



## Narratives

### Executive Summary

Title: Marlboro College

Lead intermediary: Marlboro College, Marlboro, VT

Additional organizations: United Way of Chittenden County, Burlington, VT, leader in systems of performance measurement (SPM) in the state; United Ways of Vermont, Burlington, VT, represents all nine United Ways in Vermont and has existing relationships with small to midsize nonprofit organizations (NPOs); Common Good Vermont, Burlington, VT, provides online networking, resources and technical assistance in capacity building; Vermont Commission on National and Community Service, Waterbury, VT, oversees AmeriCorps throughout the state and has connections with small to midsize NPOs; Vermont Community Foundation, Middlebury, VT, largest foundation, has a strong commitment to nonprofit SPM and connects with funders statewide.

Brief summary: Benchmarks for a Better Vermont (BBVT) will strengthen the capacity of small to midsize NPOs through a networked response to make significant, sustained improvements in the priority areas of healthy futures, education, and economic opportunities. Using Results-Based Accountability (RBA), the program will raise awareness about SPM then create a ladder of opportunity that will begin with a basic training followed by a formal assessment and competitive process to select 15 small to midsize NPOs for a 75-hour, 16-month intensive Performance Institute. BBVT will also facilitate a grant makers discussion circle focused on SPM. Upon project completion, small to midsize NPOs will have standardized performance measures for the three priority areas and the ability to leverage additional training and financial resources. BBVT will also enhance the consortium partners' respective strengths, build on existing resources and relationships, and bring new resources to the effort.

Geographic area: The state of Vermont.

Number of NPOs: Provide basic training for 100 small to midsize NPOs, assess 75, and select 15 to participate in the Performance Institute.

Amount of request: \$200,000

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### Program Design

#### 1. SERVICE AREA

The service area for the proposed program is the state of Vermont. The consortium partners operating this program have well-established nonprofit networks across the state and existing relationships with many small to midsize nonprofit organizations (NPOs).

In Vermont, 4,028 IRC 501(c)(3) NPOs serve a population of 625,741. Of that number, 86% or 3,464 have annual operating budgets of \$1.0 million or less, 78% or 3,142 have budgets under \$500,000, and 45% or 1,813 have budgets under \$100,000. Health and human services reflect the largest group at 28% or 1,128 followed by Education at 17% or 685, Arts and Culture at 15% or 604, and Community/Economic Development at 9% or 363. The Vermont Community Foundation (VCF) reports the rate of NPOs per 1,000 people is 6.5 for Vermont compared to the US at 4.9. Yet, Vermont is the second smallest state in terms of population behind Wyoming. Part of the reason is that the northern range of the Appalachian Mountains dominates the topography. The population is predominately White at 95.3% with Blacks at 1.0%, Asians at 1.4%, and Hispanics at 1.5%.

The US Department of Agriculture states that of Vermont's 14 counties, seven have poverty rates over 11.0%. Chittenden County, home of the largest city Burlington (population 42,417), has pockets of poverty ranging from 20% to 42% and the highest rates of minorities at 7.5%. The counties in Vermont's remote Northeast Kingdom consistently have the highest poverty rates, ranging from 14.9% to 16.9%, as well as high unemployment and low wages. According to an April 2011 Vermont Housing Finance Agency report, more than 80% of employed residents had incomes below the level required to purchase a house while 48% of all renters pay more than 30% of their annual income in housing costs. Exacerbating these challenges, spring 2011 floods ravaged nine counties, including federally recognized rural disaster areas located in Caledonia, Chittenden, Essex, Lamoille, and Orleans counties.

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A study conducted by the Center for Public Policy and the Social Sciences at Dartmouth College shows that the demographics of poverty in Vermont are almost entirely White, high school educated, and reside in rural areas. Vermont residents living in poverty are likely to have compounding issues such as sexual assault and child abuse, mental illness, and substance abuse. Transportation is a major problem, both public and private, making it difficult to access services throughout the state especially during winter.

Despite the value of their services, the VCF reports that 24% of NPOs experience "chronic financial problems" with 34% responding they have only one to three months of operating reserve; 72% state the demand for their services is growing and 46% cite increased expenses over the previous year. In challenging circumstances, small to midsize NPOs in Vermont struggle to maintain current levels of service with 40% preferring to freeze salaries, 28% to lay off staff, and 11% to reduce or cut programming.

Vermonters value NPOs to serve community needs yet require more accountability. VCF found 46.2% of Vermonters have a great deal of confidence while 39.5% have fair confidence that NPOs in the state provide quality charitable services. However, Vermonters are less sure about the efficiency of the sector. The report recommends, "Strengthening nonprofit systems of accountability, such as outcomes measurement, might be one way of boosting the lower level of confidence in their efficiency." The VCF report encourages NPOs to "measure your results and your progress toward goals." Vermont responded enthusiastically to the VCF report with 150 people from 100 NPOs attending Common Good Vermont's (CGVT) 2011 statewide conference to learn about "Measuring, Marketing and Money." Although the need to demonstrate results is widely recognized, with the exception of the United Way of Chittenden County (UWCC), there is no broad-based capacity effort to address the need for better

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systems of performance measurement (SPM). Vermont NPOs want to be more effective, but lack the tools, technical ability, institutional support, funds and staff time to conduct more than minimal evaluations.

### 2. SELECTION PROCESS

Please refer to the selection process for the Performance Institute in Phase III: Assessment and Selection as outlined under 4. OVERALL FRAMEWORK WITH TWO-YEAR TIMELINE.

### 3. GOAL, PHILOSOPHY & APPROACH

The GOAL of Benchmarks for a Better Vermont (BBVT) is to strengthen the capacity of small to midsize NPOs in Vermont to make significant, sustained improvements in HEALTHY FUTURES, EDUCATION, and ECONOMIC OPPORTUNITIES for all Vermonters. The OBJECTIVES of the program are to: 1) raise awareness throughout Vermont's nonprofit sector about the value of establishing SPM, 2) provide at least 100 small to midsize NPOs with the tools and resources to implement basic SPM, 3) build the capacity of 15 competitively-chosen small to midsize NPOs working with distressed communities in the priority areas to develop and implement comprehensive SPM, 4) develop shared performance measurement standards with promise for statewide use in priority areas, and 5) increase the capacity of the state's intermediary capacity-building organizations to leverage additional training and financial resources to assist small to midsize NPOs in SPM and other management competencies.

The PHILOSOPHY of Benchmarks for a Better Vermont (BBVT) is that Vermont small to midsize NPOs want to make the most of limited resources to make a difference in the communities they serve. As intermediary capacity-building organizations committed to the success of Vermont's NPOs, the consortium partners believe the single most significant investment they can make in the sector is to integrate a results-based methodology as a core component of strategic and day-to-day operations for

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small to midsize NPOs. Because Vermont is a geographically small state with a small, largely rural population, BBVT will be designed to have a statewide impact. BBVT consortium partners have well-established nonprofit networks across the state.

The APPROACH is to use the trust and mutual regard established by the consortium partners serving small to midsize NPOs to provide both basic and intensive training in SPM. BBVT will create a networked response to nonprofit capacity building throughout Vermont that leverages and expands current efforts in SPM. Six trusted intermediary capacity-building organizations will collaborate on BBVT: Lead agency Marlboro College, CGVT, the Vermont Commission on National and Community Service (VCNCS), UWCC, United Ways of Vermont (UWVT), and the Vermont Community Foundation (VCF). To maximize the long-term sustainability of these efforts, BBVT will: 1) invest in preparing a highly-qualified and experienced team of trainers, 2) make a sustained, multi-faceted commitment to 15 selected agencies, 3) use a variety of facilitation/teaching strategies shown to be effective at instituting organization-level change within small and midsize NPOs, and 4) employ a cohort model to foster lasting peer learning communities.

#### 4. OVERALL FRAMEWORK WITH TWO-YEAR TIMELINE

BBVT will use curriculum based on Results-Based Accountability (RBA), a nationally respected SPM currently used by the State of Vermont and UWVT. The program consists of five phases operating from September 30, 2011 to September 29, 2013.

Please refer to the Organizational Capacity section of this proposal for a full description of the consortium partners, personnel responsible, and their expertise.

PHASE I: Groundwork: September 30, 2011 to February 15, 2012

Develop all program components as follows: hire the program coordinator, adapt RBA curriculum,

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create statewide outreach campaign to promote SPM and the opportunities available through BBVT, develop evaluation framework and project management plan, formalize the application process for Phase IV, design training curriculum, and recruit a team of trainers. In addition, BBVT will provide three days of training for highly qualified, skilled, and culturally competent trainers including best practices in RBA and the "We All Belong" cultural competency curriculum developed by the City of Burlington. The trainers will receive two additional days of advanced skills building and peer support during Phase III.

PHASE II: Basic Training: Feb. 15 to March 15, 2012

BBVT will offer a statewide Basic Training in SPM. This free, three-hour workshop for small to midsize NPOs will establish a common language for a statewide discussion on SPM, highlight the basic principles of RBA, connect organizations with additional SPM resources, enable hands-on practice, and outline the application process for the BBVT Performance Institute.

Basic Training workshops will be held in six locations around the state, using a hybrid face-to-face and virtual format; nonprofit leaders will be invited to participate at live interactive conferencing sites. Approximately 150 participants representing 100 NPOs will participate. Post-workshop content will be available to all NPOs via free video through the CGVT web site. An FAQ forum will track discussion and provide technical help.

PHASE III: Assessment/Selection: March 15 to April 31, 2012

The partners will develop a competitive and comprehensive application process to solicit 60 to 80 small to midsize NPOs and select 15 to participate in the Performance Institute, an intense and transformative capacity-building engagement. Basic selection criteria includes: 1) mission clearly focused on healthy futures, education, or economic opportunity, 2) commitment of 70 hours over 16 months by one

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executive staff member and a second board or staff member, 3) annual operating budget under \$1.0 million with priority to organizations of budgets under \$500,000, and 4) programs operating in one or more Vermont communities facing significant resource challenges as indicated by a rating of four or above on the Rural-Urban Continuum, a federal disaster designation within the past 24 months, more than 50% of beneficiary households at or below 200% of the federal poverty line, or other indicators of exceptional hardship.

To assess readiness and provide baseline data for BBVT, each applicant will complete the Core Capacity Assessment Tool (CCAT). This 146-question, online survey measures effectiveness in relation to core capacities, generates a prioritized capacity-building plan for each organization, and aggregates community and national data. BBVT will underwrite the cost of the CCAT for up to 75 organizations. Criteria for readiness: 1) CCAT score of 235 or better for "Internal Leadership," 2) CCAT score of 230 or better for "Empowering Organizational Culture," 3) commitment to organizational capacity building as evidenced by past or planned executive staff participation in Certificate in Nonprofit Management at Marlboro College, and 4) positive collaborative relationships and strong expressed interest in developing sector-level performance measures. Applicants not accepted will be encouraged to use CCAT results to learn how to move their organizations forward through other consortium activities, e.g., the Nonprofit Management Certificate at Marlboro College or special readiness workshops offered by CGVT.

PHASE IV: Performance Institute: May 1, 2012 to August 30, 2013

Provide 75 hours of intensive individualized, cohort, and large group interactions for two participants each from 15 selected NPOs to develop effective SPM for their organizations and their sector-level priority area. There will be three cohorts representing healthy futures, education, and economic opportunity that will each operate as a learning community and assigned a lead and an assistant trainer. Scholarships of \$1,500 per organization will offset investment of staff time. The Performance Institute

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will feature the following:

1. Conferences: 30 hours of group instruction in RBA through three training events at six-month intervals. At a two-day kick-off conference, participants will engage in team building activities, develop skills in RBA, and plan their work. In January 2012, a full-day session via Vermont Interactive Television will focus on building advanced skills and assessing progress. The last conference held in June 2013 will focus on finalizing shared SPM benchmarks for each priority area, evaluating the BBVT program, and discussing next steps. Funders Circle members may participate as well.
2. TA: 20 hours of in-house, telephone, and e-mail TA from the trainers assigned to each cohort. The trainers will work one-on-one with each organization to formulate a sustainable SPM tailored to specific mission, programs, clientele, and context.
3. Peer Networks: 25 hours of trainer-facilitated, cohort-level peer support and community learning that will include five three-hour face-to-face sessions at locations throughout Vermont and five two-hour online sessions for each cohort throughout the year. Together, each cohort will master performance measurement skills, share knowledge, develop a supportive learning community, and draft shared measurement standards for their priority area.
4. Funders Circle: BBVT partners will convene a parallel track with 12 to 18 representatives from Vermont grantmakers and other stakeholders with interest in the three priority areas. Funders Circle members will meet six times throughout the 18 months to plan SPM integration strategies and discuss community indicators that will satisfy both state and private funder objectives to improve the well-being of the population served. Funders Circle members will participate in the final BBVT Performance Institute conference and may occasionally join the cohort peer networks.

PHASE V: Evaluation & Monitoring: Feb 15, 2012 to September 29, 2013

Evaluation of BBVT will be continuous to ensure adherence to the program goal, objectives, and outcomes. In Phase I, the consortium partners led by Marlboro College will develop a comprehensive

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evaluation plan based on information collected from qualitative and quantitative sources, including implementation (formative) and achievement (summative) measures. Marlboro will collect and analyze evaluation data after each event and phase. The measurement tools include: pre- and post-program CCAT assessments for the 15 NPOs selected to participate in the Performance Institute, survey information from NPOs participating in Phase II, data from applicants not accepted into the Performance Institute completing the CCAT, and post-event focus groups of representatives from the Funders Circle and organizations participating in Phases II, III, and IV. Every two months during the Performance Institute, the trainers and participating NPOs will share written progress reports with all cohorts and consortium partners. Based on these reports, the consortium will adjust the program and content as needed.

Short-term OUTCOMES for Phase II: 1) Following Basic Training, 80% of the 100 participating NPOs understand basic terms and concepts of SPM, 2) by September 2012, 60% of participating non-profits will participate in further training opportunities provided by BBVT consortium partners aimed at expanding their understanding and use of SPM to improve organizational effectiveness and community impact, and 3) by September 2013, 50% of participating NPOs will either begin or expand their use of SPM to determine the effectiveness of their services and community measures.

Short-term OUTCOMES for Phase IV: 1) 100% of the 15 NPOs will obtain the skills and data they need to improve their services, address service gaps, and secure funding, 2) by September 2013, 90% will collect and use performance measures to determine the effectiveness of their services, and 3) 60% will show measureable improvement in their CCAT assessment by September 2013.

Other OUTCOMES include: 1) 100% of the Funders Circle members will understand the terms and concepts of SPM, and 2) 80% of the consortium partners will continue to use a coordinated effort

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beyond the two-year grant timeline to assist other small to midsize NPOs to create SPM.

By December 1, 2013, the consortium partners will publish the short-term findings of the entire program and release it through its network. The consortium partners will conduct annual surveys with Phase IV participants for three years after the grant period to monitor their results toward using SPM to improve the healthy futures, education, and economic opportunities of all Vermonters.

### 5. COMMUNICATIONS PLAN

The consortium partners will communicate through a closed e-mail group on Google Apps hosted by MC. NPOs and trainers participating in the Performance Institute will work collaboratively using MC's Google Apps to create a cloud-based site to communicate, share resources, post interim reports, and forge relationships.

### **Organizational Capability**

#### 1. LEAD ORGANIZATION

Marlboro College (MC) is a 501(c)(3) nonprofit institution established in 1946. Its mission is "to teach students to think clearly and to learn independently." Since 1997, MC's Graduate School has used the same principles to advance the careers of working professionals.

Marlboro's graduate Program in Nonprofit Management plays a prominent role in capacity building for NPOs in Vermont. Since 2008, its Certificate in Nonprofit Management has provided core training to nonprofit executives in eight locations across the state and now has a vibrant network of over 300 alumni, many managing small to midsize NPOs. This past semester, 96% of graduates gave the series an overall rating of great (67%) or good (29%). Ninety percent reported that the series "changed the way they approach their work" as well as saying they left the program with "resources and skills they will continue to use." This \$150,000 program is supported by several foundation grants managed by the MC

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Development Office.

MC also offers board trainings across the state and a fully accredited 36-credit Master in Science in Managing Mission-Driven Organizations, an advanced management degree specifically designed for nonprofit professionals. Its faculty and advisors include many of the most prominent names in nonprofit capacity building in the region. According to the VCF 2010 report cited earlier, MC "is helping nonprofit leaders succeed in a complex job while easing the isolation that many feel." MC has a proven track record of successful collaboration with many intermediary organizations including fellow consortium partners VCF, CGVT, and UWCC.

The net assets of MC are \$49.3 million with an annual operating budget of \$13.8 million. This grant request represents less than 2% of its operating budget. MC has extensive experience managing government, foundation, and corporate grants including recent grants awarded by the US Department of Agriculture and the National Endowment for the Arts. MC has the required technology and accounting personnel to manage the fiduciary responsibilities of BBVT.

### 2. ROLES AND RESPONSIBILITIES

Marlboro College will direct the project, manage all partners' roles, oversee scheduling and budget, and develop program evaluation strategies. Kate Jellema, PhD, Director of the Program in Nonprofit Management at MC will be Program Manager for BBVT responsible for overall program coordination and grant administration and will play a supportive role in training design and delivery. Anne Lezak, MPA, a nationally recognized consultant specializing in policy, planning, and outcomes measurement, and a faculty member of the MC Master's in Mission-Driven Organizations, will serve as the Program Coordinator.

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UWCC works closely with NPOs in the most populous county of Vermont and is a statewide leader in SPM. In 2007, it completed a prototype two-year Community Impact Project that engaged 150 diverse community members to develop specific sets of outcomes in United Way's three priority investment areas of education, health, and income. The effort connected outcomes data to funding decisions made by the UWCC. Starting in 2008, UWCC began requiring its member agencies to set performance measures for meeting targeted community and organizational outcomes. UWCC is a model for other grantmakers in the state that require outcome measures to ensure their grants are well invested. Led by Monica Weeber, Director of Planning at UWCC, and her colleague Amy Carmola-Hauf, Research and Evaluation Specialist, UWCC will oversee recruitment, training of trainers, and design and implement the Performance Institute.

UWVT represents all nine United Ways in Vermont including UWCC. United Way agencies are trusted community partners and key grantmakers that enjoy longstanding relationships with small to midsize NPOs. Following the lead of UWCC, many UW agencies under the UWVT umbrella are currently transitioning towards a more robust outcomes-based approach. UWVT will provide trainers and support the design and implementation of training curricula. Kate McGowan, Co-Director at United Way of Addison County and chair of the UWVT, and Carmen Derby, Executive Director for the United Way of Windham County, will serve on the training team.

CGVT is a web-based hub that serves as a cooperative clearinghouse of relevant tools, training and technical assistance for the nonprofit sector. The organization also provides capacity-building webinars and convenes sector-wide conferences and events. CGVT will coordinate BBVT events and use their broadband capabilities for outreach and awareness raising. Lauren-Glenn Davitian, Executive Director and Nick Carter, Network Coordinator of CGVT will work with MC to provide the Basic Training workshop in Phase II and additional online training opportunities.

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VCNCS promotes volunteerism and community service throughout Vermont. The Commission oversees AmeriCorps programs in the state and provides TA to programs it funds. It also networks with other community service organizations and has extensive connections with small to midsize NPOs across the state. The Commission consists of 15 governor-appointed citizens supported by a staff of four housed in Vermont's Agency of Human Service. VCNCS will assist with cultural competency training and advise on training and curriculum. Hal Colston, Executive Director of VCNCS, is a widely respected nonprofit entrepreneur in Vermont's independent sector who will contribute his skills and expertise in cultural competence training.

VCF is Vermont's largest foundation with a mission since 1986 "to grow philanthropy in the state and ensure that donors and NPOs have the resources they need to be effective." It is home to over 570 charitable funds with assets of \$143 million. As a funder with a strong interest in capacity building, VCF has been an important and vocal champion of SPM for NPOs.

All partners will participate in outreach, applicant selection, program monitoring, and evaluation. MC will prepare all interim and final reports.

### **Cost Effectiveness and Budget Adequacy**

The cost to operate BBVT as proposed is \$416,779. This request is for \$200,000 or 48%. The partner match is \$216,780 or 52%. Between September 30, 2011 and September 29, 2013, the partners will commit 6,300 hours to recruit 100 NPOs, assess 75, and select 15 to participate in a 75-hour, 16-month intensive training through the Performance Institute and build partnerships with 12 to 18 grantmakers/funders.

The proposed budget reflects the costs associated with all five phases of BBVT. It supports the expertise

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provided by the six partners consortium partners that are all committed to expanding nonprofit capacity in Vermont. The budget is thoughtfully designed to take into account every aspect of the program with special attention to the following: 1) initial planning, train-the-trainers, and organization recruitment efforts, 2) multiple strategies to engage, train, provide individualized TA, and build continuing learning communities within the three Performance Institute cohorts, 3) inclusion of "value-added" pieces of the CCAT for all applicant organizations and the Funders Circle activities, and 4) focus on ongoing evaluation and opportunities to make mid-course corrections to improve the quality and impact of BBVT.

### MATCH

Marlboro College will provide \$38,813; CGVT brings \$49,650; UWCC brings \$18,863 match made by Annual Campaign Funds dedicated to this work; UWVT brings \$28,120 via Addison and Windham County Annual Campaign Funds; VCNCS brings \$16,834 in non-federal funding to support training and partner activities; and VCF and its funders bring an additional \$64,500 dedicated to CCAT fees, scholarship support, and evaluation costs.

### Clarification Summary

BUDGET: Expenses for audit services, equipment maintenance and Program Manager office space will be covered as indirect costs, thus have been removed as separate line items. Because other project personnel will work from disparate locations around the state, some site costs were retained in the budget. With these cost adjustments and a slight reduction in the match commitment from one funder, please note our final request is \$219, 990 (49%) and our match is \$224,666 (51%), for a program total of \$444,656 (an increase of \$1386 over original total).

SCHOLARSHIPS: 18 selected NPOs will each receive a \$1500 scholarship, with \$750 paid up front and \$750 upon successful completion. The Performance Institute is a major commitment, entailing 70 hours

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each from two staff to implement transformations in their own organizations and help develop statewide performance measures for their sector. The modest scholarship will provide some financial relief for participating organizations, and recognize the investment of time and energy the program demands.

### PROGRAM CLARIFICATIONS

Q1 EXPERTISE: - Marlboro College addresses SPM in grantseeking and strategic planning workshops for Certificate in Nonprofit Management and teaches required SPM course in nonprofit Master's program.

Our BBVT partners bring the following SPM training expertise:

- UWCC, Vermont's gold standard in SPM training, provides SPM training and consultation to partner agencies, boards, state agencies, other nonprofits and other United Ways across Vermont.
- UWVT trains volunteers and grant applicants on logic models, facilitates outcomes measurement support group for youth-serving organizations, and provides SPM technical assistance (TA) to funded agencies.
- Common Good Vermont trained 150 nonprofit participants in logic models via Vermont Interactive TV during its 2011 statewide conference.

The experienced BBVT team includes:

1. BBVT project coordinator, lead trainer ANNE LEZAK, MPA: senior partner at the Center for Community Leadership specializing in planning and outcomes measurement for human services. Teaches "Outcomes and Evaluation" at Marlboro College Graduate School, training adult learners to use logic models and performance measurement systems. Teaches grant-writing workshops and facilitates strategic planning efforts nationwide, helping agencies understand and implement SPM to strengthen organizations and improve program and community outcomes.
2. BBVT curriculum designer, Trainer of Trainers (TOT) AMY CARMOLA, PhD: Research and

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Evaluation Specialist at UWCC; provides SPM training, one-on-one TA and consultation in SPM with volunteers, trustees, agency staff and state departments across Vermont.

3. BBVT lead trainer KATE MCGOWAN, CPA: chair of UWVT, expert in UW Worldwide SPM and RBA, conducts training on logic models and outcomes measurement for grantseekers and volunteers, offers TA and consultation in SPM to nonprofit boards and key staff. Designed and facilitated the outcomes measurement peer support group that serves as model for the BBVT cohort learning circles.

Q2. APPROACH: Our approach is to transform Vermont's nonprofit sector through a participatory educational process. Research shows that mutual trust and respect are critical ingredients for effective adult education (Blondy 2007, Knowles 1984, Tennant & Pogson 1995), and Marlboro's data shows nonprofit leaders are most likely to pursue training if it comes from a "trusted source." BBVT will leverage consortium members' long-standing relationships of trust and respect with nonprofit leaders to expeditiously create a safe, productive environment for successful learning and collaboration.

Q3. TOT: BBVT's expert training team is well-versed in SPM with extensive experience teaching nonprofit professionals (please see Q1 above). Our TOT process will focus on developing shared knowledge and techniques geared specifically to BBVT's unique goals and objectives. Our initial TOT will:

- familiarize team with BBVT program, curriculum and reporting procedures,
- share background on SPM needs of nonprofit participants,
- develop shared protocol for teaching BBVT curriculum, providing TA, and facilitating peer learning circles,
- strengthen team's cultural competency
- build relationships of trust, mutual support and shared responsibility within team

Later TOT sessions will reconvene the team to share challenges and successes to date, and recommend

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program adjustments as needed.

Q4. PHASE II: The half-day basic training will welcome all small and medium non-profits. For many, this will be a first introduction to SPM. Our expectation is that, while also serving as a gateway to applying for the Performance Institute, these workshops will spark participants to take follow-up steps such as pursuing the resource links we provide, completing the CCAT organizational self-evaluation, enrolling in Marlboro's Certificate in Nonprofit Management, and/or seeking additional training elsewhere. One year later, at least half the Phase II participants will have gone beyond the basic training to implement substantive organizational changes in SPM.

Q5. PHASE IV: The Performance Institute entails an intensive process of change management. We can expect that while over half (60%) our participants will show measureable improvement by the end of the program, others will be undergoing major transitions and will need another six months to show major improvement. Intermediate outcome: 80% will show measurable improvement within 6 months; long-term outcome: 95% will show measurable improvement one year out.

Q6. TRAINERS: Six trainers working in pairs of two will implement BBVT. Lead trainers include Project Coordinator Anne Lezak, UWVT chair Kate McGowan, and a third trainer with appropriate skills to be identified in Phase I. Assistant trainers will include two UW staff trained in SPM, and an experienced trainer seconded by the VT CNCS office.

For Official Use Only

## Required Documents

Document Name

Status