



# The Center for Public & Nonprofit Leadership

## Working Paper Series

### **INNOVATIONS IN CAPACITY BUILDING: AN EXECUTIVE EDUCATION INSTITUTE MODEL**

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*Educating Leaders Who Change the World*

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## **ABSTRACT**

The Jessie Ball duPont Fund and Georgetown University have partnered to provide executive education programs for the Fund's nonprofit grantees. Georgetown has delivered six Jessie Ball duPont Fund Executive Institutes for 59 organizations and 138 individuals since August 2000. The curriculum was designed with the dual goals of individual skill-building and organizational capacity building, and has shown promising results to date. Distinguishing features of the four-day residential Institutes include the attendance of organizational teams comprised of the executive director/CEO, a board member, and a senior staff member from each participating organization; structured time for the organizational teams to create a plan that addresses a pressing organizational issue with the help of faculty coaches; and annual Alumni Meetings where teams of alumni from all Institutes come together on one large cohort to report on their progress and discuss new challenges. In addition to the creation and delivery of the Executive Institutes, the university-foundation partnership has contributed in positive ways to the goals of both partners. The Institutes are an integral part of the Jessie Ball duPont Fund's nonprofit agencies capacity building programs, have increased the Fund's general knowledge about many of their grantees, have strengthened the grantee/grantor relationship, and have informed the Fund's grantmaking decisions. The Institutes also benefit Georgetown University by providing opportunities for staff and faculty to interact with a diverse range of nonprofit organizations, collect longitudinal data about capacity building in nonprofit organizations, develop new executive education curriculum based on participants' experiences, and contribute to the theory and practice of nonprofit executive education.

## **INTRODUCTION**

Nonprofit organizations across the country are facing declines in government funding while at the same time are expected to increase their services, heighten their advocacy efforts, and keep pace with innovations in the third sector and society at large. In light of these challenges, universities have created graduate-level nonprofit management programs, nonprofits have experimented with ways to increase their institutional capacity, management support organizations have been established to exclusively support nonprofits, and foundations have supported these and other strategies aimed at increasing the productivity of the nonprofit sector. The Jessie Ball duPont Fund (the Fund) is one foundation invested in building the capacity of nonprofit organizations. In 1999, The Fund contracted with Georgetown University to provide executive education to the Fund's eligible organizations, excepting religious and educational institutions. The structure of the partnership, training model, and curriculum design offer promising lessons to the field of nonprofit management education. This paper will discuss our experience to date, including the value of a foundation-university partnership, the benefits and challenges of the Institute design, and the replicability of the model.

## LITERATURE REVIEW

The growth of the nonprofit sector, the increasing demand for its services, the need for professionally trained staff, and the recent efforts in capacity building are all well documented. The nonprofit sector represented 2.5% of domestic economy in 1960 and had grown to almost 9% by 2000 (Hammack 2001, p. 165). The number of nonprofit organizations in the United States grew from 15,944 in 1977 to 27,586 in 1997 ((Lampkin et. al. 2002, p. xxviii). Between 1987 and 1997, the growth rate of nonprofit organizations was twice that of for-profit businesses (Lampkin et. al. 2002, p. 4). An important factor driving the continual growth of the nonprofit sector is the increasing demand for its services. A variety of reasons, including demographic shifts, societal changes, and devolution, contribute to the escalating need for nonprofits. For example, the aging of the baby boomer generation heightens demand for health care and assisted living; the growing number of women in the workforce increases the need for child care; and the government's trend towards contracting and outsourcing encourages nonprofit organizations to deliver some services formerly provided by government agencies (Salamon 1999, p. 169).

The need for professionally trained leadership and pressure on existing nonprofits to strengthen their capacity accompany the growth of the sector and the increasing demand for its services (Connolly and Lukas 2002; Dolan 2002). Universities have responded to these sectoral demands in a variety of ways, including conducting research on the sector, providing graduate level nonprofit management programs for practitioners, and establishing mutually beneficial community/university partnerships. (Mirabella and Wish 1999; O'Neill 1998; Strand et.al. 2003) Dozens of graduate level nonprofit management programs for practitioners currently exist as independent centers within universities or within business, social work, or policy analysis schools (Mirabella and Wish 2000 p. 229).

Foundations have also responded to the need for professionalization of nonprofit staff and capacity building at the organizational level. Grants for organizational development rose 125% between 1989 and 1999 and grants for management development increased by 124% between 1994 and 1999 (Connolly and Lukas 2002, p. 2). Foundation capacity building strategies also include grants to organizations that provide technical assistance to others, endorsements and referrals to consultants and management assistance groups, the provision of training and education workshops, and partnerships with third parties to work directly with grantees (Connolly and Lukas 2002). For example, the Gill Foundation runs nonprofit trainings on board development and fundraising throughout the country, and the Fannie Mae Foundation and the Eugene and Agnes E. Meyer Foundation have partnered with Community Wealth Ventures to work with nonprofits in the Washington, D.C. area to establish new revenue streams. Foundations have also partnered with universities in a variety of ways on projects that aim to benefit the nonprofit sector: W. K. Kellogg Foundation has worked with a range of universities through its Building Bridges Initiative to make research a more effective tool for nonprofits and the Eli Lilly & Co. Foundation has been a major funder of the Center on Philanthropy at Indiana University.

## **RESEARCH QUESTIONS AND DESIGN**

The partnership between the Jessie Ball duPont Fund and Georgetown University was created to increase the capacity of the Fund's nonprofit grantees. This paper will address the lessons learned through that partnership and will look specifically at the following questions: How can a foundation and a university-based nonprofit center work together to increase the capacity of nonprofits? What unique benefits does this type of partnership provide for the foundation, university and the participating nonprofit organizations? What curricular design elements are most effective in executive education programs designed for working practitioners? Specifically, which curricular elements are most useful in ensuring that participants will use the information learned? What strategies can be used to encourage participants to share information with colleagues once they return home and, in so doing, institutionalize the knowledge within their respective organizations?

This study focuses on the elements of the Jessie Ball duPont Fund Executive Institute model and preliminary findings regarding how participants use the information learned at the Institutes. We draw on program experience, interviews with stakeholders, feedback from Institute participants, reports from our external evaluator, and a review of relevant literature to answer these questions.

## **THE INSTITUTE MODEL**

### **History**

The Jessie Ball duPont Fund was established in 1977 to benefit all organizations that had received a gift from Ms. duPont between 1960 and 1964. The number of organizations eligible to receive grants from the Fund includes 92 churches, 87 academic institutions, and 152 charities. The Fund's Trustees refer to these 331 organizations as the "duPont Fund Family" and have invested heavily in building relationships with and the capacity of these organizations. To serve this group, the Fund has two types of resource allocation programs. One is a grant making program in which eligible organizations compete with each other for grant funding. In any given year, about half of these grants are for organizational capacity building. The second is a program that provides benefits to all eligible grantees outside of the competitive grant process in the form of small technical assistant grants and executive development opportunities.

Executive development has been an integral part of the Fund's capacity building programs since 1990. The Fund views the creation of these programs as an iterative process and relies on grantee surveys and focus groups, formal evaluations, and informal feedback to shape and reshape their executive development programs. The Fund's first initiative involved sending two executive directors to Wharton Business School at the University of Pennsylvania 1991. This strategy was prohibitively costly and served only three of the 151 eligible executive directors. The Fund shifted its executive development strategy the following year and contracted with the Center for Creative Leadership to run one-day seminars open to all executive directors of eligible nonprofit agencies. In 1993, two seminars were offered at different locations. About 50 grantees attended each seminar. The feedback from those meetings showed that the executive directors enjoyed getting together, but the one-day meeting did not allow sufficient time for the attendees to adequately address substantive issues. Based on this feedback, the leadership development group

designed a four-day residential retreat for 28-30 executive directors/CEO focused on individual leadership training. The four-day retreat was held annually from 1994-1997 and, in 1997, focus groups and surveys were conducted to capture feedback on this model. The results showed that the executive directors appreciated the four-day residential institute model. Suggestions included designing the retreats to accommodate a team from each nonprofit that included staff and board members, tailoring sessions to the individual needs of organizations, and admitting a smaller number of organizations to each retreat. In 1999, the Fund issued a Request for Proposal to design and deliver a new executive education program. Georgetown University responded to the RFP and was chosen for the contract.

Between August 2000 and August 2003, Georgetown hosted six Executive Education Institutes serving a total of 59 organizations and 138 individuals. Organizations participating in the Institutes have been a diverse group ranging from large, well-endowed institutions such as The Child Welfare League of America with a budget of \$20M to small organizations largely dependent on volunteers such as Lewes Historical Society with a staff of four. (See Appendix A for a sample list of Institute attendees.) The original schedule allowed for one Institute serving 10 organizations to be offered annually. In an effort to reach a greater number of organizations in a shorter period of time, two Institutes were scheduled for each year starting in 2002. In addition, four annual alumni meetings have been held to date.

### **The Structure of the Partnership**

The Fund contracts with Georgetown to design Executive Education Institutes tailored to the needs of the Funds' grantees. The program is designed by The Center for Public and Nonprofit Leadership, formerly The Center for the Study of Voluntary Organizations and Service, which is a part of the Georgetown Public Policy Institute. Kathy Kretman, Ph.D., Director of The Center for Public and Nonprofit Leadership, runs the program with the help of dedicated staff and graduate assistants. Georgetown is responsible for recruiting faculty, designing curriculum, conducting outreach to the grantees to identify participants, delivering the Institutes, and providing appropriate follow-up. While the Georgetown Center and the Fund often discuss new ideas or challenges, the ultimate responsibility for the Institutes lies with Georgetown.

The partnership between the Fund and Georgetown has worked for several reasons. First, Georgetown was experienced in working directly with community-based organizations and in delivering programs aimed at bridging the gap between academics and practitioners prior to entering this partnership. Second, the first grant was multi-year and included time to pilot the model as well as to evaluate and strengthen the Institute on an ongoing basis. Third, both parties shared the vision that the purpose of the Institutes was to increase individual skills, provide organizational teams the opportunity to learn and work together, and encourage the participants to view themselves within the greater context of the nonprofit sector and its place in a healthy democratic society. Finally, the trust and respect between the staff of the Fund and Georgetown has also contributed to the success of the collaboration.

## **The Structure of the Institute**

Georgetown University manages the application process. Georgetown invites about 15 of the Fund's eligible organizations to apply for the four-day residential Institute. The application gathers information on board development, clarity of roles within the organization, existing partnerships, outcome measurements already in use, capacity building efforts, and organizational challenges. The lengthy application serves three purposes: it requires the participants to assess important aspects of their own organizations; it provides Georgetown with the information necessary to tailor the Institute to the needs of the attendees; and it serves as a baseline record of the state of each organization before attending the Institute. Most organizations that apply are accepted and Georgetown strongly suggests that each organization bring a team comprised of the executive director, a board member, and a senior staff person to the Institute.

The Institute curriculum is designed to expose organizational teams to nonprofit management strategies and to provide them with the opportunity to work on a pressing organizational issue with the assistance of a faculty coach. During the Institute, teams attend standard modules taught by faculty representing a balance of academic and community experience. For example, the February 2003 Institute included the following modules: Big Issues in the Nonprofit Sector; Building Effective Board/Staff Relationships; Strategic Alliances, Partnerships and Mergers; Performance Measurement and Management; Communications and Marketing; Strategies for Fund Development and Sustainability Board Governance; Partnerships; Evaluation; Fund Development; Strategic Planning; and Communications and Marketing. Concurrent sessions that meet the specific needs of the attendees are also offered. In the past, these topics have included Strategic Planning, Managing a Capital Campaign, and Information Technology. The curriculum as a whole is designed to build practitioner skills with the exception of the Big Issues in the Nonprofit Sector. This session is included in order to address the Institute goal of encouraging participants to view themselves as part of a cohesive sector and to understand the societal context in which nonprofits operate. According to Tschurthart, classes concerned with the history or overview of the sector are among the least common classes offered to university-based nonprofit management programs (1999).

The nonprofit management modules have evolved since the first Institute, but the cornerstone of the curriculum remains constant: providing organizational teams with the opportunity to work on a pressing organizational issue within the Institute context. Organizational teams attending the Institute are required to arrive with a brief written description of a specific organizational issue they wish to address during the Institute. The Institute provides structured time where teams meet to develop a strategy for their chosen issue with the help of an assigned faculty coach. Most teams create a plan to address their chosen issue using a logic model learned during the Performance Measurement and Management module, and all teams are required to include evaluation mechanisms in their plans. Organizational teams then present their strategies for critical review by other participant teams during the Peer Clinic on the last day of the Institute. This curricular element helps to address the Fund's concern from previous executive education programs that participants do not share their learning with fellow staff or incorporate it into the work of their organizations upon returning home.

The projects addressed by organizational teams generally fall into three categories: management, fund development, and program development. Management capacity building projects focus on board, staff and volunteer development, and the creation and implementation of communications strategies. Fund development projects include a variety of revenue generating strategies including the creation of development plans, diversification of revenue streams, and capital campaigns. Program development projects focus on the creation of new programs or the enhancement of existing programs. In addition, several organizational projects have focused on issues relating to strategic partnerships and alliances. (See Appendix A for a list of sample participants and projects.) Most organizational teams use a logic model and evaluation mechanisms covered in the curriculum of the Institute for their project plan. (See Appendix B for a sample logic model.)

Two-day residential Alumni Meetings are held annually to reinforce and build on the work done during the Institutes, and to introduce participants from all Institutes to one another. Teams meet with their respective Institute cohort groups and share their progress on the management plans created at the Institute. All Institute cohort groups are then brought together for a professional development session that is designed based on the results of a survey of participant needs. In addition, coaching from the Institute faculty is available to participants on an ongoing basis.

## **External Evaluation**

In August of 2001, the duPont Fund contracted with the New York based Seedco, Inc. to document the Institutes, Alumni Meetings, and participant progress since. Seedco is evaluating the programs based on four inter-related goals: leadership and management training; development of an action plan to address a self-specified challenge; progress in implementing organizational plans; and formation of collaborations with other organizations. Participating organizations are asked to submit a baseline report on their plan immediately following the Institute and follow up reports every six months for three years thereafter.

## **LESSONS LEARNED**

### **Preliminary Findings**

Seventy-two percent of participating organizations make some or significant progress on their project areas within six months of their participation in the Institute and 81% do so within a year according to Seedco's findings. In addition, Seedco's evaluation shows that, on average, the capacity of organizations has increased since attending the Institute. See Table 1 for measures of organizational capacity.

**Table 1.****Organizational Capacities of August 2000 and August 2001 Cohorts as of October 2002**

Indicator	August 2000 Cohort		August 2001 Cohort	
	Pre-Institute	May 2002	Pre-Institute	May 2002
Percent of organizations that have a strategic plan	78	89	89	89
Percent of organizations that anticipate clear measurable outcomes when planning a new initiative	44	78	22	33
Percent of organizations that have clearly understood roles and responsibilities for board, CEO and staff	56	100	56	67
Percent of organizations that actively initiate collaborative partnerships with individuals and organizations	78	100	44	67
Percent of organizations that have staff from different parts of the organization work together	44	89	43	71
Percent of organizations that encourage staff to work in teams	50	78	71	86
Percent of organizations where staff and management feel comfortable taking risks and trying new things	44	67	29	29

*Source:* "Year One Report of Jessie Ball DuPont Fund Executive Institutes." Prepared by Seedco, Inc., October 2002, p. 4.

While at least two organizations claim that participation in the Institute was the single most important factor in strengthening organizational capacity, participation in the Institute is clearly only one of many possible factors that affect the development and capacity of these organizations. The organizations identified new grants and funding, expansion of programs or services, completion of a strategic plan, and changes in state or national policies as some of the other factors that contributed to an increase in organizational capacity.

The Seedco evaluations have also documented several specific ways in which participants use information from the Institute once they return to their respective organizations. Many Institute alumni report using the logic model format to educate boards and staff members about the plan established while at the Institute. In addition, several organizational teams have trained colleagues to use the logic model. For example, each department within Presbyterian Homes and Family Services, Lynchburg, VA, uses the Institute's logic model for planning. Alumni have also shared information from the nonprofit management modules with their organizations. The Brandywine Valley Association, West Chester, PA, held a board retreat for the first time after

executive team members learned about board governance strategies at the Institute. Generally, the Communications and Marketing and Strategic Planning sessions are most often identified by the participants as the most beneficial sessions.

Utilizing the team approach contributes to the Institute's impact in several ways. In addition to individual professional development, team members develop their working relationships with each other and increase their collective ability to create needed organizational change. Staff and board members working collaboratively to design a plan helps to establish buy-in at all levels of the organization and creates an internal accountability mechanism by which Institute alumni within each organization can hold each other responsible for the execution of the plan over time. The team approach may also be a factor in institutionalizing the logic model and other tools from the Institute within organizations. For instance, in cases where one Institute alumnus leaves the organization, alumni remaining with the organization can continue to employ strategies learned during the Institute.

The residential aspect of the Institute allows participants to step back from day-to-day tasks and provides them with the opportunity to learn from other attendees. The peer exchange that takes place between organizations also contributes significantly to the learning process. The Institute environment is a safe place for participants to speak candidly about success, failures and challenges. Discussions about failed strategies and lessons learned from peers are often particularly useful. The peer exchange has proven beneficial despite the diversity of the organizations represented at each Institute. In 2003, four organizations with different ages, missions, and budgets shared management strategies for volunteer programs. While many participants have taken advantage of relationships built during the Institute and continue to communicate and share strategies or even programmatic partnerships, organizations that share geographic proximity are more likely to create sustained programmatic partnerships. For example, The Jacksonville Museum of Modern Art and Community Connections, Jacksonville, FL, are located within one mile of each other. Staff members of each organization met for the first time at a Jessie Ball duPont Fund Institute in 2000, and they have partnered around a summer camp each year since participating in the Institute.

Follow-up is an integral component of this executive development program. Alumni Meetings are held once a year where cohort groups meet and report their progress to each other, attend seminars tailored to the needs of the attendees, and have a chance to network with other recipients of Jessie Ball duPont Fund grants. At the Alumni Meeting in February 2003, one organization representative remarked that knowing he had to report back to his Institute cohort provided the incentive to focus on the plan his organizational team drafted during the Institute. These meetings also provide an opportunity for alumni to discuss new challenges with members of their Institute cohort. One common topic of discussion during cohort meetings is the role environmental factors play in the execution of each organization's project, especially in 2002. An Institute was held in August of 2001 but the priorities, funding sources, and partnerships of the participating organizations changed dramatically after September 11. Organization plans have also been affected by the slow economy. Florida Sheriffs Youth Ranches is one of the organizations that placed its program expansion plans on hold in 2002 until signs of economic recovery.

The relationship between the Fund and the organizations may also have an impact on the experience of Institute participants. First, the Fund covers the costs of room and board for attendees to minimize the cost of the Institutes to individual organizations. Second, grant funding is not specifically linked to performance during the Institute, progress on individual management projects, and responsiveness to requests to the Institute evaluator. This context allows organizational teams the freedom of not having to tailor their participation to impress a funder, but it also creates a situation where organizations are not punished if they do not implement their planned project or do not provide the evaluator with adequate information. This situation reflects the Fund's philosophy that the Institute is founded on the philosophy of learning and respect. In the context of the Institute, the Fund has made a deliberate decision to help build skills and networking among the grantees for their own sake. This environment has helped to increase the level of trust between the grantor and grantee.

### **Benefits to the Jessie Ball duPont Fund**

The Institute helps the Fund to meet its core mission in several ways. The feedback from Georgetown, Seedco, and Institute participants allows the Fund to learn about the capacity, challenges, and goals of the attendees. In the Fund's experience, paperwork and site visits alone do not provide the depth of understanding of organizational and sector challenges garnered through the Institute model. In addition to allowing for more informed understanding of an individual organization's challenges, the Institutes have informed the Fund's grant making program as a whole. Information about the common challenges facing nonprofit organizations, the need and benefit of general operating grants, and the effect of technical assistance has helped to inform the Fund's grant making programs. The Institutes themselves allow the Fund to invest in the creation of knowledge in the field of nonprofit capacity building. The Fund sees itself as a learning organization, aiming to take advantage of its unique situation by customizing capacity building strategies and learning from grantees over time. The Fund is driven by a philosophy that a healthy democracy requires a strong nonprofit sector, and a strong philanthropic community. This type of program allows the Fund to contribute to all three.

The Institute supports the Fund's goal to strengthen the capacity of its eligible nonprofit grantees efficiently and effectively. The Institute provides a cost-effective way to transfer knowledge to grantees. Although the residential-model for organizational teams is a significant expense, it is cheaper than spending equivalent time with organizations on a one-on-one basis. The individual attention given to each organization, the institutionalization of knowledge, the focus on a particular organizational issue, and the buy-in facilitated by the team approach all contribute to the impact of this model and allow executive education to meet needs otherwise addressed by more expensive one-on-one approaches. The Institute fits neatly into other capacity building efforts, as organizations often submit grant requests for capacity building after participating in these Institutes. Furthermore, the Institute accomplished these goals in concert with the philosophy that building capacity in nonprofits does not necessarily involve becoming intimately involved with management decisions. Says Sherry Magill, President of the Fund, the Institute "meets organizations where they are," does not establish dependence on the Fund for organizational development, and connects grantees with experts in the field.

In addition, the Fund has benefited from working with Georgetown and Seedco, and meeting the Institute faculty. Involvement in the Institutes has provided the Fund with opportunities to learn from the work, meet with other groups doing similar work, and present its experience to others in the field.

### **Benefits to Georgetown University**

Georgetown University also benefits from this partnership in important ways. First, the partnership is an opportunity to strengthen its relationship with a major funder, and has led to additional projects such as contracts for two case studies of special interest to the Fund. Second, it provides faculty and students with the opportunity to work with practitioners and learn about the specific issues faced by organizations of all sizes. Graduate students in the nonprofit management concentration at Georgetown are able to interact with faculty, participants, and evaluators of the Institutes, to gain a better understanding of the practical applications of theories learned through coursework. Six graduate students to date have worked with the Institute. Faculty teaching and research also benefit from working with Institute participants and from writing and publishing opportunities such as this paper and case studies that can be used in the Institute's curriculum. Third, the structure of this partnership requires Georgetown and Seedco to follow participant cohorts over time and thus allows faculty to collect longitudinal data to fuel further research. The net result of this work is an increased knowledge base about nonprofit capacity building which can be useful for individual faculty research, the creation of the graduate level nonprofit management curriculum, and student learning.

Although our experience with a university-foundation partnership has been positive, common barriers to establishing such relationship should be mentioned. First, universities and foundations are often perceived as removed from grassroots issues and organizations. Second, foundations and universities tend to be bureaucratic in nature. As a result, foundations often prefer to contract with individual consultants or other types of organizations with less red tape. Third, universities often charge financial overhead that foundations can avoid by working with another type of institution.

### **NEXT STEPS**

As the Jessie Ball duPont Fund Executive Institute reaches its three year mark, the number of alumni is growing and the alumni component of the program is poised to become a more significant component of the Fund's capacity building program. Several questions have emerged. What are the most effective components of an alumni program? Where is the point of diminishing returns for such a program? While it may be useful for Georgetown and the Fund to continue facilitating networking and conversation through the Alumni Meetings, the cost-benefit of holding such meetings may decrease over time. Among other challenges, organizational staff turnover often creates a situation where the staff member attending the Alumni Meeting did not attend the Institute, and therefore may not be familiar with the cohort group, the material presented at the Institute, and/or the project his or her predecessors addressed during the

Institute. One possibility is to hold alumni meetings based on geographic regions rather than holding one meeting for all alumni and allowing time for cohort groups to meet individually.

Another question to be addressed is whether Georgetown or Institute faculty should provide additional one-on-one technical assistance in the form of consulting, retreat facilitation, etc. This may be beneficial because of the knowledge gained about challenges and personalities within specific organizations through the Institutes and Alumni Meetings, but it may not be the most efficient allocation of resources for all parties.

Technology is another issue to consider. Can technology be used to facilitate the discussions and networking online that commonly occur during residential retreats and events? Georgetown will be actively addressing these issues in the coming months.

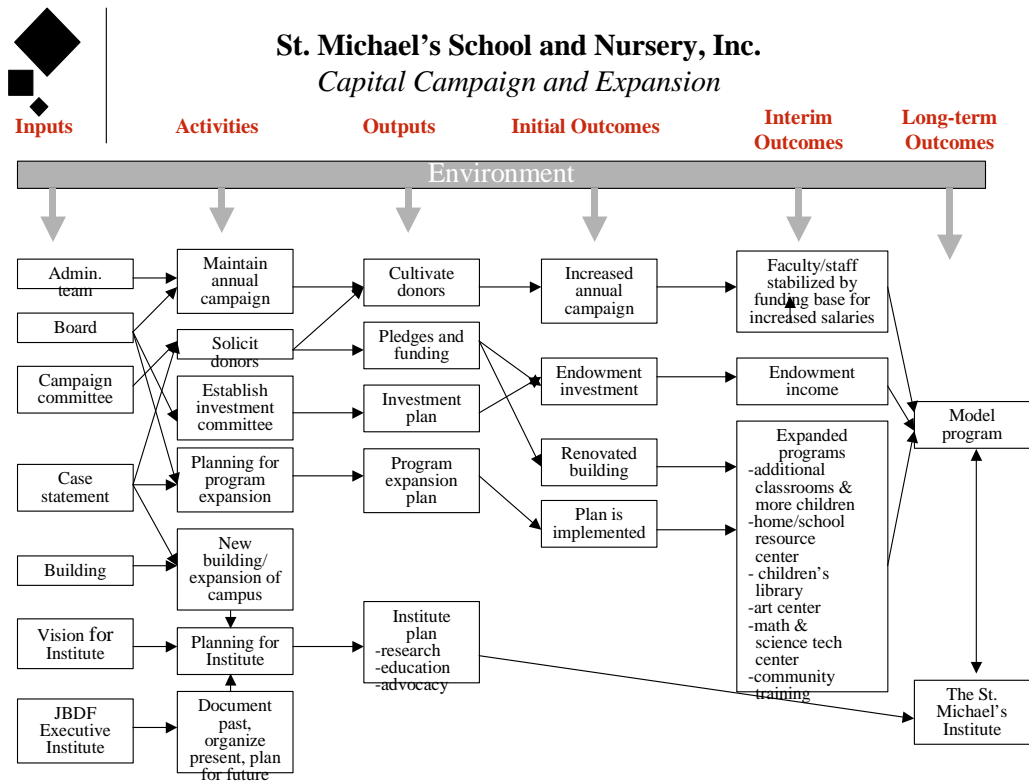
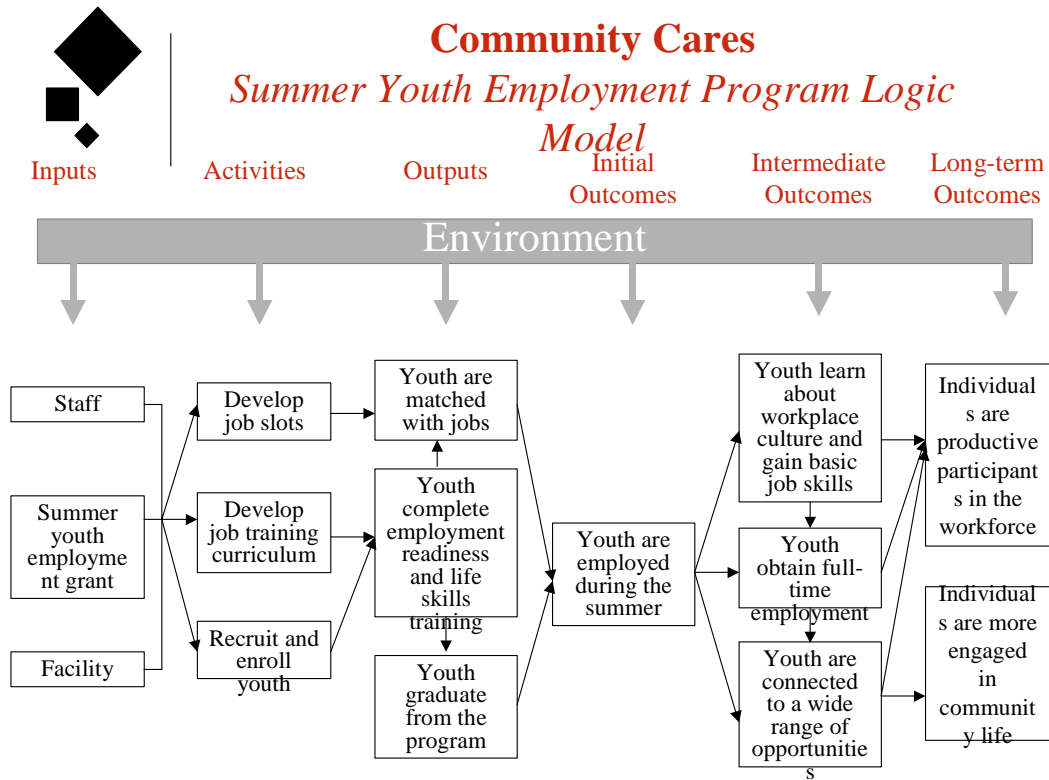
## **CONCLUSIONS AND RECOMMENDATIONS**

The Jessie Ball duPont Fund Executive Institute model is promising and the benefits of the relationship between the Fund and Georgetown University are greater than either party could realize alone. Both the Institute model and the university-foundation partnership may be replicable in part or in whole. As such, lessons learned from this partnership may help to inform similar collaborations and the field of nonprofit management education. Foundation and university staff involved in the development of the Institutes recommend at least one partner be closely connected to the target nonprofit organizations and be in a position to provide entrée to those groups; an iterative development process that involves participants in all stages of planning; and regular retooling based on external evaluations and benchmarks. In addition, remembering that the Institute participants are the experts and have much to teach each other, foundation program officers, faculty, and students are key not only to the success of the Institutes, but also to many of the benefits of the university-foundation partnership.

## APPENDIX A: Sample List of Institute Participants and Projects

Organization Name and Location	Annual Budget/ Number of Staff	Project and Key Goal
Barter Theater, Abingdon, VA	\$3.5M 76 staff	Financial Sustainability Goal: Increase donor renewals, endowment and capital fund
Boys' Home, Inc., Covington, VA	\$2.6M 48 staff	Launch Work Study Program Goal: Hire staff and raise funds for program
Child Welfare League, Inc., Washington, DC	\$20M 159 staff	Communications Strategy for Making Children Priority Goal: Increase media stories on child-friendly communities
The Delaware Academy of Medicine, Wilmington, DE	\$1.0M 23 staff	Strategic Alliance Goal: Complete strategic alliance contract with partner
The Florida Historical Society, Melbourne, FL	\$.01M 2 staff	Creation of "New" Self-Sufficient Organization Goal: Board development, strategic/staffing plan
Hope Haven Children's Clinic and Family Center, Jacksonville, FL	\$1.6M 23 staff	Expansion and Diversification of New Revenue Goal: Increase additional net revenue
Orthopedic Research and Education Foundation, Rosemont, IL	\$1.8M 16 staff	Increase Public Awareness of OREF Goal: Create/present stories with media, website, celebrities
Speech and Hearing Center, Inc., Jacksonville, FL	\$1.1M 18 staff	Increase Community Awareness of SHC Goal: Conduct market study and outreach
Wilmington Senior Center, Inc., Wilmington, DE	\$1.6M 40 staff	Fund Development for Long Term Sustainability Goal: Reduce operating budget deficit
Brandywine Valley Association, West Chester, PA	\$0.6M 5 staff	Develop an Active, Organized Volunteer Program Goal: Create action plan
Delaware Humane Association, Wilmington, DE	\$0.7M 31 staff	Board Development Goal: Obtain funding for consultant; plan retreat
Lancaster Community Library, Kilmarnock, VA	\$0.3M 6 staff	Core Values Statement Goal: Integrate values into 5-year strategic plan
Mary Ball Washington Museum and Library, Lancaster, VA	\$0.1M 3 staff	Construction of Humanities Center Goal: Design feasibility study and capital campaign
River Counties Chapter of the American Red Cross, White Stone, VA	\$0.06M 1 staff	Plan for a Volunteer Coordinator Position Goal: Develop and implement board-approved plan
Robert E. Lee Memorial Association – Stratford Hall Plantation, Stratford, VA	\$4.2M 96 staff	Restructure Board and Staff Roles Goal: Develop/implement new communication systems
Society for Values in Higher Education, Portland, OR	\$0.3M 4 staff	Fundraising Goal: Increase grant and individual donor income
The National Society of the Colonial Dames of America, Richmond, VA	\$0.3M 0 staff	Fundraising Goal : Create plan and obtain board approval
Woodlawn Plantation Mount Vernon, VA	\$0.7M 86 staff	Staff Development Goal: Reorganize staff, develop volunteer orientation

## APPENDIX B: Sample Logic Models



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