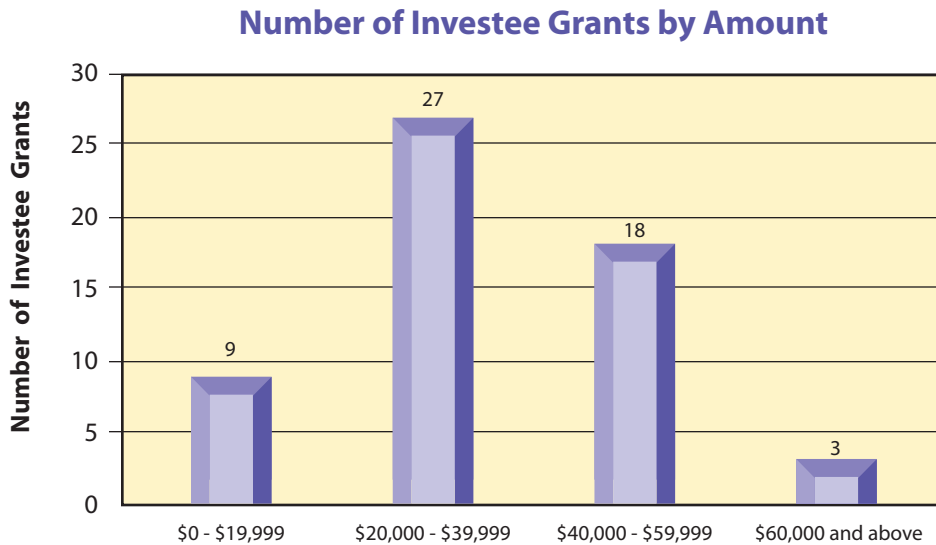
- Although the information provided by investees was confidential, there is an inherent bias in surveys administered to grantees by funders. To minimize this bias, SVP administered the survey **after** re-funding decisions had been made and announced.
- The quantitative data related to calculating the value added by SVP Partners are in some cases estimates by investees. SVPI has reviewed the data, but there is a degree of judgment in these numbers and they should be viewed as estimates.
- The data related to increased capacity gain and/or stories of significant change is subjective and was provided by investees without independent review or verification.

# General Information about Respondents:

Investees were in the following year of their SVP relationships:



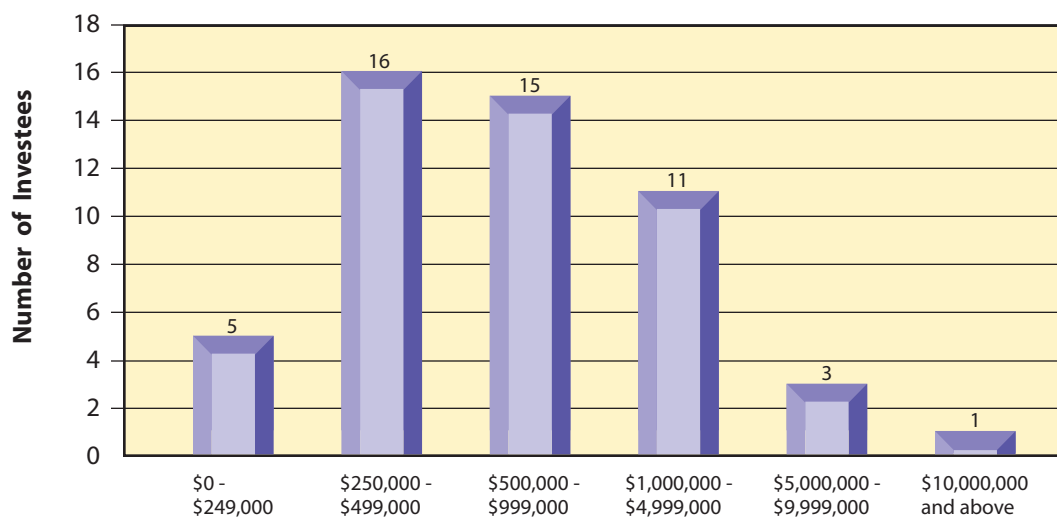
57 of the 65 investees reported their most recent grant amount. Of those that reported an amount, the number of grants by amount were as follows:



- The most recent cash grant averaged approximately \$32,667, with a mean of \$30,000.
- The smallest amount was \$7,500; the largest was \$70,000.

51 of the 65 investees reported their annual operating budget. Of those that reported an amount, the number of budgets in each range were as follows:

## Investee Budget Size



- The average budget was \$1,879,110.
- The mean budget was \$680,000.
- The smallest budget was \$50,000; the largest was \$37,000,000. This large range accounts for the difference between the average and mean.
- 71% of investees reported a budget under \$1,000,000; 41% reported a budget under \$500,000.
- Only 8% of investees reported a budget of \$5,000,000 or more.

# Key Findings on Impact

## A. INVESTEE SATISFACTION WITH SVP

Tracking investee perceptions of SVP is important because of the relationship-intensive nature of the work. SVP prides itself on its transparency with investees, and its high level of engagement requires a strong foundation of trust. As such, a high degree of investee satisfaction with the SVP relationship is a prerequisite for any meaningful capacity building work.

### Overall Satisfaction

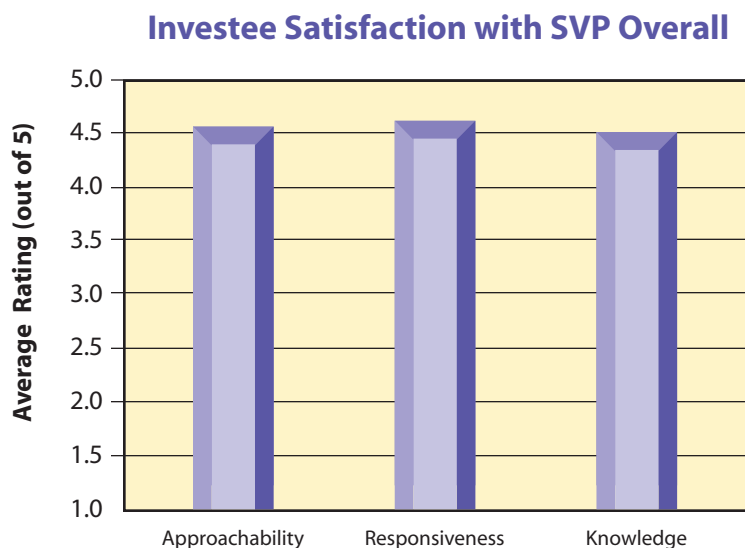
**Overall, 100% of SVP investees characterized their relationship with SVP as “excellent” or “good.” (88% excellent, 12% good).**

**No investees characterized their relationship with SVP as “fair” or “poor.”**

Investees were asked to rate the quality of their interactions with SVP according to the specific criteria of:

- *Approachability* – The investee staff knows how to contact the Partner/staff/lead; feels comfortable contacting; feels receptiveness to their questions or feedback.
- *Responsiveness* – The investee staff feels that the Partner/staff/lead replies in a timely way; the response is useful or thoughtful; and that the Partner/staff/lead demonstrated openness to the investee staff’s feedback.
- *Knowledge* – The investee staff feels that the Partner/staff/lead is able to offer resources or ideas in response to their questions or requests for information; that the Partner/staff/lead reflects understanding of their organization’s mission and needs.

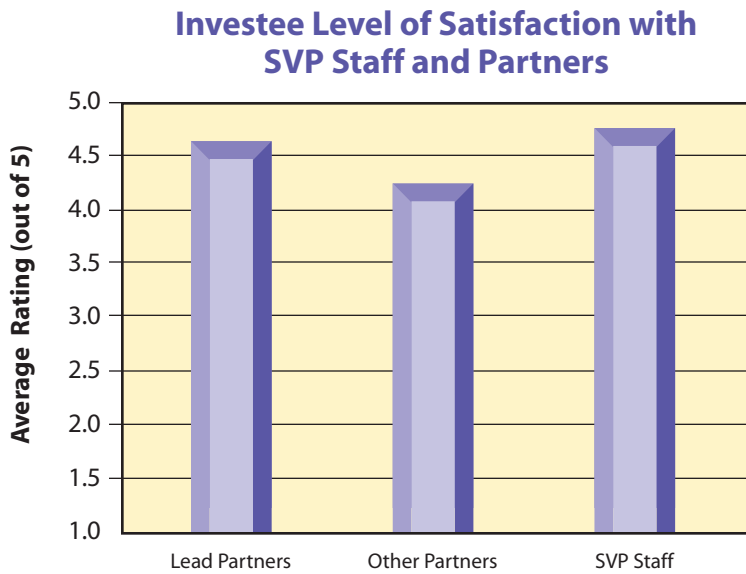
Results are as follows:



All areas averaged 4.5 or higher. Sixteen “1’s” or “2’s” were reported in all answers: seven were for Approachability, eight for Responsiveness and one for Knowledge.

## Satisfaction with SVP Partners and Staff

Investees rated the quality of their interactions with *SVP Lead Partners*, *Other Partners* and *Staff* as follows:



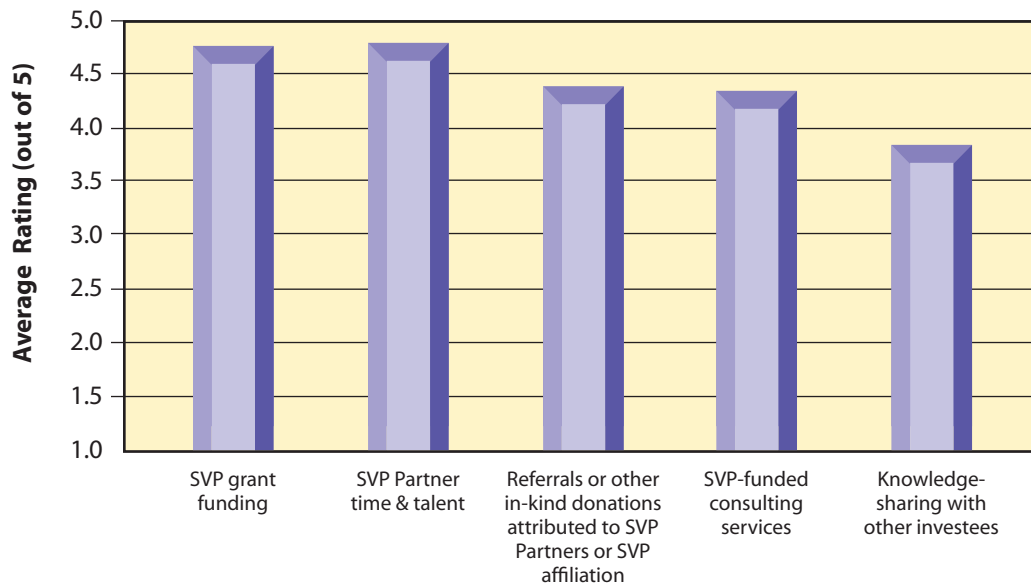
*Leads*, *Staff* and *Other Partners* all rated over 4 in this area, with both *Leads* and *Staff* rating over 4.5. It is expected that those who spend the most time with investees and have deeper knowledge about them (*Staff* and *Leads*) would have higher ratings than those who don't (*Other Partners*). However, *Other Partners* only received three "1's" or "2's" compared to *Staff* (who received seven) and *Leads* (who received six).

## Perceived Value of Different Forms of SVP Assistance

SVP asked investees to rate the value of each type of assistance in helping its organization build capacity to meet its mission. Types of assistance included the following:

- *Grants*
- *SVP Partner time and talent*
- *Referrals or other in-kind donations attributed to SVP Partners or SVP affiliate*
- *SVP-funded consulting services*
- *Knowledge sharing with other investees*

### Satisfaction by Form of SVP Assistance



The two rated highest by investees were:

- *Partner time and talent* (average rating of 4.8/5.0)
- *Cash grants* (average rating of 4.7/5.0)

All areas rated over 3.5.

The areas with the most "N/A's" were *SVP-funded consulting services* (13) and *Knowledge sharing with other investees* (eight). *Knowledge sharing with investees* had the most "1's" or "2's" (six).

## Satisfaction with Partner Volunteers

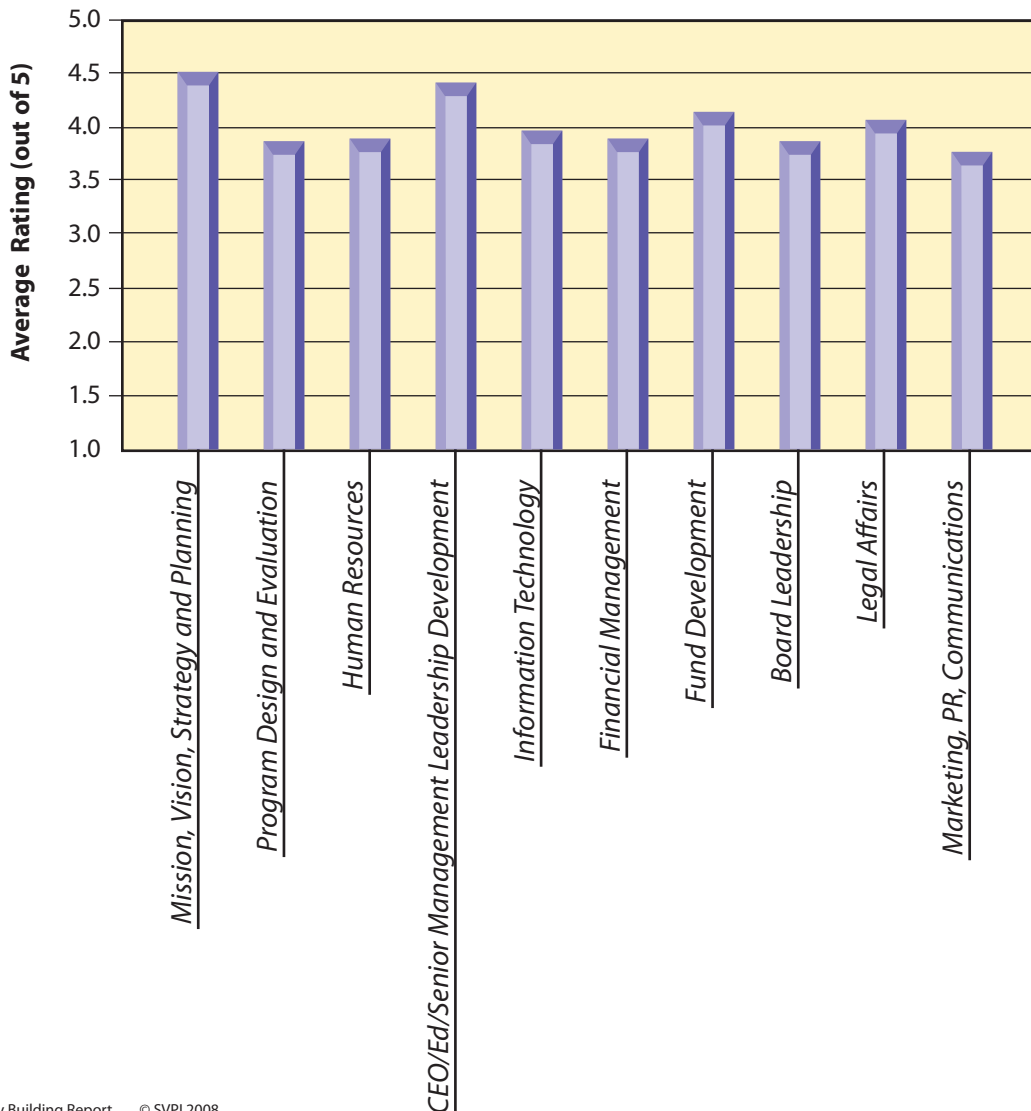
SVP works with investees to identify the particular areas of capacity it needs to develop, and then provides targeted resources to strengthen those areas. SVP asked investees to rate the value of SVP Partner volunteer time spent working on projects in the following areas:

- *Mission, Vision, Strategy and Planning*
- *Program Design and Evaluation*
- *Human Resources*
- *CEO/Ed/Senior Management Leadership Development*
- *Information Technology*
- *Financial Management*
- *Fund Development*
- *Board Leadership*
- *Legal Affairs*
- *Marketing, PR, Communications*

Two areas where investees reported receiving the most value were:

- *Mission, Vision, Strategy and Planning (4.5)*
- *CEO/Ed/Senior Management Leadership Development (4.4)*

**Satisfaction with Partner Volunteers by Capacity Area**



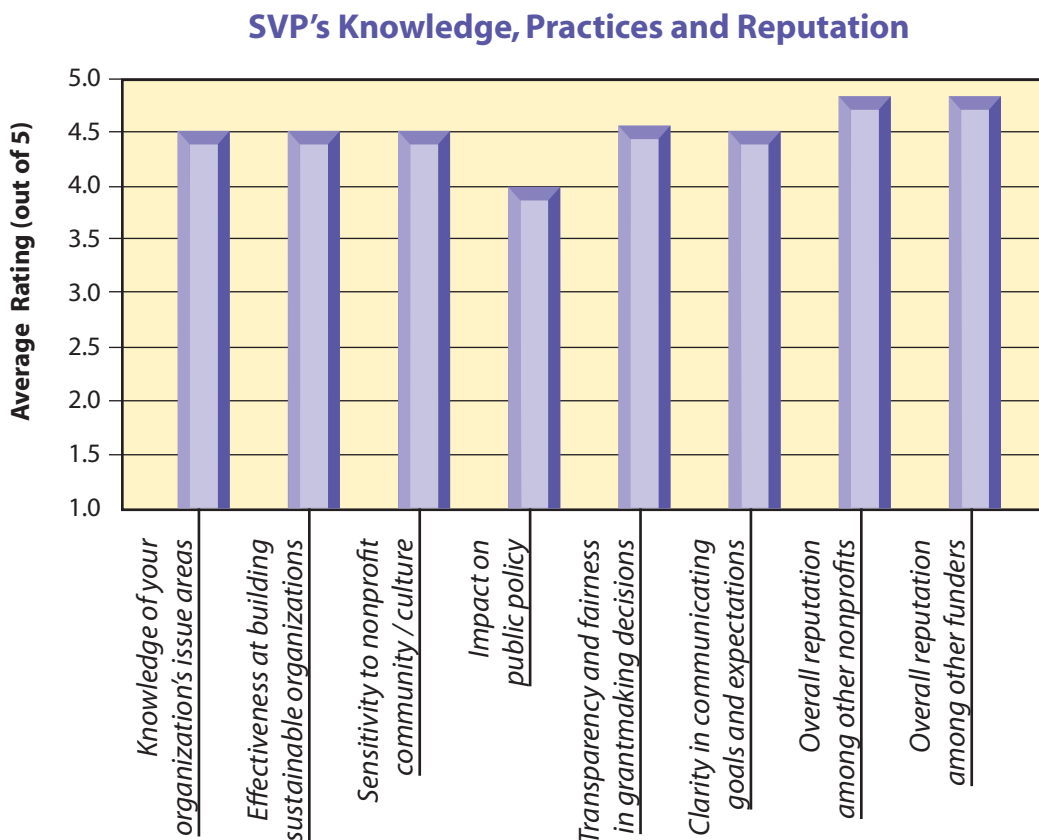
All areas were rated at 3.8 or higher.

The areas with the most “1’s” or “2’s” were *Program Design and Evaluation* (eight) and *Fund Development* (seven).

The areas with the most “N/A’s” were *Legal* (44), *Financial Management* (29), *Human Resources* (24) and *Program Design and Evaluation* (22). It may be worthwhile to explore whether this is because investees aren’t requesting these services or if it is because affiliates lack the resources to provide these services. Legal support may not be an issue, but the other three areas, particularly *Financial Management* and *Program Design and Evaluation*, are key areas of capacity building and essential for long-term sustainability.

## Characterizing SVP’s Knowledge, Practices and Reputation

How SVP does its work is as important as the work it does. Investees were asked to rate SVP’s knowledge, practices and reputation in several areas.



The two highest rated areas were *Overall reputation among other nonprofits* and *Overall reputation among other funders* (4.8 for both). All areas were rated as “4.5” or higher except for *Impact on public policy*, which is expected as very few SVP affiliates are currently working in this area (27 investees answered “I don’t know” for this question).

There were nine “1” or “2” ratings across every area in this question, six of them for *Impact on public policy*. This is expected, as many affiliates do not yet work in this area, or have chosen not to.

## B. INVESTEE SATISFACTION WITH SVP

SVP's strategy for building capacity is to provide a comprehensive support package, which, depending on the affiliate, includes financial support, professional-level volunteers (Partners), paid consultants, and networking opportunities to its investee organizations.

The cash grants are only a portion of the value that investees gain by being part of SVP. Additional value is generated through the following:

- Partner volunteer time for strategic volunteer projects (we did not include Partner time dedicated to tutoring or mentoring)
- The new cash donations made by individual SVP Partners (as opposed to the organizational grant)
- The new cash donations or grants received based on referrals or contacts from individual Partners
- The in-kind benefits received based on referrals or contacts from individual Partners

A summary of the value added by SVP Partners across all responding investees is as follows:

<b>Value Added by SVP Partners</b>	
Volunteer Time <sup>1</sup> (14775.5 hours @\$100/hr) .....	\$1,477,550
New cash contributions from individual Partners.....	\$486,866
New cash contributions from Partner referrals.....	\$336,980
In-kind contributions from Partner referrals <sup>2</sup> .....	\$450,363
<b>Total</b> .....	<b>\$2,751,759</b>

<sup>1</sup>The value was calculated using a market-based uniform rate of \$100 per hour. Although market rates vary according to type of project, we chose a single rate at the low end of the range (\$75-\$150) to maximize ease and reliability of data collection.

<sup>2</sup>This includes only donated goods, not services. It also includes a land donation valued at \$350,000, which is not typical.

During this same period, cash grants to these investees totaled \$2,594,985. SVP Partners' resources of skills, money and connections more than *doubled* the value of the initial cash grants.

SVP Partners also secured a variety of donated services for investees. While we have not quantified the value of these services for this report, we would like to list examples here:

- An SVP volunteer was nominated as Distinguished Alumni at his alma mater and used the opportunity to showcase our social enterprise . . . this was great marketing and we met good contacts at event itself.

- An SVP volunteer connected us with a sales “guru” who gave us scripts and a better system to qualify leads.
- SVP secured pro bono legal services for corporate work and for several critical real estate transactions this year to grow our organization.
- [SVP connected us to an] HR outsourcing company which provides HR payroll processing and services for 2 employees.
- SVP referred us to employment attorney who rewrote personnel policies and donated consultation.

## C. Most Significant Changes

SVP believes that stronger organizations deliver more effective, sustainable programs. The effort SVP has made to strengthen the organizational capacity of its investees leads to significant improvements in program effectiveness and social benefit. Although it is not possible to purely quantify these social gains, we have asked investees to document stories of the most significant change that they have experienced in their organizational capacity as a result of their relationship with SVP. The following four stories exemplify the type of change that SVP is trying to affect:

### **Women’s Wilderness Institute**

[www.womenswilderness.org](http://www.womenswilderness.org)

In 2007 The Women’s Wilderness Institute (TWWI) embarked on an expansion with the goal to introduce after-school, community-based programs. Patti Cummings, an SVP Partner, suggested we complete a logic model process to develop the new programs and offered to consult on the project.

Neither the Executive Director nor the Community Director of TWWI had prior experience with using a logic model. Patti’s first job was to educate us on the importance of this step in the strategic planning process. She shared her experience and success with using the logic model tool and supplied us with educational articles. Patti recommended that TWWI pull together a team of stakeholders (board, staff, community members, and staff from local schools) to go through the planning process. This proved to be a very insightful and accurate way to draw diverse wisdom and knowledge into the plan.

TWWI held two meetings which were facilitated by Patti. It was amazing how much time and thoughtfulness was needed to sort through and agree on our goals, scope, and both short and long term outcomes. This process proved an excellent way to get all of the players aligned from the beginning while creating board member buy-in. It quickly became clear that logic models are also important to external audiences. A few months later TWWI completed a large funding request for which a logic model was required. It was great to have this step of the grant application already completed!

TWWI launched a successful new after-school program called Girls on the Rise in February of 2008. As we turned our attention to the next after-school program, Girl’s Action Project, we decided to use the same strategic approach. Patti had taught us so well that we knew

we would be able to proceed with the process/ project on our own. The Executive Director stepped into the facilitator role for the logic model process and led two sessions. TWWI expects to introduce Girl's Action Project in the fall of 2008.

This is an excellent example of how SVP involvement created awareness, knowledge, and new skills. It is also a wonderful example of how the SVP model supports eventual autonomy and independence for nonprofits like TWWI.

## **Powerful Voices**

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[www.powerfulvoices.org](http://www.powerfulvoices.org)

This past year we requested professional development coaches for each of our four executive team members. Our Executive Director, Program Director, Director of Development & Marketing and Associate Director were each successfully matched with an SVP coach as a result. Investing coaching time and expertise into our team was a strategy to strengthen decision-making and support at the leadership crossroads. Opportunities and issues related to fund development, human resources, programming and board/strategic relationships intersect at this level.

Our team members were all new to their positions within the last 1 ½ years, and it was an opportune time to enlist outside perspectives to help grow individually and as a team in our role clarity, skill development and leadership/decision-making capacity. Over the past six months, our coaches have dedicated time every other week meeting with us individually. Twice we have also met as a group.

The change this has led to in organizational capacity is significant. Impacts include: 1) stronger overall staff accountability and support including a new human resource policy, conflict resolution and team motivation projects; 2) clear understanding of where the team needed to build role clarity, team trust and identify skill deficits; and 3) stronger strategic thinking—the questions we bring to meetings generate better strategic thinking.

Through our SVP coaches, the combined 'force' of outside expertise brought into our small non-profit has taken us to a new level and helped us weather adversity. For example, recently we have gone through a significant budget scale back. It's been a challenging and even scary time for some. Our coaches have been alongside us, reminding us of our values and skills and how to use these during current challenges. It's been extremely helpful to have coaching in how to hold the pressure we feel, while also learning at the same time.

Decision-making, messaging, and anticipating long-term consequences of the scale-back have all been bolstered by the collective professional experience and wisdom our coaches provide. This above all, going through a challenging leadership test with the help of our SVP coaches, significantly impacts our leadership capacity, staff morale and ultimate ability to stay on track for achieving our programmatic outcomes.

## Connections Counselling and Consulting Foundation

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[www.connections counselling.ab.ca](http://www.connections counselling.ab.ca)

All staff members and the board of directors participated in a Strategic Planning process lead by an SVP partner. This opportunity, along with the Strategic Plan document developed as a result, has set the ground work in establishing a strong foundation for organizational capacity building. The first benefit was felt immediately as both staff and board worked together in identifying four key areas for our agency. This really helped us to come together as a team. The key areas include; Fund Development, Human & Resources, Communications, and Programs. A "champion" or lead board member heads each of those areas.

The second important benefit was claiming this as a "living" document which is reviewed and changed on a regular basis. In fact, key area reviews are now a regular agenda item at every board meeting. This ensures that as an organization we are constantly attending to identified tasks and revising or establishing new tasks to realize goals. The SVP partner will participate with us in a review of the plan 18 months after its implementation.

What impact has this made to the organization? Perhaps that can best be explained by describing outcomes from each of the key areas:

**Fund Development** – With further encouragement from SVP, we applied for and were accepted into the yearlong Fund Development Plus 2008 mentorship program through CentrePoint. Both the ED and Board President have participated in workshops. Our mentor continues to guide us and through this process the ED has acquired new skills and a greater understanding of the Fund Development process. A revised Fund Development plan and Case of Support have been developed and new funding opportunities have been explored to ensure sustainable funding is in place.

**Human Resources** – Given the challenges of recruitment and retention of qualified staff in all sectors, including the social service sector, discussions considering adequate compensation, professional development and benefits took place. As a result, additional funding was secured for professional development and a working staff retreat took place. After consultation and direction from another SVP partner, a Health Spending Account was established for staff.

**Communications** - Once again an SVP partner's expertise has been instrumental in our communications committee consideration of effective communication tools and strategies. New program brochures have been developed, as has a postcard for Fund Development opportunities using key messages. The committee is reviewing the Case of Support and will develop a Case Statement.

**Programs** - We continue to evaluate our programs to ensure quality service delivery and developing additional programs to meet client needs. It was identified that the counseling component of our Family Support Program was too narrow. This spring, we were successful with the awarding of a \$50,000.00 two year grant. This enabled us to expand the counseling program both in the number of hours available and scope of counseling services to individuals with intellectual disabilities and their family members.

All of this continues to move us forward as we build capacity and a stronger foundation as an organization. The passion for our work has always been central, however building skill sets and capacity in all of these areas helps to fuel that passion. This in turn motivates the staff and board with the end result being stronger programs for the benefit of the client families we support.

## Explorations in Math

www.explorationsinmath.org

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Since the organization was first formed in 2003, EIM has had the good fortune of being supported by a single, extremely generous donor who has provided the financial support that has kept the organization going year after year. As the new Executive Director I was thrilled that there was such an organization/person that believed in our work and was willing to go to such financial lengths to ensure we could continue. At the same time of feeling such security, it scared me to death. Though a wonderful blessing, there was (and still is) no guarantee that EIM would continue to receive this tremendous financial support year after year. EIM needed to diversify. EIM needed to build awareness for itself and build financial support from a broader base. This would have to include individuals that would support the math movement.

It was in this area of work, of diversifying and building an individual donor base, that SVP made the greatest impact for EIM over this past year. EIM started the SVP relationship with perhaps 5 individual donors outside of the Board of Directors. With SVP's help the organization can now happily count close to 200 individuals as supporters of EIM with 83 as donors who have contributed to EIM financially. Nine of those donors have contributed \$500 or more. This does not include the individuals who made contributions through family foundations.

When we started to think about building an individual donor base we knew the organization would need many things: a communication path to reach out to prospective individual supporters, a Board of Directors that knew how to reach out and educate friends and associates, a database in order track all of our constituents, an event to attract donors, an electronic medium to capture donors and donations; we would even need a credit card program to accept donations other than checks.

We got to work, including our invaluable Lead Partner, Madeleine Durkin, who was with us each step of the way. With the help of the \$40k from SVP we were able to hire a part-time Development Director. At the same time, one of our Board Members, Laura Larson, started Janet Boguch's Table Talks [a peer learning series] (paid for by SVP) to learn about Board Development and what it meant to be on a Board. She would report on her work at each of the subsequent Board meetings.

Cara, the Development Director, put together an inexpensive educational communication piece on what EIM was all about. It was now up to the Board to provide some names. Laura and the rest of the Board began to really step up. Names began to come in one after another. Before we knew it we had over 350 names.

With the help of SVP volunteer, John Fine, we were able to track the initial group of names in a "beefed" up Excel database. About this same time, in the fall, EIM had started a Tech Assessment with the help of SVP volunteer Kevin Phaup. We knew if we were going to start using all of these "IT systems" we needed to make sure we had a "stable" IT environment. It was Kevin who mentioned Salesforce.com as a possible database option for EIM and that he had heard that they offer it for free to non-profits. After mentioning this information to Doug Beighle, one of our Board members, he enthusiastically exclaimed to me that he knew Salesforce really well and that he would gladly help EIM deploy Salesforce.com.

Meanwhile, we had decided on an inaugural individual donor event for EIM, Make A Move for Math. This would be a winemaker's dinner at which we would educate the crowd about EIM

and do a straight ask for financial support. The event was planned for February and our goal was to make \$25k.

EIM needed a way to allow people to learn more about the event and purchase tickets through the website. EIM also needed to build in the capability of purchasing tickets via the EIM website. Thanks to SVP volunteer, Jon Rosen, EIM not only re-vamped the website to provide event information, Jon also built in Google credit card capabilities to allow for donations or ticket purchases via the website. Jon took the project a step further and linked all of the individuals coming in via the website right into the new Salesforce.com database so that all individual activity and the associated campaigns could be tracked.

I am pleased to report that EIM exceeded the event goal by raising a net profit of \$35k. This would not have been possible without the help of our SVP volunteers nor without the help from our "revitalized" Board members who reached out to friends and associates to tell them about EIM and invite them to the event. Many of the individuals who became supporters of EIM have gone on to make introductions of EIM to additional individuals and other organizations such as Boeing and the Seattle Foundation. The 129 event attendees will be the starting point for next year's event and we look forward to building and enhancing our communication strategy with SVP this year to build the donor base from there.

## **Conclusion**

As the results of the surveys suggest, SVP has a positive impact on the nonprofit sector. Investees report high levels of satisfaction with the relationship. The value of the strategic volunteering, additional contributions and referrals from Partners more than doubles the value of the original grants. SVP capacity building support strengthens nonprofits in a variety of ways, allowing them to better fulfill their missions.



For more information contact:

**Social Venture Partners International**

1601 Second Avenue, Suite 615

Seattle Washington 98101

206.728.7872 voice • 206.728.0552 fax

info@svpi.org • www.svpi.org