



# **Nonprofit Association of the Midlands**

## **Evaluation Toolkit**

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## Executive Summary

- **Objective.** The objective of this initiative was to assess the value and effectiveness of NAM. The study was conducted in two phases. Phase 1 focused on planning while Phase 2 focused on implementation.
- **Process.** C1C used a program theory approach to conduct a Situation Analysis, create Theory of Change and Theory of Action Models, and create and implement a Measurement Framework.
- **Findings.** Key takeaways for each research question and logic model component are provided below.
  - **Activities.** One-third of members participated in each of the six activity areas over the last two years. Members used GPS and Professional Development the most. They were least aware of Products & Discounts and Sector Advocacy.
  - **Short-Term Outcomes.** Many members learned about NAM from other members and are located in the Omaha metro area. Members reported most frequently that they joined NAM for the value of GPS and Professional Development.
  - **Intermediate Outcomes.** Member GPS compliance was highest in NAM's key focus area of Transparency & Accountability, and above average in other Professional Development focus areas (Finance, HR, etc.).
  - **Long-Term Outcomes.** Local foundations report being more confident in nonprofits when they are NAM members. They report that NAM helps nonprofits most with employee practices, governance, and effectiveness. They also report that NAM could do a better job getting members to utilize services.
  - **Qualitative Results.** Members and local foundations see NAM as a connector and a helpful resource. Members report NAM helping their organization most with connections, governance, and training.
  - **Group Differences.** Larger and longer-term member organizations showed greater participation in activities and stronger short-term, intermediate, and long-term outcomes. Members who were required to join by funding agencies, however, participated less and had more negative perceptions of NAM and its value.
  - **Need Fulfillment.** Members feel that there are resources available to assist them in most GPS areas. Members reported making needed improvement in Finance, Governance, HR, and Transparency & Accountability.
- **Next Steps.** C1C will review all deliverables with NAM stakeholders, will update all deliverables based on stakeholder feedback, and recommends that NAM implement future evaluation efforts using the C1C evaluation toolkit.

## Initiative Overview

### Initiative Objective

- The objective of this initiative was to conduct a study focused on assessing the value and effectiveness of the Nonprofit Association of the Midlands (NAM).
- The study used a program theory approach and was implemented in two main phases.
- Phase 1 focused on evaluation planning while Phase 2 focused on evaluation implementation.

### Initiative Background

- NAM understands the importance of nonprofits being able to articulate the value that they bring to the community and sees that nonprofits are learning the practice of measurement and growing in their evaluation abilities.
- NAM has watched the measurement and evaluation momentum and saw value in conducting its own evaluation study.
- The study was conducted in a capacity building manner to ensure NAM can share evaluation best practices with members.
- The initiative was initiated and invited by NAM in collaboration with and support from The Sherwood Foundation.
- The initiative was led by Category One Consulting (C1C) in partnership with NAM staff and board members.

## Initiative Approach

### Program Theory Definition

- Program theory is an approach used to determine and describe how an initiative will lead to a chain of outcomes in order to address a problem or need.

### Program Theory Benefits

A program theory approach was used due to several main benefits. Specifically, it:

- Identifies and aligns assumptions regarding needs and strengths.
- Increases the likelihood that all programs have the potential to work together to achieve results.
- Ensures that desired, measurable results are part of the strategy or strategies.
- Develops a shared understanding of the strategy or strategies.
- Clarifies how individual people or groups contribute to the overall result.
- Develops initiative specifications as a basis for funding programs.
- Makes it easier to document successes and challenges.
- Ensures decisions are based on a complete and consistent set of information.

### Program Theory Stages

The program theory approach used for this initiative consisted of four main stages, each of which is described below and illustrated in Figure 1. The process used to execute each stage is described in the next section.

- **Situation Analysis** is a comprehensive analysis designed to understand the nature and extent of a problem and set the stage for future change.
- **Theory of Change** is a hierarchy of outcomes illustrating how change will unfold and informing the actions required to address the problem.
- **Theory of Action** is a description of how an initiative will be resourced and implemented in order to achieve the outcomes required for change.
- **Measurement Framework** is a detailed roadmap for evaluating the implementation of actions, achievement of outcomes, and ultimate impact on a problem.

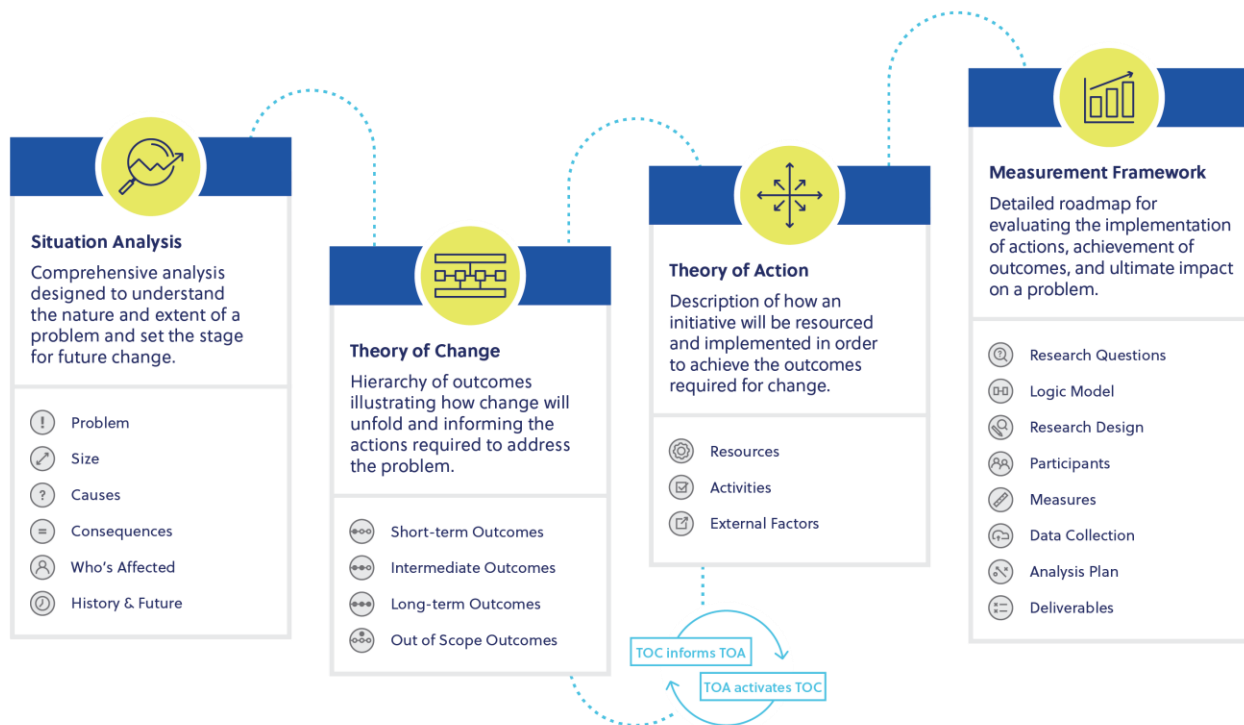


Figure 1. Graphic illustrating and defining the components of a program theory approach.

## Data Collection Sources

Data were collected from five main sources. Each source of data is described in detail below.

- **Discovery Session.** A discovery session was conducted with NAM's Chief Executive Officer to discuss, inform, guide, and plan the initiative.
- **Stakeholder Interviews.** Interviews were conducted with 20+ staff members, board members, nonprofit members, business partners, and funders. Interviews were transcribed, coded, and themed.
- **Internal Documents.** A review of 35+ documents including strategic plans, annual reports, logic models, training materials, and flyers was completed. A description and key takeaway were generated for each document.
- **Extant Literature.** An extant literature review on other nonprofit associations was conducted to understand their goals, services, and evaluation practices. A description and key takeaway were documented for each article.
- **Workgroup Sessions.** Nine facilitated workgroup sessions with internal NAM affiliates were conducted to ensure alignment and accuracy with all program theory stages. Workgroup sessions focused specifically on identifying research questions, specifying data sources, reviewing Situation Analysis findings, developing the Theory of Change, developing the Theory of Action, building the Measurement Framework, reviewing the final set of compilation deliverables, and determining future actions.

## Situation Analysis Overview

### Components

A Situation Analysis was conducted to answer the following six research questions. These are traditional Situation Analysis questions according to the program theory approach.

- **Problem.** What problem, need, or gap is NAM trying to address?
- **Size.** What is the size of the problem? How big is it?
- **Causes.** What causes this problem? Why does it exist?
- **Consequences.** If left unsolved, what are the consequences of this problem?
- **Who's Affected.** Who is affected by this problem, both directly and indirectly?
- **History & Future.** How has this problem changed over time? How will it change in the future?

### Process

A four-step process was used to conduct the Situation Analysis. Each step is described below.

- C1C reviewed data collected from all data sources including the discovery session, stakeholder interviews, internal documents, and extant literature. See Appendices A and B for a complete copy of the interview communication plan and protocol.
- C1C created a first draft of the Situation Analysis findings including the problem, size, causes, consequences, who's affected, and history & future.
- C1C reviewed all Situation Analysis components with the workgroup and conducted facilitated activities to assess the completeness and accuracy of findings.
- C1C updated the Situation Analysis findings based on input from the workgroup. C1C sent the workgroup the updated Situation Analysis findings and incorporated additional feedback.

### Findings

- A summary of the Situation Analysis Findings is provided in Figure 2 below.

<b>01</b>	<b>Problem.</b> NAM is focused on addressing eight main problems including community misperceptions, lack of voice in public policy, limited buying power, resource limitations, business acumen gaps, no operational framework, no hub to reduce silos, and no conduit to funders.
<b>02</b>	<b>Size.</b> There are 60,919 nonprofits in NE and IA. Nonprofits contribute \$836.9B to the U.S. economy. NE nonprofits employ 85,860 people. 86% of leaders believe the need for nonprofit services is rising. Over \$880M is contributed to nonprofits by NE foundations. 100% of people in NE and IA use a nonprofit everyday.
<b>03</b>	<b>Causes.</b> Two to four causes were identified for each problem mentioned above including corporate interests and perceptions, limited policy-related resources, nonprofit size, funding models, nonprofit genesis and focus, lack of overarching trade organization, nonprofit cultural/geographic dispersion, and funder variability.
<b>04</b>	<b>Consequences.</b> Six main consequences to the aforementioned problems were identified including nonprofit inefficiency, nonprofit legal risks, nonprofit ineffectiveness, client unmet needs, nonprofit poor reputation, and nonprofit reduced funds.
<b>05</b>	<b>Who's Affected.</b> Nonprofits (organizations, board members, leadership, staff), funding organizations, nonprofit clients, community partners, and community members are all affected by the problems NAM is focused on addressing.
<b>06</b>	<b>History &amp; Future.</b> The identified problems have changed and will continue to change over time. Major changes are related to the number of nonprofits, gaps between nonprofits and government, changes in community and funder perceptions, and government regulations.

Figure 2. Summary of the Situation Analysis findings.

## Theory of Change Overview

### Components

Theory of Change depicts how change will unfold by zooming in from the big picture and focusing on the different steps that are needed to solve the problem. It identifies the short-term outcomes, intermediate outcomes, long-term outcomes, and system-wide outcomes. These outcomes are then connected to one another in an outcome chain that demonstrates how the different outcomes connect and which are needed to lead to subsequent outcomes. The Theory of Change process also identifies outcomes that are out of scope, outcome assumptions, and outcome feedback loops. The definitions that were used for each outcome category are provided below.

- **Short-Term Outcomes.** Short-term outcomes are defined as direct and immediate consequences of an initiative and mechanisms by which intermediate outcomes are reached.
- **Intermediate Outcomes.** Intermediate outcomes are defined as consequences of an initiative's short-term outcomes and mechanisms by which long-term outcomes are reached.
- **Long-Term Outcomes.** Long-term outcomes are defined as the ultimate goals of the initiative and consequences of earlier outcomes. Long-term outcomes are often linked to the problems, causes, and consequences identified during the Situation Analysis.
- **System-Wide Outcomes.** System-wide outcomes are outcomes that are important and considered in-scope but are influenced by numerous external factors.
- **Out of Scope Outcomes.** Out of scope outcomes are outcomes the initiative isn't focused on because they aren't mission-driven or are influenced by too many external factors.
- **Outcome Assumptions.** Outcome assumptions are conditions required for one outcome to lead to another. These are presumed as likely but are not guaranteed. It is important to document the assumptions of the model because the outcomes hierarchy can break down if assumptions do not come to fruition.
- **Outcome Feedback Loops.** Outcome feedback loops are pathways indicating that an outcome later in the model will lead to an outcome earlier in the model.

### Process

A four-step process was used to develop the Theory of Change. Each step is described below.

- C1C created a list of all possible outcomes based on Situation Analysis data and findings. The outcomes were printed onto individual notecards.
- The workgroup organized the outcome notecards into short-term, intermediate, and long-term categories, then assessed whether all outcomes were represented.
- The workgroup arranged the categories into a chain of if-then statements, then flagged out of scope outcomes, outcome assumptions, and outcome feedback loops.
- C1C and the workgroup validated the Theory of Change by reading through all outcomes to assess whether the series of if-then statements told a cohesive story.

### Theory of Change Model

The Theory of Change Model illustrates how change can unfold through a hierarchy of outcomes. The Theory of Change Model is shown in Figure 3 and components are depicted in Figure 4 and described below.

- System-wide outcomes focus on quality of community life, nonprofit partnership, nonprofit mission execution, and public policy alignment.
- Long-term outcomes focus on nonprofit focused public policy, positive public perceptions, and positive foundation perceptions.
- Intermediate outcomes focus on nonprofit member employee practices, resource efficiency, member effectiveness, and business acumen.
- Short-term outcomes focus on member service utilization, membership value & retention, member acquisition, and NAM awareness & attraction.



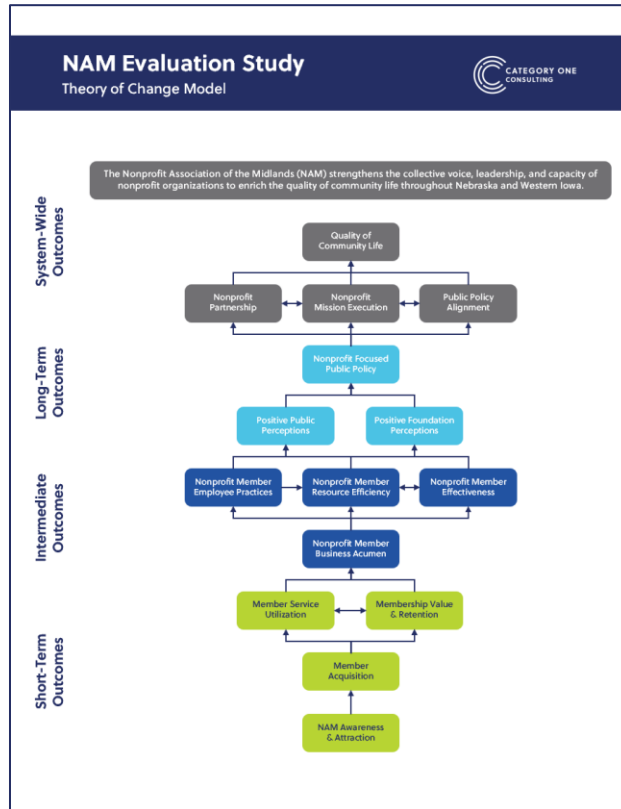


Figure 3. Theory of Change model depicting system-wide, short-term, intermediate, and long-term outcomes.

**Out of Scope Outcomes.** Outcomes that are considered out of focus because of external factors.

- Funders have consistent processes, requirements, and prioritization.
- Smaller nonprofits with similar missions will combine.
- All nonprofits are successful in executing their missions and achieving their visions.
- All community needs are met by nonprofit organizations.
- All legislative acts align with nonprofit needs.

**Outcome Assumptions.** Required conditions that are presumed as likely but are not guaranteed.

- Organizations that are aware and attracted to NAM will have the resources to join NAM.
- Members of NAM will utilize services to fulfill their needs.
- Members who get value from NAM will have the resources to maintain their membership.
- Members who use services will gain acumen.
- Nonprofit efficiency and effectiveness will lead to positive perceptions.

**Outcome Feedback Loops.** Outcomes that occur later in the model but lead to outcomes earlier in the model.

- Nonprofit member business acumen will also lead to additional service utilization, perceptions of value, and member retention.
- Positive perceptions in the public and among foundations will also lead to additional NAM awareness, attraction, and acquisition.
- Nonprofit focused public policy will also facilitate nonprofit member employee practices, resource efficiency, and member effectiveness.

Figure 4. Descriptions of out of scope outcomes, outcome assumptions, and outcome feedback loops.

## Theory of Action Overview

### Components

Theory of Action identifies the activities and resources needed to achieve the outcomes identified in the Theory of Change, while also identifying the external factors that may impact the process. While these factors are outside of the initiative's control, it is still valuable to acknowledge them and be aware of certain factors that could influence the process. Guiding principles were also identified during the Theory of Action as these can help guide work and measurement moving forward. The definitions for each of the Theory of Action components are provided below.

- **Resources.** Resources are raw materials that may be used to facilitate activities. Resources often come in the form of assets such as buildings, finances such as grants, and people such as staff.
- **Activities.** Activities are actions that can be used to achieve the desired outcomes including short-term, intermediate, long-term, and system-wide. Activities often come in the form of policies, programs, products, and services.
- **External Factors.** External factors are conditions or stimuli outside the initiative's control that influence resource attainment, activity implementation, and outcome achievement. These factors come in many forms but are often related to government, economic, and sociopolitical conditions.
- **Guiding Principles.** Guiding principles refer to the philosophy that guides the initiative in all circumstances including the gathering of resources, implementation of activities, response to external factors, and achievement of outcomes.

### Process

A four-step process was used to develop the Theory of Action. Each step is described below.

- C1C created a list of all possible resources, activities, and external factors based on Situation Analysis data and findings. These were printed onto individual notecards.
- The workgroup organized the notecards into categories of similar cards, then assessed whether the categories represented all Theory of Action components.
- The workgroup separated the categories into the three Theory of Action component groups of resources, activities, and external factors.
- The workgroup reviewed all categories and notecards for completeness and added any resources, activities, and external factors that were missing.

### Theory of Action Model

The Theory of Action Model describes how NAM's initiatives are resourced and implemented. The Theory of Action Model is shown in Figure 5 and components are described in detail below.

- Resources include revenue streams, NAM governance, NAM talent, and physical assets.
- Activities include Guidelines & Principles, Professional Development, Sponsored Networking, Peer Learning, Products & Discounts, and Sector Advocacy.
- External factors include economic conditions, government conditions, and sociopolitical conditions.
- Guiding principles include NAM's values of integrity, innovation, and accountability.



Figure 5. Theory of Action model detailing resources, activities, external factors, and guiding principles.

## Measurement Framework Overview

### Components

There are eight components to NAM's Measurement Framework. Each component is described below.

- **Research Questions.** Set of questions to be answered by measurement implementation.
- **Logic Model.** Visualization of how the Theory of Action will activate the Theory of Change.
- **Research Design.** Type of study (longitudinal, experimental, etc.) that will be implemented.
- **Participants.** Entity (organization, person, etc.) from which data will be collected.
- **Measures.** Data collection tools (surveys, archival data, etc.) used to gather data.
- **Data Collection.** Methods and schedule used to collect data.
- **Analysis Plan.** Complete set of analyses that will be conducted to answer research questions.
- **Deliverables.** Mechanisms (report, slide deck, etc.) used to disseminate results.

### Process

A four-step process was used to develop the Measurement Framework. Each step is described below.

- C1C reviewed all data collected from the Situation Analysis data and findings, the Theory of Change model, and the Theory of Action model.
- C1C conducted a workgroup activity to generate insights regarding research questions, evaluation goals, and readily available data.
- C1C conducted a workgroup activity to develop operational definitions, construct labels, participant targets, available data sources, and data structure.
- C1C put together a first draft of the Measurement Framework, then reviewed the draft with the workgroup to get their input. The updated document was sent to the workgroup for sign-off.

## Research Questions

- Do NAM’s activities lead to the short-term, intermediate, and long-term outcomes listed in NAM’s logic model?
- Which activities have the biggest impact on the short-term, intermediate, and long-term outcomes in NAM’s logic model?
- To what extent do organizational characteristics such as size and revenue impact the activity to outcome relationship?
- To what extent do membership details such as reason for joining and tenure impact the activity to outcome relationship?
- How well is NAM fulfilling member needs? How does need fulfillment impact the activity to outcome relationship?

## Logic Model

- The logic model provides a simplified illustration of the Theory of Change and Theory of Action. It is shown in Figure 6.

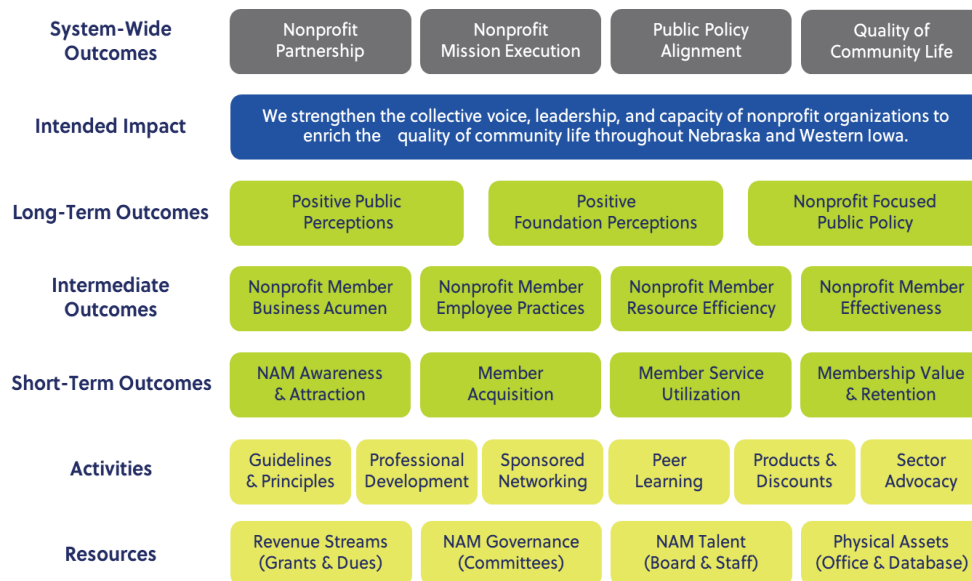


Figure 6. Logic model depicting the relationship between NAM’s resources, activities, and outcomes.

## Research Design

- **Correlational.** A correlational design was used for this evaluation study. This means that the study assessed relationships between naturally occurring events (i.e., activities and outcomes). This design was selected in lieu of an experiment, because it wasn’t appropriate to randomly assign organizations to membership conditions or monitor a new change.
- **Cross Sectional.** A cross-sectional design was used for this evaluation study. This means that the study utilized data from a specific point in time. This design was selected in lieu of a longitudinal design, because there was no consistent starting point for all current member organizations and too much variability to control for statistically.

## Participants

- **Member Organizations.** Organizations that were members of NAM as of February 1, 2018 was the primary population of interest. This equated to 523 organizations. Business partners were not included.
- **Local Foundations.** Local foundations that have supported or endorsed NAM were also a population of interest. This equated to 16 foundations. Individual donors were not included.

- **NAM Staff Members.** NAM leadership and staff members responsible for advocacy-focused efforts were also a population of interest. This equated to 2 NAM staff members. Non-advocacy staff were not included.

## Measures

- Details regarding each measure used in the evaluation study are provided in Figures 7 and 8.

Activities	
Guidelines & Principles (GPS)	The extent to which NAM member organizations' take the GPS assessment and how they answer the questions.
Professional Development (PD)	The number and type of Professional Development courses a NAM nonprofit member organization completed.
Sponsored Networking	The number and type of NAM-Sponsored Networking opportunities a NAM nonprofit member organization participated in.
Peer Learning	The number and type of Peer Learning opportunities a NAM nonprofit member organization participated in as a result of NAM activities or events.
Products & Discounts	The number and type of Products & Discounts a NAM nonprofit member organization utilized.
Sector Advocacy	The number of times a NAM staff member attempted to influence public policy via education, outreach, responses, or speaking events.
Short-Term Outcomes	
NAM Awareness & Attraction	The extent to which nonprofits are aware of and interested in joining NAM, and understand NAM's goals, activities, and mission.
Member Acquisition	The extent to which all charitable nonprofits under 501c3 status in Nebraska and nine counties in Western Iowa join NAM (i.e., become NAM member organizations), and current members' reasons for joining.
Member Service Utilization	The extent to which NAM's nonprofit member organizations utilize NAM's services including Sector Advocacy, GPS, Professional Development, NAM-Sponsored Networking, Peer Learning, and Products & Discounts.
Membership Value & Retention	The extent to which NAM's nonprofit member organizations believe they get value from their NAM membership, want to stay NAM members, and ultimately do stay members.
Intermediate Outcomes	
Nonprofit Member Business Acumen	The extent to which NAM's nonprofit member organizations are aware of and adhere to the business acumen best practices, especially those outlined in NAM's Guidelines & Principles.
Nonprofit Member Employee Practices	The extent to which NAM's nonprofit member organizations engage in effective human resources practices in order to attract and retain high quality talent.
Nonprofit Member Resource Efficiency	The extent to which NAM's nonprofit member organizations have adequate resources and use such resources efficiently.
Nonprofit Member Effectiveness	The extent to which NAM's nonprofit member organizations are accountable and transparent.
Long-Term Outcomes	
Positive Public Perceptions	The extent to which the communities in Nebraska and nine counties in Western Iowa understand the impact of nonprofits and have positive perceptions about the nonprofit sector.
Positive Foundation Perceptions	The extent to which local foundations are satisfied with and have confidence in NAM nonprofit member organizations.
Nonprofit Focused Public Policy	The extent to which policy makers in Nebraska and nine counties in Western Iowa understand the impact of nonprofits, value/invite NAM's input, and provide nonprofits with a seat at the table.

Figure 7. Table summarizing the measures and their operational definitions.

	Archival NAM Data	Archival 990 Data	Member Survey	Foundation Survey	Staff Survey
Guidelines & Principles (GPS)	X		X		
Professional Development (PD)	X		X		
Sponsored Networking	X		X		
Peer Learning	X		X		
Products & Discounts	X		X		
Sector Advocacy	X		X		X
NAM Awareness & Attraction			X		
Member Acquisition	X	X	X		
Member Service Utilization	X		X		
Membership Value & Retention	X		X		
Nonprofit Member Business Acumen	X		X		
Nonprofit Member Employee Practices	X		X		
Nonprofit Member Resource Efficiency	X		X		
Nonprofit Member Effectiveness	X		X		
Positive Public Perceptions			X	X	
Positive Foundation Perceptions				X	
Nonprofit Focused Public Policy					X

Figure 8. Table summarizing the measures and their respective data sources.

### Data Collection

- **Archival Data.** Archival data from 2014-2018 were gathered from 990 forms as well as NAM’s databases including their directory, store, dues, listservs, room reservations, GPS assessment results, member survey, salary and benefits survey, and exit survey. Data were gathered for all member organizations as of February 1, 2018.
- **Survey Data.** Three custom surveys were developed for the purpose of this evaluation. One survey was distributed to each participant group. Surveys were distributed electronically, and all participants were notified that responses would be reported in aggregate to protect confidentiality. Satisfactory response rates were obtained for all three surveys. See Appendices C-H for communication plans and survey items.

### Analysis Plan

- **Plan & Storyboard.** An analysis plan and deliverable storyboard were developed to outline all analysis steps and deliverable layout. The analysis plan was developed as a notes document detailing out all data elements and data analyses that will be utilized for each research question. The storyboard was developed as a sketch document illustrating each deliverable component and the content it will contain (header, subheader, graph, inside, etc.).
- **Clean & Code.** Archival data files and survey data files were cleaned and aggregated to the organization level. Over 2,500+ NAM directory records, 4,200+ NAM store transactions, 400+ GPS test results, 40,000+ nonprofit Nebraska and Iowa 990 records, and 275+ survey responses were cleaned and merged. First, an appropriate time frame (e.g., last two years of data) and cohort group (i.e., members as of February 2018) for all archival data were selected. Second, calculations were conducted to code and compute all store transaction data by activity (e.g., professional development, networking), appropriate GPS compliance scores across 317 items in 12 content areas, and member organization characteristics (e.g., member organization length) based on individual member records. Third, mean composite scores for the 114 survey items (e.g., member value & retention) were calculated to create one score for each construct.

Finally, qualitative analyses were conducted on all open-ended survey items to identify qualitative themes in the data.

- **Merge & Aggregate.** All files were merged into one to facilitate analyses. First, this included finding the most accurate and complete individual-level data points for a variety of variables in order to aggregate to a single organization-level record. Next, in order to add Tax ID (EIN) to each file as a unique identifier for the merge, all possible write-in variations of the 1,000+ relevant organization names across 5 different sources were cleaned and standardized. Then files were merged together, cross-checked to ensure accuracy of the standardized naming process, and prepared for analysis.
- **Analyze & Visualize.** Thousands of qualitative and quantitative analyses were conducted across both archival and survey data sources. Frequencies and means were used to assess participation in each activity type and subtype. Means for each construct were calculated using both archival and survey data sources to assess short-term, intermediate, and long-term outcomes. Correlation and regression analyses were used to assess impact of activities on outcomes and the role of member need on improvement. Finally, for each of the above analyses, output by groups (e.g., location, BPP) was further examined for group differences. Output was transformed into data visualizations include a variety of graphs and tables to facilitate consumability of information.

### Deliverables

- **Slide Deck.** A slide deck was developed to provide a clear, compelling, and cohesive overview of the entire initiative.
- **One-Pager.** A one-pager was created to provide insights-at-a-glance in an attractive legal-sized one-pager.
- **Toolkit.** An evaluation toolkit was developed to provide a detailed summary with recommendations that will allow for NAM to implement future measurement and evaluation efforts independently. This document is the evaluation toolkit.

## Evaluation Findings

### Activities

- **Key Take-Away.** Around 1/3 of members participated in each of the 6 activity areas in the last two years. Members used GPS and Professional Development the most and were least aware of Products & Discounts and Sector Advocacy. Members appreciate offerings and wish they could take greater advantage of them.
- **Recommendation.** Streamline and shorten GPS assessment tools and create a training pathway aligned to each GPS content area. Members seek greater depth than breadth in Professional Development offerings. Positive feedback also highlights the use of the Salary & Benefits Survey and listservs in particular.

### Short-term Outcomes

- **Key Take-Away.** Many members learned about NAM from other members and are located in the Omaha metro area. Most members reported that they joined NAM for the value of GPS and Professional Development. Members stay for Professional Development, Sponsored Networking, & Peer Learning opportunities.
- **Recommendation.** Expand offerings to acquire more organizations outside the Omaha area (online, western NE, etc.). Grow and communicate Sector Advocacy to spread NAM's voice and reach potential new members. Offer more advanced Professional Development to provide value for longer-term members.

### Intermediate Outcomes

- **Key Take-Away.** Member GPS compliance was highest in NAM's key focus area, Transparency & Accountability, and above average in other focus areas (Finance, HR, etc.). Members join with varying levels of need in these four IO areas but reported relatively low perceptions that NAM helped them in those areas.

- **Recommendation.** Greater GPS use and compliance impacted each IO. NAM could make clearer their resources by advertising Professional Development pathways and tools that build from GPS results. GPS scores and member feedback suggest a need for greater resources in Volunteer Management.

### Long-term Outcomes

- **Key Take-Away.** Local foundations report being more confident in nonprofits when they are NAM members. They report that NAM helps nonprofits most with Transparency & Accountability, Governance, and HR. They also report that NAM could do a better job getting members to utilize services.
- **Recommendation.** Offer support to members across all GPS-related areas (Fundraising, Volunteer Management, Communication, etc.) and work towards matching members to offerings based on need. Present NAM benefits to members in a concise and consumable fashion to increase understanding and access.

### Qualitative Survey Findings

- **Key Take-Away.** Members and local foundations see NAM as a connector and a helpful resource. Members report NAM helping their organization most with connections, Governance, and training. They could use more support with Fundraising, benefits, and advanced training opportunities.
- **Recommendation.** Continue connecting members with local nonprofits and foundations and providing opportunities for collaboration. Offer training at the 101 level and beyond to continually provide value to organizations. Help members understand and access affordable employee benefits (health, retirement).

### Group Differences

- **Key Take-Away.** Larger and longer-term member organizations showed greater participation in activities and stronger short-term, intermediate, and long-term outcomes. Members who were required to join by funding agencies, however, participated less and had more negative perceptions of NAM and its value.
- **Recommendation.** Help remove barriers to smaller organizations' participation in NAM activities (cost, location, lack of member connections, etc.). Consider amended or streamlined processes (shorter GPS, etc.) to reduce burden on smaller and/or funder-required members.

### Need Fulfillment

- **Key Take-Away.** In general, members feel that there are resources available to assist them in most GPS areas. Members reported making needed improvement in Finance, Governance, HR, and Transparency & Accountability. The largest improvement gaps were in Volunteer Management, Fundraising, and IT.
- **Recommendation.** Implement training and support in Volunteer Management and Fundraising. Evaluate current training offerings to determine if they are aligned to what members need to improve. Use current training feedback forms and GPS data to help determine the training content that members need the most.

## Recommendations for Future Evaluation

### Set Research Questions

- Review the full set of research questions from the current Measurement Framework.
- Select the research questions that you are interested in assessing in the future.
- Determine whether there are additional research questions you want to assess in the future that were not included in the original set of research questions listed in the Measurement Framework.
- Document your new set of research questions. Phrase each statement as a question and make sure you have alignment across all stakeholders regarding the number, focus, and interpretation of questions.

### Select Metrics

- Use results from the Theory of Change, Theory of Action, and Logic Model to select a set of core metrics you want to track.
- Make sure that tracking these metrics will address your research questions and avoid tracking metrics that do need to be tracked.



- Streamline data options and choose metrics that are easy to understand and assess potential change over time. For example, you could track percent member usage for activity data and GPS compliance for intermediate outcomes.
- Determine whether additional data needs to be collected and whether it can be maintained for easy use.

### Optimize Data

- Optimize your data management system so you can easily report metrics on a recurring basis.
- Implement an organization-level unique identifier such as Tax ID that can be used in addition to individual member identifiers. We recommend having the unique identifier (i.e., Tax ID) be connected to an organization name and primary contact to eliminate the need for organizations to manually enter their organization or individual names when submitting orders, registering for events, or completing surveys.
- Facilitate data quality with current and future data collection processes. A few recommendations for this are provided below.
  - Minimize potential for open-ended data by always providing a drop-down menu of options.
  - Maintain consistency in instructions, number of response options, and question types on surveys and assessments whenever possible.
  - Streamline GPS assessments and build infrastructure to easily compute and report compliance metrics for internal use and external reporting. Require completion upon joining and annually thereafter in order to compute GPS compliance improvement over time, which is a good indicator of intermediate outcomes.
  - Streamline external surveys into one overarching survey that can be offset from the GPS assessment (fall vs. spring distribution for example). Use the survey to assess short-term and long-term outcomes (reason for joining, membership value, activity perceptions, etc.). Sunset any additional surveys that are administered to member organizations, by NAM or other entities, to minimize survey fatigue.

### Plan & Conduct Analyses

- Document where and how to access or download all data to ensure it is obtained in a consistent manner each time. Be sure to specify the data source location, the specific metrics downloaded, and the specific timeframe utilized.
- Document all steps of the analysis process including how to clean, code, and merge data as well as any other preliminary analyses that need to be conducted. For example, you may need to aggregate all individual member participants at an event before reporting the percentage of organizations that participated.
- Determine and document the appropriate analysis for each metric or research question. For example, percent member usage may be conducted to understand activity participation and correlations may be conducted to see if activity use relates to GPS scores.
- Specify the analysis type (qualitative or quantitative), the analysis (frequency, mean, correlation, etc.), the analysis tool (excel, SPSS, etc.), and the initial visualization idea (pie graph, bar graph, word cloud, table, etc.) for each analysis.
- Follow your analysis plan when downloading, cleaning, preparing, analyzing, and visualizing data. This will help you avoid analysis paralysis and will ensure your analyses address your research questions in order to tell a cohesive story.
- Save all analysis output in a manner that allows for easy reporting. For example, you may use an excel file to document all output related to each research question in its own tab.

### Storyboard & Visualize

- To ensure your story flows properly, you should storyboard before you open any type of publishing software. A storyboard is a visual outline that can be created on paper, sticky notes, or a whiteboard with one box or sticky note representing each page, slide, or section of your deliverable.

- Once you have your storyboard created, determine the optimal data visualizations for each of your findings. Data visualization refers to any effort to help people understand the significance of data by placing it in a visual context (i.e., pictorial or graphical format).
- Not all types of visualization are good for all type of data. Therefore, it is imperative that you choose the right type of visualization for the data you have. This is where all of your documentation can help. You should go back and review the analyses you ran, the output you obtained, and the initial visualization idea you documented when determining the right visualization. Here are a few tips to consider when developing your data visualizations.
  - **Q&A2.** Does your deliverable clearly and cohesively communicate the question, answer, and recommended action?
  - **Simplicity.** Is all of the information presented in the most simple and concise manner possible?
  - **Consumable.** Can your deliverable be interpreted by end users of varying skill levels, with a presenter, and independently?
  - **3 Seconds.** Can your data visualization including every graph, chart, and table be interpreted in 3 seconds or less?
  - **Action.** Does your deliverable provide actionable insights, so stakeholders will be ready to act?
  - **Think, Feel, Do.** Does it pass the “think, feel, do” test? Will you and your stakeholder’s thoughts, feelings, and actions be aligned?

### Share Findings

- Specify all audiences that need to receive the information, the optimal type of deliverable, and the appropriate timeframe for delivery. For example, you might review a slide deck of results each year at the NAM summit to ensure member organizations hear the information. You might also share a scorecard of key metrics with board members at quarterly board meetings.
- There are five main delivery mechanisms that can be used to share information with audiences. These include data files, reports, dashboards, scorecards, and stories. Delivery mechanisms vary according to development and interpretation time and each requires a tradeoff between the two.
- Determine the appropriate mechanism by considering your stakeholder’s skill, interest, and time. All delivery mechanisms can also be accompanied by a one-pager for quick interpretation.
- If you are sharing a lot of the same information on a recurring basis, you may want to consider setting up a dashboard in Power BI or Tableau to automate the process. This helps to maximize efficiency while also reducing the chance for reporting error.
- Be sure to use each delivery as an opportunity to clarify information, obtain feedback, and assess the measurement protocol and whether it needs to be adjusted.

### Next Steps

- **Deliverable Review Sessions.** C1C will review all deliverables (slide deck, one-pager, toolkit) with NAM staff, project evaluation workgroup members, evaluation sponsors, and NAM’s Board of Directors.
- **Deliverable Updates & Handoff.** C1C will update all deliverables to incorporate feedback gathered during the deliverable review sessions. C1C will then handoff all deliverables to NAM.
- **Toolkit Implementation.** C1C recommends that NAM implement the evaluation toolkit to facilitate ongoing and independent evaluation. The toolkit was designed to facilitate evaluation capacity building.

## Appendices

## Appendix A: Interview Communication Plan

### HEADS UP EMAIL

The Nonprofit Association of the Midlands (NAM) strives to strengthen the collective voice, leadership, and capacity of nonprofit organizations to enrich the quality of community life throughout Nebraska and Western Iowa. We believe it is essential to continuously assess and improve upon the value and effectiveness of our service offerings.

As a result, we are partnering with Category One Consulting, a local third-party consulting firm that specializes in evidence-based practices, to help us assess the value and effectiveness of our service offerings. One of the first steps in the assessment process is to conduct interviews with a sample of NAM staff members, board members, nonprofit members, business partners, and funders/donors. A member of Category One Consulting will be contacting you to schedule an interview in the near future. Your participation in this interview, and continued support throughout this process is greatly appreciated.

If you have any questions or comments, please feel free to contact me. Thank you in advance for your participation in this important work.

### PHONE CALL

Hello, is \_\_\_\_\_ there? Hi \_\_\_\_\_. My name is \_\_\_\_\_. I am calling as a follow-up to the email that Anne Hindery, CEO of the Nonprofit Association of the Midlands (NAM), sent you last week. As was stated in the email, NAM has commissioned a study to assess the value and effectiveness of their service offerings. One of the ways we are gathering this information is through interviews with individuals who are affiliated with NAM including staff, board members, nonprofit members, business partners, and funders/donors. Anne indicated that you would be a good person for me to talk with, so I'd like to schedule a meeting to ask you a few questions. Are you available next week or the following for a 60-minute meeting?

### VOICEMAIL

Hi \_\_\_\_\_. My name is \_\_\_\_\_. I am calling as a follow-up to the email that Anne Hindery, CEO of the Nonprofit Association of the Midlands (NAM), sent you last week. As was stated in the email, NAM has commissioned a study to assess the value and effectiveness of their service offerings. One of the ways we are gathering this information is through interviews with individuals who are affiliated with NAM including staff, board members, nonprofit members, business partners, and funders/donors. Anne indicated that you would be a good person for me to talk with, so I'd like to schedule a meeting to ask you a few questions. I will also send you an email, so you can respond in whichever manner that is easiest for you. Thank you.

### EMAIL (Follow-Up to Voicemail)

My name is \_\_\_\_\_. I am reaching out as a follow-up to the email that Anne Hindery, CEO of the Nonprofit Association of the Midlands (NAM), sent you last week. As was stated in the email, NAM has commissioned a study to assess the value and effectiveness of their service offerings. One of the ways we are gathering this information is through interviews with individuals who are affiliated with NAM including staff, board members, nonprofit members, business partners, and funders/donors. Anne indicated that you would be a good person for me to talk with, so I'd like to schedule a meeting to ask you a few questions. Can you please let me know if you are available during any of the following dates/times for a 60-minute meeting? I also left you a voicemail so feel free to reach back out in whichever manner is easiest for you.

## Appendix B: Interview Guide

### GREETING

Thank you for taking the time to meet with me today. As I stated on the phone, I am partnering with the Nonprofit Association of the Midlands (NAM) to conduct a study focused on assessing the value and effectiveness of their service offerings. As a first step, I am conducting interviews with individuals affiliated with NAM to learn more about NAM and their clients, services, and goals. I will be asking you 14 questions but want to let you know that your responses will be kept confidential. That means your responses will only be shared in aggregate without your name attached. I do this to ensure you feel comfortable sharing your perspectives with me. With your permission, I would like to tape record our conversation to ensure that I accurately document your responses. Do you have any questions for me before I begin?

### INTERVIEW QUESTIONS

1. Can you tell me a little about your role and organization, including your affiliation with NAM?
2. If you had to describe NAM in 1-2 sentences, what would you say?
3. Who or what does NAM try to help?
4. What does NAM do? What buckets of services, programs, activities, etc. does NAM provide?
5. What problems or issues would you say NAM is trying to address? In thinking about this problem...Who does this problem affect? What causes this problem? If left unsolved, what are the consequences of this problem? How has this problem changed over time? How do you think it will change in the future?
6. What are the specific outcomes you hope to see as a result of NAM?
7. Which NAM activities or programs have the most positive impact on these outcomes?
8. Imagine that NAM is 100% successful and has achieved every intended goal. What does this look like?
9. Do you think NAM provides nonprofits with what they need when they need it? If not 100% today, how could this be done better?
10. If you had to list 1-2 things that are working really well with NAM and should continue, what would they be?
11. If you had to list 1-2 things that aren't working well with NAM and should be changed, what would they be?
12. Is there anything else you would like me to know about NAM?

### INTERVIEW QUESTIONS – ONLY STAFF & BOARD MEMBERS

1. What 2-3 things do you want to know at the end of this study that you do not know today?
2. Are there problems you are facing today or could face in the future you hope this study will help you solve?

### INTERVIEW QUESTIONS – ONLY NONPROFIT MEMBERS & BUSINESS PARTNERS

1. What is the #1 benefit of being a NAM member?
2. If there was one thing you would want NAM to add to their list of service offerings, what would it be?

### INTERVIEW QUESTIONS – ONLY SELECTED WORKGROUP PARTICIPANTS

These interviews are the beginning of a 2-year comprehensive evaluation and continuous improvement study being funded by Sherwood Foundation. Another component of this project will be the creation of a small workgroup of valued NAM affiliates who will help develop NAM's Theory of Change, Theory of Action, and Measurement Framework. Anne Hindery thought you would be a great asset for this workgroup. The group will meet once per month for 90 minutes with little to no tasks outside of this. It may also provide a valuable opportunity to experience and influence an evaluation process, which will most likely become a NAM recommended best practice. With all of that being said, do you think you would be interested?

### CLOSING

Those were all of my questions. Thank you so much for taking the time to meet with me. I do want to remind you that everything you told me will be kept confidential. Do you have any questions for me? Thank you again!

## Appendix C: Member Organization Survey Communication Plan

### HEADS-UP MEMO

To: Current Nonprofit Member Organization List  
BCC: Sara Roberts  
From: Anne Hindery  
Subject: Nonprofit Association of the Midlands Evaluation Survey

Greetings,

The Nonprofit Association of the Midlands (NAM) is dedicated to helping nonprofits help their communities. Our mission is to strengthen the collective voice, leadership, and capacity of nonprofit organizations to enrich the quality of community life throughout Nebraska and Western Iowa. To execute our mission, we believe it is essential to continuously improve our services. As a result, we are partnering with Category One Consulting, a local third-party consulting firm, to help us evaluate the effectiveness of our service offerings. As part of this evaluation, we are asking member organizations to complete a brief survey designed to gather your perceptions and feedback.

On Monday, June 11<sup>th</sup>, you will receive an invitation to complete the NAM Evaluation Survey. The invitation will be sent to you, the primary NAM contact at your organization. We are asking each member organization to complete one survey. If you are interested in having other members of your organization complete the survey as well, you may contact Sara Roberts ([sararoberts@category1consulting.com](mailto:sararoberts@category1consulting.com)) at Category One Consulting.

Your feedback will help us strengthen NAM's service offerings, so it is important that you answer each of the survey questions honestly. Your individual responses will be kept completely confidential, which means they will never be shared with anyone inside or outside NAM in a manner that identifies you or your organization. Category One Consulting will only report responses in aggregate so your identity will be protected. If you have any questions regarding the survey, please feel free to contact Sara Roberts at Category One Consulting. Thank you in advance for your participation in this important work.

Thank you,

Anne Hindery  
Chief Executive Officer  
Nonprofit Association of the Midlands

### SURVEY INVITATION

Date: 06.11.18  
To: Current Nonprofit Member Organization List  
From: Anne Hindery (sent via C1C's survey system)  
Subject: Nonprofit Association of the Midlands Evaluation Survey

<Name>,

You are invited to participate in the Nonprofit Association of the Midlands (NAM) Evaluation Survey. NAM's mission is to strengthen the collective voice, leadership, and capacity of nonprofit organizations to enrich the quality of community life throughout Nebraska and Western Iowa. Your feedback will be used to strengthen NAM's service offerings. This invitation is being sent to you, the primary NAM contact at your organization. We are asking each member organization to complete one survey. If you are interested in having other members of

your organization complete the survey as well, you may contact Sara Roberts (sararoberts@category1consulting.com) at Category One Consulting (C1C).

The survey should take approximately 15 minutes to complete and can be taken on a computer or mobile device. If you are able to, please complete the survey now. If that isn't possible, please do so sometime by June 22. When you are taking the survey, it is important that you answer each of the questions honestly. Your individual responses will be kept completely confidential, which means they will never be shared with anyone inside or outside NAM in a manner that identifies you or your organization. C1C will only report responses in aggregate so your identity will be protected. Please feel free to tell C1C what you really think.

Click the following link to begin the survey.

**SURVEY LINK**

If you have questions about the survey, please contact Sara Roberts at Category One Consulting at sararoberts@category1consulting.com.

Thank you,

Anne Hindery  
Chief Executive Officer  
Nonprofit Association of the Midlands

Sara Roberts  
Co-Founder & Principal Consultant  
Category One Consulting

**SURVEY REMINDER #1**

Date: 06.18.18

To: Non-respondents

From: Anne Hindery (sent via C1C's survey system)

Subject: Nonprofit Association of the Midlands Evaluation Survey

<Name>,

This is a friendly reminder to complete the Nonprofit Association of the Midlands (NAM) Evaluation Survey by June 22. NAM's mission is to strengthen the collective voice, leadership, and capacity of nonprofit organizations to enrich the quality of community life throughout Nebraska and Western Iowa. Your feedback will be used to strengthen NAM's service offerings. This invitation is being sent to you, the primary NAM contact at your organization. We are asking each member organization to complete one survey. If you are interested in having other members of your organization complete the survey as well, you may contact Sara Roberts (sararoberts@category1consulting.com) at Category One Consulting (C1C).

The survey should take approximately 15 minutes to complete and can be taken on a computer or mobile device. If you are able to, please complete the survey now. If that isn't possible, please do so sometime by June 22. When you are taking the survey, it is important that you answer each of the questions honestly. Your individual responses will be kept completely confidential, which means they will never be shared with anyone inside or outside NAM in a manner that identifies you or your organization. C1C will only report responses in aggregate so your identity will be protected. Please feel free to tell C1C what you really think.

Click the following link to begin the survey.

SURVEY LINK

If you have questions about the survey, please contact Sara Roberts at Category One Consulting at sararoberts@category1consulting.com.

Thank you,

Anne Hindery  
Chief Executive Officer  
Nonprofit Association of the Midlands

Sara Roberts  
Co-Founder & Principal Consultant  
Category One Consulting

**SURVEY REMINDER #2**

Date: 06.21.18

To: Non-respondents

From: Anne Hindery (sent via C1C's survey system)

Subject: Nonprofit Association of the Midlands Evaluation Survey

<Name>,

This is a friendly reminder to complete the Nonprofit Association of the Midlands (NAM) Evaluation Survey by June 22. NAM's mission is to strengthen the collective voice, leadership, and capacity of nonprofit organizations to enrich the quality of community life throughout Nebraska and Western Iowa. Your feedback will be used to strengthen NAM's service offerings. This invitation is being sent to you, the primary NAM contact at your organization. We are asking each member organization to complete one survey. If you are interested in having other members of your organization complete the survey as well, you may contact Sara Roberts (sararoberts@category1consulting.com) at Category One Consulting (C1C).

The survey should take approximately 15 minutes to complete and can be taken on a computer or mobile device. If you are able to, please complete the survey now. If that isn't possible, please do so sometime by June 22. When you are taking the survey, it is important that you answer each of the questions honestly. Your individual responses will be kept completely confidential, which means they will never be shared with anyone inside or outside NAM in a manner that identifies you or your organization. C1C will only report responses in aggregate so your identity will be protected. Please feel free to tell C1C what you really think.

Click the following link to begin the survey.

SURVEY LINK

If you have questions about the survey, please contact Sara Roberts at Category One Consulting at sararoberts@category1consulting.com.

Thank you,

Anne Hindery  
Chief Executive Officer  
Nonprofit Association of the Midlands

Sara Roberts  
Co-Founder & Principal Consultant  
Category One Consulting



## Appendix D: Member Organization Survey

### GREETING

Thank you for participating in the Nonprofit Association of the Midlands Evaluation Survey! All responses will be kept completely confidential, so please feel free to respond honestly to each item. Click on NEXT or > to begin the survey.

### SURVEY

Please answer each of the following questions by selecting the response(s) that best represents your answer. You may select all responses that apply.

1. How did you **first** find out about NAM?
  - a. I heard about NAM from another NAM member organization.
  - b. I heard about NAM from another organization that was not a NAM member.
  - c. I heard about NAM from a funder or foundation.
  - d. I heard about NAM directly from NAM via an email, mailing, event, or other channel.
  - e. I heard about NAM from another source: \_\_\_\_\_.
  - f. I do not remember how I first heard about NAM.
  
2. Which of the following most closely matches the department or area in which you work?
  - a. Board of Directors
  - b. Communications
  - c. Development/Fundraising
  - d. Executive Office
  - e. Finance/Accounting
  - f. Human Resources
  - g. Information Technology
  - h. Marketing
  - i. Operations/Programming
  - j. Research/Quality
  - k. Strategy
  - l. Other: \_\_\_\_\_.
  
3. Why did your organization **first** join NAM?
  - a. Membership benefits were deemed valuable to our organization.
  - b. Membership status was thought to enhance the reputation of our organization.
  - c. Membership was believed to be a way to support the nonprofit sector.
  - d. Membership was required by an external entity such as a funder or foundation.
  - e. Membership was recommended or encouraged by an external entity such as a funder or foundation.
  - f. Membership was paid for by an external entity such as a funder or foundation.
  - g. I do not know why my organization first joined NAM.
  
4. Why did your organization join NAM **this year**?
  - a. Membership benefits were deemed valuable to our organization.
  - b. Membership status was thought to enhance the reputation of our organization.
  - c. Membership was believed to be a way to support the nonprofit sector.
  - d. Membership was required by an external entity such as a funder or foundation.
  - e. Membership was recommended or encouraged by an external entity such as a funder or foundation.

- f. Membership was paid for by an external entity such as a funder or foundation.
  - g. I do not know why my organization joined NAM this year.
5. Why does your organization **stay** a member of NAM?
- a. Membership benefits are deemed valuable to our organization.
  - b. Membership status is thought to enhance the reputation of our organization.
  - c. Membership is believed to be a way to support the nonprofit sector.
  - d. Membership is required by an external entity such as a funder or foundation.
  - e. Membership is recommended or encouraged by an external entity such as a funder or foundation.
  - f. Membership is paid for by an external entity such as a funder or foundation.
  - g. I do not know why my organization stays a member of NAM.

Please indicate the extent to which each of the following member benefits **influenced your organization's decision to join NAM**. Please indicate your response on a scale of 1-Not at all Influential to 10-Extremely Influential. If you are not aware of one or more of the following member benefits, you may select Not Aware of Benefit.

- |                        |   |   |   |   |   |   |   |   |    |                       |                      |
|------------------------|---|---|---|---|---|---|---|---|----|-----------------------|----------------------|
| Not at all Influential |   |   |   |   |   |   |   |   |    | Extremely Influential | Not Aware of Benefit |
| 1                      | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                       |                      |
1. **Guidelines & Principles** program including the GPS assessments, wiki, and personalized support.
  2. **Professional Development** opportunities including e-learning, tools and templates, and training courses such as Squeaky Clean HR, Dirty Sexy Money, and Nonprofit Executive Institute.
  3. **NAM-Sponsored Networking** events including the Annual Meeting, NAM Summit, HR Affinity Group, and CEO Roundtables.
  4. **Peer Learning** opportunities that resulted from NAM membership, attendance at NAM-sponsored events, or access to the HR Listserv.
  5. **Products & Discounts** including health insurance options, 403(b) retirement, career center access, salary & benefits survey, and conference room use.
  6. **Sector Advocacy** efforts such as lobbying, education, and issue tracking.

Please indicate the level of improvement you believe your organization needed or hoped to make when **your organization first joined NAM**. Please indicate your response on a scale of 1-No Improvement Needed to 10-Significant Improvement Needed. If you do not have enough information to answer a specific item, you may select Do Not Know as your response.

- |                       |   |   |   |   |   |   |   |   |    |                                |             |
|-----------------------|---|---|---|---|---|---|---|---|----|--------------------------------|-------------|
| No Improvement Needed |   |   |   |   |   |   |   |   |    | Significant Improvement Needed | Do Not Know |
| 1                     | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                                |             |
1. Communication
  2. Evaluation
  3. Financial Management
  4. Fundraising
  5. Governance
  6. Human Resources
  7. Information Technology
  8. Planning
  9. Public Policy & Advocacy

- 10. Strategic Alliances
- 11. Transparency & Accountability
- 12. Volunteer Management

Please indicate the extent to which you believe relevant **NAM resources (tools, trainings, events, etc.) have been available throughout your NAM membership** to meet your organization’s needs in each of the following areas. Please indicate your response on a scale of 1- No Resources Available to 10-Significant Resources Available. If you do not have enough information to answer a specific item, you may select Do Not Know as your response.

No Resources Available									Significant Resources Available	Do Not Know
1	2	3	4	5	6	7	8	9	10	

- 1. Communication
- 2. Evaluation
- 3. Financial Management
- 4. Fundraising
- 5. Governance
- 6. Human Resources
- 7. Information Technology
- 8. Planning
- 9. Public Policy & Advocacy
- 10. Strategic Alliances
- 11. Transparency & Accountability
- 12. Volunteer Management

Please indicate **how often you or someone at your organization utilized the following NAM member benefits** throughout your NAM membership. Please indicate your response on a scale of 1 = Never; 2 = Annually; 3 = Quarterly; 4 = Monthly; 5 = Weekly; 6 = Daily. If you are not aware of one or more of the following member benefits, you may select Not Aware of Benefit.

- 1. **Guidelines & Principles** program including the GPS assessments, wiki, and personalized support.
- 2. **Professional Development** opportunities including e-learning, tools and templates, and training courses such as Squeaky Clean HR, Dirty Sexy Money, and Nonprofit Executive Institute.
- 3. **NAM-Sponsored Networking** events including the Annual Meeting, NAM Summit, HR Affinity Group, and CEO Roundtables.
- 4. **Peer Learning** opportunities that resulted from NAM membership, attendance at NAM-sponsored events, or access to the HR Listserv.
- 5. **Products & Discounts** including health insurance options, 403(b) retirement, career center access, salary & benefits survey, and conference room use.
- 6. **Sector Advocacy** efforts such as lobbying, education, and issue tracking.

Please indicate the how much value you believe your organization has gotten out of each of the following NAM member benefits since joining NAM. Indicate your response on a scale of 1-No Value to 10-Significant Value. If you are not aware of one or more of the following member benefits, you may select Not Aware of Benefit.

No Value									Significant Value	Not Aware of Benefit
1	2	3	4	5	6	7	8	9	10	

1. **Guidelines & Principles** program including the GPS assessments, wiki, and personalized support.
2. **Professional Development** opportunities including e-learning, tools and templates, and training courses such as Squeaky Clean HR, Dirty Sexy Money, and Nonprofit Executive Institute.
3. **NAM-Sponsored Networking** events including the Annual Meeting, NAM Summit, HR Affinity Group, and CEO Roundtables.
4. **Peer Learning** opportunities that resulted from NAM membership, attendance at NAM-sponsored events, or access to the HR Listserv.
5. **Products & Discounts** including health insurance options, 403(b) retirement, career center access, salary & benefits survey, and conference room use.
6. **Sector Advocacy** efforts such as lobbying, education, and issue tracking.

Please indicate the level of improvement you believe your organization has made in the following areas **as a result of your NAM membership**. Please indicate your response on a scale of 1-No Improvement Made to 10-Significant Improvement Made. If you do not have enough information to answer a specific item, you may select Do Not Know as your response.

No Improvement Made							Significant Improvement Made				Do Not Know
1	2	3	4	5	6	7	8	9	10		
1.	Communication										
2.	Evaluation										
3.	Financial Management										
4.	Fundraising										
5.	Governance										
6.	Human Resources										
7.	Information Technology										
8.	Planning										
9.	Public Policy & Advocacy										
10.	Strategic Alliances										
11.	Transparency & Accountability										
12.	Volunteer Management										

Please indicate your level of agreement with the following statements on a scale of 1-Strongly Disagree to 10-Strongly Agree. If you do not have enough information to answer a specific item, you may select Do Not Know as your response.

Strongly Disagree								Strongly Agree		Do Not Know
1	2	3	4	5	6	7	8	9	10	

**I believe NAM has helped my organization to...**

1. Gain the skills (e.g., Finance, Legal, HR) required to run our organization effectively.
2. Obtain and maintain adequate resources.
3. Use our resources efficiently.
4. Be effective in executing our mission.
5. Be accountable and transparent.
6. Utilize fair and effective employee practices.
7. Attract and retain high quality talent.
8. Be perceived positively by the community.
9. Be viewed favorably by other nonprofit organizations.

10. Be viewed favorably by the local foundations.
11. Have a positive impact on public policy.
12. Have a positive impact on the quality of community life.
13. Collaborate and partner with other local nonprofit organizations.

Please indicate your level of agreement with the following statements on a scale of 1-Strongly Disagree to 10-Strongly Agree. If you do not have enough information to answer a specific item, you may select Do Not Know as your response.

Strongly Disagree									Strongly Agree	Do Not Know	
1	2	3	4	5	6	7	8	9	10		
1.											
2.											
3.											
4.											
5.											
6.											
7.											
8.											
9.											
10.											
11.											
12.											

Please provide any feedback you have regarding the following NAM member benefits below.

1. **Guidelines & Principles** program including the GPS assessments, wiki, and personalized support.
2. **Professional Development** opportunities including e-learning, tools and templates, and training courses such as Squeaky Clean HR, Dirty Sexy Money, and Nonprofit Executive Institute.
3. **NAM-Sponsored Networking** events including the Annual Meeting, NAM Summit, HR Affinity Group, and CEO Roundtables.
4. **Peer Learning** opportunities that resulted from NAM membership, attendance at NAM-sponsored events, or access to the HR Listserv.
5. **Products & Discounts** including health insurance options, 403(b) retirement, career center access, salary & benefits survey, and conference room use.
6. **Sector Advocacy** efforts such as lobbying, education, and issue tracking.

Please answer the following questions in the space provided. If you do not have enough information to answer a specific item, you may enter Do Not Know as your response.

1. What 3 words would you use to describe NAM?
2. What 1-2 things do you think NAM helped your organization with most?
3. What 1-2 things do you wish NAM was able to better help your organization with?
4. Please provide any additional feedback you have regarding NAM below.

## CLOSING

Your responses have been recorded. Thank you for participating in the Nonprofit Association of the Midlands Evaluation Survey!

## Appendix E: Local Foundation Survey Communication Plan

### HEADS-UP MEMO

Date: Week of 06.04.18  
To: Local Foundation List  
BCC: Sara Roberts  
From: Anne Hindery  
Subject: Nonprofit Association of the Midlands Evaluation Survey

Greetings,

The Nonprofit Association of the Midlands (NAM) is dedicated to helping nonprofits help their communities. Our mission is to strengthen the collective voice, leadership, and capacity of nonprofit organizations to enrich the quality of community life throughout Nebraska and Western Iowa. To execute our mission, we believe it is essential to continuously improve our services. As a result, we are partnering with Category One Consulting, a local third-party consulting firm, to help us evaluate the effectiveness of our service offerings. As part of this evaluation, we are asking local foundations to complete a brief survey designed to gather your perceptions and feedback.

On Monday, June 11th, you will receive an invitation to complete the NAM Evaluation Survey. The invitation will be sent to you, the primary NAM contact at your organization. We are asking each local foundation to complete one survey. If you are interested in having other members of your organization complete the survey as well, you may contact Sara Roberts ([sararoberts@category1consulting.com](mailto:sararoberts@category1consulting.com)) at Category One Consulting.

Your feedback will help us strengthen NAM's service offerings, so it is important that you answer each of the survey questions honestly. Your individual responses will be kept completely confidential, which means they will never be shared with anyone inside or outside NAM in a manner that identifies you or your organization. Category One Consulting will only report responses in aggregate so your identity will be protected. If you have any questions regarding the survey, please feel free to contact Sara Roberts at Category One Consulting. Thank you in advance for your participation in this important work.

Thank you,

Anne Hindery  
Chief Executive Officer  
Nonprofit Association of the Midlands

### SURVEY INVITATION

Date: 06.11.18  
To: Local Foundation List  
From: Anne Hindery (sent via C1C's survey system)  
Subject: Nonprofit Association of the Midlands Evaluation Survey

<Name>,

You are invited to participate in the Nonprofit Association of the Midlands (NAM) Evaluation Survey. NAM's mission is to strengthen the collective voice, leadership, and capacity of nonprofit organizations to enrich the quality of community life throughout Nebraska and Western Iowa. Your feedback will be used to strengthen NAM's service offerings. This invitation is being sent to you, the primary NAM contact at your organization. We

are asking each local foundation to complete one survey. If you are interested in having other members of your organization complete the survey as well, you may contact Sara Roberts (sararoberts@category1consulting.com) at Category One Consulting (C1C).

The survey should take less than 10 minutes to complete and can be taken on a computer or mobile device. If you are able to, please complete the survey now. If that isn't possible, please do so sometime by June 22. When you are taking the survey, it is important that you answer each of the questions honestly. Your individual responses will be kept completely confidential, which means they will never be shared with anyone inside or outside NAM in a manner that identifies you or your organization. C1C will only report responses in aggregate so your identity will be protected. Please feel free to tell C1C what you really think.

Click the following link to begin the survey.

#### SURVEY LINK

If you have questions about the survey, please contact Sara Roberts at Category One Consulting at sararoberts@category1consulting.com.

Thank you,

Anne Hindery  
Chief Executive Officer  
Nonprofit Association of the Midlands

Sara Roberts  
Co-Founder & Principal Consultant  
Category One Consulting

#### SURVEY REMINDER #1

Date: 06.18.18

To: Non-respondents

From: Sara Roberts (sent via C1C's survey system)

Subject: Nonprofit Association of the Midlands Evaluation Survey

<Name>,

This is a friendly reminder to complete the Nonprofit Association of the Midlands (NAM) Evaluation Survey by June 22. NAM's mission is to strengthen the collective voice, leadership, and capacity of nonprofit organizations to enrich the quality of community life throughout Nebraska and Western Iowa. Your feedback will be used to strengthen NAM's service offerings. This invitation is being sent to you, the primary NAM contact at your organization. We are asking each local foundation to complete one survey. If you are interested in having other members of your organization complete the survey as well, you may contact Sara Roberts (sararoberts@category1consulting.com) at Category One Consulting (C1C).

The survey should take less than 10 minutes to complete and can be taken on a computer or mobile device. If you are able to, please complete the survey now. If that isn't possible, please do so sometime by June 22. When you are taking the survey, it is important that you answer each of the questions honestly. Your individual responses will be kept completely confidential, which means they will never be shared with anyone inside or outside NAM in a manner that identifies you or your organization. C1C will only report responses in aggregate so your identity will be protected. Please feel free to tell C1C what you really think.

Click the following link to begin the survey.

SURVEY LINK

If you have questions about the survey, please contact Sara Roberts at Category One Consulting at sararoberts@category1consulting.com.

Thank you,

Anne Hindery  
Chief Executive Officer  
Nonprofit Association of the Midlands

Sara Roberts  
Co-Founder & Principal Consultant  
Category One Consulting

**SURVEY REMINDER #2**

Date: 06.21.18

To: Non-respondents

From: Sara Roberts (sent via C1C's survey system)

Subject: Nonprofit Association of the Midlands Evaluation Survey

<Name>,

This is a friendly reminder to complete the Nonprofit Association of the Midlands (NAM) Evaluation Survey by June 22. NAM's mission is to strengthen the collective voice, leadership, and capacity of nonprofit organizations to enrich the quality of community life throughout Nebraska and Western Iowa.

Your feedback will be used to strengthen NAM's service offerings. This invitation is being sent to you, the primary NAM contact at your organization. We are asking each local foundation to complete one survey. If you are interested in having other members of your organization complete the survey as well, you may contact Sara Roberts (sararoberts@category1consulting.com) at Category One Consulting (C1C).

The survey should take less than 10 minutes to complete and can be taken on a computer or mobile device. If you are able to, please complete the survey now. If that isn't possible, please do so sometime by June 22. When you are taking the survey, it is important that you answer each of the questions honestly. Your individual responses will be kept completely confidential, which means they will never be shared with anyone inside or outside NAM in a manner that identifies you or your organization. C1C will only report responses in aggregate so your identity will be protected. Please feel free to tell C1C what you really think.

Click the following link to begin the survey.

SURVEY LINK

If you have questions about the survey, please contact Sara Roberts at Category One Consulting at sararoberts@category1consulting.com.

Thank you,

Anne Hindery  
Chief Executive Officer  
Nonprofit Association of the Midlands

Sara Roberts  
Co-Founder & Principal Consultant  
Category One Consulting



## Appendix F: Local Foundation Survey

### GREETING

Thank you for participating in the Nonprofit Association of the Midlands Evaluation Survey! These survey items have been designed to gather your perceptions on a variety of topics related to the Nonprofit Association of the Midlands (NAM). If you do not have enough information to answer a specific item, you may select Do Not Know as your response. All responses will be kept completely confidential, so please feel free to respond honestly to each item. Click on NEXT or > to begin the survey.

### SURVEY

Please indicate your level of agreement with the following statements on a scale of 1-Strongly Disagree to 10-Strongly Agree. If you do not have enough information to answer a specific item, you may select Do Not Know as your response.

Strongly Disagree										Strongly Agree	Do Not Know
1	2	3	4	5	6	7	8	9	10		

1. I think most local foundations are aware of NAM.
2. I think most nonprofit organizations are aware of NAM.
3. I think most nonprofit organizations want to be NAM members.
4. I understand NAM's purpose or mission.
5. I understand the services and benefits offered by NAM.
6. I understand the goals and outcomes NAM is trying to achieve.
7. I know which nonprofit organizations are members of NAM.
8. I think NAM does a good job helping member organizations maximize their operational effectiveness.
9. I feel more confident in nonprofit organizations when I know they are a NAM member.
10. I think NAM does a good job acquiring new members.
11. I think NAM does a good job providing value in exchange for membership.
12. I think NAM does a good job retaining members over time.
13. I think NAM does a good job getting member organizations to utilize NAM services.

Please indicate how beneficial you think each of the following NAM service offerings are in helping member organizations meet their needs. Indicate your response on a scale of 1-Not at All Beneficial to 10-Extremely Beneficial. If you do not have enough information to answer a specific item, you may select Do Not Know as your response.

Not at All Beneficial										Extremely Beneficial	Do Not Know
1	2	3	4	5	6	7	8	9	10		

1. **Guidelines & Principles** program including the GPS assessments, wiki, and personalized support.
2. **Professional Development** opportunities including e-learning, tools and templates, and training courses such as Squeaky Clean HR, Dirty Sexy Money, and Nonprofit Executive Institute.
3. **NAM-Sponsored Networking** events including the Annual Meeting, NAM Summit, HR Affinity Group, and CEO Roundtables.
4. **Peer Learning** opportunities that resulted from NAM membership, attendance at NAM-sponsored events, or access to the HR Listserv.
5. **Products & Discounts** including health insurance options, 403(b) retirement, career center access, salary & benefits survey, and conference room use.
6. **Sector Advocacy** efforts such as lobbying, education, and issue tracking.

Please indicate how much improvement you believe NAM member organizations make in each of the following areas **as a result of their NAM membership**. Please indicate your response on a scale of 1-No Improvement to 10-Significant Improvement. If you do not have enough information to answer a specific item, you may select Do Not Know as your response.

No Improvement							Significant Improvement				Do Not Know
1	2	3	4	5	6	7	8	9	10		
1. Communication							7. Information Technology				
2. Evaluation							8. Planning				
3. Financial Management							9. Public Policy & Advocacy				
4. Fundraising							10. Strategic Alliances				
5. Governance							11. Transparency & Accountability				
6. Human Resources							12. Volunteer Management				

Please indicate your level of agreement with the following statements on a scale of 1-Strongly Disagree to 10-Strongly Agree. If you do not have enough information to answer a specific item, you may select Do Not Know as your response.

Strongly Disagree							Strongly Agree			Do Not Know
1	2	3	4	5	6	7	8	9	10	

**I believe NAM helps its member organizations to...**

1. Gain the skills (e.g., Finance, Legal, HR) required to run an organization effectively.
2. Obtain and maintain adequate resources.
3. Use their resources efficiently.
4. Be effective in executing their missions.
5. Be accountable and transparent.
6. Utilize fair and effective employee practices.
7. Attract and retain high quality talent.
8. Be perceived positively by the community.
9. Be viewed favorably by other nonprofit organizations.
10. Be viewed favorably by the local foundations.
11. Have a positive impact on public policy.

Please answer the following questions in the space provided. If you do not have enough information to answer a specific item, you may enter Do Not Know as your response.

1. What 3 words would you use to describe NAM?
2. What 1-2 things do you think NAM helps member organizations with most?
3. What 1-2 things do you wish NAM was able to better help member organizations with?
4. Please provide any additional feedback you have regarding NAM below.

**CLOSING**

Your responses have been recorded. Thank you for participating in the Nonprofit Association of the Midlands Evaluation Survey!

## Appendix G: NAM Staff Survey Communication Plan

### HEADS-UP MEMO

A heads-up memo will not be sent for this survey.

### SURVEY INVITATION

Date: 06.11.18

To: Anne Hindery & Hannah Young

From: Sara Roberts (sent via C1C's survey system)

Subject: Nonprofit Association of the Midlands Evaluation Survey

<Name>,

You are invited to participate in the Nonprofit Association of the Midlands (NAM) Evaluation Survey. This survey is designed to gather your perceptions regarding the Nonprofit Association of the Midland's advocacy efforts. The survey should take less than 10 minutes to complete and can be taken on a computer or mobile device. If you are able to, please complete the survey now. If that isn't possible, please do so sometime by June 22. When you are taking the survey, it is important that you answer each of the questions honestly. Your individual responses will be kept completely confidential, which means they will never be shared with anyone inside or outside NAM in a manner that identifies you. C1C will only report responses in aggregate so your identity will be protected.

Click the following link to begin the survey.

### SURVEY LINK

If you have questions about the survey, please contact Sara Roberts at Category One Consulting at sararoberts@category1consulting.com.

Thank you,

Sara Roberts

Co-Founder & Principal Consultant

Category One Consulting

### SURVEY REMINDER #1

Date: 06.18.18

To: Non-respondents

From: Sara Roberts (sent via C1C's survey system)

Subject: Nonprofit Association of the Midlands Evaluation Survey

<Name>,

This is a friendly reminder to complete the Nonprofit Association of the Midlands (NAM) Evaluation Survey. This survey is designed to gather your perceptions regarding the Nonprofit Association of the Midland's advocacy efforts. The survey should take less than 10 minutes to complete and can be taken on a computer or mobile device. If you are able to, please complete the survey now. If that isn't possible, please do so sometime by June 22. When you are taking the survey, it is important that you answer each of the questions honestly. Your individual responses will be kept completely confidential, which means they will never be shared with anyone

inside or outside NAM in a manner that identifies you. C1C will only report responses in aggregate so your identity will be protected.

Click the following link to begin the survey.

**SURVEY LINK**

If you have questions about the survey, please contact Sara Roberts at Category One Consulting at sararoberts@category1consulting.com.

Thank you,

Sara Roberts  
Co-Founder & Principal Consultant  
Category One Consulting

**SURVEY REMINDER #2**

Date: 06.21.18  
To: Non-respondents  
From: Sara Roberts (sent via C1C's survey system)  
Subject: Nonprofit Association of the Midlands Evaluation Survey

<Name>,

This is a friendly reminder to complete the Nonprofit Association of the Midlands (NAM) Evaluation Survey. This survey is designed to gather your perceptions regarding the Nonprofit Association of the Midland's advocacy efforts. The survey should take less than 10 minutes to complete and can be taken on a computer or mobile device. If you are able to, please complete the survey now. If that isn't possible, please do so sometime by June 22. When you are taking the survey, it is important that you answer each of the questions honestly. Your individual responses will be kept completely confidential, which means they will never be shared with anyone inside or outside NAM in a manner that identifies you. C1C will only report responses in aggregate so your identity will be protected.

Click the following link to begin the survey.

**SURVEY LINK**

If you have questions about the survey, please contact Sara Roberts at Category One Consulting at sararoberts@category1consulting.com.

Thank you,

Sara Roberts  
Co-Founder & Principal Consultant  
Category One Consulting

## Appendix H: NAM Staff Survey

### GREETING

Thank you for participating in the Nonprofit Association of the Midlands Evaluation Survey! These survey items have been designed to gather information on the Nonprofit Association of the Midlands' advocacy-related efforts. If you do not have enough information to answer a specific item, you may leave that item blank. All responses will be kept completely confidential, so please feel free to respond honestly to each item. Click on NEXT or > to begin the survey.

### SURVEY

Please answer the following questions based on your advocacy-related efforts in 2016 and 2017. *Note: Electronic survey will have individual response spaces for 2016 and 2017.*

1. How many times did you contact a government official to advocate for or against an issue or policy?
2. How many times did you contact a government official to provide information about an issue or policy?
3. How many times did you testify about an issue or policy?
4. How many times did you contact nonprofit organizations (members or non-members) to advocate for or against an issue or policy?
5. How many times did you contact nonprofit organizations (members or non-members) to provide information about an issue or policy?
6. How many times did you publicly discuss (in-person presentation) the impact of an issue or policy on nonprofits or their causes?
7. How many times did you post or publish content about the impact of an issue or policy on nonprofits or their causes?
8. How many times did you send nonprofit organizations (members or non-members) instructions or draft memos to contact government officials about issues or policies?
9. How many times did you appear at an advocacy-related event?
10. How many times did you complete some other advocacy-related activity? (describe and provide counts)
11. How many times did elected officials reach out to you for information or education related to items within the advocacy agenda?
12. How many times did media representatives reach out to you for information or education related to items within the advocacy agenda?
13. How many times did nonprofit organizations (members or nonmembers) reach out to you for information or education related to items within the advocacy agenda?
14. How many times did local foundations reach out to you for information or education related to items within the advocacy agenda?
15. How often did the resolution of an issue or policy that you advocated for turn out in NAM's favor? (percent)
16. What issues or policies did you advocate most for in 2016 and 2017?
17. What are the top 1-2 advocacy-related success stories from 2016 and 2017?
18. What 1-2 advocacy-related efforts do you wish would have turned out differently in 2016 and 2017?
19. What other information would you like to share about NAM's advocacy-related efforts from 2016 and 2017?

### CLOSING

Your responses have been recorded. Thank you for participating in the Nonprofit Association of the Midlands Evaluation Survey!