



Photo by: Dylan Brogan of Isthmus

# TOWARD A STRONGER NONPROFIT SECTOR: Addressing Capacity Building Needs in Dane County

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DANE COUNTY

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# EXECUTIVE SUMMARY

Nonprofit organizations have become an essential component of community wellbeing and play a critical role in addressing societal challenges here in Dane County. But how are nonprofits themselves sustained and strengthened? While the public may know nonprofits for their programmatic work, their leaders are constantly attending to their capacity: to the health, sustainability and development of the organization and the people within. In the past, nonprofit organizational capacity – strong leadership, sound finances, the ability to collaborate, and the development, execution, and evaluation of new strategies – was too often ignored or devalued by funders, donors and observers of the nonprofit sector. Despite increased attention and resources being devoted in recent years, critical capacity building resources are still lacking.

The aim of our research was to identify the most important needs and determine how funders, educational institutions and other organizations serving nonprofits could better contribute to stronger organizations and a stronger nonprofit sector. We surveyed and held conversations with leaders and program managers from 74 nonprofits in the arts, community development, environmental and out-of-school-time fields. We synthesized what we learned into five main categories, with each category structured as a recommendation for action.

**PEER LEARNING:** There are numerous nonprofit management workshops, conferences and training sessions offered in Madison on a regular basis, but these one-off sessions are insufficient. What's needed are more *accessible and affordable* local peer learning cohort programs that last from a few months to a year, allowing leaders to understand key components of organization management, experiment with new techniques and strategies, and get feedback and support from expert guides and peers.

*Recommendation: Develop and sustain robust peer cohort learning and longer time-frame professional development opportunities based here in Dane County.*

**INFORMATION SHARING:** In Dane County, information sharing about local resources for nonprofits is random, inefficient, frustrating and inequitable. There is no central hub or clearinghouse of information to learn about upcoming trainings and workshops, funding opportunities or consultants to hire.

*Recommendation: Establish and sustain a local nonprofit center or hub of practical information about what's going on in the nonprofit sector that is up-to-date and easy to use.*

**RACIAL EQUITY:** The nonprofit sector both exemplifies Dane County's intense racial disparities and is critical to dismantling them. Many leaders of color explained how, despite their deep cultural competency, trusted relationships with community members, wisdom from lived experience, sterling talent and professional credentials, they have faced repeated discrimination and exploitation. Many of the white leaders who participated in our conversations said that racial equity is a priority for them, but they have struggled to develop and implement strategies that address the complexity of challenges.

*Recommendation: Fund and support organizations led by people of color working on equity and assist white-led organizations in deeper transformations towards racial equity.*

**COLLABORATION:** Collaboration is valuable, even critical at times, but almost always fraught and difficult. Nonprofits know the power and importance of building working relationships across organizations but also to the deep challenges: power dynamics, the need for specific resources and the complex role of funders. To effectively collaborate, nonprofits need intentional funding and support to navigate these challenges.

*Recommendation: Fund and support equitable collaboration and coalition-building around shared goals with a focus on nurturing existing relationships.*

**EVALUATION:** People working for nonprofits in Dane County want to do good work and want to know their work is valuable, yielding real results, and bringing about genuine social or environmental change. Common forms of evaluation, however, tend to be burdensome, redundant and even exploitative. They often involve collecting and analyzing data that is not meaningful or relevant to nonprofit goals or community context.

*Recommendation: Fund and support meaningful and equitable evaluation and impact assessment that is most useful and relevant to those closest to the work.*

## ABOUT THE AUTHORS

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# INTRODUCTION

Nonprofit organizations, as mission driven entities, have become an essential component of community wellbeing. The nonprofit sector plays a critical role in addressing societal challenges by bolstering support for individuals where the public and private sectors fall short by building community vitality through arts, education, environmental and health related programs, and by challenging aspects of the status quo that are either unjust, unsustainable or inequitable.

But how are nonprofits themselves sustained? What are the ingredients to ensure that these entities can continue to function effectively and reliably? To sustain successful programs and fulfill their long-term goals, nonprofit organizations need to be well-functioning, efficient and resilient entities. While the public may know nonprofits for their programmatic work, their leaders are constantly attending to the health, sustainability and development of the organization and the people

#### KEY DEFINITIONS

***Nonprofit capacity*** includes “effective leader[ship], good financial management, the ability to collaborate with others, and the space to plan, execute and assess new strategies.”

***Nonprofit capacity building*** is the “funding and technical assistance to help nonprofits increase specific capacities to deliver stronger programs, take risks, build connections, innovate and iterate.”

from Grantmakers for Effective Organizations

within. Organizational capacity building practices, including recruitment and support of skilled and talented staff; development of project management systems and strategic plans; creation of sustainable revenue streams; adoption of technology to manage data; and cultivation of strong working relationships with community members, funders, and collaborators are paths to achieve greater and more substantial impact.

To better understand nonprofit capacity building, we asked representatives of nonprofit organizations about their learning practices and where they find information. We were interested in what assets are currently available to the nonprofit community, and where gaps persist. Our goal was to understand how local funders, educational institutions and other organizations serving nonprofits could contribute to stronger organizations and a stronger nonprofit sector through capacity building efforts.

Before describing the research initiative in full, we must first define how we use the terms nonprofit capacity and nonprofit capacity building. While definitions abound, we’ve chosen the description offered by Grantmakers for Effective Organizations. *Nonprofit capacity* includes “effective leader[ship], good financial management, the ability to collaborate with others, and the space to plan, execute and assess new strategies.” *Nonprofit capacity building* is the “funding

and technical assistance to help nonprofits increase specific capacities to deliver stronger programs, take risks, build connections, innovate and iterate.”<sup>1</sup>

Until recent years, these aspects of nonprofit work were often ignored or devalued by funders, donors and observers of the nonprofit sector. Nonprofits were expected to achieve great things while being lean to the point of monastic austerity and organizational pauperism. This expectation resulted in what Ann Goggins Gregory and Don Howard of the Bridgespan consulting firm notably termed the “nonprofit starvation cycle,” a constant lack of adequate organizational infrastructure.<sup>2</sup>

Thankfully, there’s been a rising tide of reform in the field to change these dynamics. Spurred by everything from popular TED Talks, funder consortiums, influential nonprofit blogs and statements from national nonprofit data gurus, the unhealthy myths about bloated

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*“It is both arrogant and ignorant to believe that you can give money to an organization for your project, and not be concerned about the infrastructure that makes your project possible.”*  
– Darren Walker, President of the Ford Foundation

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“overhead” costs that constrain nonprofit organizational capacity are gradually being expunged.<sup>3</sup> A notable demonstration of this shift in culture is a pointed statement from Darren Walker, president of the Ford Foundation, during an interview with 60 Minutes in April 2021: “It is both arrogant and ignorant to believe that you can give money to an organization for your project, and not be concerned about the infrastructure that makes your project possible.”<sup>4</sup>

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<sup>1</sup> “What We Care About: Capacity Building.” Grantmakers for Effective Organizations. <https://www.geofunders.org/what-we-care-about/capacity-building>.

<sup>2</sup> Ann Goggins Gregory and Don Howard. “The Nonprofit Starvation Cycle.” Stanford Social Innovation Review. Fall 2009. [https://ssir.org/articles/entry/the\\_nonprofit\\_starvation\\_cycle](https://ssir.org/articles/entry/the_nonprofit_starvation_cycle).

<sup>3</sup> Dan Pallota. “The way we think about charity is dead wrong.” Filmed 2013. TED video. 18:38. [https://www.ted.com/talks/dan\\_pallotta\\_the\\_way\\_we\\_think\\_about\\_charity\\_is\\_dead\\_wrong/](https://www.ted.com/talks/dan_pallotta_the_way_we_think_about_charity_is_dead_wrong/). “What We Care About: Capacity Building.” Grantmakers for Effective Organizations. <https://www.geofunders.org/what-we-care-about/capacity-building>. Vu Le. “How the focus on overhead disenfranchises communities of color and fans the flames of injustice.” Nonprofit AF. April 3<sup>rd</sup>, 2017. <https://nonprofitaf.com/2017/04/how-the-focus-on-overhead-disenfranchises-communities-of-color-and-fans-the-flames-of-injustice/>. In 2013, the CEOs of the Better Business Bureau Wise Giving Alliance, GuideStar, and Charity Navigator penned an open letter: Art Taylor, Jacob Harold, Ken Berger. “The Overhead Myth: Moving Towards an Overhead Solution.” <http://overheadmyth.com/>.

<sup>4</sup> “Darren Walker: How the head of the Ford Foundation wants to change philanthropy.” 60 Minutes. April 4, 2021. <https://www.cbsnews.com/news/darren-walker-ford-foundation-60-minutes-2021-04-04/>.

And yet, foundations nationwide are still prone to restrict funding for infrastructure, preferring instead to dedicate the bulk of funding resources to programs. The consequence manifests in overworked, underpaid staff who rely on outdated systems, gaps in resources and inattention to professional development. Gaps in adequate capacity building resources persist, including here in Dane County. Addressing these gaps would be a critical contribution to achieving the long-term goals of stronger organizations and a stronger sector better equipped to bring about positive social and environmental change in Dane County.

Given the size and scope of the nonprofit sector, augmented capacity has the potential to have an impact on nearly every aspect of life in our community. In Dane County, nonprofits have a significant presence: there are more than 3,000 organizations (501(c)3 public charities) together drawing over \$5 billion in annual revenue.<sup>5</sup> The range of issues these organizations address is broad, including: improving education, reducing poverty and providing affordable housing, strengthening the health care support system, protecting and enhancing natural resources, and sustaining the arts. In Wisconsin, approximately 12% of the state workforce is employed in nonprofit organizations; that percentage is likely the same if not greater in Dane County.<sup>6</sup>

#### DANE COUNTY NONPROFITS

- 3,045 organizations  
(501(c)3 public charities)
- \$5 billion annual revenue

The core of our inquiry about capacity building gaps involved conversations with small groups of executive directors and program managers from 74 nonprofit organizations. These conversations were supplemented with surveys of a slightly larger set of nonprofits and some individual conversations with nonprofit leaders and others working locally in the field. We focused on arts, community development, environmental and out-of-school-time organizations because those reflect Madison Community Foundation's grantmaking focus areas.<sup>7</sup>

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<sup>5</sup> Number of 501(c)3s as of May 2021. See "Greater Madison Nonprofit Directory," Madison Community Foundation. <https://www.madisongives.org/giving/greater-madison-nonprofit-directory>. Revenue data from: Andy Davey, "Sifting Through Abundance: Outlining The Nonprofit Sector in Dane County." January 2018. Madison Community Foundation. <https://www.madisongives.org/nonprofits/mcf-initiative-seeks-to-better-understand-the-dane-county-nonprofit-sector>.

<sup>6</sup> "Nonprofit Wisconsin In Brief." 2019. Helen Bader Institute for Nonprofit Management. <https://uwm.edu/hbi/wp-content/uploads/sites/435/2019/09/Nonprofit-WI-In-Brief-2019.Final.pdf>.

<sup>7</sup> We used a working definition of "community development" based on UW-Madison Extension Dane County community development program's frame of reference: "Community development is collective action taken by community members to address

We synthesized what we learned into five main categories, with each category structured as a recommendation for action. One of the things we heard from nonprofit leaders was they've been here before; in other words, they've been convened to have these kinds of conversations but often the primary result is a stale report and little meaningful action by funders, educational institutions, or other entities that serve nonprofits. We're doing our best to make sure this effort is different, not just in the way we've written this report but the way we've already begun to take action in our respective institutions, which we discuss in the concluding section.

We heard various insights and good ideas that didn't fit neatly into the five main categories, but most of these were essentially explanations of what nonprofit capacity looks like in practice and a call for more resources and support to build that capacity. Of note is that there were unique sector-specific dynamics and concerns that are not covered in this report. We've added links in this document to reports from each of the conversations to include concerns specific to the sector (see Appendix: Methods).

One recurring theme we heard is that capacity building either at the organizational or network level often requires a longer than expected timeframe and may need to be ongoing to be fully effective. We think of this insight as a kind of meta-recommendation, a feature that is an element of all five of the core recommendations detailed below. This theme also emerged as a central conclusion from nationwide research conducted by Grantmakers for Effective Organizations:

"Grantmakers should take a long-view approach to building capacity, because organizational transformations will not happen overnight. One-time workshops on fundraising or management, and even many short-term consulting engagements, cannot be expected to produce significant changes in capacity. One of the most frequent challenges we heard from nonprofit leaders in the listening sessions was that funders were not providing capacity-building funding with an appropriate time horizon. We heard many stories of partially completed capacity-building projects that ended up not meeting their original objectives due to the lack of funding to cover costs required to implement and maintain the work."<sup>8</sup>

The primary unit of analysis for nonprofit capacity tends to be the individual organization, and that was the case for our research also. We tried to broaden this

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common problems and to advance equity, sustainability, and the well-being of the community."

<sup>8</sup> Lori Bartczak. "Supporting Nonprofit Capacity: Three Principles for Grantmakers." *Nonprofit Quarterly*. Fall/Winter 2013. <https://nonprofitquarterly.org/supporting-nonprofit-capacity-three-principles-for-grantmakers/>.

scope, however, because – as both our participants and insightful scholars and veteran observers of the field have explained – the ability of nonprofits to achieve their mission and bring about substantial change often involves the capacity of networks of multiple organizations and coalitions.<sup>9</sup> We explicitly asked nonprofit leaders to reflect on the dynamics of the nonprofit sector more broadly and whatever multi-organizational networks to which they belong. Through their answers to these questions and the interactive conversations across organizations we were able to make sense of some of these dynamics.

In our minds, the key audiences for this report are 1) fellow funders, educational institutions and other organizations serving nonprofits in Dane County and 2) local nonprofit staff and boards. We hope members of the first audience take up our call to action and work with Madison Community Foundation and UW-Madison Extension Dane County to meet the needs our participants identified and build on the strengths of our local nonprofits. We hope members of the second audience can use this report to reflect on their own capacity, strategically plan and budget to build that capacity, and will continue to work with us in advocating for a strong and resilient sector. And we hope and expect both audiences – as well as anyone else in the community – will tell us what in this report resonates as true and what they think we've gotten wrong as part of ongoing dialogue and action.

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<sup>9</sup> See, for example: David Renz, "Reframing Governance III." *Nonprofit Quarterly*. July 15<sup>th</sup>, 2020. <https://nonprofitquarterly.org/reframing-governance-3/>. Jared Raynor. "Capacity Building 3.0." TCC Group. January 2014. <https://www.tccgrp.com/resource/capacity-building-3-0-how-to-strengthen-the-social-ecosystem/>.

# PEER LEARNING

Develop and sustain robust peer cohort learning and longer time-frame professional development opportunities based here in Dane County.

Many executive directors and program managers enter their positions without formal nonprofit management training. Instead, they might have backgrounds as educators, environmental scientists, practicing artists or a multitude of other paths through which they've grown their talents, knowledge and skills but have not been prepared for their management roles.

While learning on the job can be invigorating and rewarding, it's also stressful, overwhelming and often inefficient, requiring new leaders to painstakingly discover essential techniques and strategies they could have quickly learned from more formal training. Many people told us they are piecing together their professional development in a way that too often feels haphazard and draining. They might attend random workshops when they happen to hear about them, make calls to colleagues or board members for advice, or watch webinar recordings late at night. There will always be an element of this kind of learning born of serendipity or urgency but increasing the availability of more formal and strategic professional development opportunities will be of great benefit to our local nonprofit community. Participants repeatedly mentioned that training in core management skills related to fundraising, data management and human resources (such as conflict resolution and staff development) are special priority needs.

### **Gaps and Limitations of the Current Training Environment**

There are numerous nonprofit management workshops, conferences and training sessions offered in Madison on a regular basis. For example, one program that several participants spoke highly of is the Fundraising and Development Conference offered each spring by the Center for Nonprofit Studies at the University of Wisconsin-Madison (formerly run by the UW Business School). Another popular offering is the Madison Nonprofit Day Conference, offered through Collaboration for Good – an organization based in Madison and serving the nonprofit and social good sectors. This annual conference provides opportunities for learning, networking and skill building. These local programs are valuable for connecting the nonprofit sector but are limited in scope and reach.

Other available workshops and training sessions tend to be short and introductory or are part of an expensive packet with rotating participants. There are some peer learning programs, such as the one provided by the UW School of Business's Center for Professional and Executive Development, but they are either targeted at for-profit businesses, prohibitively expensive for most nonprofits, or both.

Peer learning groups such as the Association for Fundraising Professionals (AFP) chapter, are valued highly by those involved, but participation is limited to those engaged in fundraising and development. Community Shares of Wisconsin's (CSW) board, composed of a representative of each nonprofit organization under its umbrella, serves as a de facto peer network, and learning occurs through board

management and lunch and learn events. Members of CSW remarked to us how valuable participation in the board is in building strong connections with leaders of other nonprofit organizations. However valuable, these experiences are limited to the 70 members of Community Shares of Wisconsin.

There are also many excellent training programs offered nationwide, some of which intentionally build peer networks, and we recommend that funders support more local nonprofit leaders to participate in these. The Management Center offerings, for instance, were mentioned by multiple participants in our conversations across the sub-sectors. These programs provide participants access to a wider pool of talented experts and teachers, exposure to inspiring and innovative approaches and models being implemented elsewhere, and opportunities to connect with broader networks. Sometimes these programs are also targeted to specific missions, for instance youth theater organizations, which allow participants to examine the specific complexities of their work.

There are disadvantages, however, to these programs. They are expensive because of both program and travel costs. They also tend to be intense multi-day or week-long programs with people from far-flung places, a format that has weaknesses compared to the strengths of local training programs described above. Moreover, it is uncommon for several people from the same organization to attend a national training or conference together making implementation of new ideas difficult. Often a critical number of staff members need to share an understanding of why and how to incorporate new thinking and processes.

Virtual programs and webinars have proliferated during the coronavirus pandemic. Many offerings cost nothing financially to participants and are recorded for viewing whenever is most convenient. The format allows people in Dane County to learn from diverse practitioners and experts across the state, country, and even around the world. Nonprofit-serving organizations should find ways to sustain this virtual programming and help nonprofits with acquiring the relevant technology if they need assistance.

There are significant downsides, however, to virtual learning. While webinars are easy to access, they tend not to encourage active engagement, nor do they provide space for participants to engage in conversations about challenging issues. Furthermore, just one month into the pandemic we already heard concerns about “Zoom burnout,” the fatigue that arises from interacting over virtual spaces where common social cues are missing. Virtual learning is best for introductory or very specific content and should be used judiciously. As one participant explained, it should be “easily digestible, efficient and accessible in small pieces.”

## The Benefits of Peer Learning Cohort Programs

Not readily available are affordable local peer learning cohort programs that might last anywhere from a few months to a year, allowing leaders to understand key components of organization management, experiment with new techniques and strategies, and get feedback and support from expert guides and peers. In strong peer learning cohorts, there is shared responsibility for building the capacity of colleagues. Members

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*“There’s a bounty of knowledge locked up in other executive director heads.”*

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provide training to one another, share information about resources and hold each other accountable for implementing what they’ve learned or discussed. This model also helps our community recognize and make use of the depth of experience and wisdom already at our fingertips. As one organizational leader put it: “There’s a bounty of knowledge locked up in other executive director heads.”

Peer learning cohorts lead to long-term relationships and local collaborations to address shared issues. Ongoing peer networks also allow leaders to continually get fresh perspectives and advice from someone who is not embroiled in internal organizational dynamics. During our community conversations, we heard nonprofit executives express feeling isolated or overwhelmed. Peer networks engage leaders in conversations to address shared challenges. There is great value in knowing others are facing similar problems and can offer advice and support. After attending a community conversation and interacting with peers, one participant described the most important take-away as “I am not alone!”

Peer learning programs can also foster mentorships, which many participants said are crucial to their success as nonprofit leaders. Meaningful, productive and equitable mentorships tend to involve ongoing dialogue rather than single conversations; they involve mutual learning and benefit rather than a one-way imposition of knowledge. Honest and open dialogue about power dynamics, race and racism are often an important part of many nonprofit mentoring relationships. Leaders of color may find it beneficial to be in a mentoring relationship with other leaders of color. On the other hand, there is also value in cross-racial mentorships, if done carefully. For instance, white leaders – often more established and in positions of privilege relative to access to resources and power – might be mentored by leaders of color with wisdom from lived experience and more connected to grassroots communities. Those leaders of color, in turn, might get assistance from white leaders to build their fundraising, financial management and board development skills. As discussed below in the section on collaboration, however, these kinds of relationships can be fraught without explicit

understandings of the race and power dynamics and intentional efforts to prevent exploitation.

Local training opportunities would make it easier for multiple people from an organization to participate, learn from each other and maintain momentum to implement ideas within their organization. One example of a local, on-going, peer focused training program is the Social Good Accelerator, offered through Collaboration for Good. Over the course of several months, expert trainers and resource people provide training and coaching for startup nonprofit organizations, for-profit ventures, and cooperative businesses that aim to address social justice issues, improve the community and offer services. The Social Good Accelerator provides ongoing support to Black, Indigenous, Latinx, Asian and women-owned businesses, and has been successful in helping many new organizations launch and thrive.

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*After attending a community conversation and interacting with peers, one participant described the most important take-away as “I am not alone!”*

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A similar effort – Amplify Madison – was launched by the YWCA in 2018 with support from the Madison Community Foundation. Amplify Madison explicitly focuses on funding groups

of three women nonprofit professionals to engage in a professional development opportunity together. This cohort model recognizes that people learn better together, and by sharing an experience they will be likely to build upon that experience and knowledge together.

Participants in our conversations emphasized that the more robust form of in-person peer learning cohort opportunities should be available to program managers, front-line staff and board members, in addition to executive directors. This mirrors national research findings from Grantmakers for Effective Organizations: “Many successful capacity-building programs reach beyond the executive director role to engage a team that is drawn from multiple levels of the organization. ‘People respond to and remember information better when they are learning it in a group,’ said Russell Willis Taylor of National Arts Strategies. ‘When working with organizations, we try to find ways to educate the team to help ensure the learning sticks.’”<sup>10</sup> It’s important to also note that making programs accessible and equitable might involve not only the direct cost of programs but time of day they are offered, with accommodations made for childcare and transportation.

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<sup>10</sup> Bartczak, 2013.

Front-line staff, such as those that work for out-of-school-time organizations, often have few or no opportunities for professional development, which, together with chronically low wages, leads to constant turnover. According to Madison-area Out-of-School Time, the median wage is \$13 an hour “despite the fact that there are often rigorous credentials required to work in school-age OST Programs” and the turnover rate is nearly 40% each year.<sup>11</sup> Structured venues for front-line staff to build their skills, establish relationships with others in the field, and take time to pause and reflect on their work are critical to organizational stability and capacity.

Board members come from an enormous spectrum of experiences and backgrounds, some with years of nonprofit experience and others with very little. Board structures vary widely as well – from working boards with no paid staff to governing boards that meet only a few times a year. Having accessible training programs can help board members be more effective while supporting underrepresented community members to serve on boards. United Way of Dane County’s BoardWalk program is doing just this and could be expanded to serve more people. Moreover, peer learning cohorts of board members have similar benefits to those of staff members. We heard from multiple environmental nonprofits that some of their most innovative, impactful and collaborative work grew out of relationships and strategic conversations among board members from different organizations.

### **Models to Draw From**

Fortunately, these kinds of longer-term peer cohort learning programs don’t have to be invented from scratch. In addition to the examples already mentioned above, there are other examples that might be emulated or made more accessible through additional funding or partnerships, including those closer to home. The Community Foundation for the Fox Valley Region has developed a highly regarded Nonprofit Leadership Institute for organizations in their area. The Wisconsin Philanthropy Network (based in Milwaukee) has run the Leadership Advanced program for executive directors, which several participants in our conversations have attended and lauded for its quality.

There are also compelling models to be found among local programs tailored to specific nonprofit work. Concurrent with our research, Madison-Out-of-School Time was funded by Dane County to provide an annual peer cohort learning program for staff to deepen their knowledge and skills in trauma-informed care, a critical approach in the field. The program has multiple tiers, each with a rich peer learning element, but tailored to different levels of individual experience and organizational resources. This program includes technical training, a cohort-based

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<sup>11</sup> “State of the Out-of-School-Time Field.” Madison-area Out-of-School-Time. 2019.

community of practice, coaching, site visits, and participant sharing of program learning. Similarly, organizations that serve the arts community, including DaneArts and the Bolz Center for Arts Administration, provide educational programs specific to the sector.

# INFORMATION SHARING

Establish and sustain a local nonprofit center or hub of practical information about what's going on in the nonprofit sector that is up-to-date and easy to use.

A recurring theme during our conversations was that information sharing about local resources for nonprofits is random, inefficient, frustrating and inequitable. There is no central hub or clearinghouse of information to learn about upcoming trainings and workshops, funding opportunities or consultants to hire. People in the field tend to rely on word of mouth through small personal or professional networks. These avenues will, of course, always play an important role in information sharing, but participants expressed the need for more thorough, intentionally managed and easily accessible information hubs.

Reliance on word of mouth is also inherently inequitable. Those who are already well-connected professionally and who have strong relationships with funders

and donors tend to have the best access to information. Those who are new to Madison or to the nonprofit field do not.

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*Several participants mentioned that the environmental networks that do exist can be “secret” and insular and operate like exclusive “clubs.”*

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Participants from environmental organizations said that longstanding leaders from established, well-funded organizations tend to have

good access to information and valuable peer networks while leaders who are new to the community or new to their roles are less connected, as are those from smaller, more grassroots, and less well-funded organizations. Several participants mentioned that the environmental networks that do exist can be “secret” and insular and operate like exclusive “clubs.” Moreover, availability and access to networks can also vary depending on staff role. Not all executive directors have good access, but in general, they are better connected than other staff members, such as program managers and frontline staff. Moreover, these personal and professional networks are often determined by race and class and even gender, and they tend to entrench broader societal inequities (see more in the sections on “Racial Equity” and “Collaboration” below).

One participant in the community development conversation summed up the situation in Madison as follows:

I assumed when I moved here that there was a nonprofit resource center. Having somewhere that could at least coordinate some of these resources would help. There are always things that I don’t know about that are going on in Madison and resources we may not know about. We often take for granted that people know how to access funding. I would like to be able to speed up this process of learning about this .... We need more equal access because right now it’s a lot of who we know.

## Current Information Aggregators to Build On

Many cities have nonprofit centers and many states have a statewide nonprofit association as part of the National Council of Nonprofits. A statewide association was operating in Wisconsin but was disbanded in 2019. (This came just a year after the longstanding Nonprofit Center of Milwaukee also closed). In response, a

group of organizations – mostly higher education institutions – created the Wisconsin Nonprofit Resource Group (WisNRG) to try to fill the gap. WisNRG hosts a website, a jobs board and events calendar, and provides some additional information to the nonprofit sector. Their state-wide focus means, however, that they are only able to scratch the surface of what's happening and available in Madison. Furthermore, WisNRG is a loose coalition with no dedicated staff and their capacity is limited.

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*“I assumed when I moved here that there was a nonprofit resource center. Having somewhere that could at least coordinate some of these resources would help.”*

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Our own institutions, Madison Community Foundation and UW-Madison Extension Dane County, regularly provide information for local nonprofits both through digital platforms and in-person meetings, but this information also tends to be partial, sporadic, narrow in focus, or limited to a subset of agencies. For example, Madison Community Foundation hosts the Greater Madison Nonprofit Directory, a database that provides at least some information about every nonprofit in the area (more than 3,000 501(c)3 organizations in Dane County alone). The directory is helpful for nonprofits who want to share information with donors or other potential supporters in the community but it's primarily a tool for donors. Moreover, Madison Community Foundation staff eagerly share information with the hundreds of organizations they interact with each year, but this tends to be in an ad-hoc way and often circumscribed to those that have received a grant or hold an endowment fund with the Foundation. Likewise, UW-Madison Extension Dane County produces a periodic e-newsletter for nonprofits, but both the content and reach are limited.

There are a variety of other institutions in Madison that share useful and relevant information for nonprofits, but again, this information is limited in its availability or narrow in focus. For instance, the United Way focuses on its partner agencies, a small subset of nonprofit organizations (there were 53 in 2020).<sup>12</sup> It also helps nonprofits recruit volunteers and board members through the site [Volunteeryourtime.org](https://volunteeryourtime.org). Another example is The Association of Fundraising

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<sup>12</sup> “2020 Agency and Program Directory.” United Way of Dane County. <https://www.unitedwaydaneconomy.org/wp-content/uploads/2020-Agency-Program-Directory.pdf>.

Professionals, which shares information through multiple newsletters, learning sessions, and events throughout the year, with the focus on fundraising and development. Collaboration for Good provides perhaps the most broad-ranging information. As mentioned previously, Collaboration for Good hosts a variety of capacity building and knowledge sharing events open to anyone throughout the year, including Madison Nonprofit Day, the Social Good Summit and Nonprofit Draft Day, events that attract hundreds of participants. They have also created a nonprofit book lending library and other online resources, but many of these end up being limited pilots or are in the beta stage.

In summary, while much of the information nonprofits need is available somewhere, it's scattered across multiple organizations, occasional events, websites and networks, and is not necessarily easily accessible to all.

### **The Benefits of a Nonprofit Center or Information Hub**

What's needed in Madison, at the very least, is a nonprofit center that serves as a central hub for aggregating and widely sharing relevant and updated information. Ideally, a nonprofit center would also help coordinate professional development opportunities and convene strategic conversations and peer learning networks. Dedicated and ongoing funding and staff are needed for any of these functions to be performed effectively.

Fortunately, many models exist of successful nonprofit centers that fit the description above, including in smaller cities like Madison. Here in Wisconsin, the Nonprofit Leadership Initiative (funded by the Community Foundation for the Fox Valley Region and more than a dozen major local and national funders) serves as both a virtual and in-person nonprofit center. The Fox Valley Technical College partners with the Nonprofit Leadership Initiative for delivery of professional development and organizational capacity building content. The Center for Nonprofit Excellence in Charlottesville provides professional development training, consultation, community events and free educational resources. They have ongoing funding from foundations but also fundraise from individuals and

### **EXAMPLES OF NONPROFIT CENTERS**

*Nonprofit Leadership Initiative,  
Appleton WI -*

<https://npleadershipfv.org/>

*Center for Nonprofit Excellence,  
Charlottesville VA -*

<https://www.thecne.org/>

*NEW, Ann Arbor MI -*

<https://www.new.org/>

*Propel Nonprofits, Minneapolis MN -*

<https://www.propelnonprofits.org/>

use a membership model, where nonprofits pay a modest annual fee to access more in-depth and tailored resources.<sup>13</sup>

No nonprofit center will be perfect. There will always be a need for tailored and informal information-sharing networks and multiple organizations and institutions to provide specific expertise and assistance. That said, given the plethora of nonprofit organizations in the Madison area, their scope of impact, and the complexity of issues they are engaged in, some significant centralized information and coordinating hub is warranted. Our belief is that a robust, well-funded and appropriately staffed nonprofit center can work in collaboration with organizations throughout the community to ensure crucial information is shared in an accessible, equitable, and inspiring way.

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<sup>13</sup> Project Pivot in Milwaukee finished a similar nonprofit capacity needs assessment in August of 2020. Their research also revealed the need for a re-imagine nonprofit center. To discern what model might be best for Milwaukee, they analyzed 15 different models around the country, analysis which is relevant to any similar efforts to be undertaken in Dane County: "Study Complete: Results & Recommendations," Project Pivot. <https://www.pivotwi.org/news/2020/8/26/study-complete-results-amp-recommendations>.

# RACIAL EQUITY

Fund and support organizations led by people of color working on equity and assist white-led organizations in deeper transformations towards racial equity.

It's no secret that Dane County has some of the most intense racial disparities in the country.<sup>14</sup> The nonprofit sector exhibits those racial inequities but is also critical to dismantling them. How to bring about greater diversity, equity, inclusion, and justice was a reoccurring point of discussion among participants, and most often it focused on race. To achieve these goals, the talents, knowledge, and expertise of leaders of color need greater recognition and financial backing, while white-led organizations need additional guidance and support for deeper organizational change.<sup>15</sup>

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*"Many women and men of color are being used and abused in nonprofit industries."*

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Many leaders of color explained how, despite their deep cultural competency, trusted relationships with community members, wisdom from lived experience, sterling talent, and professional credentials, they have faced repeated discrimination and exploitation. As one participant put it, "Many women and men of color are being used and abused in nonprofit industries." Black leaders spoke of intense scrutiny they've faced by funders who question their methods and abilities. They spoke of feeling the pressure to abandon their identity, to not act "too black or strong" in ways that might challenge the stereotypes of powerful white funders and donors. Moreover, they said they are given limited funding but expected to produce profound impact.

These findings dovetail with results from national research on racial inequity in the nonprofit sector as well as another recent local study specifically focused on the experiences of black leaders.<sup>16</sup> The local study, led by UW-Madison sociologist Greg Wilson in collaboration with Randy Stoecker, involved interviews

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<sup>14</sup> Research and reporting have laid bare these disparities in Madison since the 1930s. For an expansive list of reports and articles, with a focus on educational disparities, see Kaleem Caire. "Why Black People in Madison are Impatient and Should Be." Medium.com. Jan 23, 2020. <https://kaleemcaire.medium.com/why-black-people-in-madison-wisconsin-are-impatient-and-should-be-8fb50fd89f>. See also "Race to Equity: A Baseline Report on the State of Racial Disparities in Dane County." Wisconsin Council on Children and Families. 2013. <http://racetoequity.net/wp-content/uploads/2016/11/WCCF-R2E-Report.pdf>.

<sup>15</sup> For more specific recommendations for funders on supporting leaders of color, see, for example: Vu Le. "How philanthropy fails to support its greatest assets, BIPOC leaders, and what it should do about it." *Nonprofit AF*. <https://nonprofitaf.com/2020/08/how-philanthropy-fails-to-support-its-greatest-assets-bipoc-leaders-and-what-it-should-do-about-it/>.

<sup>16</sup> For various national studies on the experiences of leaders of color, see the Race to Lead series: <https://racetolead.org/>. See also Cheryl Dorsey, Jeff Bradach, and Peter Kim. "Racial Equity and Philanthropy: Disparities in Funding for Leaders of Color Leave Impact on the Table." Bridgespan Group. May 4, 2020. <https://www.bridgespan.org/insights/library/philanthropy/disparities-nonprofit-funding-for-leaders-of-color>.

with 15 black leaders of nonprofits in the Madison area (out of 20 they were able to identify).<sup>17</sup> One key finding from their study was that racialized norms of how a nonprofit should operate tend to obscure or devalue the expertise of black leaders. For black leaders, their lived experience and rich knowledge of issues facing those they serve – such as the criminal justice system or the complexities of poverty – inform the holistic, multi-pronged approach they take to bettering the lives of the people with whom they work. Through the typical prism of nonprofit work, however, this holistic approach is sometimes denigrated as unfocused mission drift. Moreover, to have significant impact, the complexity of the work often requires more intense work with fewer clients. Too often, however, impact is assessed through quantitative means that prioritize larger numbers of participants and discrete numerical metrics versus qualitative means (or, ideally, mixed methods) that are more appropriate and have their own robust standards of validity and rigor. Another key finding was that black leaders have experienced being forced to collaborate with white-led organizations who are more trusted by or familiar to funders. In turn, these white-led organizations all too often exploit the connections black leaders have with the community and take credit for impact.

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*“We speak to old, white people in a world that is growing younger and browner” was how one person described the environmental sector.*

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Many of the white leaders who participated in our conversations said that racial equity is a priority for them but have struggled to develop and implement strategies that address the complexity of challenges. Organizations across

each of the sectors we studied suffer from limited leadership and staff diversity, even as audiences and clients are increasingly diverse. This is exemplified in environmental nonprofits, where insufficient attention to racial inequities in access to natural areas and exposure to environmental toxins is endemic not just here in Dane County but across the country.<sup>18</sup> “We speak to old, white people in a world that is growing younger and browner” was how one person described the environmental sector. Another participant said, “Traditional environmental

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<sup>17</sup> For Wilson and Stoecker, a Black-led organization is defined as “an organization led by a Black person and where a majority of employees and board members identify as Black.” For a presentation of their findings see “The Racialized Reality of Madison Non-Profits.” Youtube, uploaded by Justified Anger, August 20<sup>th</sup>, 2020. <https://www.youtube.com/watch?v=iSlqct24rdU>.

<sup>18</sup> For an analysis of organizational diversity see Dorcetta E. Taylor. “The State of Diversity in Environmental Organizations.” Green 2.0. 2014. <https://diversegreen.org/research/the-challenge/>. The environmental justice movement is, in part, a response to the lack of attention to racial inequities by mainstream organizations. For one of first scholarly studies of environmental injustices, see Robert Bullard. *Dumping in Dixie: Race, Class, and Environmental Quality*. (Boulder, CO: Westview Press, 1990).

organizations have got to do the deep work of racial justice. This goes way beyond diversity (Who's in the room? How many more of these folks are participating this year over last year?) and inclusion (Have everyone's ideas been heard? Is this environment safe for folks to feel like they belong?) to reach equity and justice.”

Several environmental leaders explained that racial equity workshops and training for them and their predominantly white staff and boards are helpful but insufficient for the transformational work that is needed. A single training cannot address the racial justice overhaul most often needed to address systemic inequities and organizational biases inherent in long-standing, overwhelmingly white organizations.

Participants from the arts sector described how they are wrestling with diversity, equity, and inclusion along multiple lines. Priorities include: diversifying staff and board composition; working with a wider diversity of artists; offering performances and

pieces that reflect the heterogeneity of the population; and expanding the audiences they engage. A few participants noted how these efforts intersected with other troubling norms in the arts world that create inequalities for artists

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*“Traditional environmental organizations have got to do the deep work of racial justice. This goes way beyond diversity (who's in the room? how many more of these folks are participating this year over last year?) and inclusion (have everyone's ideas been heard? Is this environment safe for folks to feel like they belong?) to reach equity and justice.”*

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more broadly. They mentioned the problematic notion that art should be free or, alternatively, only the literal art-making should be funded and not the administrative and organizational costs involved in supporting that art-making. As one participant explained: “Free is an insult. Free goes right along with the ‘working for exposure’ trope .... Audiences/do not come back after you give them a free performance/experience and then come back wanting them to pay for it. It doesn't build audiences. Even underserved and poor communities want to pay for things. Arts organizations have to straddle that complicated line of covering expenses (which would be a lot easier to do with funding subsidies for lower ticket costs) and making sure not to price people out.”

To pursue the path of becoming a genuinely multi-racial organization, or a path of allyship or co-conspiratorship, each white-led organization will likely need a tailored approach, but as environmental leaders explained, that approach will

require more than just workshops and training. Longer-term organizational transformation demands ongoing resources of time, energy and money as well as specific measurable goals and the more nebulous but equally critical shifts in

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*“We have young staff [of color] who could run this organization (or others in Madison) if they had access to [professional development] in these areas.”*

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culture. Funders and grantees will need to both take responsibility and mutually reinforce this work.<sup>19</sup>

In addition to these broad recommendations,

participants mentioned various compelling ideas more tailored for each individual sector. There was one idea, however, that was raised by participants across the arts, environment and out-of-school time conversations: mentorship and “pipeline” programs that could provide an on-ramp for youth of color to enter nonprofit career paths and help transform the field. This is not a new idea, but many participants believed there remains a large need and opportunity.

One participant put it this way: “We have young staff [of color] who could run this organization (or others in Madison) if they had access to [professional development] in these areas. Developing leaders from within could go a long way in impacting the diversity of our nonprofit leadership three, five, 10 years down the road.” A related idea was the suggestion that a concerted effort be made to help staff of color gain more traditional credentials to bolster their capacity and status in the field. Some participants suggested that funders could partner with local colleges or universities to allow executives to attend courses free of charge while working and earning a degree. A survey respondent noted, “If you want to reduce inequity, we need more people of color with degrees in the field, especially those with lived experience.”

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<sup>19</sup> For an insightful analysis and set of capacity building recommendations written by and for people of color in the nonprofit field, see April Nishimura et al. “Transformational Capacity Building.” Stanford Social Innovation Review. Fall 2020. [https://ssir.org/articles/entry/transformational\\_capacity\\_building](https://ssir.org/articles/entry/transformational_capacity_building).

# COLLABORATION

Fund and support equitable collaboration and coalition-building around shared goals with a focus on nurturing existing relationships.

Collaboration is valuable, even critical at times, but almost always fraught and difficult. We heard variations on this theme over and over again across all four of the community conversations. Participants spoke to the importance of building working relationships across organizations, and also acknowledged the challenges: addressing power dynamics, securing specific resources and navigating the complex role of funders.

### Current Collaboration

Participants made clear that a lot of collaboration is already happening among nonprofits in Dane County. One participant in the community development conversation emphasized, for instance, that housing organizations have a long history of collaboration. An environmental leader said that collaborations are “already happening at a pretty substantial level in the environmental community statewide. There is an extensive network of coalitions and groups that are organized around specific issues to work on public policy.” Arts leaders offered a variety of examples, including serving on each other’s boards; hosting collaborative events and performances; participating in projects through Dane Arts and the Madison Arts Commission; belonging to the Arts Education

Roundtable (hosted by Overture Center); attending the “Art Party” (a gathering of artists and nonprofit arts orgs); and engaging in numerous efforts through school and libraries. Youth organizations collaborate in developing shared outcome measurements, standards and training through the umbrella organization Madison-area Out-of-School-Time (MOST).<sup>20</sup>

**51%**

of post-gathering respondents said the most important take-away related to how satisfying and meaningful it was to connect with other nonprofit leaders

There is also a strong desire for more collaboration, or at least more dialogue and relationship building. In an evaluation question that asked about the most important take-away from the conversations, a common response was that people really appreciated the space we gave them to engage each other. In fact, 51% of respondents said the most important take-away from their conversation related to

how satisfying and meaningful it was to connect with other nonprofit leaders, to realize they share many of the same goals and challenges, and the desire to have more of these opportunities.

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<sup>20</sup> For more details see “About US.” Madison-Area-Out-of-School-Time.  
<https://mostmadison.org/most/about-us>

For example, one leader of an out-of-school-time organization described their main take-away as “a desire for more time to connect with and problem solve with Executive Directors.” Another said they and others want to “continue a broad conversation that brings people together around how to best address after-school/out-of-school youth enrichment and education.” One arts leader recognized there was a common and “genuine interest in skill-building and professional development through cooperative training opportunities.” Another said there is a “need for a support network, resources and cooperatives to share skills, services, counsel.”

People’s experience and perception of collaboration in the field varied among participants, however. For example, one environmental leader said, “It’s always great to be in the same room as our environmental conservation colleagues; it helps us be better problem-solvers.” But they went on to say that, “Right now, there aren’t strong forums beyond serendipitous projects or occasional conference/lecture meetups for working together or learning more about each other.” This comment contrasts with the environmental leader quoted earlier who spoke of the “extensive network of coalitions” and points to the complex challenges and frustrations related to collaboration.

### **Profound Challenges to Fair and Effective Collaboration**

While we heard a genuine belief and interest in the power of collaboration, we also heard significant hesitation, criticism and even cynicism. Participants identified multiple complex challenges, not the least of which are the racial power dynamics discussed in the prior section. While we’ve disaggregated the challenges here to highlight them, they are usually intertwined in complicated ways, as indicated by many of the quotes below.

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*“We are too busy with our own organizations to organize such collaboration ... It is extremely helpful when another group performs that service.”*

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First, collaboration requires time, energy and resources over and above normal operations and programs and therefore requires intentional structures, processes and funding. Moreover, many leaders said that some sort of

designated entity is needed to facilitate and manage the collaboration. One participant said, “We are too busy with our own organizations to organize such collaboration ... It is extremely helpful when another group performs that service, usually around a common area, such as water or climate change.” Another from the community development conversation put it this way: “I would like to see an organization that serves the backbone function, that finds a way to convene and work together beyond discussing abstract ‘should we’ or ‘how should we’ collaborate.”

Sometimes invitations from peer organizations are less effective (more on that below) whereas, as one person said, “a convener can get other people in the room.” But again, that convening entity needs to help sustain the work, as explained by another participant: “Facilitation and convening and group consensus building takes more time than any one organization can do on their

## FOUR CORE CHALLENGES TO COLLABORATION

1. Requires time, energy and resources over and above normal operations and programs and therefore requires intentional structures, processes and funding.
2. Needs to be supported but not primarily driven by funders and their agendas.
3. At the heart of collaborative work is relationship building and maintenance of trust, neither of which can be attained without conscious effort and allocation of time.
4. There are inherent power dynamics that can reinforce existing inequities or create new ones

own, especially without ongoing funds to do so. Funds, shared accountability, shared record keeping – all this takes time, energy and resources that are often not available.” Many arts leaders spoke of the need for a convening or backbone organization with additional resources to be a strong advocate for government policies and programs beneficial to the arts.

Second, collaboration needs to be supported but not primarily driven by funders and their agendas. The role of funders is necessary but complicated and thorny. As explained above, the work of collaboration requires dedicated funds. Moreover, funders can sometimes play a pivotal role by helping to convene agencies and maintain long-term momentum. Such efforts, however, are likely to go awry if funders force agencies to work together or push their own specific vision too hard. There seems to be a fine line in discerning when to play a more active role and when to recede into the background. Success is more likely if funders help nurture and grow existing efforts and relationships rather than try to aggressively catalyze something from scratch.

An arts leader described the dynamic this way: “Collaboration seems to be the main aim for foundations and funders – all with little understanding of the additional work that this requires from the participating organizations. Building a one-off collaboration just to secure funding – as it’s a ‘primary outcome’ required or strongly advised by the funder – has led to short-term successes for many but is damaging in the long run as those relationships are impossible to maintain with limited staffing and funding.” Many participants also noted that some grantmaking practices can incentivize competition rather than collaboration. As one environmental leader said, “We are all fighting for the same limited funding.” Another said more innovative thinking and collaboration is hindered, “Because we are each trying to stay in our lane and not compete directly with other organizations.”

Third, at the heart of collaborative work is relationship building and maintenance of trust, neither of which can be attained without conscious effort and allocation of time. One participant said that for many issues and problems where collaboration would be beneficial there’s, “No structured way to come together on a regular basis to build trust.” We heard from other participants that even when there are structures – such as regular meeting times – more intentional facilitation and dialogue might be required. In other words, people from different

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*“Few donors will pay for the time it takes to build the relationships and trust required to collaborate and there is a fear that if we take a risk through collaboration and fail that organizational reputation will suffer and funding will disappear.”*

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organizations might be cordial with each other but haven’t done the hard work of examining and working through underlying tensions that inhibit deeper collaboration. An environmental leader said, “We are often completely consumed by the

challenges of running our individual shops and struggle to find time to build effective collaborations. Few donors will pay for the time it takes to build the relationships and trust required to collaborate and there is a fear that if we take a risk through collaboration and fail that organizational reputation will suffer and funding will disappear.” As much collaborative work operates at the speed of trust, funders should consider providing support for relationship-building as part of collaborative efforts.

A fourth challenge that runs through every collaborative effort: there are inherent power dynamics that can reinforce existing inequities or create new ones. These power dynamics (alluded to in many of the quotations above) exist along multiple lines: between funders and grantees; between larger and more established

organizations vs. smaller and more grassroots ones. And they exist along broader societal lines, especially race, class and gender. One participant from an environmental organization said, “Few Dane County funders – at least to my knowledge – support organizations in convening roles or the kind of collaborative effort referred to as ‘collective impact.’” Even when they do, however, too often these “collective impact efforts perpetuate the funding of majority groups and organizations (white-led organizations or simply the largest group working on something, which doesn't necessarily equate to being effective), rather than creating space for smaller, newer, people-of-color-led organizations to develop their leadership around a program or issue area.”

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*Too often “collective impact efforts perpetuate the funding of majority groups and organizations (white-led organizations or simply the largest group working on something ...), rather than creating space for smaller, newer, people-of-color-led organizations to develop their leadership around a program or issue area.”*

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As noted at the outset, these four challenges – the need for designated resources, the thorny role of funders, the essential need for trust, and power dynamics – often are bound up together in tangled ways. This web of challenges – along with the

frustration and cynicism that can result – is on full display in the following survey response from someone at an arts organization:

You do a ton of work to establish a collaborative effort, particularly one that is inclusive, write extensive grants, and funders give a pittance that barely covers expenses, even when feedback and scores are very positive. You work hard to bring unconventional works and collaborate for educational purposes for the community and funders say it's not enough ... While the monetary side is essential, this is not how innovation works. The same organizations are funded at larger and larger amounts to fund programs for older white constituencies while small organizations with the same or sometimes more training, talent, or impact on the community, and often with a broader vision and an eye on the future, are consistently turned down or patted condescendingly on the head. So why bother with collaboration? Do all the extra work and get the same funding results? Yes, the altruistic side of us still does it because we know it's important. But when there's more work done and you're not rewarded monetarily, it leads directly to burnout.

## Charting a Path Forward

Despite these challenges, our community needs to continue to find ways to effectively and equitably collaborate. As participants made clear, many of the big challenges we face – including climate change, structural racism, opportunity gaps in education – require multiple organizations and constituencies to work together. Collaboration can take many forms and be understood through multiple frames, whether it's simply a joint project or more ambitious and complex phenomena such as collective impact initiatives, community organizing campaigns or broad social movements.<sup>21</sup> Regardless of the form, however, great care needs to be taken by nonprofits and grantees alike to navigate the challenges outlined above.

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<sup>21</sup> There is a wealth of practice-oriented research and literature within each of these frames for nonprofits and funders to utilize for thinking through how to support effective, equitable collaboration. Here are a few examples: Manuel Pastor and Rhonda Ortiz. "Making Change: How Social Movements Work and How to Support Them." Program for Environmental and Regional Equity at the University of Southern California. 2009. <https://dornsife.usc.edu/pere/making-change/>. Barbara Masters, and Torie Osborn. "Social movements and philanthropy: How foundations can support movement building." *The Foundation Review* 2, no. 2 (2010): 3. Craig McGarvey and Anne MacKinnon. "Funding Community Organizing: Social Change Through Civic Participation." Grantcraft. 2008. <https://grantcraft.org/content/guides/funding-community-organizing/>. Paul Schmitz. *Everyone Leads: Building Leadership from the Community Up*. (San Francisco: Jossey-Bass, 2012). Jennifer Blatz, et al. "Filling the Gaps in Collective Impact." *Stanford Social Innovation Review*. Sep. 11, 2019.

# EVALUATION

Fund and support meaningful and equitable evaluation and impact assessment that is most useful and relevant to those closest to the work.

There was broad interest among participants for building their evaluation and impact assessment capacity in meaningful and useful ways. People working for nonprofits in Dane County want to do good work and want to know their work is valuable, yielding real results, and bringing about genuine social or environmental change. They also want to know how they might do even better. As one person from a community development organization said of their conversation, they “appreciated discussion of potential funding streams to help nonprofits assess strengths/opportunities [of their programs].”

Participants also expressed frustrations with common forms and practices of evaluation and provided suggestions for how evaluation might be done in more meaningful, useful and equitable ways. Several people spoke of burdensome or redundant grant reporting requirements. For

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*Too often, the drumbeat for more evaluation has led to “expecting more than evaluation can deliver, high stake decision making that goes beyond the evidence, politicization and distortion of findings, misuse of evaluations, bloated rhetoric around accountability, huge expenditures on poorly done and useless studies ...”*

*- Michael Quinn Patton*

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example, it is not uncommon to input the same program data into multiple databases and generate multiple reports in different formats for each individual funder. A common database or reporting structure would be efficient and effective; it would also allow more time for impact evaluation of the work. One participant described the need for more training and capacity building to help them collect data that’s relevant to them and the people they work with, rather than just what the funder has requested or what they’ve tended to collect in the past - whether it’s useful or not.

Many participants also described the need to use tailored metrics and both quantitative and qualitative methods of collecting and analyzing data to capture the complexity of their work and communicate their impact in richer, more meaningful ways. Participants expressed a desire to collect data and conduct evaluations across the sector and collaborate on shared metrics and outcomes as appropriate.

Participants also emphasized that the most meaningful outcomes may vary widely based on context of the population engaged. For instance, for youth programs that are working with relatively engaged students, quantitative metrics related to academic improvement may be best for assessing program success. For other programs working with youth struggling with major trauma, nonacademic assessments of success may be more meaningful. Moreover, several participants

suggested carefully funding research and evaluation by external parties that might be useful for multiple organizations involved in similar work and can help facilitate learning and improvement.<sup>22</sup> Nonprofit staff and leaders may or may not have research experience and expertise, but they seldom have time to conduct their own in-depth research.

Whether the evaluation is conducted by internal organizational staff or external researchers it must be done in equitable, culturally relevant ways. Various people – especially leaders from out-of-school-time organizations – emphasized the need to include community members and youth in the evaluation process to ground-truth the results and ensure that the questions asked and data collected are non-exploitative. Furthermore, participants said that surveys, interviews, focus groups and other evaluation methods that engage youth need to be appropriate to their experience and perspective. The use of images or photographs might work better than text for some youth, especially younger kids. Ideally, youth can also be engaged as field researchers to assist with assessing programs.

These critiques of current evaluation norms and suggestions for better practices mirror wisdom and research findings from veteran experts in the field, as well as from cutting-edge approaches. As Michael Quinn Patton, a renowned evaluation scholar and practitioner has described, evaluation and impact assessment has moved front and center in nonprofit work, but it's often done in problematic ways. Too often, the drumbeat for more evaluation has led to “expecting more than evaluation can deliver, high stake decision making that goes beyond the evidence, politicization and distortion of findings, misuse of evaluations, bloated rhetoric around accountability, huge expenditures on poorly done and useless studies, and a likely decline in quality as demand has outstripped the capacity for high-quality supply.”<sup>23</sup>

Moreover, evaluative research – like many forms of research – has historically often been done by university researchers or well-paid consultants who extract data from communities to further their own purposes and offer findings that are inaccessible, unhelpful or even harmful, deeply biased or all of the above. The American Evaluation Association has created a set of standards that are intended to change this historical precedent. For instance, they emphasize “utility,” through which “program stakeholders find evaluation processes and products valuable in meeting their needs.” They also emphasize that evaluations should be not only

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<sup>22</sup> Creating a rich and strategic culture of learning is not just valuable for nonprofit grantees but it's also valuable for philanthropic foundations. See Jane Reisman, et al, “What Will it Take for Philanthropy to Learn?” The Center for Evaluation Innovation, October 2019. <https://www.evaluationinnovation.org/insight/what-will-it-take-for-philanthropy-to-learn/>.

<sup>23</sup> Michael Quinn Patton. *Utilization-Focused Evaluation*. 4th edition. (Los Angeles: Sage Publications, 2008).

“proper, fair, legal, right and just” but culturally relevant.<sup>24</sup> Organizations like The Equitable Evaluation Initiative are working to bring a new and more equitable paradigm into being by expanding “notions of validity, objectivity rigor, and to embrace complexity.”<sup>25</sup> Moreover, to build a field of equitable evaluation here in Dane County, nonprofit “clients” should play a critical role in the evaluation process themselves, as they are the most proximate to the work.

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<sup>24</sup> “The Program Evaluation Standards.” American Evaluation Association.  
<https://www.eval.org/About/Competencies-Standards/Program-Evaluation-Standards>.

<sup>25</sup> Equitable Evaluation Initiative. <https://www.equitableeval.org/>.

# CONCLUSION AND NEXT STEPS

Prioritize capacity building to improve the strength and reach of the nonprofit sector.

What then, are options for addressing gaps in capacity building for nonprofits?

First and foremost, we encourage fellow funders and nonprofit serving organizations to regard robust and sustained capacity building as an essential aspect of their portfolios. Capacity building is to the nonprofit world what infrastructure renovation and repair is to national security and prosperity. Just as crumbling bridges and roads need regular influxes of capital to withstand ongoing use and to perform safely and effectively, so too do nonprofit organizations need resources to upgrade technology, innovate and advance staff professional development. As such, we call on funders and nonprofit serving organizations to dedicate grant funding and long-term programming for organizational capacity building activities that are deemed most appropriate by the nonprofit itself (and sometimes identified in collaboration with trusted partners).

Second, we call on funders to collaborate in building and sustaining nonprofit infrastructure, rather than working in isolation. We recognize that each funder focuses on a specific set of organizations, programs or outcomes in their decision-making. By attending to the nonprofit sector as a whole, however, funders can work together to strengthen organizations of all kinds more efficiently and effectively and distribute funds more equitably.

Third, this research has indicated a consistent call for a nonprofit hub or center. The need for such a center is a primary opportunity for funders to collaborate on long-term nonprofit capacity building. A center would serve as a kind of “traffic control” arm for information, resources and collective initiatives. To create such a hub would necessitate dedicated personnel, funding, and time for relationship and trust building.

And fourth, we call on organizations serving nonprofits to also collaborate in developing low-cost, effective, innovative training programs and networking opportunities. Educational institutions, in partnership with community organizations, can craft meaningful professional development experiences for both virtual environments and in-person learning. Redundancy and duplication are not in the sector’s best interest. Collaboration will also increase the marketing reach when programs are offered, so that there is more equitable exposure to opportunities.

Why has this level of collaboration among funding agencies and institutions serving nonprofits not yet been realized? In some regards, these groups face similar challenges as those found in nonprofit organizations: Limited staffing resources, overwhelmed agendas and inadequate communication. Moreover, competitiveness can limit collective action toward shared goals at this level as well. How much better our community would be if these entities could further

collaborate to distribute responsibility for meeting the needs of the nonprofit sector.

We have highlighted specific themes in this report that participants emphasized throughout our research, and, once again, these themes are at the core of our recommendations:

- ❖ Develop and sustain robust peer cohort learning and longer timeframe professional development opportunities based here in Dane County.
- ❖ Establish and sustain a local nonprofit center or hub of practical information about what's going on in the nonprofit sector that is up-to-date and easy to use.
- ❖ Fund and support organizations led by people of color working on equity and assist white-led organizations in deeper transformations towards racial equity.
- ❖ Fund and support equitable collaboration and coalition-building around shared goals within and across sub-sectors.
- ❖ Fund and support meaningful and equitable evaluation and impact assessment that is most useful and relevant to those closest to the work.

### **Getting Started and Staying Committed**

Madison Community Foundation and UW-Madison Extension Dane County have already begun to take action in response to our findings. While these efforts are still in their nascent stages, we describe them here to help build momentum for addressing the gaps discussed in this report.

To meet the need for better information sharing, Madison Community Foundation has created directories of local resources including funders, professional development opportunities, consultants and contract services (such as accounting or human resources). These directories build on the work of Wisconsin Nonprofit Resources Group (WisNRG), and we hope this will be part of a larger campaign to create a more robust nonprofit center. In the meantime, however, we will manage these directories and keep them up to date.

Madison Community Foundation is also partnering with the Wisconsin Evaluation Collaborative (WEC) at UW-Madison to pilot an evaluation capacity building program in the Fall of 2021. The program will focus on potential MCF grantees, but some elements will be available to anyone in the community. WEC's approach to evaluation is dynamic and inclusive, defined as "a process where organizations and communities systematically reflect and learn together for the purpose of improving access, implementation, outcomes and impacts." The pilot will build the capacity of grantees to conduct rigorous, culturally responsive and equity-focused program evaluation and also involve technical assistance to funders to improve

our evaluation knowledge and processes. Nonprofits will self-select into tiers designed to meet organizations where they are and invite them into deeper engagement. The first tier will include webinars and workshops available to all; the second tier involves 1 to 1 consultation with nonprofit staff; and the third tier will engage a smaller set of organizational leaders and program managers in an in-depth peer learning cohort. If successful, this is the type of long-term capacity building that could be permanently integrated into the grantmaking of Madison Community Foundation and other foundations.

To meet the need for deeper and longer-term peer learning cohorts, UW-Madison Extension Dane County is launching a nonprofit peer learning program pilot in the Fall of 2021, building on efforts by other UW-Madison Extension staff throughout the state. The program will involve weekly sessions over four months, covering fundamentals of nonprofit management and emphasizing equity. Priority will be given to organizations that are specifically committed to working for social, racial, environmental, and/or economic justice. While educational content is provided to participants, peer learning is centered, and the experiences of nonprofit professionals is highlighted throughout. The program features video recordings of a diverse panel of experienced nonprofit sector leaders sharing their expertise.

The Madison Community Foundation and UW-Madison Extension Dane County are committed to a continued dialogue around the full set of recommendations in this report, and to continued efforts to improve the capacity building environment in Dane County. To this end, we will convene gatherings of both funders and organizations serving nonprofits to discuss the findings of this research. Our hope is that together we can create a roadmap to put in place the recommendations herein, in support of building a stronger, equitable and sustainable nonprofit sector.

# APPENDICES

## ACKNOWLEDGEMENTS

We first want to thank the many nonprofit professionals who participated in this research, offering their precious time and valuable insights. We tried our best to understand the complexity of their experience and accurately convey what they shared with us and their colleagues. We hope this report is part of ongoing dialogue and mutual learning and support.

A hearty note of appreciation goes out to Megan Betts, who served as an Extension intern in the summer of 2019 and helped get the research off the ground, served as a diligent notetaker at the out-of-school-time and environmental gatherings, and co-wrote with us the out-of-school time preliminary report with a keen sociological eye.

We are very grateful to the many other facilitators who provided their time and thoughtful approach to listening and group dynamics: Nathan Beck, Micah Kloppenburg, Mindy Habecker, Aaron Fai and Sherry Wagner-Henry. We offer extra thanks to facilitator Nathan Beck of Madison-area Out-of-School-Time (MOST) for helping to spread the word about our research and make the first community conversation happen. We are also thankful for the careful work of our notetakers: Joe Muellenberg, Lisa Curley, Michelle Scarpace, Andrea Nilsen, Zoey Yandell, Paser Yang, Areli Estrada, Liz Teubert and Merry Farrier-Babanovski. Andrea Nilsen, a colleague at Madison Community Foundation and event planner extraordinaire was also instrumental in helping organize the in-person conversations. Thanks to Old National Bank Foundation, who provided their community room and refreshments for one of our community conversations.

This research was informed by a variety of people who have been working in the nonprofit world for many years, either in funding or capacity building roles. We are grateful for informative conversations with Kathy Martinson, Betsy Parker and the educators of SEEM, Karin Wolf, Mark Fraire, Ann Katz, Alnisa Algood, Cheri Dubiel and Judy Young.

Lastly, we want to thank our own organizations and colleagues at Madison Community Foundation and UW-Madison Extension Dane County for supporting this project, which has been a wonderful collaborative endeavor. Special thanks go to Tom Linfield for championing the vision of the work, assisting with much of the early planning and logistics, and inviting participants throughout.

## METHODS

As mentioned in the body of the text above, our primary method of research was facilitating focus groups – what we called “community conversations” – with nonprofit executive directors and program managers. We held four of these community conversations between May 2019 and March 2020, each involving organizations from specific nonprofit fields: youth out-of-school-time, environment, arts and community development. These four fields represent Madison Community Foundation’s grantmaking focus areas, but also overlap significantly with the work of UW-Madison Extension Dane County.

Organizations were invited to participate using the “snowball method” – beginning with those professionals with whom we had a relationship or knowledge of and asking them to suggest others to invite.

### VIEW THE PRELIMINARY REPORTS

You can view the preliminary reports for the arts, environment, out-of-school-time and community development sectors, detailing the specific sector dynamics and needs at [www.madisongives.org/strongernonprofits](http://www.madisongives.org/strongernonprofits)

Three of the conversations were held in-person and the fourth (for community development) was held virtually over three separate sessions because of the onset of the COVID-19 pandemic. We sent out a survey to all invited participants prior to each meeting to help us understand the salient issues and try to ensure the conversation was engaging for everyone involved. In-person meetings involved 20-30 people (with some organizations having two representatives). The community development virtual meetings were smaller, involving five to seven people. The in-person meetings lasted for approximately 2.5 hours, the bulk of that time involving small group discussions with an assigned facilitator and notetaker for each group. The virtual meetings lasted for approximately 1.5 hours. Some of the people we invited we not able to attend but wanted to participate and we instead met and interviewed them separately, either in person or over the phone, taking notes each time.

After each session we sent a brief evaluation form asking for feedback on the session. We then analyzed the survey responses, notes from the conversations, and evaluation responses for themes using MAXQDA, a qualitative coding software, and then wrote a preliminary report for each session. We sent each report to all the participants and encouraged feedback.

This final report is the product of synthesizing findings from the four preliminary reports and re-examining survey and evaluation responses and original notes from the community conversations as needed.

## LIST OF PARTICIPATING ORGANIATIONS

1000 Friends of Wisconsin Land Use Institute	Madison Audubon Society
Aldo Leopold Nature Center	Madison Ballet
Arts & Literature Laboratory	Madison Children's Museum
Arts for All Wisconsin	Madison Circus Space
Artworking	Madison Opera
Bach Dancing & Dynamite Society	Madison Youth Choirs
Bayview Foundation	Maydm
Benedictine Life Foundation	Meadowood Health Partnership
Center for Community Stewardship	Mellowood Foundation
Center for Resilient Cities	Mentoring Positives
Centro Hispano	Middleton Outreach Ministry
Chazen Museum of Art	Midwest Environmental Advocates
Children's Theater Madison	Madison Museum of Contemporary Art
Clean Lakes Alliance	Madison Organizing in Strength, Equality, and Solidarity (MOSES)
Clean Wisconsin	Movin' Out
Common Wealth Development	Madison School and Community Recreation (MSCR)
Community Groundworks	Nehemiah Center for Urban Leadership Development
Community Immigration Law Center	Olbrich Botanical Society
Children's Theater of Madison	People Building Opportunity through Grace and Action
Dane Arts Mural Arts	Positive Women for Change
Dane County Library Services	RENEW Wisconsin
Dane County Timebank	River Alliance of Wisconsin
East Madison Community Center	Sierra Club – Wisconsin Chapter
FEED Kitchens	Simpson Street Free Press
First Tee of South Central Wisconsin	TAPIT/new works
Forward Theater Company	The Bubbler at Madison Public Library
Four Seasons Theater	The Nature Conservancy
Gathering Waters	The Road Home Dane County
Girl Scouts of Wisconsin – Badgerland Council	Urban League of Greater Madison
Girls Rock Camp Madison	UW-Madison Community Arts Collaboratory
Goodman Community Center	Vera Court Neighborhood Center
Groundswell Conservancy	Wisconsin Conservation Voters
Ice Age Trail Alliance	Wisconsin Land & Water
Kanopy Dance Theatre	Wisconsin Youth Company
Kathie Rasmussen Women's Theatre	Wisconsin Youth Symphony Orchestras
Latino Academy of Workforce Development	YWCA of Wisconsin
Li Chiao-Ping Dance	
Lussier Community Education Center	

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Published September 2021 by Madison Community Foundation

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