



**NONPROFIT SECTOR
WORKFORCE COALITION**

EVALUATION REPORT

APRIL 2007

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EXECUTIVE SUMMARY

An NYU evaluation team was commissioned by American Humanics to evaluate stakeholder perceptions, internal communications, governance and sustainability of the recently launched Nonprofit Sector Workforce Coalition as well as its Initiative for Nonprofit Sector Careers. Additionally, the evaluation team was asked to conduct a study to analyze how these projects have been covered in the media.

To conduct our evaluation, the evaluation team administered online surveys to both Coalition members as well as a sample of organizations that declined participation in the Coalition. To complement the mostly quantitative data provided by these surveys, 30-minute phone interviews of the Coalition's Steering Committee members were completed to yield more detailed, qualitative feedback.

EVALUATION OF THE NONPROFIT SECTOR WORKFORCE COALITION

Perceptions

General feedback from both the survey of Coalition members and the phone interviews of Steering Committee members suggest that the Coalition has indeed defined goals that are important to the nonprofit sector, and that this is the main reason that participating organizations have chosen to be part of this effort. Many members agree that the nonprofit sector needs to think strategically and collectively about the next generation of its workforce and expressed an appreciation for the platform of a national Coalition to address these issues. However, many believe that a clearer action plan is needed and that the Coalition's current agenda needs to be refined.

Methods of Communication

Although natural for any new entity, the Coalition is still experiencing difficulty developing a coherent, unified voice and streamlining existing communications into concrete actions. Members express that developing an effective communication methodology for both internal as well as external stakeholders should be a priority for the Coalition.

Sustainability

Members generally agree that the Coalition, as currently constructed, is sustainable for at least the short to medium term. However, there is some evident concern about sustainability in the long term, particularly among members who do not feel that the Coalition is truly making progress on its goals.

Coalition Leadership and Governance

On the whole, Coalition members hold the work that American Humanics staff has put into this effort with high regard, often singling out Stephen Bauer as a great contributor. However, many

have expressed concern that because American Humanics has been the forefront facilitator of the Coalition, there is a general lack of ownership in the process and thus, many organizations are reluctant to step up into lead roles.

Non-Member Feedback

Non-members overwhelmingly agree that the Coalition's goals are consistent with those of their organizations and the majority of those surveyed stated that they would reconsider membership in the Coalition. The membership fee, staff availability and time conflicts are among the most important factors that prevented organizations from joining the Coalition.

Media Study

A media study including online research of members' websites and key searches related to both the Coalition and the Initiative showed that neither is mentioned in the media enough to raise the profile of the Coalition, strengthen awareness of nonprofit sector workforce issues or increase participation at the National Dialogues. Though the Coalition was recently profiled in *The Chronicle of Philanthropy*, there have been few additional mentions of the Coalition and its activities in the media.

SUMMARY OF RECOMMENDATIONS

Based on its findings from the surveys and interviews, the evaluation team recommends that the Coalition:

- (1) Plan for specific time(s) and forum(s) led by a moderator for presenting ideas and raising concerns discussed in this evaluation;
- (2) Undergo a strategic planning or chartering process to reach a consensus on how to proceed further;
- (3) Define the specific roles and responsibilities of Steering Committee and at-large members;
- (4) Disseminate information discussed in Steering Committee meetings to at-large members;
- (5) Compose minutes and agendas that specifically outline agreed upon action steps from each meeting;
- (6) Specifically discuss recruitment goals and strategies;
- (7) Create a formal invitation packet that includes a list of resources to help pay for Coalition membership dues; and
- (8) Develop a comprehensive communications plan.

INTRODUCTION

EVALUATION OVERVIEW

American Humanics requested that our team of graduate students (the evaluation team) from New York University's Robert F. Wagner School of Public Service conduct an evaluative study of the Nonprofit Sector Workforce Coalition (the Coalition). The purpose of the evaluation is to provide American Humanics and members of the Coalition with a snapshot of the Coalition's current status and offer objective recommendations for proceeding further. The evaluation covers the following major issues: (i) *current activities and involvement*; (ii) *benefits of membership*; (iii) *communication*; (iv) *sustainability*; and (v) *representation in media*. Some of the main research questions we asked include:

1. What are Coalition members' general perceptions of the Coalition's mission and accomplishments?
2. How effective are communications within the Coalition and between Coalition members and American Humanics staff?
3. What are Coalition members' feelings about the long-term sustainability of the Coalition?
4. What are the main strengths of the Coalition and what areas need improvement?
5. Why have organizations declined Coalition membership?
6. Where and how often has the Coalition been mentioned in the media?

The study also included a comprehensive evaluation of the usefulness and impact of American Humanics' Initiative for Nonprofit Sector Careers (the Initiative) through activities such as the National Dialogues and the literature review and bibliography entitled, "Workforce Issues in the Nonprofit Sector: Generational Leadership Change and Diversity."

CLIENT BACKGROUND

Based in Kansas City, Missouri, American Humanics is a national alliance of colleges, universities, and nonprofit organizations. Its mission is to educate, prepare, and certify professionals to strengthen and lead nonprofit organizations. American Humanics operates several programs to further this mission, including its Nonprofit Management Certificate Program, which trains college students to work in the sector, and the American Humanics Management Institute, an educational symposium.

American Humanics' Initiative for Nonprofit Sector Careers is a program designed to recruit, prepare, and retain the next generation of nonprofit sector leadership. After a series of national dialogues held in 2004 and 2005, the Initiative for Nonprofit Sector Careers was launched to identify the core issues affecting the nonprofit workforce. Early steps taken through the Initiative included commissioning research, partnering with other organizations on research initiatives,

publishing a series of guidebooks on nonprofit sector careers, convening additional national dialogues, and developing training programs for offices of career service professionals at colleges and universities across the country.

COALITION BACKGROUND

In early 2006, American Humanics launched the Nonprofit Sector Workforce Coalition in response to the research of the Initiative and the workforce issues raised through its National Dialogues series. At the time of this evaluation, the Coalition is comprised of nearly sixty nonprofit organizations, associations, foundations and academic institutions. The Coalition focuses on issues affecting the nonprofit sector in two specific areas: (1) addressing student debt as a barrier to entering the nonprofit sector workforce; and (2) working to create a more racially/ethnically diverse nonprofit workforce.

EVALUATION METHODOLOGY OVERVIEW

In December 2006, Coalition members were sent an online survey to obtain feedback regarding how the Coalition has been operating to date. A similar online survey was also distributed to organizations that have turned down Coalition membership in order to assess why they declined participation. In addition, telephone interviews were conducted with Coalition Steering Committee members to obtain in-depth, qualitative opinions that would complement data from the online survey. The evaluation team also conducted a media study to determine how the Coalition and Initiative have been covered by the media, and to what extent member organizations publicize their Coalition membership on their websites. For detailed information about the evaluation team's methodology, please see Appendix IV on page 69.

EVALUATION TEAM

The evaluation team consists of five New York University graduate students from the Robert F. Wagner School of Public Service. The combined academic and professional backgrounds are varied and include experience in research, statistical analysis, consulting, and nonprofit management. The Wagner School of Public Service also provided the team with project oversight and guidance.

EVALUATION OF THE NONPROFIT SECTOR WORKFORCE COALITION

In conducting this evaluation of the Nonprofit Sector Workforce Coalition, it was important for the evaluation team to consider the relatively short amount of time that the Coalition has been in existence. Therefore, rather than conduct an impact evaluation of the Coalition's accomplishments, the evaluation team was purposeful in creating a study that would instead analyze the process by which the Coalition came together and now operates. To that end, the team gathered information regarding members' current *perceptions* of the Coalition including whether its goals are *realistic and attainable*; the *level of activity and involvement* of its members; *methods and effectiveness of communication* between Coalition members and American Humanics; and whether members believe the work of the Coalition is ultimately *sustainable*. In addition to these four categories identified by the evaluation team, the issue of *Coalition leadership and governance* also emerged from the analysis.

While this section of the report is broken down to reflect these issues, the reader should note that these categories are strongly interrelated. For example, one's perception of the sustainability of the Coalition may be closely tied to how confident one is in its leadership. Ultimately, as reflected in other areas of this report, American Humanics and the members of the Coalition are asked to view the report, and particularly the contents of this section, as an opportunity to spur dialogue regarding future directions of the Coalition. Further, in the absence of an impact evaluation, the evaluation team hopes that the Coalition will view these findings as a baseline for identifying measurable goals over the next one to three years.

Additionally, it is important to emphasize that this report was conducted by a disinterested third party that holds no direct stake in how data should be interpreted or how recommendations should be implemented. The report's findings have been produced independently and thus provide unbiased information for American Humanics and the Coalition.

Lastly, this report summarizes and highlights key findings from our online survey and phone interviews. The full results from our Coalition member survey are compiled in Appendix I, which can be found on page 29. Coalition members from 35 out of 57 organizations responded to the survey, for an overall response rate of 61%. Of the total survey respondents, 11 are Steering Committee members out of a total of 25, which translates into a 44% response rate. Twelve Steering Committee members participated in the telephone interviews, a response rate of 48%.

PERCEPTIONS

The general feedback from both the survey of Coalition members and the phone interviews of Steering Committee members is that the Coalition has indeed defined goals that are important to the nonprofit sector, and that this is the main reason that participating organizations have chosen to be part of this effort. Many agree that the nonprofit sector needs to think strategically

and collectively about the next generation of its workforce and expressed an appreciation for the platform of a national Coalition to address these issues. According to one member:

The Nonprofit Sector Workforce Coalition is one of the most important initiatives in the nonprofit sector. It is well led and I believe it will result in concrete action to make the nonprofit sector more aware of and better prepared to act on workforce issues.

“The Nonprofit Sector Workforce Coalition is one of the most important initiatives in the nonprofit sector.”

While members connect with the important goals of the Coalition, there are mixed opinions regarding how effective the Coalition has been in translating its goals into concrete action.

One member states:

We haven’t reached our overall goals yet, obviously, but in terms of the action steps that each committee has set, every meeting there seems to be progress and the objectives are moving forward on our conference calls.

On the other hand, although 74% of all survey respondents believe that ideas proposed during Coalition meetings and conference calls are presented effectively, less than half of survey respondents feel that ideas are then translated into action items. Furthermore, while 67% of respondents report that they find value in receiving e-mails that prompt their organization to take action, fewer have actually implemented any of the suggested action items.

One survey respondent takes a practical approach in explaining why action items are often difficult to implement:

Ideas proposed during Coalition meetings are presented effectively:

 **74% agree**

Ideas proposed during Coalition meetings are effectively translated into action items:

 **48% agree**

The reason for non-participation in requested actions (sending letters, attending meetings) is that too little notice is often given for me to make time in my schedule. With more notice to participants (more than a few days), perhaps more could get done and I would be able to participate more actively.

Another member also reflects on the participation of Coalition members:

There need to be greater expectations. When you create a wide tent with low expectations of being connected sometimes not a whole lot happens because being a member doesn’t really mean anything. So I think there needs to be a greater expectation of what they want people to do.

This sentiment about defining expectations is considered even further by another member:

I think that what the Coalition has done is gotten people to sign on and say this matters. When you say people are members and that they represent something, what does it mean to say you

represent something? There's almost a sense of 'Well, this is a way to clear my conscience so this is done' and now we can say 'we care about diversity,' 'we care about student debt' and this absolves us of other stuff.

"We're not really targeting the big issue, which is recruiting many more people to careers in the nonprofit sector."

Members of the Coalition have differing views about the specific action items undertaken by the Coalition thus far. From the survey, although 97% of the respondents believe that student debt is an important issue for the Coalition to address, only 48% agree that the Coalition successfully addresses this issue. Likewise, 100% of respondents believe that improving the diversity of the nonprofit sector workforce is an important issue to address, but only half believe that the Coalition successfully addresses it.

Many Steering Committee members also acknowledge that the Coalition is still in a nascent stage. Some feel, however, that a more strategic and focused direction is needed to bring about change in those two areas. One Steering Committee member states:

I think the two issues [of student debt and workforce diversity] are perfectly valid issues. My concern is whether there is anything tangible [the Coalition] can show from those issues.

Another Steering Committee member is concerned that:

We're not really targeting the big issue, which is recruiting many more people to careers in the nonprofit sector. We have two tactics [student debt and workforce diversity]. We don't have a strategy. To quote Emeril [Lagasse], 'we've got to kick it up a notch.' We've got to take the Coalition up a level to the big picture strategy level.

Other Steering Committee members, however, spoke very highly about what the Coalition has achieved thus far:

I think the Coalition has been successful in achieving its agenda; they have been very focused. This is an issue that could be very broad and they have done a good job in staying focused on the core areas that they are addressing.

Another member agrees:

They've made it simple. It's very difficult for an organization to attack 20 things. We've narrowed it down to two areas of focus and I think we have concrete plans in both.

A few members commented specifically on the work of the two Coalition subcommittees. Regarding the diversity effort, one member feels that:

The diversity committee is still really struggling to figure out how they can make an impact.

Workforce diversity in the nonprofit sector is an important issue for the Coalition to address:

 **100% agree**

The Coalition successfully addresses the issue of workforce diversity:

 **50% agree**

This Steering Committee member then described how the Diversity Committee is working on utilizing Guidestar.org as a central place for all nonprofit organizations to take the pledge for workforce diversity, as the website has become a trusted and recognized resource in improving the transparency and accountability of the sector. This member feels action-oriented items like this are key for the Coalition to advance its agenda.

Another member expresses concern about the Coalition’s definition of diversity:

I don’t think we have a clear definition of what diversity is, or whom the word diversity applies to when it is discussed on the Steering Committee. I’m not sure if the Coalition simply hasn’t done a good job defining what they mean by diversity, or whether their definition keeps changing.

Regarding the student debt effort, one member comments:

People are going to sign up on a piece of paper saying that student debt matters. Whether there’s something real that’s going to happen as a result of that is always a question.

Some members interviewed have specific concerns about whether student debt and workforce diversity should actually be the two core working goals of the Coalition. One states:

I feel like a lot of people may not be completely inspired by student debt and diversity.

Another member echoes this sentiment:

I’m a little torn because I feel that student debt and workforce diversity are very important issues but that can’t be all the universal space in the nonprofit sector workforce.

If existing members do not uniformly endorse the overall goals and major initiatives of the Coalition, this may hinder the advancement of the Coalition’s agenda and prevent other organizations from joining.

“Student debt and workforce diversity are very important issues but that can’t be all the universal space in the nonprofit sector workforce.”

When asked the survey question, “*What issues, other than workforce diversity and student debt, should the Coalition address?*” respondents answered: competitive compensation strategies, nonprofit sector leadership transition as affected by the upcoming baby boom retirement wave, educating college students about public service employment opportunities, and employee retention. Still, as was reflected in the phone interviews, several survey respondents are aware of the effects of taking on too many issues:

Student debt as a barrier to entering the nonprofit sector is an important issue for the Coalition to address:

 97% agree

The Coalition successfully addresses the issue of student debt:

 48% agree

Mission creep is a serious issue. There are many good causes, but we cannot address them all.

Another member agrees:

The issue may be less about having a large number of issues and more about a narrow focus with some measure of success.

One member feels that the issue is not in too many or too few issues, but in focusing on a functioning broader strategy:

We need to catalyze [members] around the big picture for which they joined the coalition. I really do think our big challenge is to get folks to think much bigger. To the Coalition's credit, it's really built upon the retreat that helped launch it but it's been focusing on these two specific tactics and not about the big picture.

In general, data from the survey and feedback from phone interviews show that there is no clear consensus on whether or not the Coalition's goals are too broad or too narrow. However, there is clearly a desire for a more direct action plan derived from the two core issue areas and/or a re-examination of the two issues areas.

In addition, whether or not members believe that the work of the Coalition thus far has been successful, all agree that a Coalition is an appropriate medium or framework for discussing the issues of nonprofit workforce development. The survey reports that 86% of members have gained useful information through their participation in the Coalition. In an open-ended survey question about what specific benefits members gain through the Coalition, 17% report that the Coalition has provided their organizations with a vehicle to impact the nonprofit sector, 23% like receiving information and research about the issues; and 37% report appreciating the opportunity to build connections with other like-minded organizations.

Regarding the networking opportunity that the Coalition provides, one member states:

[I] haven't really met anyone through the Coalition other than the [organizations] I already worked with.

On the other hand, 28% of survey respondents report having created a formal partnership with another organization as a result of their membership in the Coalition.

One member expresses this sentiment:

A Coalition is a good medium or framework to discuss the issues of nonprofit workforce development:

 **100% agree**

I have gained useful knowledge as a result of my participation in the Coalition:

 **86% agree**

I recognize that by doing this work that there are people you meet. There is value that you will be meeting people who you may find ways to work with too.

Another member further emphasizes the benefit of networking on a national level:

Having a national perspective and being able to be close to some of the leaders of the field that are also on the Steering Committee is very helpful for keeping me abreast of what's happening and I have been able to transfer some of that knowledge to my board.

METHODS OF COMMUNICATION

Given the feedback from phone interviews and survey data, the Coalition faces a challenge in developing effective communication as well as a coherent, unified voice. The primary methods identified for internal Coalition communication include conference calls, e-mails and meeting in-person at national conferences. While 81% of all survey respondents believe that the Coalition initiates an appropriate amount of conference calls, this opinion diverges sharply depending on whether one is a member of the Steering Committee. According to the survey, 19% of at-large survey respondents believe that there are too few conference calls as opposed to 0% of Steering Committee members and 20% of Steering Committee members believe that there are too many as opposed to 0% of at-large members. One Steering Committee member reports that:

It's tough to do any community building when the focus is on doing conference calls.

The Coalition initiates too few conference calls:

 **19% of at-large members agree**

The Coalition initiates too many conference calls:

 **20% of Steering Committee members agree**

However, another Steering Committee member indicates that the frequency of conference calls is:

...about right. We let people know well ahead of time when scheduled conference calls will take place, but we don't communicate as effectively as we might. [However], conference calls are always productive and we always try to stay on task, which can be difficult to do.

Generally, telephone interviewees did comment that more in-person meetings are needed and necessary in order to maximize effective communication.

One Steering Committee member explains how in-person meetings prove valuable:

It can be difficult when a group only has conference calls, so I think it was good that there was the national meeting, allowing people to get together face-to-face to speak. I'd like to see that kind of personal interaction continue. It is necessary to truly advance our agendas.

Another interviewee further highlights the benefits of in-person meetings:

Minneapolis was a unique opportunity to meet in person. I think something different happens when you can meet in person.

Even with various means of communication, some telephone interviewees expressed frustration with the challenge of advancing the Coalition’s mission due to lapses in communication within the group, particularly with new members:

“Minneapolis was a unique opportunity to meet in person. I think something different happens when you can meet in person.”

When we met in Minneapolis, I thought there was going to a different outcome—firming up the mission and handing out roles and responsibilities—and when we got there, we were really starting from square one. Some people clearly did not understand why we were there and others were new. Each time this happens, we alter the understanding of the mission. If a new member is vocal, there is an effort to incorporate their concerns into the agenda. We’re not getting the traction we otherwise might.

In a similar vein, another member explained:

There is a lot of process stuff which is important to some folks, but I’m not sure which ones. It’s hard with a coalition; you need people to feel like what they’re doing is recognized. And then there’s sort of the process question about how are we going to run the Coalition.

Communication with Steering Committee members occur at just the right rate:

 **90% of Steering Committee members agree**

Communication with Steering Committee members occur too infrequently:

 **80% of at-large members agree**

Overall, feedback regarding the internal communications among American Humanics, the Coalition and Steering Committee members is positive. The survey responses show that 61% of members agree that the Steering Committee is responsive to the needs of their organization. However, Steering Committee members themselves are more apt to agree with this statement than at-large members (67% versus 56%). This may have to do with the pace of internal communications as 90% of Steering Committee survey respondents believe that their communication with other Steering Committee members happens at just the right rate, whereas 80% of at-large survey respondents report that their communication with the Steering

Committee occurs too infrequently. To put this into perspective, 71% of at-large survey respondents report that they speak with Steering Committee members an average of less than once per month, whereas all Steering Committee members report speaking to one another at least 1 to 2 times per month.

With regard to the appropriate frequency of communication with American Humanics, again there is a discrepancy between Steering Committee and at-large members. According to the survey responses, 100% of Steering Committee members feel that their communication with American Humanics occurs at just the right rate, but 44% of at-large survey respondents think that their communication with American Humanics occurs too infrequently. Again, to put these figures into perspective, 88% of Steering Committee survey respondents report the frequency of their communications as occurring 1 to 3 times per month and 77% of at-large survey respondents report speaking with American Humanics 0 to 1 time per month.

SUSTAINABILITY

Members of the Coalition generally agree that the Coalition, as currently constructed, is sustainable for at least the short to medium term, with 71% of survey respondents agreeing that furthering the Coalition's goals is considered a long-term priority for their organizations. However, there is a discrepancy in responses between Steering Committee respondents and at-large respondents. While 90% of Steering Committee respondents agree that furthering the Coalition's goals is a long-term priority, only 61% of at-large respondents agree.

One Steering Committee member connects the Coalition's sustainability to external societal factors:

I think the Coalition could exist as long as workforce development for the nonprofit sector remains an important topic. Since the nonprofit sector is far behind the for-profit sector and federal government...it's going to take a while to close the gap. The Coalition should be around for five to ten years at a minimum.

"I think the Coalition could exist as long as workforce development for the nonprofit sector remains an important topic."

Several members express concern that the Coalition will only maintain support from its members if it can translate its goals into tangible results:

As long as [the Coalition] continue[s] to exist we would be involved with them. But in order for us to truly remain engaged, and would be willing to put in a significant amount of staff time and financial resources behind the effort, I think they need to keep meeting regularly, setting up ambitious goals and agendas, and pursuing them in a very action-oriented fashion. It should be a lot more than just organizations sitting around and just talking about issues and I think that's what they're struggling with right now. It seems as though we spend a lot of time just sitting around spinning our wheels just trying to figure out how to be a coalition.

Additionally, some Steering Committee members feel that the Coalition is not truly representative of the nonprofit sector—focusing its membership and recruitment on large institutions to the exclusion of smaller organizations.

Coalition membership is more homogenous in terms of the work they do, and not broadly representative of the nonprofit sector because it doesn't include the smaller nonprofits, which

make up the majority of the sector. This is an issue if we don't have a mechanism to get direct input from those who make up the majority of the sector in terms of what issues they confront in hiring, recruitment and training of young professionals and then the sustaining of these young professionals in the field.

In contrast, one member has reservations about the effect growth may have on the Coalition's ability to advance its agenda.

I think [membership] could be better in terms of diversity, and I think diversity is always a good thing, but that'll just make everything that much harder to come to consensus around and everyone will have very different opinions about everything in order to get things done. It might be better to start on a more manageable scale and I think the size that they are now and the diversity that they have now is right about where they should be.

Several Steering Committee members simply state that they have never been asked to recruit other organizations to join the Coalition, which would publicize the Coalition, improve membership, and ensure further sustainability.

Some Steering Committee members are concerned with the Coalition's leadership and governance as a barrier to sustaining the Coalition. They question the Coalition's reliance on American Humanics' leadership:

“I think that's the single biggest thing – to make people feel as though there's some ownership of this.”

It's a question of whether there's a way to have more people take over more elements of this work. Otherwise it's just a notion that it's American Humanics' project. It's easy to say there's no reason to be involved. I think that's the single biggest thing – to make people feel as though there's some ownership of this. The question is whether or not [American Humanics] want[s] to have a separate entity go and represent the Coalition that's not necessarily tied to American Humanics. But then again that's that whole branding issue of whether this thing exists independent of them or not and what's the long term plan for that.

One Steering Committee member suggests that the Coalition should move towards hiring an Executive Director independent of American Humanics to provide dedicated oversight and help ensure its long-term viability.

Any group like this needs some leader that should be full time with organizational and institutional support behind [him or her]. If American Humanics were taken out of the picture, in order for this Coalition to be truly successful we should hire an Executive Director and start an organization. I think that's the only way for this Coalition to be sustainable, otherwise busy CEOs and other senior executives are not going to find the time to really move things forward.

The concern regarding the lack of time CEOs have to devote to Coalition-related activities is supported by much of the survey data. In fact, 89% of all survey respondents report spending fewer than five hours a month on Coalition specific tasks and of that number, 36% report spending less than one hour.

Only 25% of at-large survey respondents report that their executive directors participate in Coalition activities and only 16% of all survey respondents report that at least one board member participates in Coalition activities. The Coalition lacks tangible support from the top management of its members, despite the fact that 59% of all survey respondents report that their organization's management considers Coalition participation a priority.

The dearth of participation is not isolated to nonprofit management. Only 50% of at-large survey respondents report passing Coalition materials onto other employees at their organization. One interviewee states outright:

We use the research put out primarily for framing the broader issues. The information is not really discussed with our staff.

One Steering Committee member relates how important the dissemination of information is:

I think one of the things we've discovered is we can get representation from organizations that are very interested in these issues. But we can't gauge how much is trickling down through their own organization or is it just one highly committed individual on the Coalition. We need to think about how to track this.

Our organization intends to renew its Coalition membership:

 **92% agree**

Coalition membership dues are affordable:

 **44% agree**

Another practical challenge to the Coalition's sustainability is its members' ability to continue paying membership dues. Fortunately, 92% of survey respondents indicate that their organization intends to renew its membership for the next year. The financial commitment itself does not appear to be much of a limiting factor to participation even though only 44% of all survey respondents feel that annual membership dues are affordable. On the other hand, 60% of respondents were either unsure or will not be able to pay membership dues over the next three years.

One Steering Committee member feels more financial transparency may improve organizational commitment to the Coalition:

I think there could be an issue of people continuing to pay their dues if they sense there's nothing going on. There hasn't been a budget for instance that has been shared with people in terms of what in fact are the costs.

The overall sentiment is that the mission and work of the Coalition supersede any possible organizational strain:

Furthering the Coalition's goals is considered a long-term priority for my organization:

 **71% agree**

My organization's management considers Coalition participation a priority:

 **59% agree**

If we can use the information to help our members deal effectively with their challenges, then we consider our membership in the Coalition to be worth the financial and time commitment.

LEADERSHIP AND GOVERNANCE

On the whole, Coalition members hold the work that American Humanics' staff members have put into spearheading this effort with high regard, often singling out Stephen Bauer as a great contributor. However, many have expressed concern that because of American Humanics' facilitation, there is a general lack of ownership in the process and reluctance for members to step up into a lead role. One Steering Committee member identifies a core leadership challenge for American Humanics:

I think American Humanics is stuck between hoping that the Coalition will kind of find a voice and wanting to suggest a voice but is getting some critique for being too directive.

Other Steering Committee members are more concerned about the challenge of ensuring proper leadership from within the Coalition and how that affects members at-large:

Beyond there being a Steering Committee, I couldn't really tell you who the leaders are. It's primarily led by American Humanics staff. There's really no governance structure that's very clear. That causes me some concern. To me, that says that the degree of ownership is severely limited.

Another interviewee reiterates this sentiment:

There are no officers of this thing. If I was going to call the chair right now, I wouldn't know who to call. I'm not aware of any actual leadership of the Steering Committee. And with any coalition, it limits the degree of ownership of the participants—it could use some structure.

One member expresses concern for identifying leadership from within the Coalition members and recalls:

In the national meeting they had in Minnesota, there were multiple parties contending and fighting with each other *not* to be in the leadership role. Everyone was looking around the room for who was heading this.

“In the national meeting they had in Minnesota, there were multiple parties contending and fighting with each other not to be in the leadership role.”

While there is no clear consensus on who should be assuming the Coalition's leadership role, there does seem to be agreement among members that such a role is needed. Members gave suggestions to fill the leadership gap, which include creating a Coalition chairperson that can rotate on an annual or biennial basis and hiring a full-time executive director to lead the Coalition. Others, however, believe that this should remain part of Stephen Bauer's job and should be facilitated by American Humanics' staff. According to one interviewee:

Steve Bauer does a great job in organizing the calls and sending out agendas in advance and follow-up notes.

Overall, Coalition members are positive regarding the facilitation of the Coalition with 90% of all survey respondents agreeing that American Humanics handles the administrative functions of the Coalition well. Nevertheless, some members feel that the decisions of the Coalition should come from within the Coalition, rather than from American Humanics. Several interviewees express concern that too much direction from American Humanics might lead members to put in less effort and subsequently become less engaged in the Coalition's agenda.

I think there remains the issue that people don't really have an expectation of what they're supposed to do. There's a sense that you hear from [American Humanics] and plan a time for a phone call. If you want to expect more from [members] then you've got to find ways of sharing more of that information and have better communication. But right now it's a very small number of people who are doing any real work. Members just wait for Steve Bauer to initiate communication.

“I feel often on the Steering Committee we sit around and have discussions, not play a leadership role.”

Many members are concerned about the role and purpose of the Steering Committee:

I don't actually feel like it is a Steering Committee. I feel like it is more of a facilitation or coordinating committee. When I think of steering committees, I think of people who are most responsible for ensuring the agenda is reached. I feel often on the Steering Committee we sit around and have discussions, not play a leadership role.

Another Steering Committee member reaffirms this notion:

Right now, the Steering Committee is just more of a discussion society for people who are more engaged rather than a body to push the agenda forward.

Members also express concerns regarding the size of the Steering Committee:

I don't think we should have a Steering Committee of 30 people. Ideally it would be between 10 and 15 and I think that the current Steering Committee needs to be changed to reflect organizations that truly are committed to the goals.

The Coalition must establish strong leadership directed at encouraging further participation and engagement among all members.

NON-MEMBER FEEDBACK OF THE COALITION

The perceptions of non-member organizations provide a complementary view of the Coalition and its activities. From this data, several major themes emerged regarding non-members' knowledge of the Coalition, their organizations' alignment with the Coalition's mission, and issues surrounding membership. In total, 36 individuals responded to the online survey from a random sample of 100 people identified by American Humanics whose organizations have declined Coalition membership. For full results from the non-member survey, see Appendix II on page 63.

KNOWLEDGE OF THE COALITION

Non-member responses to the survey reveal numerous ways in which respondents first heard about the Coalition, suggesting that the various means utilized for advertising were somewhat effective. For instance, 34% of non-members were first introduced to American Humanics or the Coalition by means of a targeted phone call or mailing; 16% learned about the Coalition online; and 13% heard about it from another organization. On the other hand, even though the sample provided to the evaluation team was purportedly composed of organizations that had received some correspondence from American Humanics, three respondents noted that they were not even sure what American Humanics is.

The non-member survey ended with an open-ended question that allowed respondents to offer any comments and opinions. From the responses, 20% mentioned that they did not have enough information about the Coalition. An overwhelming 80% stated that they would be interested in and would like to reconsider membership to the Coalition. When asked if they would recommend the Coalition to others, 45% of respondents said that they would do so based on their limited knowledge, suggesting that even those who have already declined membership support the goals of the Coalition.

Non-Members who expressed interest in the Coalition and in reconsidering membership:

 **80%**

In order to gauge their knowledge of the Coalition, non-members were asked what they consider to be the mission of the Nonprofit Sector Workforce Coalition. The responses showed that 28% do not know the mission and 16% provided missions that are not in line with the goals identified by the Coalition. One survey respondent gave a meaningful explanation for this lack of knowledge:

I really don't know the Coalition at all. It's totally new to me. American Humanics isn't exactly a household name either. Thus, anything it does must be carefully explained and rationalized. Put the two together (Humanics and nonprofit workforce) and the fit is odd, but I could be wrong about what Humanics is.

MISSION ALIGNMENT

The survey data reports that 74% of non-members agree that the Coalition's goals are consistent with those of their organizations. Of those who correctly identified the Coalition's mission, respondents mentioned the Coalition's goals of developing leadership within the nonprofit sector, as well as recruiting and retaining nonprofit employees.

In addition to supporting these goals within their own organizations, respondents largely believe that the two issues the Coalition has selected as its foci are important. From the survey, 85% support the initiative on student debt and 96% support the initiative on workforce diversity. Respondents were also concerned with issues related to succession planning and employee compensation within the nonprofit sector, which mirror the concerns expressed by Coalition members. Similar to Coalition members' responses, 96% of non-members agree that a coalition is a good medium or framework to discuss issues of nonprofit workforce development.

MEMBERSHIP

Given the positive responses to the survey from organizations that declined membership in the Coalition, the evaluation team sought to understand why these organizations turned down the opportunity to participate.

According to respondents, identifying with the issues does not seem to be the principal deterrent as only 21% of non-member respondents report declining membership because of the issues chosen. Instead, the membership fee, staff availability and time conflicts are among the most important factors that prevented organizations from joining the Coalition. One Steering Committee member comments about membership:

I don't think [American Humanics has] done a good job of reaching out beyond [academic or more mainstream nonprofits] to more social justice organizations, but it represents a fair number of mainstream people they've traditionally had contact with. Much smaller orgs have to pay to become a member. By virtue of having a one fee structure you leave out certain organizations and you're definitely going to go for those that are well funded.

I did not join the Coalition because:

Of time conflicts

 **57% agree**

The membership fee is too high

 **69% agree**

Not enough available staff

 **62% agree**

The issues are not relevant

 **21% agree**

AMERICAN HUMANICS' INITIATIVE FOR NONPROFIT SECTOR CAREERS

Respondents from both online surveys responded positively to the Initiative for Nonprofit Sector Careers, its research and the National Dialogues. In general, they consider the Initiative and its goals both useful and informative.

KNOWLEDGE OF THE INITIATIVE

Most survey respondents first learned about the Initiative by receiving either a mailing or a phone call. Nevertheless, respondents were less knowledgeable about the Initiative than they were about the Coalition. Few Steering Committee members discussed the Initiative explicitly during phone interviews, and most did not distinguish between the Initiative's activities and the Coalition's goals and objectives.

NATIONAL DIALOGUES

The survey reports that 100% of respondents agree that American Humanics facilitates the National Dialogues well. Moreover, 91% of respondents, composed of 100% of at-large respondents and 80% of Steering Committee members, believe that the National Dialogues focus on issues that are important to their organizations. Further, 86% of respondents, 100% of at-large respondents and 67% of Steering Committee members, believe that it is important for their organizations to be represented at the National Dialogues.

National Dialogues focus on issues important to my organization:

 **91% agree**

It is important for my organization to be represented at the National Dialogues:

 **86% agree**

The National Dialogues prove to be an advantageous venue for Coalition members to gather and discuss ideas brought up during conference calls. All Steering Committee respondents have attended at least one National Dialogue, though 56% have attended only *one*. It is also important to note that 63% of at-large members have *never* attended a National Dialogue. Additionally, none of the non-members surveyed have attended a National Dialogue. While this may prove to be significant down the road, the National Dialogues have only recently begun; it is therefore difficult to establish larger trends without looking at long-term data.

LITERATURE REVIEW

In addition to hosting the National Dialogues, American Humanics compiled a comprehensive literature review and detailed bibliography comprised of current relevant research on nonprofit sector workforce issues. The survey reports that 100% of Steering Committee respondents and 50% of at-large members received the literature review. Of those who received it, all agree that the materials are informative and further the goals of the Coalition and 79% agree that the materials are helpful to their specific organizations. One Steering Committee interviewee comments:

[The research from the Initiative] makes me familiar with information I would not have had time to go out and find myself. It provides me with information to send to my CEO and my peers and to our HR staff—which I've already done—and our affiliate CEOs and board chairs because they need to have talent in front of their mind as well. It's a good clearinghouse of what's available out there so it helps from that standpoint.

“[The research from the Initiative] makes me more familiar with information I would not have had time to go out and find myself.”

Another member agrees that the information is useful:

We use the research put out by American Humanics primarily for framing the broader issues and how it impacts the type of activities we do, and our support for organizations in the South, and communicating these things to our board.

Of the non-members surveyed, almost *half* (48%) had not received the literature review and bibliography. Additionally, of the non-member respondents who had received the resources, only 36% of non-members had put them to use as compared to 72% of Coalition member respondents.

MEDIA COVERAGE

In order to determine how the Coalition and the Initiative have been covered by the media, the evaluation team completed a historical search of media representation and investigated members' websites for mention of either the Coalition or the Initiative. Our findings show that the Coalition and the Initiative are not mentioned in the media enough to further promote the Coalition's objectives on a national scope nor raise its organizational profile. Steering Committee members are quite conscious of this operational shortcoming:

"We need a media strategy and need to start talking to people outside of the sector in addition to people within the sector."

We're going to have to make this issue better known nationally—let others know there is a lot of opportunity within the nonprofit sector. We need a media strategy and need to start talking to people outside of the sector in addition to people within the sector.

Though the Coalition was recently profiled in *The Chronicle of Philanthropy*, there have been few additional references to the Coalition and its activities in the media. Online listings include a mention of Stephen Bauer's presentation at the Independent Sector Annual Conference and Nonprofit Congress (10/23/06), a seminar with Ken Gladish in collaboration with the Council on Philanthropy (9/27/06), and an article in the Spring 2006 newsletter summarizing the role of the Young Nonprofit Professionals Network in the Coalition's strategies and activities.

While lauding the successes of media mentions thus far, one Steering Committee member reflects that there is still progress to be made, especially as it relates to increasing membership:

I definitely think that we need to get many more organizations involved. I think some of the recent media attention may help, but it is important to be more aggressive in terms of marketing and outreach to get other groups involved.

In a search of the websites of Coalition members, the evaluation team found that the Coalition is mentioned only three times, while American Humanics and its work beyond the nonprofit management certification program are mentioned seven times.

Some notable media action items that can be easily replicated by Coalition members include posting the Coalition's letter to the US Department of Education on their websites or making American Humanics' Workforce Literature Review and Bibliography available as a downloadable '.pdf' file as the National Council of Nonprofit Associations has done. Nonprofit Oyster publicizes its Coalition involvement on its website with a short description of the Coalition and the Initiative and invites organizations to join the Coalition by providing a link to the American Humanics website. This type of promotional activity is a positive first step allowing the public to easily access the Coalition's activities without specifically searching for the "Nonprofit Sector Workforce Coalition" or "American Humanics."

OVERALL RECOMMENDATIONS

All together, the online survey and phone interview results illustrate that the views, opinions and perspectives of the Coalition membership are quite diverse and run the gamut from absolute devotion to deep concern. Given this reality, the evaluation team finds itself unable to make recommendations that are anything but broad. While the reader will find some precise suggestions in this section, we ultimately believe that the survey results show that members will be best served by using the results of this evaluation to initiate a more in-depth conversation about the future.

The evaluation team recommends that the Coalition undergo a strategic planning or chartering process; such a process would be an apt model for getting all of the concerns out on the table and helping members reach, if not agreement, at least consensus on how to proceed. Given the wide disparity of responses to many of the evaluation questions specifically related to mission, two questions that must be answered in this extended conversation include:

*Are we tackling the right issues?
Are we tackling them well?*

Survey results and member interviews support the conclusion that members have a thirst for action. Coalition members seek specific action items and clarified roles and responsibilities. However, members do not feel that they have been provided the resources necessary to take action or they believe that the action items currently available are inadequate to move the Coalition's goals forward. To assist in ensuring action, the evaluation team suggests that any meeting—whether it is over the phone or in person—should have a defined format whereby attendees leave knowing specifically what action they have agreed to take. To assist in this process and to ensure accountability, agendas should continue to be sent out prior to each meeting and minutes that specifically outline agreed upon action steps should be sent out after each meeting.

The evaluation team also believes that portions of each meeting should be set aside to enable Coalition members to present ideas and raise concerns in a safe environment. The evaluation process—both via the survey and the interviews—revealed that Coalition members were more than willing to voice their organizational concerns, if only because they had not been provided an outlet to do so before. The evaluation team offers this recommendation with a word of caution. Venues for concern-raising can quickly overwhelm any meeting, so opportunities for ombudsmanship should specifically be built into the agenda with an understanding that time for raising concerns is limited. Thus, meetings are best facilitated by a skilled moderator who can ensure that concerns should be raised within an appropriate context. Obviously, if the Coalition accepts the need to conduct a strategic planning or chartering process, the amount of time set

aside for raising concerns can be significantly longer than it would be during a more traditional conference call or meeting.

The evaluation team cannot stress enough how important mission-acceptance and communication are toward ensuring Coalition sustainability. These two points are important not only for attracting new members, but for retaining current ones. In many cases the disparity in perceptions regarding the success of the Coalition—both related to mission and communication—can be controlled for by determining whether a respondent was a Steering Committee member or not. As such, the evaluation team recommends that the Coalition address several issues related to a perceived break-down in what it means to be a Steering Committee member versus an at-large member. For instance:

Should the specific roles and responsibilities of Steering Committee members vs. at-large members to be defined?

(We recommend yes.)

Should there be officers on the Steering Committee?

(We recommend yes, and are supported by some Steering Committee members who voiced this opinion during their interviews.)

Should information discussed in Steering Committee meetings be disseminated to at-large members to a greater degree?

(We recommend yes, and are supported by some Steering Committee members who voiced this opinion during their interviews.)

Determine whether the Steering Committee is too large and/or too exclusive.

(While we have no precise recommendation to this point, we note that some respondents voiced these specific concerns.)

Defining roles, creating officers, and creating a more formalized meeting format may help to dispel the perceived leadership vacuum voiced by many survey and interview respondents. The team believes that in requesting an evaluation, the Coalition has already taken a strong first step in proving that it desires action. By following up on the results and recommendations, it will further establish among members that a desire exists to strengthen the very foundation of the group.

While strengthening the internal processes and perceptions of the group is important, the work of the Coalition should not come to a complete stop at the end of meetings or phone calls. If members believe that the Coalition provides a jump-off point for further collaboration outside of the Coalition itself, there is some work to do on this matter given that only 28% of survey respondents report having created a formal partnership with another organization as a result of their membership in the Coalition.

Since mission and communication are at the heart of Coalition sustainability, these concepts help us provide recommendations for recruiting new members. While many non-member survey respondents report that one of the reasons keeping them from joining the Coalition are membership dues, existing membership suggests that this concern is reduced when mission and communication needs are being met. In other words, the Coalition should feel confident that the current monetary obligation is not too much of a hurdle to recruiting new members, so long as they concentrate on producing tangible results. Unfortunately, this hurdle isn't cleared until *after* members join. To appease potential members that are concerned about the monetary obligation, we recommend that the Coalition create a list of resources for organizations that they are recruiting that details various means to fund membership such as internal budgeting, seeking grant or foundation support, or requesting sponsorship from the Coalition itself.

Such a financial resource flyer should be part of a larger formal invitation packet which consists of materials that: a) Describe what the Coalition is, b) clearly define its goals, c) outline the tangible benefits of membership, d) specify the programmatic obligations of membership (monetary, time commitment, expectations on taking specific action) e) explain how membership fees are allocated, and f) provide resources for finding funding. Note that while this formal invitation packet can be created to entice new members, its very contents are precisely what some existing members are asking for in terms of Coalition transparency and accountability.

Prior to sending out the formal invitation and as part of the strategic planning process, we recommend that the Coalition have a thorough conversation about what its recruitment goals are: are they interested in getting as big as possible or do they want to target specific organizations in order to ensure sector representativeness? If the Coalition is interested in the former, we recommend that they create a tiered participation plan that allows organizations to be members in name only. If it is interested in the latter, the Coalition will want to be strategic about ensuring that its size does not get too big such that it crowds out member voices. This is already a concern for some organizations who feel as though their voices are getting lost in the influx of new members. This is likely a consequence not only of size, but of timing. We recommend that the Coalition implement an annual window of enrollment, so that the joining of new organizations is an orderly process and momentum is not sacrificed. Such a recommendation is borne out of the response of some members who fear that as new members come in, so does potential mission creep.

Despite the caution, there is reason for optimism. In conducting the survey of non-members, more than a few respondents suggested that they are willing to join the Coalition. In developing a recruitment plan, the Coalition can feel confident that there is a built-in market of organizations that are not only in support of the Coalition but are also interested in furthering the goals of the group. Given the survey results of existing members related to what made them initially enroll, when recruiting new members the Coalition should emphasize its communal feel; an existence of direct contact between members; and the first-name basis relationships that are forged between Coalition members themselves as well as between Coalition members and American Humanics.

While expanded membership will be driven in part by recruitment, Coalition exposure will most certainly play a role as well. The evaluation team's analysis of the Coalition's media coverage has shown that there has been little exposure at best. Further, the review of Coalition member websites illustrates that few member organizations publicize their involvement in the Coalition on their own websites. The Coalition would be best served by developing a comprehensive communications plan that includes determining how it would like to be covered by the local and national media and which activities should be highlighted as part of its overall image. Part of this process may include the creation of a Coalition-specific logo that can be included on each member organization's home page which will link back to a Coalition-specific webpage (which also needs to be created), with its own independent URL. The creation of a logo and webpage will serve the dual purpose of both branding the Coalition and addressing the concerns of some members that the Coalition is merely an extension of American Humanics.

Trade publications such as *The Chronicle of Philanthropy* certainly help publicize the Coalition's activities; however, the Coalition should seek to leverage the high profiles of some of its larger partners—such as the Boy Scouts—to garner national coverage for its agenda. This publicity may further the mission of the Coalition by raising the awareness of nonprofit sector workforce challenges.

Finally, for any evaluation, hindsight is of course twenty-twenty. As such, in developing this report, the evaluation team is reminded of questions we wish we would have asked and parties we wish we would have interviewed. To that end, and to future evaluators, we recommend that the information presented herein be used as a baseline for future analyses—particularly once the Coalition has shed some of its new skin. We hope and trust that the readers of this report find the information useful and we ultimately wish the greatest success for American Humanics and the Nonprofit Sector Workforce Coalition in their truly admirable efforts.