



Colorado Nonprofit Development Center

Exploratory Impact Assessment
& Evaluation Recommendations
July 2023

CNDC Exploratory Impact Assessment & Evaluation Recommendations

Submitted to:

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Introduction & Background

The Colorado Nonprofit Development Center (CNDC) began in 1999 to “to support innovative thinkers, community leaders, and funders in serving communities with needed programming and services that fill gaps in the Colorado nonprofit sector.” CNDC offers emerging projects fiscal sponsorship, along with nonprofit management services and operational supports such as human resources and accounting services. In 2022, CNDC made a commitment to better understanding its impact and collecting data to inform ongoing refinements to its services. CNDC partnered with OMNI Institute (OMNI) on a two-phase project to:

- 1) **explore social and economic influences** of its services since inception;
- 2) **identify gaps in data collection** and areas in which practices should be expanded and/or improved; and
- 3) **create an evaluation framework** with recommendations for data collection and more strategically assessing efforts over time.

The **Assessment Phase** of the project consisted of the following three elements:



Project Portfolio data were analyzed to explore the characteristics of CNDC projects (e.g., location, size, etc.) that have been sponsored and any trends over time.



Project **Satisfaction Survey data** were analyzed to gauge the perceptions sponsored projects have of CNDC’s services and any trends in satisfaction over time.



A high-level **Cost Benefit Analysis** was also completed to provide additional context on the economic benefits of CNDC’s model to inform potential projects seeking these services.

The **Evaluation Planning Phase** of the project utilized these preliminary assessment findings and insights from CNDC leadership, staff, and board members, as well as leaders of CNDC projects receiving their services, to better understand gaps in data.



An Initial Evaluation Framework was created to serve as a starting point for more robust evaluation of CNDC’s impact over time, including recommendations for data collection related to satisfaction and feedback mechanisms for sponsored projects; the cost and value/benefit of CNDC sponsorship services; and options for tracking CNDC’s progress advancing its goals related to justice, equity, diversity, and inclusion.

This report provides an overview of assessment methods, rationale, and key findings, as well as the evaluation planning process and initial framework.

Assessment Phase

To explore the portfolio of CNDC sponsored projects over the last 10 years, CNDC provided OMNI with data collected through internal tracking systems. OMNI merged multiple data sets to create a master file of project characteristics such as revenue, assets, length of support, etc. Additionally, OMNI created several new variables by conducting background research to provide a high-level snapshot of the service focus of CNDC projects in the community. Complete details regarding variables and analytic decisions can be found in Appendix A. Key research questions for the portfolio analysis included the following:

What are key characteristics of CNDC's project portfolio?

- Where are the majority of CNDC projects located?
- What proportion of projects are explicitly focused on advancing equity in their communities?
- What populations do CNDC projects serve?
- What general service areas are CNDC projects engaging in?
- What is the average revenue for CNDC projects?
- For what reasons do projects end CNDC support?

How, if at all, has CNDC's project portfolio shifted over time?

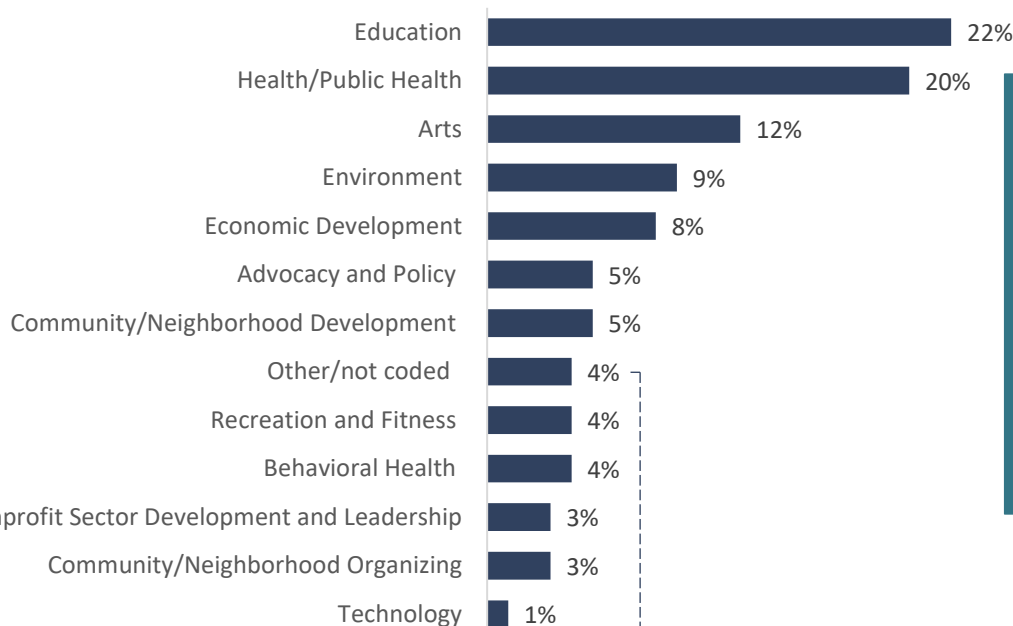
- How have key project portfolio characteristics changed over the past 10 years?

Historical CNDC Project Portfolio Snapshot



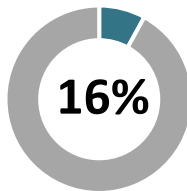
CNDC project portfolio data include 113 CNDC projects with start dates from 2012-2022 and projects designated as Model A which is the traditional and most common model practiced by CNDC (Model A projects apply to become part of CNDC and agree to operate under their umbrella with no legal separation).

The most common areas of services for these CNDC projects included Education, and Health/Public Health.



Populations served by CNDC projects: Limited available information about CNDC project missions was reviewed for details about key populations served. CNDC projects most commonly specified serving people who identify as gender or racial/ethnic minorities, low-income communities, and individuals with disabilities.

4% of projects were categorized as "Other" as sufficient detail regarding the program service areas was not available.



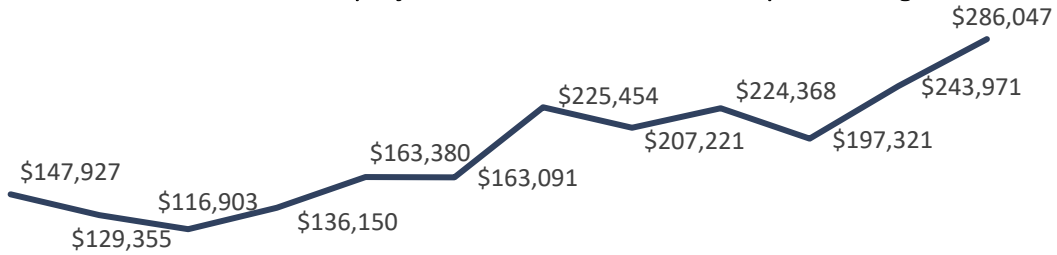
16% of CNDC projects with available information articulated an explicit DEI focus.

Assessment Phase

CNDC has seen changes in their project’s financial characteristics over the years. While small projects have always been a meaningful part of the portfolio, CNDC has started consistently supporting larger projects over the past 5 years.

Average Annual CNDC Project Revenue, 2012-2021

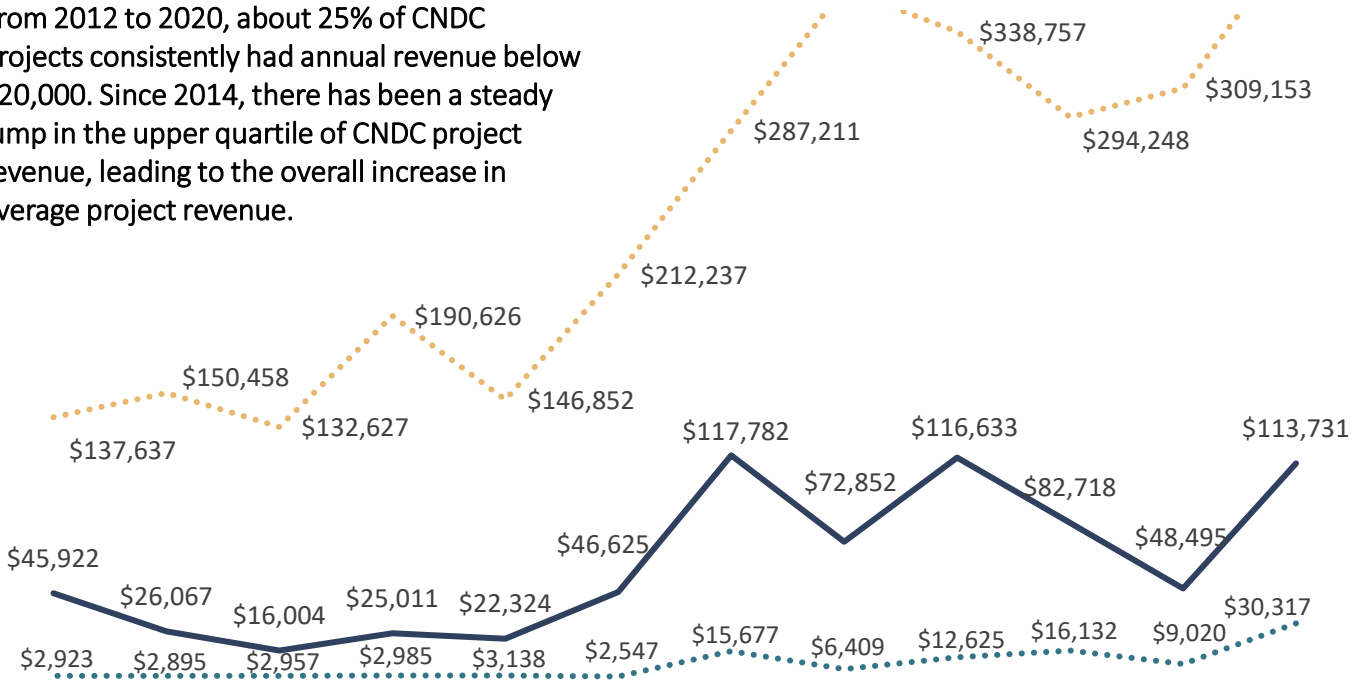
Since 2012, annual CNDC project revenue has been steadily increasing.



| Year | 2012 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|------|--------|--------|--------|---------|--------|--------|--------|--------|--------|--------|--------|--------|
| (n) | (n=62) | (n=73) | (n=97) | (n=101) | (n=97) | (n=84) | (n=80) | (n=80) | (n=82) | (n=77) | (n=82) | (n=67) |

Annual CNDC Project Revenue, 2012-2021

From 2012 to 2020, about 25% of CNDC projects consistently had annual revenue below \$20,000. Since 2014, there has been a steady jump in the upper quartile of CNDC project revenue, leading to the overall increase in average project revenue.



| Year | 2012 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|------|--------|--------|--------|---------|--------|--------|--------|--------|--------|--------|--------|--------|
| (n) | (n=62) | (n=73) | (n=97) | (n=101) | (n=97) | (n=84) | (n=80) | (n=80) | (n=82) | (n=77) | (n=82) | (n=67) |

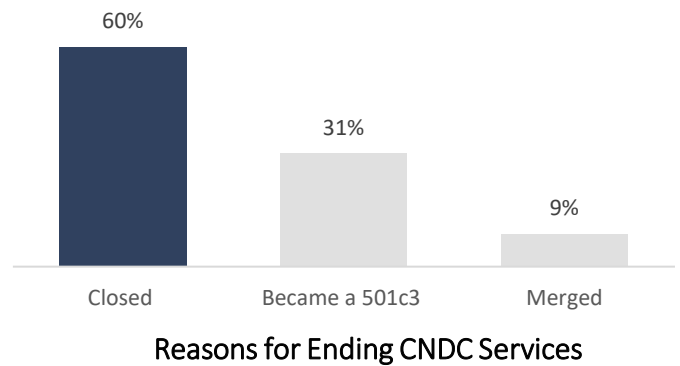
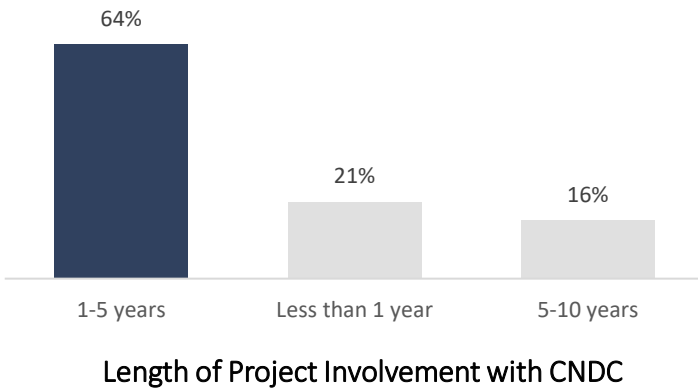
..... 25th percentile — 50th Percentile 75th Percentile

Assessment Phase

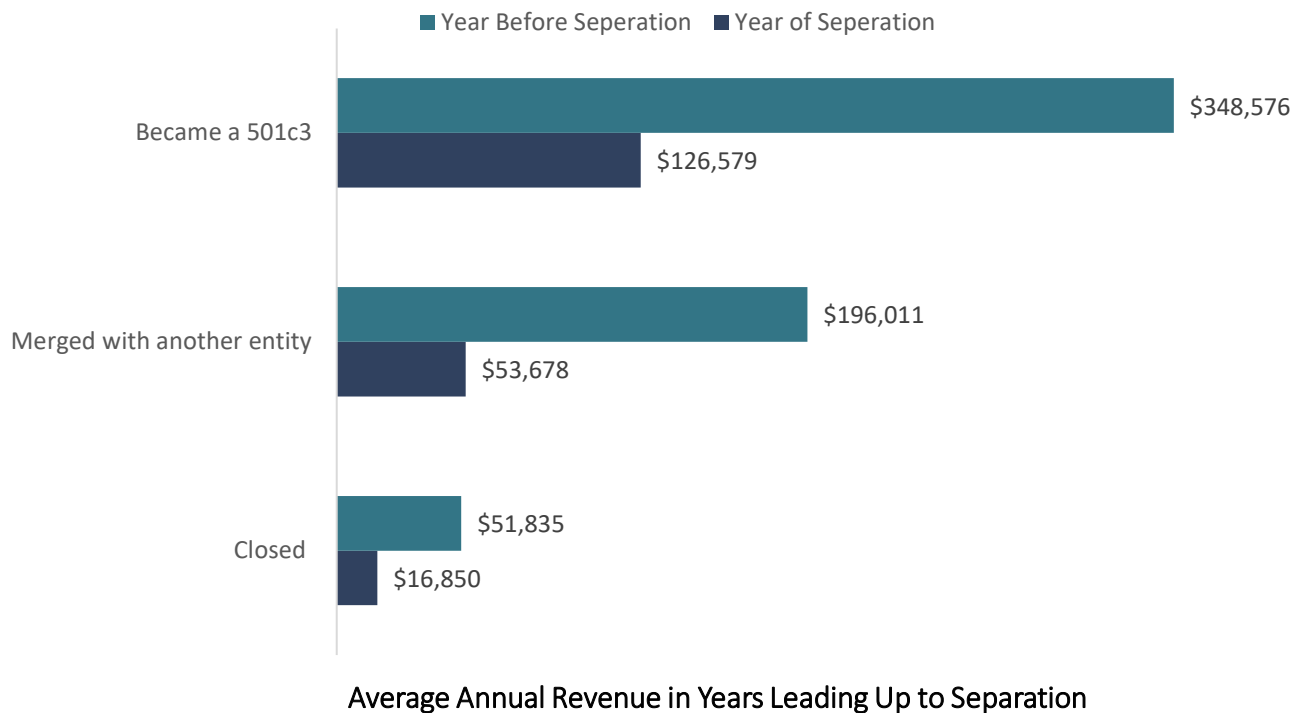
CNDC supports various types of projects, many with the goal of supporting their eventual sustainability. Projects with from 2012-2022 with valid recorded start and end data, stopped working with CNDC for three main reasons: closing, spinning off into their own 501(c)3, and merging with another entity/being acquired by another organization (n=58).

When projects leave CNDC, they have been with CNDC for an average of 2.68 years.

Closing was the most common reason for ending services with CNDC.



Projects that leave CNDC to become their own 501(c)3 have the highest levels of revenue in the year preceding separation and the year they separate. Projects may have higher levels of revenue in the year prior to separating due to many reasons such as the timeline for organizational decisions (e.g., a board is likely to make a decision that is then implemented in following fiscal year), or because they are only using CNDC services for a portion of the year (n=26).



Assessment Phase

Project Satisfaction Survey



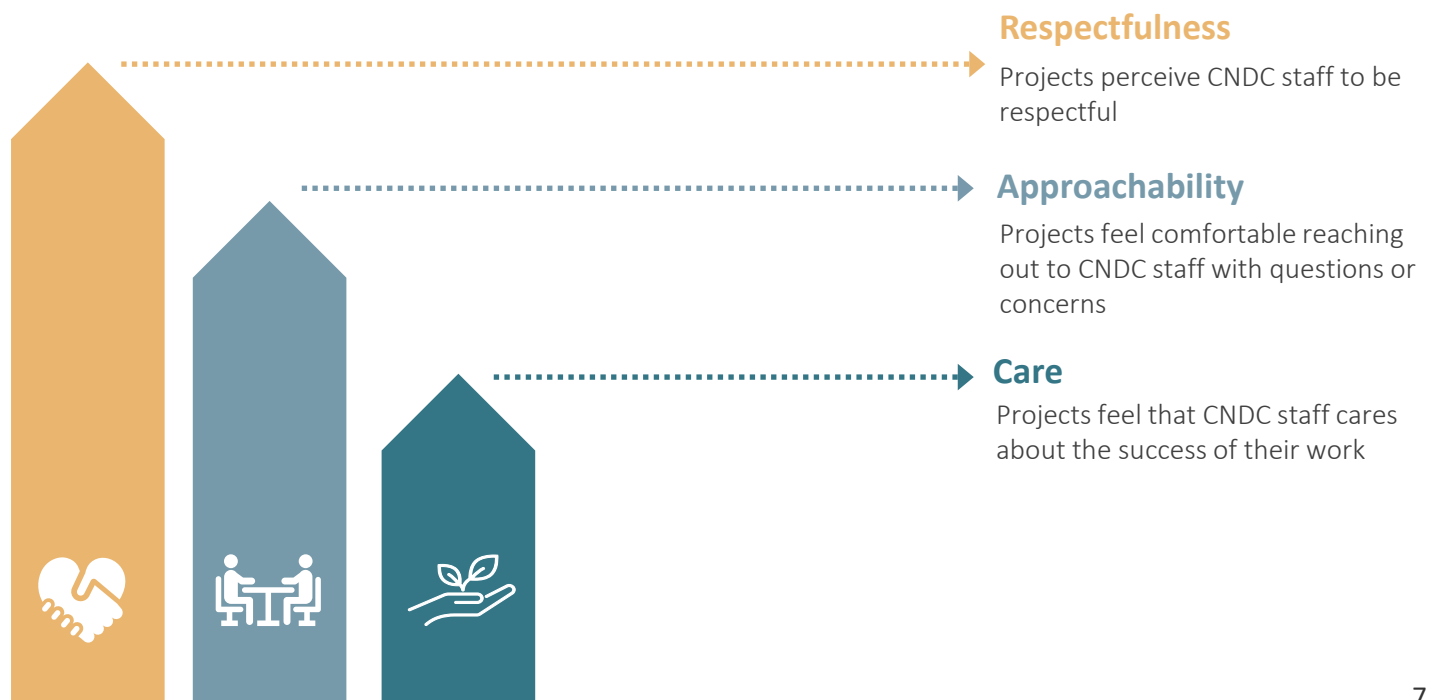
CNDC administers an annual Project Satisfaction Survey to all sponsored projects to better understand perceptions of CNDC support including value of the project fee paid to CNDC, staff support provided, strengths, and areas for improvement. CNDC receives responses from approximately 30-35 projects each year and provided OMNI with multiple data sets from which a merged master file of projects from 2012-2022. This ten-year timeframe was selected to ensure the most consistent set of survey items was available while also including as many projects responses as possible. Complete details regarding variables and analytic decisions can be found in Appendix A.

Key research questions included :

- How satisfied have projects been with CNDC's services?
- Has satisfaction varied based on project characteristics (e.g., annual revenue/size)?
- What does CNDC do well? How has this changed over time?
- What areas can CNDC improve? How has this changed over time?
- How well has CNDC addressed areas that can be improved over time?

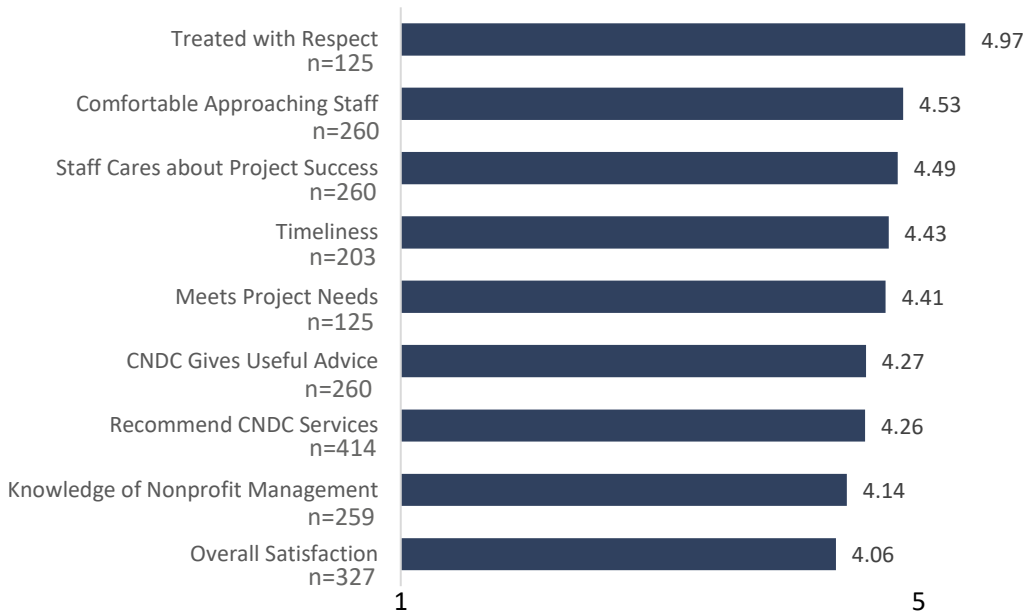
"I appreciate that everyone at CNDC treats our organization as a member of their team!"

Overall, projects were highly satisfied with their experience working with CNDC. From 2011 to 2021, projects rated CNDC highest in the areas of respectfulness, approachability, and care. Mean scores for key items are outlined on the following page.



Assessment Phase

The item-level mean scores on CNDC's Satisfaction Survey suggest that the services provided have historically had a high perceived value, and that projects are typically satisfied across all key areas. Furthermore, there was no significant correlation found between project revenue and satisfaction measures, suggesting that organizations of all sizes have been satisfied with the services provided and find them valuable.



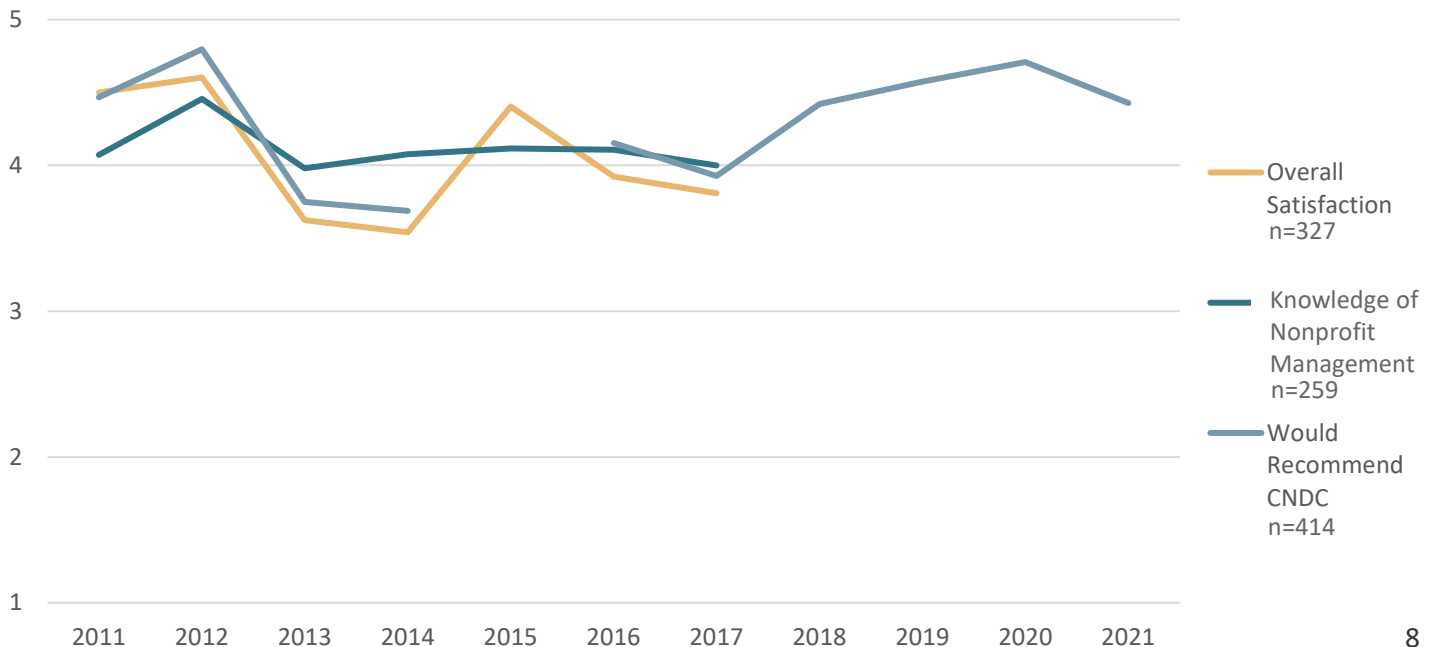
Very Dissatisfied

Very Satisfied



*All items on CNDC's Satisfaction Survey were rated on a 5-point scale except for the 4-point scale for the overall 'Value of Services' item: 1=Poor; 2=OK; 3=Good; 4=Very Good; 5=Excellent

Satisfaction with CNDC has remained consistent over time, with minor dips in 2013 and 2014.



Assessment Phase

CNDC Strengths

Open-ended responses on CNDC's Project Satisfaction Survey highlighted several CNDC strengths, including overall quality of services and staff support. Organizational strengths included customer service, supportive and friendly staff, and overall quality and value of services.



Customer Service



Supportive and Friendly Staff



Quality of Services



Value of Services

"CNDC is very supportive and helpful in all aspects of a project's programming. We will continue to partner with CNDC, even when we have a million-dollar budget."

....

"We would not be as successful as we are without CNDC. CNDC is the best resource for startup nonprofit organizations!"

....

"I appreciate that everyone at CNDC treats our organization as a member of their team!"

Potential Areas for Improvement

Projects also highlighted opportunities for growth, including improving financial reports and processes, desire for quicker turn around on budgets and payroll, and the need for more communication and guidance. Several projects also mentioned the desire for a tiered approach to the project fees CNDC charges, offering various levels of services depending on project needs.

"I think a lot more [networking] can be leveraged, especially with 60+ projects under CNDC. I feel disconnected to the other organizations."

....

"As a fiscal sponsor, it is understood that the primary role is financial, but at times that can seem disconnected from the actual content of the goals of the projects."

....

"I feel a tiered approach could be beneficial for organizations to opt in to various levels of services. For instance, for more simple pass through services and financial management, a lesser fee could apply for organizations who do not utilize CNDC's peer support or training programs."

Challenges with financial reports and processes



Desire for quicker turnaround on budgets and payroll



Need for more communication and guidance



Assessment Phase

Cost Benefit Analysis



A cost benefit analysis (CBA) provides a systematic framework for assessing the economic benefits of a service relative to its costs. OMNI conducted a CBA for CNDC’s fiscal sponsor services to estimate the potential cost savings that the fiscal sponsor model provides for current projects and those who may be considering joining CNDC as a project.

CNDC Services Areas

CNDC provides a wide variety of services to organizations, reducing the financial and logistic burden of acquiring these services from individual vendors. Below is an overview of ongoing services provided by CNDC. A more detailed list of CNDC services can be found in Appendix B.



Compliance (ex. tax services)



Financial Management (ex. payroll and accounting services)



Business Administration (ex. contract and insurance review services)



Human Resources (ex. benefits and onboarding support)



Additional Services (ex. pro bono legal services, staff expertise)



Capacity Building (ex. coaching and local community supports)

To calculate the estimated value of CNDC services, OMNI and CNDC developed an itemized services to which tangible estimated costs can be assigned (including all areas listed above except for Capacity Building, which was excluded because of the challenge of assigning tangible costs). Comparable market costs were then determined using initial independent estimates from a nonprofit accounting specialist and refined with input from CNDC.

Assessment Phase

Cost Benefit Analysis Calculations

Often, CBAs involve quantifying the monetary value of both tangible and intangible benefits and costs. In this case, we included *only* tangible benefits in the CBA calculations. Examples of intangible benefits that were excluded from our calculations include support during Executive Director transitions, crisis management support, and immediate access to a line of credit. These costs often fall under the category of Capacity Building services for CNDC. Additionally, we calculated an *annual* CBA that includes costs that projects typically incur on a year basis during operation and excluded one-time expenses that are typically incurred during the first year of a project at CNDC (e.g., retirement plan set up for employees; credit card processing account; state sales tax exemption; city sales tax license) as well as emergency or urgent services that are available if needed (and therefore provide a safety net for projects) but are not typically incurred on an annual basis (e.g., managing workers compensation, insurance, and legal claims; cash flow loan program). Because intangible benefits, benefits realized during the first year of a project, and benefits available in response to emergency or urgent situations were excluded, these estimates provides a relatively conservative estimate of the potential benefit of CNDC’s fiscal sponsor services. That is, the following estimates of the cost-benefit of CNDC fiscal sponsorship likely underestimate the actual benefit that a project would realize over the course of its lifespan.

The following equation was used to estimate the annual CBA:

$$\frac{\text{Costs: Estimated Annual Project Fee}}{\text{(annual project revenue x funding source allocation)}} = \frac{\text{Benefits: Estimated Annual Value of Services}}{\text{(total estimated costs for services typically provided on an annual basis)}} = \text{Estimated Annual Savings (\%)}$$

Accounting for CNDC Project Variability

Projects supported by CNDC’s fiscal sponsorship model include a wide range of circumstances that are directly related to the variables used to estimate the monetary value of costs and benefits (e.g., annual revenue; the proportion of private and government funding; number of staff; needed services; etc.). To account for this variation, a set of four CBAs were conducted based on *high* and *low* revenue scenarios and *high* and *low* project complexity.

Complexity

Since each project comes to CNDC with different needs, *Project Complexity* was determined by the types of services needed to support a programs sustainability. Service categories include Business Administration, Capacity Building, Compliance, Financial Management, Human Resources and Other. Each quadrant includes the relevant service fees needed to support this type of project. Additionally, low complexity projects were defined as those with 100% private revenue, and high complexity projects were defined as those with 75% private revenue and 25% government revenue.¹

Revenue

In addition to complexity, each project has a unique financial situation. *Project Revenue* was informed by a historical revenue analysis of CNDC projects. Designation of low and high revenue amounts were based on the most recent available revenue data collected in 2021, reflecting the 25th and 75th percentile of project revenue, respectively.

Results from the four resulting CBAs are presented on the following page.

¹ For more details on how government and private revenue distinctions impact estimates, see results from Sensitivity Analyses in Appendix A.

Assessment Phase

Cost Benefit Analysis Results

Low Revenue | High Complexity

\$30,317 Revenue x 10% and 14% Project fees for 75% Private and 25% Government Funding* = \$3,334.87 Estimated Annual Project Fee

\$1753 in Compliance + \$12,080 in Financial Management + \$5,000 in Business Administration + \$400 in Human Resources + \$250 in Other services = \$19,483 Estimated Value of Services

The estimated annual savings for *low revenue, high complexity projects* is

83%

High Revenue | High Complexity

\$387,249 Revenue x 10% and 14% Project fees for 75% Private and 25% Government Funding = \$42,597.39 Estimated Annual Project Fee

\$3,935 in Compliance + \$40,000 in Financial Management + \$16,000 in Business Administration + \$6,300 in Human Resources + \$1,500 in Other services = \$67,635 Estimated Value of Services

The estimated annual savings for *high revenue, high complexity projects* is

37%

Assessment Phase

Cost Benefit Analysis Results

Low Revenue | Low Complexity

\$30,317 Revenue X 10% Project fee for 100% Funding = \$3,301.70 Estimated Annual Project Fee

\$753 in Compliance + \$4,800 in Financial Management + \$3,250 in Business Administration = \$8,803 Estimated Value of Services

The estimated annual savings for low revenue, low complexity projects is

66%

High Revenue | Low Complexity

\$387,249 Revenue X 10% Project fee for 100% Funding = \$38,724.90 Estimated Annual Project Fee

\$3,223 in Compliance + \$27,100 in Financial Management + \$11,000 in Business Administration + \$4,450 in Human Resources + \$750 in Other services = \$67,635 Estimated Value of Services

The estimated annual savings for high revenue, low complexity projects is

17%

Evaluation Framework Recommendations

The evaluation recommendations presented in this section of the report were developed to enhance the quality of ongoing data collection and inform a more robust framework for evaluating CNDC's services over time. Recommendations are grounded in findings from the Phase I Assessment, as well as in feedback gathered through dialogue with CNDC staff and representatives from several projects.

Key goals for the development of CNDC's evaluation framework included:

- Assessing the effectiveness of CNDC services
- Maintaining consistent feedback mechanisms that support organizational learning and growth
- Utilizing assessment information to inform decision making and refine CNDC's service approach/model
- Implementing explicit evaluation items and/or data collection approaches that support CNDC's justice, equity, diversity, and inclusion goals
- Strengthening accountability internally, as well as to CNDC Projects, Board and funders
- Minimizing data collection burden on staff and CNDC Projects
- Increasing awareness of the value of CNDC services for potential projects and funders

In February of 2023, OMNI shared initial recommendations with the following groups to gather feedback and input:

- Project evaluation sessions with nine project representatives
- Evaluation presentation and feedback session with CNDC staff
- Evaluation presentation and feedback session with CNDC Board

General evaluation recommendations include the following:

- **Standardize structured data collection tools and processes** to ensure consistency and more effectively assess potential changes over time. This includes internal processes as well as survey administration approaches and timing.
- **Ensure existing day-to-day data management systems** (e.g., Salesforce) are configured to support evaluation.
- **Develop additional internal infrastructure** as needed, that allows for easeful tracking of project portfolio information and structural alignment across systems for necessary data merging, etc.
- **Cultivate more real time learning opportunities and feedback loops with CNDC projects.** CNDC could utilize information sharing strategies such as newsletters or project highlights that allow projects to learn about the work of other projects. CNDC could also host convenings such as quarterly learning community events in which projects come together to connect, learn from each other, and provide real time feedback to CNDC. Project representatives who participated in the evaluation feedback sessions specifically expressed a desire for opportunities to:
 - Surface challenges and potential solutions
 - Promote cross-project information sharing to maximize impact and leverage resources and ideas

Specific evaluation questions and detailed recommendations for CNDC's ongoing equity, diversity and inclusion efforts; project portfolio; satisfaction survey; and cost benefit assessments are provided next.

Evaluation Framework Recommendations

Elevating Equity, Diversity and Inclusion (EDI)



CNDC staff and Board members went through several exercises to define a CNDC Value Proposition, through which several key values related to EDI were explicitly articulated. Justice, equity, diversity and inclusion are interwoven throughout their values and reflect a commitment to *“supporting and seeking out Projects and Leaders that are on the frontlines of social justice, challenging ourselves and those we fiscally sponsor to root out systems and practices based in White supremacy and other systems of supremacy, and continuously looking inward at how we can be better partners in this ongoing work.”* To this end, the first area of evaluation recommendations below serves as a starting point for CNDC to more effectively elevate EDI practices in evaluation of its work with projects. Three core EDI areas in which CNDC may focus, include:



Assessing values alignment with projects as CNDC continues to grow its project portfolio



Evaluating project satisfaction with CNDC services and key related equitable practices



Supporting projects by promoting EDI-related support and learning opportunities

Assessing values alignment with projects as CNDC continues to grow its project portfolio

First, CNDC should develop clear and transparent expectations for projects: This involves clearly communicating expectations regarding EDI practices to projects and potential projects. Outline the specific EDI goals and principles that CNDC prioritizes and explicitly communicate the importance of projects aligning with these values. CNDC should utilize its recently developed core values and EDI preamble as a starting point.

CNDC should also establish EDI criteria as part of the project application process and ongoing assessment of CNDC’s project profile: Integrating EDI-related questions and criteria into CNDC’s application process, questions about the project’s commitment to EDI, their strategies for promoting diversity and inclusion, and any relevant initiatives they have implemented, will allow CNDC to assess the alignment between related CNDC and project values over time. CNDC should also ensure that they maintain these criteria internally in their own organizational practices.

Key potential EDI criteria include the following:

- **Demonstrated commitment to EDI:** Assess whether the project has a clear commitment to EDI, as reflected in their mission, vision, values, and strategic plans. Look for explicit statements and evidence of their dedication to fostering an inclusive and equitable environment.
- **Diversity in leadership and governance:** Document the composition of the project’s board of directors and senior leadership team. Assess the diversity of representation in terms of gender, ethnicity, race, age, and other relevant dimensions. Look for projects that prioritize diverse perspectives at decision-making levels.
- **Staff diversity and inclusion:** Consider the project’s efforts to promote diversity and inclusion among their staff. Assess the diversity of their workforce in terms of gender, ethnicity, race, disability status, and other relevant factors. Look for evidence of inclusive recruitment practices, equal opportunity policies, and professional development opportunities for diverse employees.

Evaluation Framework Recommendations

Elevating Equity, Diversity and Inclusion (continued)



- **Inclusive programs and services:** Evaluate the extent to which the organization's programs and services are designed to be inclusive and accessible to diverse populations. Look for implementation of cultural competency training for staff, accessibility measures for individuals with disabilities, multilingual services, and targeted initiatives that aim to reduce disparities and promote equity.
- **Impact on marginalized communities:** Assess the project's track record in serving and advocating for marginalized communities and underrepresented populations. Consider their efforts to address systemic barriers and promote social justice. Look for evidence of partnerships with community-based organizations and initiatives aimed at addressing inequities.
- **Project policies and practices:** Review written policies and practices related to EDI. Assess the presence of policies addressing anti-discrimination, harassment, diversity, equity, and inclusion. Review recruitment and hiring practices, board diversity, staff training programs, and any other relevant policies or initiatives.
- **Evaluation and accountability:** Assess project commitment to ongoing evaluation and accountability in their EDI efforts. Look for evidence of monitoring and reporting on progress, setting measurable goals, and learning from outcomes. Consider their transparency in sharing successes, challenges, and lessons learned.

Equity, Diversity and Inclusion: Project Portfolio Evaluation Questions

- How well do CNDC projects align with its core EDI values?
- Is CNDC supporting projects with:
 - Diverse leadership and board members, decisionmakers, etc.?
 - Diverse staff that represent the communities they serve?
- What % of CNDC projects are explicitly focused on advancing equity in their communities? How do they articulate this commitment?
- How are CNDC projects focusing on EDI?
 - What project activities or services are focused on diverse communities and/or addressing inequities?
 - What community partnerships do they utilize to increase the effectiveness and reach of their EDI efforts?
 - What internal policies and practices are being implementing to promote EDI?
 - How do projects evaluate progress toward their EDI goals?

Evaluation Framework Recommendations

Elevating Equity, Diversity and Inclusion (continued)



Equity, Diversity and Inclusion: Project Portfolio Data Collection Recommendations

Recommended Tool/Data Source(s): Salesforce, Project Applications, Annual Project Reports

Identify a streamlined set of EDI-related items to be collected from projects at project start and in annual reporting thereafter, as part of project portfolio data. Items should include various measures of EDI including staff demographics, services provided, and populations served. Open-ended items should also be included to provide the opportunity for projects to further describe any EDI-related efforts. As data are collected; they should be stored electronically with other project portfolio information and include a unique project identifier (see additional information in Appendix C).

Example Survey Items

A set of selected items from the list below could be included as a basic checklist or on a simple Likert agreement scale (i.e., 1=Strongly Disagree; 2=Disagree; 3=Agree; 4=Strongly Agree; Not Sure; Not applicable).

Please check any of the following that options apply to your project:

Our project...

- ...mission is explicitly focused on racial equity.
- ...mission is explicitly focused on EDI more generally.
- ...serves marginalized and/or underrepresented populations/communities.
- ...has established community partnerships to increase the effectiveness of our EDI efforts.
- ...has staff that represent the communities we serve.
- ...is implementing internal EDI initiatives.
- ...has written internal policies related to EDI.
- ...includes EDI as part of our project strategic plan.
- ...formally evaluates/tracks progress toward our EDI goals.

Individuals part of our project identifying as BIPOC, staff of color and/or self identifying as holding diverse or nondominant identities (e.g., race/ethnicity, gender identity, sexual orientation, disability, etc.):

- 50 percent or more of our senior staff
- 50 percent or more of our board members
- Our executive director/CEO/President
- Majority leadership/decisionmakers of a core initiative/program/service

Example Open-Ended Options:

- Please share any specific equity, diversity, and inclusion (EDI) efforts that your project has implemented.
- Please provide any examples of activities that demonstrate your project's commitment to advancing equity, diversity, and inclusion.

Evaluation Framework Recommendations

Elevating Equity, Diversity and Inclusion (continued)

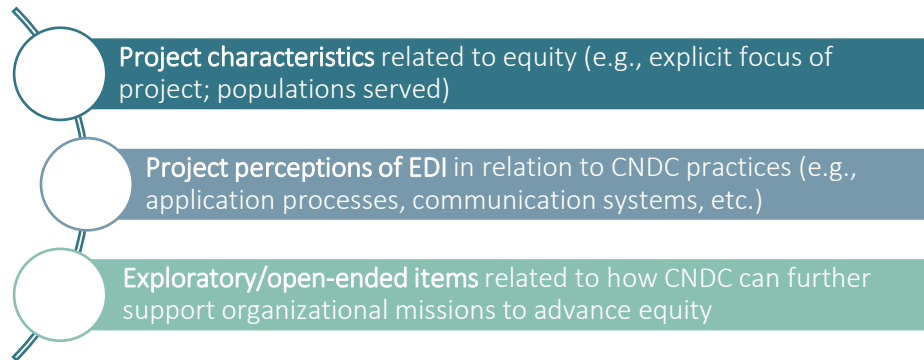


Evaluating project satisfaction with CNDC services and equity of practices

CNDC should ensure that its project satisfaction survey includes items specifically related to EDI and that it is able to explore survey results by respondent/project characteristics. Exploring participant satisfaction by project characteristics is important for many reasons, including:

- **Identifying potential inequities in project experiences** and exploring whether certain projects are consistently more satisfied or less satisfied with its services and uncover areas for improvement.
- **Understanding diverse project perspectives** and gaining a deeper understanding of how various types of projects perceive and engage with CNDC. This insight can help tailor CNDC's communication and service approaches to address challenges, better meet the specific needs and expectations of different participant groups and improve satisfaction overall.
- **Promoting CNDC accountability and transparency** by sharing survey findings with projects, as well as the actions taken to improve services.

CNDC should enhance their current project satisfaction survey in three areas:



Equity, Diversity and Inclusion: Satisfaction Evaluation Questions

- How, if at all, does satisfaction with CNDC services differ by key project characteristics?
- Do projects perceive key CNDC services and processes to be accessible across all types of projects?
- Do projects perceive CNDC services to be provided equitably across all types of projects?
- How do projects perceive CNDC's efforts to advance equity in their work and practices with projects?
- What, if any, challenges do more EDI-focused projects experience working with CNDC?

Evaluation Framework Recommendations

Elevating Equity, Diversity and Inclusion (continued)



Equity, Diversity and Inclusion: Satisfaction Survey Data Collection Recommendations

Recommended Tool/Data Source(s): Salesforce, Project Applications, Annual Project Reports

To address potential project concerns with confidentiality, CNDC should clearly articulate for potential projects why the data are being collected and how it relates to CNDC EDI efforts; how data will be protected and utilized; and how it will be shared back with projects to allow for transparency and shared learning. This information should be included on the data collection tool, within CNDC's project application or annual report, and/or an FAQ document.

Options for collecting satisfaction survey data include:

- Conduct the annual satisfaction survey and include a brief set of items that collect key project characteristics. Assurances regarding data protections and limited CNDC staff access (or data access only by an external contractor) should help assuage concerns about responses being identifiable/able to be linked to a specific project.
- In addition to the above survey, conduct an additional separate survey or provide a simple mechanism for anonymous feedback. This will enable CNDC to explore core satisfaction ratings by project type while also allowing respondents the opportunity to provide additional candid feedback.

Example Survey Items

A set of selected items from the list below could be included as a basic checklist or on a simple Likert agreement scale (i.e., 1=Strongly Disagree; 2=Disagree; 3=Agree; 4=Strongly Agree; Not Sure; Not applicable). CNDC could explore differences in responses by key project characteristics (e.g., projects with BIPOC leadership versus non-BIPOC leadership).

Please rate the extent to which you agree or disagree with the statements below.

- All of CNDC's projects receive the same quality of services, regardless of the type of project.
- My project has adequate access to CNDC...
 - ...Information
 - ...Resources
 - ...Services and support
- CNDC staff demonstrate cultural sensitivity and awareness.

Please rate the accessibility of the CNDC systems or processes listed below (i.e., the ease with which processes are easy to understand and/or use).

- CNDC's project application is [choose: straightforward/clear/easy to complete].
- CNDC's reporting requirements are [choose: straightforward/clear/easy to complete].
- CNDC's communication systems are [choose: straightforward/easy to access].

Example Open-Ended Items

- How would you describe CNDC's commitment to equity, diversity, and inclusion (EDI) in its practices and policies?
- In what ways have you observed CNDC promoting EDI?
- In what ways do you think CNDC could further improve its EDI practices or initiatives?
- Can you share any recommendations or suggestions for how CNDC can better support EDI-focused projects?

Evaluation Framework Recommendations

Elevating Equity, Diversity and Inclusion (continued)



Supporting projects by promoting EDI-related support and learning opportunities

In addition to addressing EDI through evaluation practices, we offer some ways that CNDC directly support and promote EDI practices for its projects. Given that implementation and evaluation are inherently connected and should inform each other, expanding project support for EDI efforts will create more opportunities for evaluation of CNDC's efforts. These can include, for example:

Sharing best practices and lessons learned: Encouraging projects to share their EDI successes, challenges, and lessons learned with other projects. Consider facilitating knowledge-sharing platforms or events where projects can exchange experiences and strategies, fostering a collective learning and improvement environment.

Collaborating on EDI goals and capacity building: Engaging in conversations with projects about their EDI goals and challenges and offering support and resources to support them in fostering their own EDI practices. This can include providing learning community and/or training opportunities, sharing best practices, connecting them with networks or consultants specializing in EDI, or funding specific initiatives aimed at strengthening their EDI efforts.

For additional resources related to organizational EDI practices, see Appendix C.

Evaluation Framework Recommendations

CNDC Project Portfolio



General Evaluation Questions

- What are key characteristics of CNDC’s project portfolio?
 - What is the geographic breakdown of projects?
 - What is the breakdown of service areas for CNDC's projects (e.g., education, health, etc.)?
 - What is the breakdown of project revenue levels?
 - For what reasons do projects end CNDC support?

Data Collection Recommendations

Recommended Tool/Data Source(s): Salesforce

CNDC should first review and address the ‘Recommendations to Enhance Data Quality’ outlined in Appendix A.

Additionally, CNDC should determine a standard set of information to be collected for new CNDC projects at time of sponsorship and annually ongoing. If multiple systems are used (e.g., additional system for financial information), ensure use of a common identifier (e.g., 7-digit unique ID) across systems, alignment of key variables and general dataset structure. Key data should include, at a minimum:

- Location of project headquarters (zip code)
- Location(s) in which projects provide services
- Service area(s) (TBD by CNDC but should consider areas identified through assessment coding process: Health/Fitness; Education; Business/Finance; Arts; Environment; Science/Technology; Social Justice; Legal/Policy; Religion/Spirituality; Housing)
- Annual revenue (including proportion of private & government revenue)
- EOY net assets
- # FTE (at FY end as another proxy for project size)
- Reason(s) for initiating CNDC support (if possible, create standard set of reasons that can be administered as a select all that apply question)
- Reason(s) for ending CNDC support
- Date of project start and separation (to support calculation of length of CNDC support)

Evaluation Framework Recommendations

CNDC Project Satisfaction



General Evaluation Questions

- How satisfied are projects with CNDC's services overall?
- What are the CNDC service areas in which projects are most satisfied?
- What are the CNDC service areas in which projects are least satisfied?/Where can CNDC improve?
- How, if at all, does satisfaction with CNDC services differ by key project characteristics?
- What, if any, common challenges do projects experience working with CNDC systems and processes?

Data Collection Recommendations

Recommended Tool/Data Source(s): Annual Satisfaction Survey; Project convenings; documentation of ongoing project feedback within Salesforce

CNDC should first review and address the 'Recommendations to Enhance Data Quality' outlined in Appendix A.

Additionally, CNDC should:

- **Standardize CNDC Satisfaction Survey questions to ensure items utilize consistent formatting, response options and Likert scales.** Include, at a minimum, key elements of general satisfaction related to CNDC knowledge; communication; timeliness; and responsiveness. This will facilitate a more straightforward analysis process and support the assessment of potential changes over time.
- **Add items that assess CNDC services at a more granular level** (e.g., benefits administration with 'Human Resources' or 'Preparation of Invoices' within 'Financial Management.' This will allow CNDC access to more specific satisfaction data to inform service refinements and overall improvements.
- **Collect additional data on project characteristics** to further understand whether satisfaction varies by project type, structure, leadership, service area, etc. A Salesforce developer can easily configure user profiles to restrict access to certain fields so that key staff/salesforce system administrators can access all project profile information while other users are limited to See EDI section for more detail.
- **Request that one person per project completes the satisfaction survey on behalf of each project**, and provide more prescriptive guidance on who that person should be (e.g., most senior project staff person or Board member for projects with no staff) to reduce unknown duplication within responses (e.g., multiple members of a highly satisfied or unsatisfied project submitting responses that skew overall averages without being detectable)

For additional resources related to satisfaction survey practices and considerations, see Appendix D.

Evaluation Framework Recommendations

CNDC Cost Benefit Analysis



General Evaluation Questions

- What costs would projects incur if not for CNDC, and how does that compare to CNDC's project fee and services received via CNDC?/What is the value of CNDC services and what would projects typically pay for services without CNDC?
- What factors impact the cost of services for projects and for CNDC?
- Are there specific types of CNDC project profiles with respect to staff size, revenue amounts/sources, etc.?

Data Collection Recommendations

Recommended Tool/Data Source(s): Salesforce, staff time tracking systems (project-specific tracking in Salesforce, time tracking platform, staff calendar, retrospective weekly/monthly estimates from staff by project), current data on market values for key CNDC Services

CNDC should first review and address the 'Recommendations to Enhance Data Quality' outlined in Appendix A.

Additionally, CNDC should:

- **Improve quantification of tangible benefits** for the full list of services included in CNDC's initial CBA by tracking staff time and resources for hard costs.
- **Continue to track and benchmark against market rates.** Compare the costs associated with engaging other market consultants/services to the project fees charged by CNDC, which can provide the basis for ongoing assessment of CNDC's value proposition.
- **Identify and track key project factors that may influence the amount and depth of services provided by CNDC.** Consider variables such as project complexity, project leadership expertise/experience, project scope and length, geographical location, technology requirements, specialized expertise, and regulatory compliance. This analysis will help identify the key drivers of project service costs.
- **Improve quantification of intangible benefits as feasible and appropriate.** Some intangible benefits are likely best left unquantified (e.g., goodwill in the community), as attempts at quantification cannot be grounded in reliable data. CNDC can however, improve quantification of some intangible benefits over time, particularly when it is a support or service that CNDC provides to projects. When applicable, track staff time providing services as a proxy for value (i.e., value of intangible service = average CNDC staff time providing that service x hourly rate of CNDC staff). This could be implemented through ongoing staff time tracking or retrospective (e.g., weekly/monthly) estimates from staff by project with corresponding description of services. By building database of CNDC staff time spent on such activities over time, these data can be used to estimate averages that serve as proxy for value.
- **Continue to evaluate factors influencing CNDC costs** such as CNDC staff expertise and compensation, operational overhead, and technology infrastructure.

Appendix A:

Additional Analytic Details and Data Quality Recommendations



Portfolio Analysis

CNDC provided OMNI with two files containing project portfolio information, the first including basic descriptive information about all projects and the second with project financial information. Below is a list of variables from each of these files, with data quality notes, analytic decisions, and recommendations to enhance future data quality from each source, as well as the ability to connect data across sources.

| Variable Name | Data Quality Notes and Analytic Decisions | Recommendations to Enhance Data Quality |
|--|--|---|
| Project/ Organization /Fund Name | Completed consistently; no data quality issues noted. | N/A |
| Project code | Inconsistent use of project code formula. | Begin to utilize a standardized common identifier (e.g., 7-digit auto-generated unique ID or staff generated unique ID utilizing a formula) that can be applied consistently across all data systems and facilitate merging of data sets. |
| Service Area | Inconsistent definition and reporting of service areas (e.g., Denver, Metro Denver, and specific Metro Denver locations). For the portfolio analysis conducted for this report: Metro Denver and all variations were merged into one code. | Determine service area level (city/town or county) that will be most useful for understanding CNDCs geographical reach and apply consistent labels for metro areas (e.g., note Denver County v. Metro Denver which is less clearly defined). |
| Billing City | Approximately 70% of entries indicated Denver as billing city, as funders require the use of CNDC as a billing address. | Clarify rationale for collecting and utilizing Billing City data; if only for financial purposes and the data do not offer meaningful information about CNDC's project portfolio, exclude in future portfolio-related analyses. |
| Description | Missing data for approximately 25% of records and inconsistent level of detail and format for descriptions. For the portfolio analysis conducted for this report: project descriptions for organizations with missing data were generated with publicly available information. Multiple rounds of coding were completed to generate higher level 'Service Type' categories. See page 26 for full list. | To increase consistency, provide clear guidance for projects to provide their own description as part of CNDC's project application (e.g., brief mission statement including focus populations). Finalize a list of 'Service Types' which should also be included as a closed ended item on CNDC's project application. See page 26 for potential ongoing service area categories. |
| Relationship Type | Missing data for approximately 10% of records and some inconsistency and variation in codes utilized. Categories included Model A Fiscal Sponsorship, Intermediary, and Non-Model A. For the current portfolio analysis: Projects other than Model A were excluded per CNDC request as they are less typical. | Ensure relationship types are clearly defined and an internal drop-down menu is created to force consistent coding by CNDC staff and improve data quality. |

Appendix A (continued): Additional Analytic Details and Data Quality Recommendations



Portfolio Analysis

| Variable Name | Data Quality Notes and Analytic Decisions | Recommendations to Enhance Data Quality |
|------------------------------|---|---|
| Date Became a Project | Minimal missing data but inconsistent date format and some invalid dates (e.g., start date after end date, invalid year, etc.) | Ensure locked date format to improve data quality and support future data cleaning and analysis. |
| Date of Separation | Minimal missing data but inconsistent date format and some invalid dates (e.g., start date after end date, invalid year, etc.) For the portfolio analysis conducted for this report: Records with invalid date formats were excluded and currently active projects were omitted from the length of project involvement calculation. | Ensure locked date format to improve data quality and support future data cleaning and analysis. |
| Reason for Separation | Missing data for approximately 25% of records. | Ensure reasons for separation are clearly defined and an internal drop-down menu is created to force consistent coding by CNDC staff and improve data quality. |
| Focus Population | There was no existing focus population variable. For the portfolio analysis conducted for this report: A focus population variable was created to indicate specific populations/communities served by CNDC projects. Project descriptions were explored and publicly accessible information was added when available. Many projects had secondary and/or tertiary service area and/or focus population themes. | Clearly define focus populations and create internal drop-down menu to force consistent coding by CNDC staff and improve data quality. |
| Equity Focus | There was no 'Equity Focus' variable in the CNDC data set. For the portfolio analysis conducted for this report: This variable was created to indicate CNDC projects with an explicit DEI focus. Project descriptions and available information was explored and only projects who clearly articulated a DEI focus with terms such as advancing equity, addressing inequity/disparities etc. It is important to note the limitations of this initial exploration as project information was inconsistently available. | Further explore measures that assess the level of equity focus for CNDC projects. Consider project perception/explicit statement of equity focus as one measure among others. |
| Revenue and Assets Variables | Information available for approximately 80 projects (~25% of total projects). The revenue and assets data set was provided by CNDC separately from the above variables in a distinct format (e.g., multiple rows of data for each project) and required extensive cleaning and recoding to merge the two files. For the portfolio analysis conducted for this report: Only revenue entries for the period of time that the project was active with CNDC were included. | Develop data file in which each unique Project ID is represented in a single row and all associated data for that Project are stored in the associated columns (i.e., "wide" format, rather than "long" format) to facilitate merging with other project data files |

Appendix A (continued): Additional Analytic Details and Data Quality Recommendations



Portfolio Analysis – Project Service Area Definitions

| Potential Service Area Definitions | |
|--|---|
| Advocacy and Policy | Projects providing support, advocacy services and/or promoting policy for a specific community/population or cause. |
| Arts | Projects offering access to, or promotion of the arts and related activities |
| Behavioral Health | Projects focused on mental health and/or substance use services, support groups, etc. |
| Community/Neighborhood Development | Projects focused on community-building efforts, community and neighborhood development, and grassroots organizing. |
| Economic Development, Mobility and Employment | Projects focused on economic development, family economic security and mobility, and/or employment and workforce development activities/services. |
| Education | Projects related to K-12 education, schools, general youth support, and academic support or mentoring activities. |
| Environment | Projects related to climate change/action, disaster relief services, sustainability, clean energy, farming/gardening, etc. |
| Health/Public Health | Projects focused on health care, specific health conditions, nutrition, harm reduction, general community-based resources, and health equity. |
| Nonprofit Sector Development | Projects promoting leadership opportunities, networking/partnerships, and infrastructure for the nonprofit sector. |
| Recreation and Fitness | Projects offering sports, physical activity and general support for recreational spaces. |

Appendix A (continued): Additional Analytic Details and Data Quality Recommendations



Satisfaction Survey

CNDC provided OMNI with access to all Satisfaction Survey data collected over time, with multiple iterations of the survey administered since 2007. A crosswalk of survey items over the years was completed to determine a core set of items and a final merged file of the ten-year period between 2011-2021 was compiled.

| Core Survey Items of Focus | Data Quality Notes and Analytic Decisions | Recommendations to Enhance Data Quality |
|---|---|--|
| <ul style="list-style-type: none"> • CNDC treats projects with respect • CNDC meets project needs • CNDC provides timely services • Projects are comfortable approaching CNDC staff • Projects perceive that CNDC staff care about their success • CNDC gives useful advice • CNDC is knowledgeable about nonprofit management • Project perceptions of the value of CNDC • Overall project satisfaction | <ul style="list-style-type: none"> • Substantial missing data due to the variation in survey items across years. • Variation in Likert scales utilized (in some cases within the same items from year to year) including: Never > Always; Strongly Disagree > Agree; Very Dissatisfied > Very Satisfied; Poor > Excellent which made recoding key variables necessary and time intensive. <p>For the Satisfaction Survey analysis conducted for this report:</p> <ul style="list-style-type: none"> • Because the survey is administered anonymously, the analysis is cross-sectional and focuses on annual trends rather than within-project changes to assess changes in CNDC’s services and value over time. • The analysis consisted of year-by-year item-level frequencies but the trends described are descriptive only. Statistical significance could not be tested as the independence/non-independence both within a year and across a year is unknown. This is due to the anonymous nature of the survey and inability to match participant responses over time, as well as the potential for multiple respondents from the same organization to complete the survey. • Due to the variation of Likert scale use across years, some measures were recoded to be comparable with the same middle point when appropriate. • Bivariate correlations and linear regressions were used to test how aspects of projects (e.g., revenue or size) might influence satisfaction. Additionally, a Cronbach's alpha analysis was used to probe the reliability of different measures to capture overall satisfaction. • Qualitative data was also coded to identify themes of perceived strengths and areas of growth for CNDC. | <ul style="list-style-type: none"> • Make a decision and commitment to tracking some level of project characteristic information linked to survey responses that allows CNDC to explore whether satisfaction with its services differs by project type. • To ensure that basic analyses of survey can be conducted by CNDC annually, select a consistent set of items utilizing the same Likert scale. • Integrate a new core set of EDI-related items to be included on the annual survey. • See more specific recommendations and potential options regarding CNDC’s Satisfaction Survey in the Evaluation Framework section of this report. |

Appendix A (continued): Additional Analytic Details and Data Quality Recommendations



Cost Benefit Analysis

The above data quality recommendations also address needs for enhancing CNDC's ability to assess the cost benefit of its services.

Additional analytic notes: The distinction between government and private revenue has implications for the costs incurred by projects via the project fee, as CNDC charges 10% for private revenue and 14% for government revenue. To assess the impact of these assumptions on the CBA for high complexity projects, we conducted sensitivity analyses that assumed 50% government revenue and 50% private revenue (rather than the originally assumed 25% government revenue and 75% private revenue), which would result in higher CNDC project fees. Results showed that the revised estimated annual savings for Low Revenue, High Complexity projects is 81% (slightly lower than the original estimate of 83%), and the revised estimated annual savings for High Revenue, High Complexity projects is 31% (slightly lower than the original estimate of 37%). These analyses indicate that the estimated annual cost-benefit of CNDC is relatively robust to variation in revenue source, which can be attributed to the relatively small difference in project fee rates (10% versus 14%, respectively).

Appendix B: Key CNDC Services



Below is a detailed list of services that CNDC offers its projects. Additional services provided may not be included in this list.



Compliance

- Inclusion in CNDC's 990
- Registration for charitable solicitations
- Acknowledgement to donors of tax-deductible donations
- 1099s
- State Sales tax Filing & Remittance of taxes
- City Sales tax Filing & Remittance of taxes



Human Resources

- Hiring W2 Employees
- Terminating W2 Employees
- Background checks
- Onboarding
- Benefits selections
- Benefits administration
- Unemployment management
- Conflict resolution assistance



Financial Management

- Accounts payable
- Accounts receivable
- Preparation of Invoices to funders (AR) including government contracts and grants
- Tracking of restricted funds
- Payroll Processing / Allocation
- Financial statements
- Training on Federal Non-profit cost principles (Super Circular)
- Participation in government audits
- Company credit cards for approved staff
- Inclusion in CNDC's year-end audit



Additional Services

- CNDC's good will in the community
- Staff expertise in nonprofit management and finance
- Pro-bono legal counsel
- Being part of a large employer group for HR issues
- Informal mentoring of Project Executive Directors
- Guidance for troubleshooting issues
- Banking fees and costs



Business Administration

- Lease and contract review
- Administration of all liability insurance
- Additional property, event or other liability insurance
- Waivers for volunteers and program participants



Capacity Building

- Coaching and support
- Membership rates with partner orgs
- Ability to participate in Colorado Gives Day

Appendix C:

Additional EDI Resources



A Checklist of Potential Actions: Incorporating DEI in Your Grant-Making Process

Description: Offers a useful checklist for incorporating DEI in grant-making processes.

Summary Points:

- More proactive approach to seeking and supporting applications, vetting projects before inviting them to apply, outreach to diverse projects, asking organizations to recommend others to apply
- Ensure application process is equitable, flexible, nimble, timely, and responsive, user-friendly platform, multiple options for submission such as video, etc.
- Ask how organizations define their own EDI principles and efforts
- Consider overall project profile and where there might be gaps in diversity
- Streamline reporting processes
- Offer TA, capacity building, learning opportunities

Internal:

- Increase diversity of Board, implement term limits, include projects on board, embed DEI in governance, mandate DEI training for members

ADVANCING DIVERSITY, EQUITY, AND INCLUSION IN GRANT MAKING

Description: The document identifies six opportunities in the grant-making process to align with DEI practices. Each opportunity illustrates a set of questions and reflections for grant-makers to consider.

Summary Points:

- Developing a portfolio strategy: Bring an intersectional power and privilege analysis into your strategy discussions. Work with colleagues with different lived experiences or expertise.
- Building relationships with organizations and understanding their health and effectiveness: Explain why challenging structures of power and privilege is critical to your foundation and be transparent about your own journey. You are not expecting grantee partners to have this “figured out,” but rather you are looking to both learn with them and from them.
- Scanning the field, conducting outreach, and soliciting concept notes and proposals: Tailor your outreach to raise awareness and increase accessibility. Partnering with grantees or peer funders to leverage their existing networks and communication channels.
- Negotiating and reviewing a proposal and structuring grant support: Prioritize flexible and multi-year funding. This will enable grantees the space to set their own agendas and build their power in the field.
- Learning throughout the life of a grant: Engage grantees in defining what progress means for them and in analyzing impact. Speak with those directly impacted by the issues grantees work with.
- Ending a funding relationship: Seek to understand the consequences of ending funding, at an organizational and field level. Try not to take funding away abruptly from grantees. When possible and appropriate, aim to create the softest landing possible for the grantee.

DEI LEARNING SERIES FUNDER GUIDANCE FOR ENGAGING GRANTEEES ON DEI

Description: A guide on how funders can address grantees with DEI principles at the bringing of a relationship.

Summary Points:

- Make DEI values and principles part of your first conversations. Ask questions, how does the organization view DEI?
- Be aware of what is universal and what is contextual. Diversity will depend on the geographic region.
- Request data that can help you understand where the organization is now, and where it wants to be. Capturing diversity at different levels of the organization is a good way to begin a concrete conversation and gather information that will allow you to track change over time.
- If you have concerns, raise them and pay attention to how they respond. Does everyone understand the concerns?
- Consider making changes when there are persistent challenges.

Appendix C:

Additional EDI Resources



Leveraging Effective Consulting to Advance Diversity, Equity, and Inclusion in Philanthropy

Description: An article of case studies that highlights the key goals to help grant makers define or refine the meaning of DEI and support in understanding where equity fits into their values and mission.

Summary points:

- Define the meaning of diversity, equity, and inclusion.
- Create a trusting partnership between the foundation/client and consultant.
- Make room in the work for all partners to understand that equity goes beyond diversity and inclusion and is intersectional.
- Guide DEI projects and initiatives into a scope broad enough to articulate aspirations and goals as well as commit to internal changes and action.
- Distinguish the technical, “fix-it” elements of a solution from more complex and adaptive change strategies.
- Embrace emergent strategy.
- Commit to ongoing organizational learning.

Strategies for Driving Equity in Grantmaking Practice

Description: General overview of how to be an effective grantmaking organization working through the lens of DEI.

Summary points: 2 Recommendations

Reduce bias in decision-making and grantmaking processes.

- Bringing a diversity of voices into grantmaking decisions by using external review committees or engaging in participatory grantmaking.
- Proactively seek, reach out to, and engage, potential grantees from underserved communities.

Collect, analyze, and use disaggregated demographic data to advance equity and impact.

- Share demographic data with both internal and external stakeholders and communicate how demographic data will be used and protected.
- Support grantee capacity and technical skills to collect demographic data. Recognized that grantee organizations often lack the capacity or technical skills to collect data.

The Influence of Board Diversity, Board Diversity Policies and Practices, and Board Inclusion Behaviors on Nonprofit Governance Practices

Description: Investigates board diversity policies, practices and board inclusion behaviors to mediate EDI practices.

Summary points:

- The board’s diversity impacts governance practices, but this impact is manifested differently for gender, age, and racial/ethnic diversity.
- The behaviors of the board directly impact the internal and external performance and governance of the organization.
- Adoption and review of minimum standards to include and keep diverse board members.
- Boards that are more diverse in race/ethnicity will have more effective governance.
- As boards establish more policies and practices related to diversity, the effective performance of internal and external governance practices will be improved.

Appendix C:

Additional EDI Resources



The Road to Nonprofit Diversity and Inclusion

Description: A general overview of how organizations can lean into the obstacles and step into prioritizing diversity, inclusion, and equity work.

Summary points: Discuss primary questions every non-profit should ask themselves.

- Do we have a shared vocabulary?
- How do we define: diversity, inclusion, racial equity, and other terms?
- What is implicit bias?
- Have we discussed structural racism, microaggression, dominant culture, and privilege?
- Are we welcoming as a board, staff, and organization?
- How would we know, and how can we prevent blind spots?

A 5-element approach to DEI work:

- Vision - building a shared vision for DEI that is grounded in the organization's values, mission, and principles.
- Assessments- Use data. Define gaps between where you are and where the organization aims to go.
- Education - Develop competencies around DEI.
- Implementation & Integration - Implement strategies with attention to culture, programs, practices & systems.
- Evaluation - Measure progress & impact, report results, and celebrate accomplishments.

Appendix D:

Additional Satisfaction Survey Resources



2020 Grantee Perception Report: Results and Commitments

Description: A high overview result summary of a series of custom questions about the Greater Rochester Health Foundation's commitments to equity through the "Grantee and Applicant Perception Report" from CEP.

Survey items and/or summary points: Funding organization surveyed

- Relationships and communication
- Understanding of communities, fields and organizations
- Impact on organizations, fields and communities
- Grantmaking practices

Cone Health Foundation Grantee Perception Survey Report

Description: This report represents a summary of key findings from a survey conducted by the Greater New Orleans Foundation

Survey items and/or summary points: Findings from grantee surveys start on page 8. The feedback from grantees has been divided into three sections:

- Grantees' assessment of their interactions with the foundation
- Grantees' assessment of the foundation's organizational effectiveness activities
- Grantees' perceptions of the foundation's impact

GRANTEE PERCEPTION REPORT - The Colorado Health Foundation

Description: A large report of collected survey data responses from grantees aligned with the Colorado Health Foundation.

Survey items and/or summary points:

- Data from surveys were placed into different subgroups. For example, the year of the grant, program area, objectives, congressional districts, organizational budget, etc.
- Report surveys on the impact of their funding by asking questions on a sliding scale response from 1 to 7. For instance, 7 indicates the funding organization thoroughly understood the needs of the grantee organization.

Survey of Grantee Demographics Results

Description: A large report of quantitative data about the demographics of grantees from the Foundation.

Survey items and/or summary points:

- Starting on page 46 the report uses open-ended questions to ask grantees about DEI work and practices.
- The primary purpose of this data book is to present findings from the survey in ways that support the foundations learning and reflection.

The William and Flora Hewlett Foundation 2021 Grantee Perception Report - Organization Wide

Description: A large report of quantitative data about the demographics of grantees from the Foundation.

Survey items and/or summary points:

- Data from surveys were placed into different subgroups, education, environment, gender equity, performance art, democracy programs, and philanthropy.
- Report surveys on the impact of their funding by asking questions on a sliding scale response from 1 to 7. For instance, 7 indicates the funding organization thoroughly understood the needs of the grantee organization.