

RAVALLI COUNTY NONPROFIT PARTNERSHIP

A New Day For The Bitterroot:

Stronger Communities Through Stronger Nonprofits



Prepared by: Big Sky Institute for the Advancement of Nonprofits

Introducing The Ravalli County Nonprofit Partnership

The Ravalli County Nonprofit Partnership (RCNP) is a collaborative effort of nonprofit and community leaders who are working together to increase education, training, consulting and funding resources to help build the capacities of nonprofits in the Bitterroot, strengthen their

Sharon Bladen <> Retired and Senior Volunteer Program (RSVP)

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operations, and increase their effectiveness. RCNP is an all-volunteer effort; the members of the Steering Committee constitute RCNP's decision making body, as well as its unpaid workforce.

Terry Moran <> St. Paul's Episcopal Church; Parents, Families and Friends of Lesbians and Gays (PFLAG) <> **Co-chair**

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For additional information, to learn more about the Ravalli County Nonprofit Partnership, and to learn about how you can help, please contact co-chairs Terry Moran terrymoran1955@yahoo.com 406-531-4545, or Dave Schultz schultz_dv@msn.com 406-381-2355.

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Executive Summary

A New Day for the Bitterroot: Stronger Communities Through Stronger Nonprofits presents the findings of a survey of Ravalli County's nonprofits regarding priority interests in training and consulting services for seven key categories of nonprofit capacity building. The report also provides a snapshot overview of the county's nonprofit sector and the 223 nonprofits that comprise it.

Sixty-five nonprofits completed surveys about their interest in the following capacity building topics: Vision and Organizational Planning; Fundraising; Financial Management; Board of Directors; Staff; Volunteers; and Public Communications. Respondents ranked the Fundraising category as their top priority for receiving training and consulting services. Eighty-one percent of the respondents ranked “expanding philanthropic resources in the county” as either important, very important, or extremely important.

The report includes recommendations for next steps and strategies to consider for translating the survey findings into future capacity building programs for nonprofits in the Bitterroot. A prototype example of a nonprofit seminar series on fundraising is included in the report.

A New Day for the Bitterroot: Stronger Communities Through Stronger Nonprofits was researched and written by the Helena-based Big Sky Institute for the Advancement of Nonprofits, working in collaboration with the Ravalli County Nonprofit Partnership. These activities are currently being undertaken under the fiscal sponsorship of the Bitter Root Resource Conservation and Development Area, Inc., headquartered in Hamilton, Montana.

A Few Words from the Ravalli County Nonprofit Partnership

The Ravalli County Nonprofit Partnership (RCNP) is pleased to present *A New Day for the Bitterroot: Stronger Communities Through Stronger Nonprofits*. This report is an important beginning point for formalizing the important link between local community development and our county's nonprofit sector. It presents nonprofit and community leaders with foundational data to help gather and organize new resources and programs to strengthen nonprofits so that they become more sustainable, and more effective in providing the myriad services and programs that make for stronger communities.

Nonprofit organizations are important community assets. They provide essential services that contribute to the social, economic, and environmental well-being of our communities. Many of them partner with private citizens, businesses, and government agencies to provide a broad spectrum of services for all sectors of our communities. They provide opportunities for citizens to give of themselves to their communities. In many cases, they provide essential services that local government would

otherwise need to provide. They help build social capital, nurture civic pride, and contribute to a sense of belonging to a place.

Nonprofit organizations are a significant economic engine in Ravalli County, providing local jobs and attracting important dollars from outside the County. In fact, wages paid by nonprofit organization represent approximately 9.7% of total wages paid in Ravalli County. Jobs provided by nonprofits represent approximately 8.5% of the County's employed workforce.

This assessment report is the first step in helping Ravalli County nonprofit organizations identify the tools and other means they think are most needed to help them provide their important services to our communities. We welcome your questions and suggestions, and RCNP Steering Committee members look forward to discussing future steps with nonprofit stakeholders and community leaders throughout the Bitterroot in the months ahead.

Terry Moran and Dave Schultz, Co-Chairs

Ravalli County Nonprofit Partnership

March 31, 2012



Building Rural Communities Since 2001!

A Few Words from Big Sky Institute for the Advancement of Nonprofits

In 2009, Big Sky Institute for the Advancement of Nonprofits (BSI) was approached by nonprofit leaders from the Bitterroot because of our success in starting and developing the Montana Nonprofit Association.

BSI was asked, “*Would you come to the Bitterroot and help our nonprofits collaborate and develop capacity building programs for the county's very diverse nonprofit community?*” We were intrigued. From all of our work in nonprofit capacity building, and from what our foundation colleagues were telling us, community-based approaches for nonprofit capacity building and philanthropy development were beginning to get serious attention, especially for rural, low population states that lack significant numbers of large foundations.

There is a growing number of efforts, but no commonly accepted “best practices” approach in Montana to serve as a model for developing community-based nonprofit capacity building and philanthropy development. BSI saw that the way to do it is to work in partnership with local nonprofit leaders to co-design an approach that builds upon existing assets and strengths within the Bitterroot nonprofit community. Thus began the journey whose first public accomplishment is this report.

Developing sustainable community/county capacity building programs in Montana will not be accomplished overnight. This challenge will take dedicated leadership, lots of work, community education, and alliance building. It takes meeting with funders to explain the vision, communicate the benefits, and cooperatively figure out strategies that maximize support

for current needs while concurrently enabling the Bitterroot's nonprofits to develop themselves to meet myriad unmet needs in the county.

A daunting proposition? Perhaps. But the Bitterroot has several important things going for it. First is love of place, which gives people energy and perseverance. Second is the growing record of success that nonprofits in the valley have had through collaborations. Third is the willingness to tap those with knowledge and skills from outside the county to work in partnership with experienced leaders from within the county.

These kinds of collaborative activities will make a compelling case to key funders to explore how their investments, if partnered and coordinated with support from other funders, can leverage the economies of scale from cross-sector cooperation, and result in a comprehensive, sustainable system of capacity building services and programs. Now, that's a goal worth working toward.

Mike Schechtman, Executive Director

William B. Pratt, Projects Coordinator

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Introduction

This report provides an overview of the Ravalli County nonprofit sector, and an assessment of capacity building needs and interests of local organizations. The assessment is part of a nonprofit capacity building initiative begun in the summer of 2009 with informal discussions between several Ravalli County nonprofit members and representatives of Big Sky Institute for the Advancement of Nonprofits (BSI) in Helena. BSI had published *The Philanthropic Divide*, an important study describing the state of philanthropy for nonprofits in rural areas.

Discussions with a representative group of nonprofits in Ravalli County led to the establishment of an Organizing Committee in 2010 that identified a need to provide some capacity building infrastructure for nonprofits. The Organizing Committee called itself the Ravalli County Nonprofit Partnership (RCNP), and worked with BSI to develop a strategy to enable local nonprofits to learn about themselves, learn what they need, and provide a pathway toward acquiring needed capacity building programs and tools, expanded funding and other assistance.

A Steering Committee was formed in 2011, with RCNP initially operating as a project of the Bitter Root Cultural Heritage Trust, and later as a project of the Bitter Root Resource Conservation and Development Area, Inc. (RC&D). The RCNP Steering Committee and RC&D contracted with BSI to conduct research about the County's nonprofit sector, carry out the assessment and provide this written report.

A New Day for the Bitterroot contains two main parts. The first is a snapshot of the characteristics of the nonprofit sector in the County – numbers, ages, sizes, interests served, employment, revenues and expenses, etc. The second part summarizes the results of a survey of a representative portion of the nonprofit sector that measures nonprofit organizational interest in capacity building topics. In short, we want to know what nonprofits think are their greatest needs to build capacity in their organizations to do their work. Seventy-five Ravalli County nonprofit organizations were asked to complete the survey and sixty-five completed the survey, representing an 86.7% response rate. This exceptional response rate demonstrates a keen interest in capacity building – an energizing affirmation for working together to realize a New Day for the Bitterroot nonprofit community.

Identifying areas of capacity building needed can help guide future project and program development and make the case to foundations and other funding sources to support these efforts. Potential funders want to know that the homework has been done to inventory our nonprofit sector and identify its needs for capacity building to ensure the funds they provide are well spent.

This assessment is the first step in helping our nonprofit organizations build their capacity to fulfill their own missions. Next steps are obviously to act on the findings and recommendations indicated by the results of this assessment.

Introducing Ravalli County's Nonprofits

The nonprofit sector in Ravalli County permeates everyday life in the Bitterroot in myriad ways. The 223 Ravalli County nonprofits with 501(c)(3) tax exempt status include very small volunteer organizations, such as the various 4-H Clubs, and much larger entities such as the Ravalli Services Corporation. Whether it's emergency services, patient treatment, preventative care or diagnostic screening, we turn to the Marcus Daly Memorial Hospital. Ravalli Head Start helps low-income children get a leg up to be ready for success in our elementary schools. Daly Mansion reminds us of our history; the Hamilton Players enlightens and entertains us; the Bitter Root Land Trust helps maintain our legacy of spectacular open spaces; the Bitter Root Water Forum educates and acts to maintain the quality and quantity of precious water resources in the Bitterroot; and the Hamilton Senior Center provides programs and services for aging county residents.

These examples and the data in this report barely begin to tell the full story of who all of Ravalli County's nonprofits are, and what they do to enrich community life, as well as provide essential services to individuals and families in need. Nonprofits stand alone in their ability to combine private dollars, public dollars, donated resources, and incredible gifts of volunteer energy and enthusiasm. The Bitterroot's nonprofits are

masterful at stretching dollars; they accomplish so much, and with so few dollars. These are important stories, and they need to be told because they would describe the heart and soul of the Bitterroot's communities – the willingness of individual citizens to give generously of their time, knowledge, money and goodwill to make our communities better places for all of us to live.

Most importantly, the contributions of nonprofits in providing fundamental amenities and enhancing the quality of life strengthen the vitality of our communities, which helps to attract new businesses and retain existing ones. Moreover, employment choices are not always just about the job position and the compensation package. The quality of educational opportunity for a wage earner's children, as well as cultural, recreational, and spiritual enrichment provided by nonprofits – are all deeply important for attracting and retaining professionals of all kinds, and having a motivated workforce.

Methodology

To provide the Overview of Nonprofits in Ravalli County, data was obtained from the IRS Master File, which reflects data from Forms 990 filed with the IRS, information provided by the National Center for Charitable Statistics, and the Montana Nonprofit Association's *The Montana Nonprofit Sector Report* (1/26/11). Results from these three primary data sources were arranged in tabular or graphic fashion and explanatory comments were added by BSI.

For the Findings of Survey of Nonprofits, data was collected with a survey instrument developed by BSI, polling respondents' interest in learning more about seven capacity-building topics. The survey also asked for organizations' current sources of organizational development information, the barriers they see to organizational capacity building, and their interest in nonprofit collaboration.

Seventy-five representative nonprofit organizations were selected to be surveyed from the total list of Ravalli County's 223 organizations. Organizations were selected to provide good geographic coverage of the County and also to include a broad representation of the purposes

and program activities (based on National Taxonomy of Exempt Entities (NTEE) codes) offered to residents of Ravalli County. Another factor in selecting organizations was the Steering Committee members' knowledge of various organizations' active involvement in community capacity-building efforts.

Selecting the seventy-five organizations to be surveyed helped control the amount of time needed by RCNP volunteers to contact and follow-up with each organization during the survey process. Limiting the number of organizations also helped reduce analysis time needed by BSI.

Representatives from all seventy-five selected organizations were contacted at least once by RCNP volunteers, and many of them several times. Purposes of contacts were to explain the mission of the Ravalli County Nonprofit Partnership and the purpose of the Capacity Building Initiative, to encourage them to complete the survey, and to provide follow up reminders.

Results from surveys were tabulated and analyzed by BSI to highlight preferences indicated by respondents.

The National Taxonomy of Exempt Entities is a classification system developed by the National Center for Charitable Statistics, which classifies organizations by institutional purpose and major programs and activities. It recognizes 26 major groups, which are aggregated into 10 program categories. Within each program category, there is wide diversity in the types of organizations conducting the different functions. The IRS classifies nonprofit organizations using this system for statistical purposes on the basis of information provided in the "Statement of Program Service Accomplishments" section of Forms 990 and 990-EZ completed by nonprofit organizations. <http://nccs.urban.org/classification/NTEE.cfm>.

Summary of Research Findings

A. Findings of the Nonprofit Survey on Organizational Capacity Building

Developing a representative sampling of Ravalli County’s nonprofit sector, taking into account NTEE categories and geography, resulted in 75 nonprofits being invited to participate in a survey to identify interests in nonprofit capacity building topics, current sources for organizational development information, barriers to participating in capacity building activities, and interest in training on collaboration topics. A total of 63 nonprofits completed the survey, for a response rate of 84 percent.

The age of responding organizations ranged from 7 that were less than 5 years old to 15 that were 25 years old or greater, with 7 or more organizations in each of the 5 age brackets 5 years old or greater. A total of 33 nonprofits (52.4%) had annual budgets of less than \$50,000; 8 nonprofits (12.7%) were in the \$50,000 to \$99,999 range; 9 nonprofits (14.3%) were in the \$100,000 to \$199,999 range; 8 nonprofits (12.7%) were in the \$200,000 to \$499,999 range; and 5 nonprofits (7.9%) were in the \$500,000 or greater range.

For the responding organizations, a total of 36 nonprofits (57.1%) had 0 full-time staff; 10 nonprofits (15.9%) had 1 full-time staff; 10 nonprofits (15.9%) had 2 to 5 full-time staff; 2 nonprofits (3.2%) had 6 to 10 full-time staff; 1 nonprofit (1.6%) had 11 to 20 full-time staff; 2 nonprofits (3.2%) had 21 to 50 full-time staff; and 2 nonprofits (3.2%) had greater than 50 full-time staff. Almost 40 percent of the respondents served all of Ravalli County, and almost a quarter served one or more communities, but not the whole county.

The structured survey asked for interest levels in seven capacity building topic areas: Vision and Organizational Planning; Fundraising; Financial Management; Board of Directors; Staff; Volunteers; and Public

Communication. Based on analysis of responses that aggregated “important priority,” “very important priority” and “extremely important priority,” **Fundraising** emerged as the highest ranked capacity building topic, and **Public Communication** emerged as the second highest ranked topic. **Vision and Organizational Planning** wound up in a virtual tie with **Board of Directors**, ranking third and fourth respectively. **Financial Management** (ranked fifth) and **Volunteers** (ranked sixth) were also very close to each other in levels of interest, and interest in training on **Staff** topics ranked seventh.

BSI wishes to note that the rankings are only intended to demonstrate interest in training on the various topics. It is not a reflection of the level of importance accorded each topic more generally. For example, a topic might be ranked relatively low for training because the nonprofit thought it was such an important topic that it already received training and associated capacity building assistance on that topic. BSI also wants to point out that the pathway to success in fundraising is not always adequately illuminated by training on **Fundraising** and **Public Communication** skills alone. Strong **Financial Management**, active and effective **Boards of Directors**, clear and high quality **Vision and Organizational Planning**, well trained and fully engaged **Volunteers** and **Staff** – are all critical building blocks for both organizational and fundraising success.

Survey participants were asked to indicate their level of use for twelve different sources for obtaining organizational development information. Aggregating responses for “use fairly often” with “use extensively” **the Internet and associated search engines** ranked highest with 65.6% of respondents checking these usage choices. **Skilled people on our Board**

of Directors ranked second highest with 54.1% of respondents checking these usage choices. **Skilled volunteers who assist our organization** ranked third highest with 45.9% of respondents checking these usage choices. And **peer organizations doing similar work outside the county** ranked fourth highest with 39.3% of respondents checking these usage choices.

Respondents identified barriers to accessing organizational capacity building resources and opportunities by indicating for seven barriers the extent to which each topic was a barrier. By aggregating responses for “large barrier” and “huge barrier,” analysis of respondents' replies ranked **Financial costs for participation** as the top ranked barrier, with 45% of respondents checking these choices. **Lack of time for staff participation** was the second ranked barrier, with 43.3% of respondents checking these

choices. **Lack of time for Board participation** was the third ranked barrier, with 41.6% of respondents checking these choices.

Finally, survey participants were asked to indicate their level of interest in Nonprofit Collaboration Training Topics for each of four sub-topics. By aggregating responses for “strong interest” and “extremely strong interest” analysis of respondents' replies ranked **Building collaborative partnerships for grant-seeking opportunities** as the top ranked interest with 55% of respondents checking these choices. **Working effectively with diverse perspectives and differing skill levels** was the second ranked interest (46.7%). **Resolving conflicts to serve the greater good** ranked third (46.7%), and **the stages of collaboration, from sharing information to partnerships** ranked fourth (43.3%).

More detailed information about survey results is available in the Appendices, which contains:

- Appendix A – Ravalli County Nonprofit Survey Respondents;
- Appendix B – A listing of all 501(c)(3) Nonprofits of the Bitterroot as of 2009; and
- Appendix C – Capacity Building Topics – Tables and Charts – by Level of Priority, and by Level of Priority and Organizational Annual Revenue.

Overview of Ravalli County Nonprofit Sector

According to Internal Revenue Service (IRS) data (circa 2009), there were 223 nonprofits with 501(c)(3) tax deductible status in Ravalli County. In 2011, however, 67 of these organizations had their 501(c)(3) determination revoked for failure to comply with IRS reporting requirements.

The Ravalli County nonprofit sector is relatively young, with only 26 nonprofits, or 11.6% of the total having been established prior to 1960, when formation of new nonprofits began to accelerate. Nearly 62% of the 2009 total were formed in the two decades from 1990 through 2009 – 52 formed in the 1990s, and 86 formed in the 2000s.

Revenues of nonprofits reporting to the IRS in 2009 totaled \$70.6 million. Similar to statewide and national patterns, the great majority of nonprofits are relatively small in scale. The 168 nonprofits with less than \$50,000 each in annual revenues comprised just over 75% of all nonprofits in the County. Their revenues totaled \$0.76 million, or 1.1% of total revenues. The 12 large entities with annual revenues of \$500,000 or greater, comprised 5.4% of the total number of nonprofits, accounted for a combined total of \$62.4 million, which is 88.5% of total revenues.

The 43 nonprofits with annual revenues between \$50,000 and \$499,999 comprised 19.2% of all nonprofits, and accounted for a total of \$7.4 million in revenues, or 10.4% of total revenues.

Examination of Ravalli County nonprofits based on their National Taxonomy of Exempt Entities (NTEE) classifications demonstrated a lack of correlation between the number of nonprofits in each subsector and the total revenues received by that subsector.

NOTE: Nonprofits that have annual revenue of under \$25,000 do not have to report financial information. However, they will have to file an annual Electronic Notice (Form 990-N). Because these organizations don't have to report revenue or expenses, the data is understated.

- **Religious Organizations** totaled 40 nonprofits, and comprised 17.9% of the sector. Since religious congregations are not required to submit annual Form 990 annual reports, information was not complete for purposes of determining the scale of this subsector based on revenues.
- With 21 nonprofits (9.4% of total nonprofits), **Youth Development Programs** was the second largest subsector based on the number of groups; however, with combined revenues totaling \$79,974, this subsector ranked last according to income.
- With 20 nonprofits (9% of total nonprofits), **Arts and Cultural Organizations** ranked third largest based on the number of organizations; however, with combined revenues of \$1.4 million, this subsector ranked fifth according to income.
- With 18 nonprofits each (8.1% of total nonprofits), **Human Service Organizations** and **Recreation, Sports and Leisure Organizations** tied for fourth based on the number of groups; however, **Human Service Organizations** with \$3.1 million in revenues (4.3% of total nonprofit income) ranked third according

to income, while **Recreation, Sports and Leisure Organizations** with \$267,833 in revenues ranked eighth according to income.

- With 6 nonprofits each (2.7% of total nonprofits), **Health – General and Rehabilitative** and **Community Improvement** tied for eighth based on the number of groups. With \$48.9 million in

revenues (69.2% of total nonprofit income) **Health – General and Rehabilitative** ranked first according to income. This scale for health entities is consistent with state and national data, with Marcus Daly Memorial Hospital ranking as the largest nonprofit in Ravalli County - by far - according to income. **Community Improvement** with \$1.8 million in revenues ranked sixth according to income.

According to data obtained from the Montana Department of Labor and Industry by the Montana Nonprofit Association for July 2007 through June 2008, 43 Ravalli County nonprofits reported wage information for 735 employees that totaled \$21.4 million in wages, and an average nonprofit wage of \$29,120 (2010 population of 40,212).

Findings of the Survey of Ravalli County Nonprofits

This section of the report provides information that both gives an overall profile of the respondents to the Survey of Nonprofits in Ravalli County and their interest in various Capacity Building Topic Areas. The RCNP sent surveys out to seventy-five 501(c)(3) nonprofit organizations in Ravalli County. These organizations were initially chosen by a review of a master list of Ravalli County nonprofits obtained from the IRS, which was subsequently augmented by RCNP’s local knowledge about those

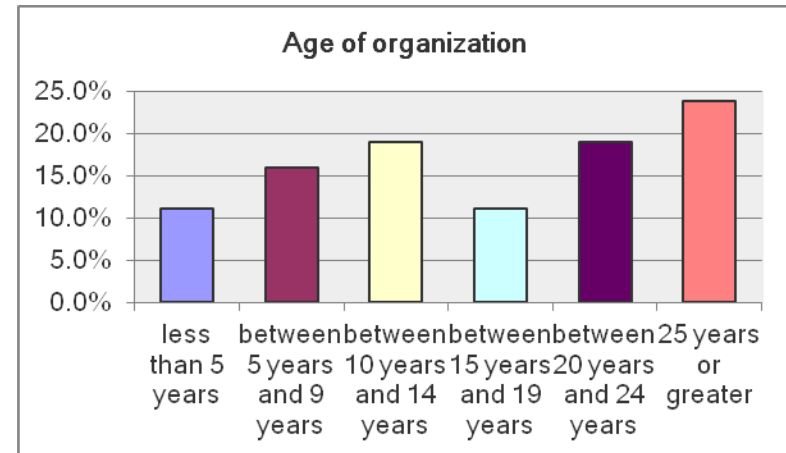
organizations they knew to be active. For more information on how these organizations were selected, see the section on Methodology. A survey questionnaire developed using Survey Monkey was distributed electronically, and, in a few cases, a hard copy was sent to organizations. Sixty-five organizations completed and returned the surveys, for an overall response rate of 86.7 %.

A. Description of Survey Respondents.

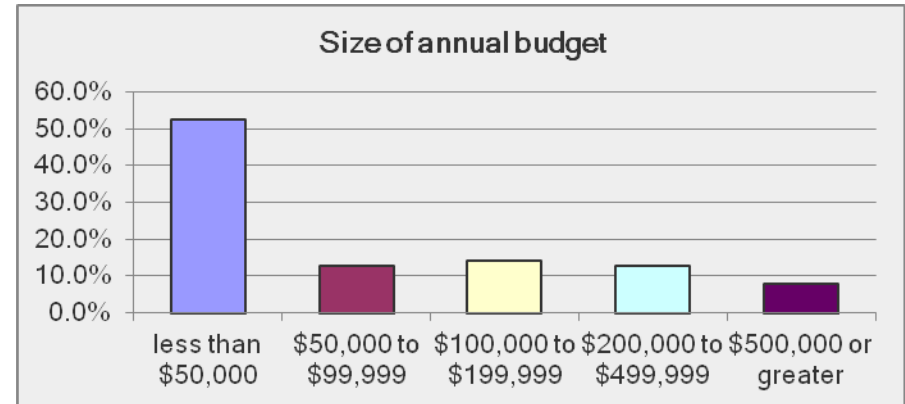
The initial part of the survey contained eight questions that requested descriptive information about each organization including: organizational age, annual budget, annual payroll, number of full- and part-time staff and the geographic area served. Subsequent sections dealt

with organizational interest in seven Capacity Building Topic Areas, e.g., fundraising, staffing, and board development. These responses were also correlated with organizational budget size to determine if interest in a particular Topic Area varied with budget size.

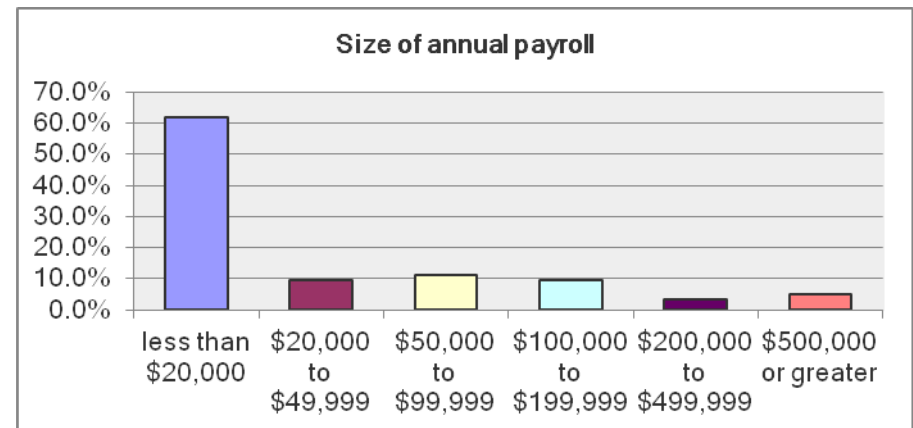
- 1. Age of organization.** Respondents were distributed throughout all six organizational age categories from “less than 5 years old” to “25 years old or greater.” The median age fell in the “between 15 and 19 years” category, and almost one-quarter of the organizations were 25 years old or greater.



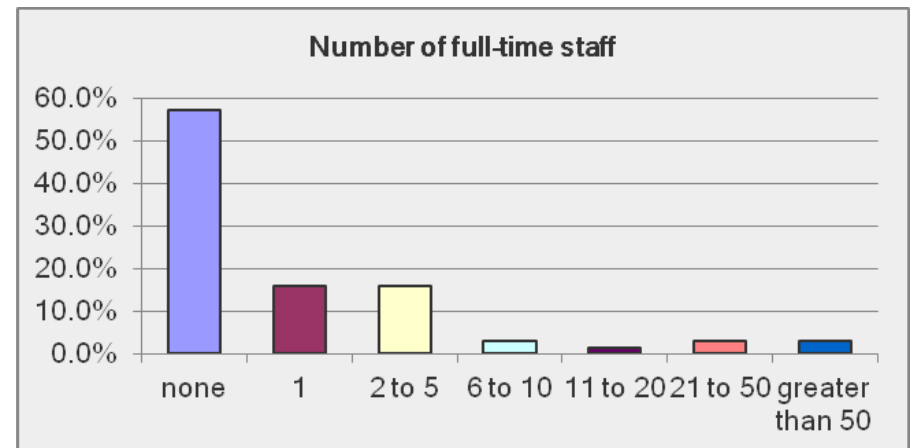
2. Size of Annual Budget. While survey respondents were distributed throughout the five annual budget size categories, over half were small organizations with budgets of less than \$50,000. Forty percent of respondents had budgets between \$50,000 and \$499,999, with less than eight percent having budgets of \$500,000 or greater.



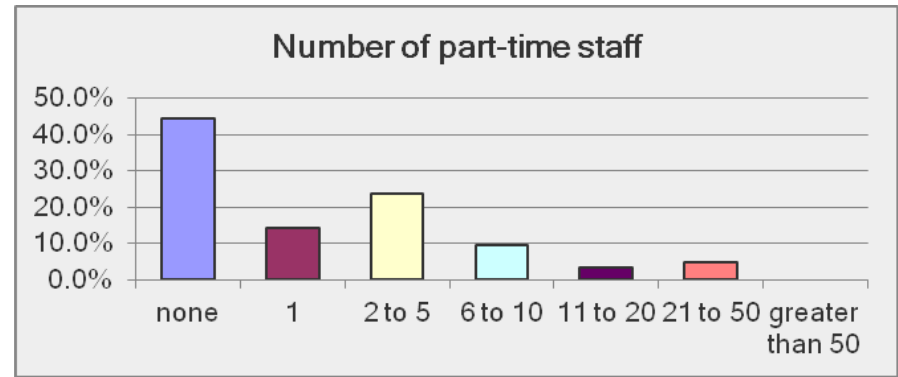
3. Size of Annual Payroll. With the majority of respondents having budgets under \$50,000, understandably, the size of annual payroll was concomitantly small. Almost sixty-two percent of respondents have payroll of less than \$20,000. Only 17.5 % of respondents have annual payroll of over \$100,000.



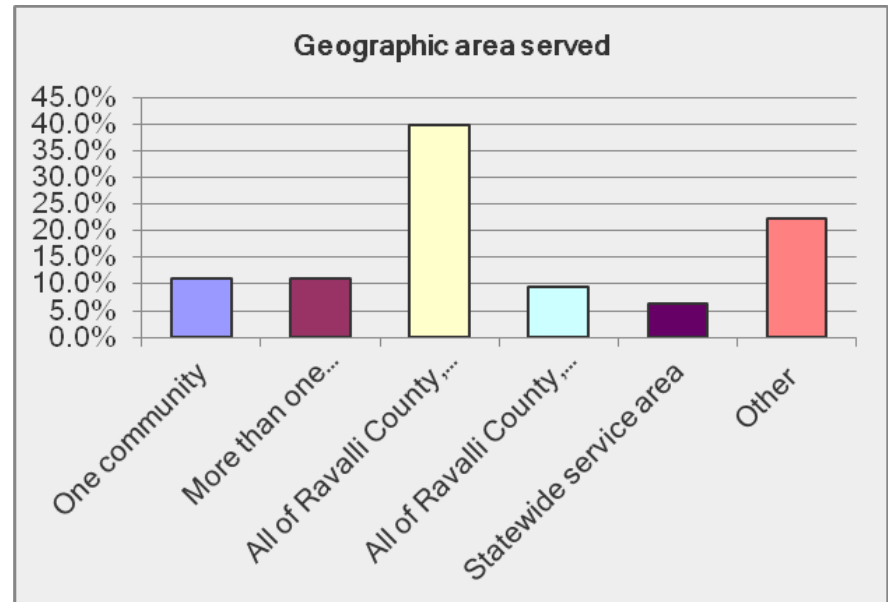
4. Number of Full-Time Staff. Budget size was also reflected in the number of full-time staff, with almost 60 % of respondents not having any full-time employees, and almost 16 % having only one full-time staff person. Those with 2 to 10 full-time employees made up 19 % of respondents. The large organizations, those with 11 or more full-time staff, made up only eight percent of respondents.



5. Number of Part-Time Staff. With part-time staff, the situation was somewhat better than with full-time staffing, as almost 56 % of respondents had at least one part-time person. Over one-third of organizations responding had from 1 to 5 half-time employees. Only 17 % had more than six part-time staff.



6. Geographic Area Served. Almost 40% of respondents exclusively served all of Ravalli County. Almost one-quarter served one or more communities, but not the entire county. Ten percent served Ravalli County and one to three additional counties, and six percent provided statewide services.



B. Ravalli County Nonprofits' Interest in Capacity Building Topics.

This section of the report describes the interest of Ravalli County nonprofit organizations in learning more about seven major capacity building topics. Information gleaned from this section will provide the RCNP with essential information to share with local funders and to inform the development of its nonprofit capacity building program for nonprofits in the county.

The seven major capacity building topics include:

- Vision and Organizational Planning
- Fundraising
- Financial Management
- Board of Directors
- Staff
- Volunteers
- Public Communication.

To further focus in on specific areas of interest, each major topic area was divided into four to eight subtopics. For example, in Financial Management -- “developing explicit internal fiscal controls” was a subtopic; in Board of Directors -- “board conduct and evaluation of its performance” was a subtopic. The following directions were given to survey respondents to show their level of priority interest in the capacity building topics:

“For the following seven categories, please use the following scale to indicate how important¹ the activity is for your organization for training and/or consulting services:

- 1 = not a priority
- 2 = somewhat of a priority
- 3 = an important priority
- 4 = a very important priority
- 5 = an extremely important priority”

NOTE: Supplemental information about the survey responses can be found in Appendix C.

¹ Indicating that a topic is not a priority is not a value judgment regarding whether the topic is intrinsically important. It may simply just mean that the task – such as developing a strategic plan – may already be done.

1. Vision and Organizational Planning. This topic was divided into four sub-topics including:

- developing a vision or mission statement;
- developing a written strategic plan;
- developing an operating plan; and
- evaluating annual organizational performance.

When the “important priority,” “very important priority,” and “extremely important priority” responses for each sub-topic were totaled, responses for seeing the sub-topic areas as at least an important priority ranged from 45.2% to 59.7%.

Capacity Building Sub-Topics	Total of “important priority,” “very important priority,” and “extremely important priority” responses
Evaluating annual organizational performance	59.7%
Developing an annual operating plan	58.0%
Developing a written strategic plan	51.6%
Developing a vision or mission statement	45.2%

Vision and Organizational Planning Analyzed by Annual Budget. The “important priority,” “very important priority,” and “extremely important priority” responses to each topic were totaled and analyzed by the size of an organization’s annual budget. For organizations with annual incomes of:

- Under \$50,000 – 39.4% to 42.5% ranked all topics as “important” or greater;
- \$50,000 to \$99,999 – 71.4% to 100% ranked all topics as “important” or greater;
- \$100,000 to \$199,999 – 44.4% to 55.5% ranked “developing a vision/mission statement” and “developing a written strategic plan,” as “important” or greater, and 77.7% saw “developing an annual operating plan” and “evaluating organizational performance,” as “important” or greater;
- \$200,000 to \$499,999 – 62.5% to 87.7% ranked all topics as “important” or greater; and
- \$500,000 or greater – 80% saw “evaluating annual organizational performance” as important or greater, and 0% to 40% saw the other three topics as “important” or greater.

Vision and Organizational Planning: Totals of “Important Priority,” “Very Important Priority,” and “Extremely Important Priority” Responses					
Size of Annual Budget					
Capacity Building Sub-Topics	Less than \$50,000	\$50,000 to \$99,999	\$100,000 to \$199,999	\$200,000 to \$499,999	\$500,000 or greater
Developing a vision or mission statement	42.5%	71.4%	44.4%	62.5%	0%
Developing a written strategic plan	42.5%	71.4%	55.5%	87.7%	20.0%
Developing an annual operating plan	42.4%	100%	77.7%	75.0%	40.0%
Evaluating annual organizational performance	39.4%	85.7%	77.7%	87.5%	80.0%

2. **Fundraising.** This major topic area was divided into five sub-topic areas including:

- Developing an annual fundraising plan;
- Diversifying sources of annual revenues;
- Training to improve fundraising success;
- Evaluating the current mix of revenue sources; and
- Expanding philanthropic resources in the county.

When the responses from “important priority” to “extremely important priority” to each sub-topic were totaled, the interest shown in the fundraising topic area was substantial.

Capacity Building Sub-Topics	Total of “important priority,” “very important priority,” and “extremely important priority” responses
Expanding philanthropic resources in the county	80.6%
Diversifying sources of annual revenues	74.2%
Training to improve fundraising success	74.2%
Developing an annual fundraising plan	72.6%
Evaluating the current mix of revenue sources	58.1%

Fundraising Analyzed by Annual Budget. The “important priority,” “very important priority,” and “extremely important priority” responses to each topic were totaled and analyzed by the size of an organization’s annual budget. For organizations with annual incomes of:

- Under \$50,000 – 45.5% to 72.7% ranked all topics as “important” or greater;
- \$50,000 to \$99,999 – 71.5% to 100% ranked all topics as “important” or greater;
- \$100,000 to \$199,999 – 66.6% to 100% ranked all topics as “important” or greater;

- \$200,000 to \$499,999 – 87.5% to 100% ranked all topics as “important” or greater; and
- \$500,000 or greater – 40% saw “evaluating the current mix of revenue sources” as important or greater, and 80% to 100% saw the other three topics as “important” or greater.

Fundraising: Totals of “Important Priority,” “Very Important Priority,” and “Extremely Important Priority” Responses

Size of Annual Budget					
Capacity Building Sub-Topics	Less than \$50,000	\$50,000 to \$99,999	\$100,000 to \$199,999	\$200,000 to \$499,999	\$500,000 or greater
Developing an annual fundraising plan	60.5%	100.0%	77.8%	87.5%	80%
Diversifying sources of annual revenues	60.7%	85.7%	100%	87.5%	80%
Training to improve fundraising success	63.7%	71.5%	66.6%	87.5%	80%
Evaluating the current mix of revenue sources	45.5%	71.5%	77.7%	87.7%	40%
Expanding philanthropic resources in the county	72.7%	71.5%	88.8%	100%	100%

3. Financial Management. This major topic area was divided into four sub-topic areas including:

- Developing a documented annual budget;
- Developing explicit internal fiscal controls;
- Developing internal and external fiscal reports; and
- Developing Board level financial oversight.

When the responses “important priority” and above were totaled, interest in the sub-topics ranged from 44% to 52%.

Capacity Building Sub-Topics	Total of “important priority,” “very important priority,” and “extremely important priority” responses
Developing Board level financial oversight	51.7%
Developing a documented annual budget	46.8%
Developing explicit internal fiscal controls	45.5%
Developing internal and external fiscal reports	43.5%

Financial Management Analyzed by Organizational Annual Income. The “important priority,” “very important priority,” and “extremely important priority” responses to each topic were totaled and analyzed by the size of an organization’s annual budget. For organizations with annual incomes of:

- Under \$50,000 – 36.4% to 42.5% ranked all topics as “important” or greater;
- \$50,000 to \$99,999 – 57.2% to 85.7% ranked all topics as “important” or greater;
- \$100,000 to \$199,999 – 33.3% to 66.6% ranked all topics as “important” or greater;
- \$200,000 to \$499,999 – 50.0% to 62.5% ranked all topics as “important” or greater; and
- \$500,000 or greater – 20% to 40% ranked all topics as “important” or greater.

Financial Management: Totals of “Important Priority,” “Very Important Priority,” and “Extremely Important Priority” Responses					
Size of Annual Budget					
Capacity Building Sub-Topics	Less than \$50,000	\$50,000 to \$99,999	\$100,000 to \$199,999	\$200,000 to \$499,999	\$500,000 or greater
Developing a documented annual budget	42.5%	85.7%	33.3%	62.5%	20%
Developing explicit internal fiscal controls	36.4%	71.5%	66.6%	62.5%	20%
Developing internal and external fiscal reports	39.4%	57.2%	55.5%	50.0%	20%
Developing Board level financial oversight	42.5%	71.5%	66.6%	62.5%	40%

4. Board of Directors. This major topic area was divided into eight sub-topic areas including:

- Writing descriptions of roles and responsibilities;
- Writing descriptions of each committee's role and responsibilities;
- Training for running effective Board meetings;
- Protocols for recruiting and orienting new members;
- Training on the Board's fundraising role and responsibilities;
- Board conduct and evaluation of its performance;
- Training on legal, liability and risk management; and
- Supervise, evaluate, manage executive directors.

When the responses “important priority” and above were totaled, six topics were 39% or lower. Only two sub-topics ranked 48% or above. These were “protocols for recruiting and orienting new members” and “training on the Board's fundraising role and responsibilities.”

Capacity Building Sub-Topics	Total of “important priority,” “very important priority,” and “extremely important priority” responses
Training on the Board's fundraising role and responsibilities	59.6%
Protocols for recruiting and orienting new members	48.4%
Writing descriptions of each committee's role and responsibilities	38.8%
Board conduct and evaluation of its performance	38.8%
Training on legal, liability and risk management	38.8%
Supervise, evaluate, manage executive directors	38.8%
Writing descriptions of roles and responsibilities	38.7%
Training for running effective Board meetings	27.5%

Board of Directors Analyzed by Organizational Annual Income. The “important priority,” “very important priority,” and “extremely important priority” responses to each topic were totaled and analyzed by the size of an organization’s annual budget. For organizations with annual incomes of:

- Under \$50,000 – 14.1% to 42.4% ranked all topics as an “important” or greater;
- \$50,000 to \$99,999 – 42.9% to 100% ranked all topics as “important” or greater;
- \$100,000 to \$199,999 – 33.3% to 55.5% ranked all topics as “important” or greater;
- \$200,000 to \$499,999 – 50.0% to 100% ranked all topics as “important” or greater; and
- \$500,000 or greater – 20% to 80% ranked all topics as “important” or greater.

Board of Director: Totals of “Important Priority,” “Very Important Priority,” and “Extremely Important Priority” Responses

Size of Annual Budget

Capacity Building Sub-Topics	Less than \$50,000	\$50,000 to \$99,999	\$100,000 to \$199,999	\$200,000 to \$499,999	\$500,000 or greater
Writing descriptions of roles and responsibilities	30.3%	71.5%	33.3%	50%	40%
Writing descriptions of each committee's role and responsibilities	24.3%	71.5%	44.4%	62.5%	40%
Training for running effective Board meetings	18.3%	42.9%	44.4%	62.5%	40
Protocols for recruiting & orienting new members	36.4%	85.8%	44.4%	62.5%	60%
Training on the Board's fundraising role and responsibilities	42.4%	85.8%	55.5%	100%	80%
Board conduct and evaluation of its performance	27.3%	71.5%	33.3%	75%	20%
Training on legal, liability and risk management	30.3%	100%	33.3%	75%	20%
Supervise, evaluate, manage executive directors	14.1%	71.5%	44.4%	75%	60%

5. **Staff.** This major topic area was divided into five sub-topic areas including

- Writing job descriptions for all staff;
- Developing comprehensive personnel policies;
- Conducting annual performance evaluations;
- Providing professional development for staff; and
- Supervising, inspiring and managing staff.

When the responses “important priority” and greater were totaled, all were below 50%, with the highest percentage being “supervising, inspiring and managing staff” at 45%.

Capacity Building Sub-Topics	Total of “important priority,” “very important priority,” and “extremely important priority” responses
Supervising, inspiring and managing staff	45.2%
Providing professional development for staff	38.7%
Writing job descriptions for all staff	29.1%
Conducting annual performance evaluations	29.0%
Developing comprehensive personnel policies	27.4%

Staff Analyzed by Organizational Annual Income. The “important priority,” “very important priority,” and “extremely important priority” responses to each topic were totaled and analyzed by the size of an organization’s annual budget. For organizations with annual incomes of:

- Under \$50,000 – 9.1% to 15.1% ranked all topics as “important” or greater;
- \$50,000 to \$99,999 – 42.9% to 71.5% ranked all topics as “important” or greater;

- \$100,000 to \$199,999 – 44.4% to 88.8% ranked all topics as “important” or greater;
- \$200,000 to \$499,999 – 37.5% to 75.5% ranked all topics as “important” or greater; and
- \$500,000 or greater – 40% to 80% ranked all topics as “important” or greater.

Staff: Totals of “Important Priority,” “Very Important Priority,” and “Extremely Important Priority” Responses					
Size of annual budget					
Topics	Less than \$50,000	\$50,000 to \$99,999	\$100,000 to \$199,999	\$200,000 to \$499,999	\$500,000 or greater
Writing job descriptions for all staff	12.1%	42.9%	55.5%	50%	40%
Developing comprehensive personnel policies	9.1%	57.2%	55.5%	37.5%	40%
Conducting annual performance evaluations	9.1%	57.2%	44.4%	50%	60%
Providing professional development for staff	12.1%	71.5%	55.5%	75%	80%
Supervising, inspiring and managing staff	15.1%	71.5%	88.8%	75%	80%

6. Volunteers. This major topic area was divided into five sub-topic areas including

- Annual plan for systematic volunteer recruitment;
- Orienting and training for new volunteers;
- Annual plan to recognize and reward volunteers;
- Leadership development for committed volunteers; and
- Supervising and managing volunteers.

When the responses “important priority” and above were totaled, the range was 43% to 50%, reflecting, perhaps, the large volunteer segment of the nonprofits in Ravalli County.

Capacity Building Sub-Topics	Total of “important priority,” “very important priority,” and “extremely important priority” responses
Orienting and training for new volunteers	50.0%
Supervising and managing volunteers	48.4%
Annual plan for systematic volunteer recruitment	46.7%
Leadership development for committed volunteers	43.6%
Annual plan to recognize & reward volunteers	43.5%

Volunteers Analyzed by Organizational Annual Income. The “important priority,” “very important priority,” and “extremely important priority” responses to each topic were totaled and analyzed by the size of an organization’s annual budget. For organizations with annual incomes of:

- Under \$50,000 – 33.3% to 45.5% ranked all topics as an “important” or greater;
- \$50,000 to \$99,999 – 42.9% to 71.5% ranked all topics as “important” or greater;
- \$100,000 to \$199,999 – 55.5% to 66.6% ranked all topics as “important” or greater;
- \$200,000 to \$499,999 – 50% to 62.5% ranked all topics as “important” or greater; and
- \$500,000 or greater – 20% to 40% ranked all topics as “important” or greater.

Volunteers: Totals of “Important Priority,” “Very Important Priority,” and “Extremely Important Priority” Responses

Size of annual budget

Topics	Less than \$50,000	\$50,000 to \$99,999	\$100,000 to \$199,999	\$200,000 to \$499,999	\$500,000 or greater
Annual plan for systematic volunteer recruitment	45.5%	42.9%	55.5%	50%	40%
Orienting and training for new volunteers	42.4%	57.2%	66.6%	62.5%	40%
Annual plan to recognize & reward volunteers	36.3%	57.2%	66.6%	62.5%	40%
Leadership development for committed volunteers	33.3%	71.5%	66.6%	50%	20%
Supervising and managing volunteers	36.4%	57.2%	66.6%	57.2%	40%

7. Public Communication. This major topic area was divided into four sub-topic areas including:

- Materials development for priority audiences;
- Media training to secure consistent public visibility;
- Using electronic media to expand communications; and
- Approaches and tools for public feedback.

When the responses “important priority” and above were totaled, the range was 45% to 69%, with “using electronic media to expand communications” being of most interest.

Capacity Building Sub-Topics	Total of “important priority,” “very important priority,” and “extremely important priority” responses
Using electronic media to expand communications	69.4%
Media training to secure consistent public visibility	62.9%
Materials development for priority audiences	56.5%
Approaches and tools for public feedback	54.8%

Public Communication Analyzed by Organizational Annual Income. The “important priority,” “very important priority,” and “extremely important priority” responses to each topic were totaled and analyzed by the size of an organization’s annual budget. For organizations with annual incomes of:

- Under \$50,000 – 42.5% to 63.6% ranked all topics as “important” or greater;
- \$50,000 to \$99,999 – 57.2% to 85.7% ranked all topics as “important” or greater;
- \$100,000 to \$199,999 – 55.5% to 88.9% ranked all topics as “important” or greater;
- \$200,000 to \$499,999 – 62.5% to 75% ranked all topics as “important” or greater; and
- \$500,000 or greater – 60% to 80% ranked all topics as “important” or greater.

Public Communication: Totals of “Important Priority,” “Very Important Priority,” and “Extremely Important Priority” Responses					
Size of annual budget					
Topics	Less than \$50,000	\$50,000 to \$99,999	\$100,000 to \$199,999	\$200,000 to \$499,999	\$500,000 or greater
Materials development for priority audiences	42.5%	85.7%	66.6%	72.5%	80%
Media training to secure consistent public visibility	57.5%	57.2%	88.9%	62.5%	60%
Using electronic media to expand communications	63.6%	85.7%	66.6%	75.0%	80%
Approaches and tools for public feedback	51.6%	57.2%	55.5%	62.5%	60%

8. Current Sources Used for Organizational Development

Information. This major topic area was divided into fourteen sources of information, which included two opportunities for respondents to indicate the use of “other” sources of information. These sources included:

- The Internet and associated search engines;
- Skilled people on our Board of Directors;
- Skilled volunteers who assist our organization;
- Local businesses that provide pro bono assistance;
- Local organizations within Ravalli County;
- Local libraries in Ravalli County;
- Peer organizations doing similar work outside the county;
- National association(s) with which our nonprofit is affiliated;
- Consultant(s) who serve our organization;
- Webinars offered by the Montana Nonprofit Association;

- Workshops provided by the Montana Nonprofit Association;
- Workshops and/or conferences of regional or national associations with which our nonprofit has affiliation; and
- “Other” sources. Responses included state agencies and programs, recommended reading materials, national nonprofit development organizations, and professional journals.

When the responses “used fairly often” and “used extensively” were totaled for each source, the Internet, board members and volunteers were ranked highest, followed by peer organizations and national associations with which the nonprofit was affiliated. The balance of sources were ranked between 5% and 28%.

Sources of Capacity Building Information	Total of “use fairly often” and “use extensively” responses
The Internet and associated search engines	65.6%
Skilled people on our Board of Directors	54.1%
Skilled volunteers who assist our organization	45.9%
Peer organizations doing similar work outside the county	39.3%
National association(s) with which our nonprofit is affiliated	32.8%
Local businesses that provide pro bono assistance	27.9%
Workshops and/or conferences of regional or national associations with which our nonprofit has affiliation	27.9%
Local organizations within Ravalli County	24.6%
Other 1 & 2	13.1%
Webinars offered by the Montana Nonprofit Association	11.4%
Consultant(s) who serve our organization	9.9%
Workshops provided by the Montana Nonprofit Association	6.6%
Local libraries in Ravalli County	4.9%

9. Barriers to Organizational Capacity Building. This major topic area was divided into nine barriers to organizational capacity building, including two opportunities to identify “other” barriers:

- Lack of time for staff participation;
- Lack of time for Board participation;
- Lack of support from the Board for staff to participate;
- Lack of interest for Board participation;
- Financial costs for participation;
- Physical access to participate (location of sessions - distance);
- Quality of training being presented; and

- “Other” barriers. These include, for example, training is not appropriate for needs or not available locally, lack of knowledge about available training opportunities, and the volunteer nature of organization.

When the “large barrier” and “huge barrier” responses were totaled, financial costs for participation and lack of time for both board and staff participation were ranked most highly. The balance of “barriers” ranged from 7% (lack of support from the Board for staff to participate) to 28% (physical access to training).

Barriers to Organizational Capacity	Total of “large barrier” and “huge barrier” responses
Financial costs for participation	45%
Lack of time for staff participation	43.3%
Lack of time for Board participation	41.6%
Physical access to participate (location of sessions - distance)	28.4%
Lack of interest for Board participation	18.3%
Other - 1	11.6%
Other - 2	6.7%
Lack of support from the Board for staff to participate	6.7%
Quality of training being presented	6.6%

10. Nonprofit Collaboration Training Topics. This major topic area was divided into four sub-topics including:

- The stages of collaboration, from sharing information to partnerships;
- Working effectively with diverse perspectives and differing skill levels;
- Resolving conflicts to serve the greater good (the group or community); and
- Building collaborative partnerships for grant-seeking opportunities.

When the “strong interest” and “extremely strong interest” responses were totaled, “building collaborative partnerships for grant-seeking” was of most interest (55%), with the other three sub-topics ranking between 43% and 47%.

Nonprofit Collaboration Sub-Topics	Total of “strong interest” and “extremely strong interest” responses
Building collaborative partnerships for grant-seeking opportunities	55.0%
Working effectively with diverse perspectives and differing skill levels	46.7%
Resolving conflicts to serve the greater good (the group or community)	46.7%
The stages of collaboration, from sharing information to partnerships	43.3%

A Closer Look at the Ravalli County Nonprofit Sector

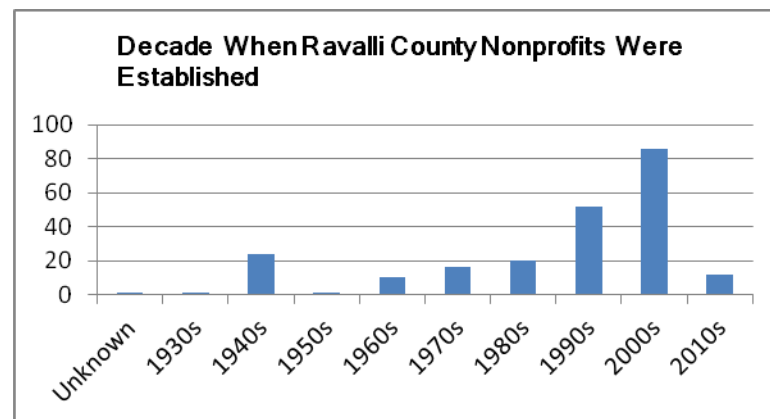
This section of the report provides an overview of all 501(c)(3) nonprofits in Ravalli County, and describes:

- the overall number of nonprofits;
- when they were established;
- their income, expenses and assets for 2009;
- how they are categorized according to the National Taxonomy of Exempt Entities, for example, arts and cultural organizations; recreation, sports and leisure; and youth development programs; and
- the wages paid by nonprofits in Ravalli County.

The data was obtained from a master list of Ravalli County nonprofits acquired from the IRS, information provided by the National Center for Charitable Statistics, and the Montana Nonprofit Association's *The Montana Nonprofit Sector Report*.

A. The number of nonprofit organizations and when they were established. The IRS reports that in 2009 there were 223 501(c)(3) nonprofit organizations in Ravalli County. Please note that subsequently, in 2011, the IRS also reported that the agency had revoked the 501(c)(3) status of 67 nonprofit organizations in Ravalli County because of these organizations' failure to file their Form 990s. (<http://www.irs.gov/charities/article/0,,id=240099,00.html>).

The first 501(c)(3) nonprofit organization was created in the 1930s and another 24 were added during the next decade. Only one was established in the 1950s, but starting in the 1960s, when 10 were established, the number of nonprofits created each decade gradually increased. In the 1990s, the number jumped substantially to 52 that were created in that decade and an additional 86 were added in the 2000s. The nonprofits established in the 2000s made up close to 40% of



profit organizations in the County. Since 2010, another 12 have been established. Half of all nonprofits established in Ravalli County were created in the seven decades from the 1930s through the 1990s. The second half was added in approximately two decades.

B. The National Taxonomy of Exempt Entities (NTEE) Categories and Ravalli County Nonprofits. Among the 223 Ravalli County 501(c)(3) nonprofit organizations, 23 NTEE major groups were identified. Religious organizations, primarily churches, made up the largest group – almost 18% of all organizations. An additional 12% were “not categorized” or were of “unknown” categorization. These groups were followed by: Youth Development Projects (9.4%) – the majority being 4-H chapters, Arts and Cultural Organizations (9%), Human Service Organizations (8.1%), Recreation, Sports & Leisure (8.1%), Educational Institutions (7.6%), Animal-Related Activities (7.2%), Environmental Quality Protection (4.5%), Community Improvement & Capacity Building (2.7%), and Health-General & Rehabilitative (2.7%).

When there were 5 or less organizations in a major group, we grouped them into an “Other” category. This category contained 25 organizations or 11.2% of all nonprofit organizations. The “other” category included the following 11 major groups: Agriculture, Food & Nutrition (3 organizations), Civil Rights, Social Action & Advocacy (1), Crime & Legal Related (1), Employment, Job Related & Vocational Rehabilitation (1), Housing & Shelter (4), Public Safety & Disaster Preparedness (5), International (1), Philanthropy, Voluntarism & Grantmaking (5), Science & Technology Institutes (1), Social Science Research Institutes (1), and Public Society Benefit (2).

National Taxonomy of Exempt Entities – Ravalli County 501(c)(3) Nonprofit Organizations per Category for 2009			
Category		Number	Percent
Animal Related Activities		16	7.2%
Arts and Cultural Organizations		20	9.0%
Community Improvement & Capacity Building		6	2.7%
Educational Institutions		17	7.6%
Environmental Quality Protection		10	4.5%
Health-General & Rehabilitative		6	2.7%
Recreation, Sports & Leisure		18	8.1%
Youth Development Programs		21	9.4%
Human Service Organizations		18	8.1%
Religion		40	17.9%
Other		25	11.2%
Not Categorized & Unknown		26	11.7%
Total		223	100.0%

C. The Income of 501(c)(3) Nonprofit Organizations in Ravalli County in 2009. The total income for all nonprofit organizations in Ravalli County was **\$70.6 million**. Nonprofit organizations were grouped into one of five income categories: under \$50,000, \$50,000 to \$99,999, \$100,000 to \$199,999, \$200,000 to \$499,999, and \$500,000 and greater. The income of all organizations in each income category was totaled.

- **Over 75% of all organizations had income of under \$50,000.** This also included organizations for which no income information was available. Note that churches are not required to file Form 990s with the IRS and thus income figures are usually unavailable. The total of this income category was \$758,451 or just 1.1% of the total income of all nonprofits in the county.
- Organizations with income of \$50,000 to \$99,999 made up almost 7% of all organizations. This category had total income of \$1.0 million or 1.4% of total nonprofit income.
- Organizations with income of \$100,000 to \$199,999 also made up 7% of all organizations. This category received \$2.1 million or 3.0% of total nonprofit income.

Income of 501(c)(3) Nonprofit Organizations in Ravalli County in 2009				
Income Category	Number	Percent	Total Income	Percent
Under \$50,000	168	75.3%	\$758,451	1.1%
\$50,000 to \$99,999	15	6.7%	\$1,022,649	1.4%
\$100,000 to \$199,999	15	6.7%	\$2,109,012	3.0%
\$200,000 to \$499,999	13	5.8%	\$4,262,160	6.0%
\$500,000 or greater	12	5.4%	\$62,432,939	88.5%
Total	223	100.0%	\$70,585,211	100.0%

- Organizations with income of \$200,000 to \$499,999 made up almost 6% of all organizations. This category accounted for \$4.3 million or 6.0% of total nonprofit income.
- **Organizations with income of \$500,000 and greater made up 5.4% of all organizations. This category accounted for \$62.4 million or 88.5% of all nonprofit income.**

D. Expenses of 501(c)(3) Nonprofit Organizations in Ravalli County in 2009. The total expenses for all nonprofit organizations in Ravalli County were **\$59.1 million**. Nonprofit organizations were grouped into one of five expense categories: under \$50,000, \$50,000 to \$99,999, \$100,000 to \$199,999, \$200,000 to \$499,999, and \$500,000 and greater. The expenses of all organizations in each expense category were totaled.

- **Almost 80% of Ravalli County nonprofits had expenses of under \$50,000.** This category had expenses of \$0.76 million and made up 1.3% of total nonprofit expenses.
- Organizations with expenses of \$50,000 to \$99,999 made up almost 7% of all organizations. This category had total expenses of \$1.04 million, which represented 1.87% of total nonprofit expenses. Organizations with expenses of \$100,000 to \$199,999 also made up almost 7% of all organizations. This category had total expenses of \$1.9 million or 3.2% of total nonprofit expenses.
- Organizations with expenses of \$200,000 to \$499,999 made up 4.0% of all organizations. This category had expenses of \$2.6 million or 4.5% of total nonprofit expenses.
- Organizations with expenses of \$500,000 or greater made up 3.1% of all nonprofit organizations. This category had expenses of \$52.8 million or 89.3% of total nonprofit expenses in the County.

Expenses of 501(c)(3) Nonprofit Organizations in Ravalli County in 2009				
Expense Category	Number	Percent	Total Expenses	Percent
Under \$50,000	177	79.4%	\$759,178	1.3%
\$50,000 to \$99,999	15	6.7%	\$1,038,487	1.8%
\$100,000 to \$199,999	15	6.7%	\$1,915,320	3.2%
\$200,000 to \$499,999	9	4.0%	\$2,637,530	4.5%
\$500,000 or greater	7	3.1%	\$52,779,483	89.3%
Total	223	100.0%	\$59,129,998	100.0%

E. Assets of 501(c)(3) Nonprofits Organizations in Ravalli County in 2009. The total assets for all nonprofit organizations in Ravalli County were **\$87.2 million**. Nonprofit organizations were grouped in one of five asset categories: under \$50,000, \$50,000 to \$99,999, \$100,000 to \$199,999, \$200,000 to \$499,999, and \$500,000 and greater. The organizational assets in each asset category were totaled.

- Organizations with assets of under \$50,000 made up almost 77% of all organizations. This category had total assets of \$0.59 million or 0.7% of total nonprofit assets.
- Organizations with assets of \$50,000 to \$99,999 made up almost 5% of all organizations. This category had assets of \$0.76 million or almost 1% of total nonprofit assets.
- Organizations with assets of \$100,000 to \$199,999 made up 4.0% of all organizations. This category had assets of \$1.2 million or 1.4% of total nonprofit assets.
- Organizations with assets of \$200,000 to \$499,999 made up almost 6% of all nonprofits. This category had \$4.3 million or 4.9% of total nonprofit assets.
- Organizations with assets of \$500,000 and greater made up 8.5% of organizations. This category had assets of \$80.3 million or 92.1% of all nonprofit assets in the County.

Assets of 501(c)(3) Nonprofit Organizations in Ravalli County in 2009				
Asset Category	Number	Percent	Total Assets	Percent
Under \$50,000	171	76.7%	\$590,810	0.7%
\$50,000 to \$99,999	11	4.9%	\$763,500	0.9%
\$100,000 to \$199,999	9	4.0%	\$1,200,960	1.4%
\$200,000 to \$499,999	13	5.8%	\$4,306,495	4.9%
\$500,000 or greater	19	8.5%	\$80,339,777	92.1%
Total	223	100.0%	\$87,201,542	100.0%

F. The National Taxonomy of Exempt Entities (NTEE) Categories by Income and Expenses. For 2009, total income for all nonprofits in Ravalli County was **\$70.6 million** and total expenses were **\$59.2 million**.

- While only making up 2.7% of the nonprofit organizations in the County, **the Health Care category had income of \$48.9 million or just over 69% of all nonprofit income and \$44.5 million or just over three-quarters of all nonprofit expenses in 2009.**
- Educational Institutions were next in line with \$4.9 million or 7% of total income and \$2.8 million or 4.8% of total nonprofit expenses.
- The “Other” category, which contained 25 organizations from 11 major groups, had \$4.8 million or 6.8% of total income and \$2.8 million or 4.8% of total expenses.
- Human Service Organizations had \$3.05 million or 4.3% of total income and \$2.9 million or 4.9% of total expenses.
- Environmental Quality Protection Organizations had \$2.8 million or 3.9% of total income and \$2.6 million or 4.5% of total expenses.
- Animal Related Activities had \$2.3 million or 3.2% of total income and \$1.4 million or 2.3% of total expenses.
- Community Improvement and Capacity Building had \$1.8 million or 2.6% of total income and \$0.63 million or 1.1% of total expenses.
- Arts and Cultural Organizations had \$1.4 million or 2.0% of total income and \$1.1 million or 1.9% of total expenses.
- Recreation, Sports & Leisure Organizations had \$0.3 million or 0.4% of total income and \$0.2 million or 0.3% of total expenses.
- Religion had \$0.3 million or 0.4% of total income and \$398 or 0.0% in total expenses.
- The “Not Categorized & Unknown” category had \$50,127 or 0.1% of total income and \$24,545 or 0.0% of total expenses.

**National Taxonomy of Exempt Entities
Ravalli County 501(c)(3) Nonprofit Organizations per Category, Income and Expenses for 2009**

Category	Organizations		Income		Expenses	
	No.	%	Total	%	Total	%
Animal Related Activities	16	7.2%	\$2,284,805	3.2%	\$1,388,841	2.3%
Arts and Cultural Organizations	20	9.0%	\$1,426,384	2.0%	\$1,095,197	1.9%
Community Improvement	6	2.7%	\$1,833,761	2.6%	\$631,479	1.1%
Educational Institutions	17	7.6%	\$4,922,219	7.0%	\$2,816,124	4.8%
Environmental Quality Protection	10	4.5%	\$2,751,437	3.9%	\$2,646,172	4.5%
Health-General & Rehabilitative	6	2.7%	\$48,871,393	69.2%	\$44,537,259	75.3%
Recreation, Sports & Leisure	18	8.1%	\$267,833	0.4%	\$194,902	0.3%
Youth Development Programs	21	9.4%	\$79,974	0.1%	\$59,852	0.1%
Human Service Organizations	18	8.1%	\$3,052,447	4.3%	\$2,902,457	4.9%
Religion *	40	17.9%	\$266,943	0.4%	\$398	0.0%
Other **	25	11.2%	\$4,777,888	6.8%	\$2,832,772	4.8%
Not Categorized & Unknown	26	11.7%	\$50,127	0.1%	\$24,545	0.0%
Total	223	100.0%	\$70,585,211	100.0%	\$59,129,998	100.0%
* Churches are not required to file Form 990s or to report financial information; therefore, these figures are understated.						
** Categories containing 5 organizations or less						

Nonprofit Wages for Ravalli County From July 2007 to June 2008. In January 2011, the Montana Nonprofit Association (MNA) updated its Montana Nonprofit Sector Report, which provided an overview of the nonprofit sector in Montana. The information about nonprofit wages contained in the report was obtained by MNA from the Montana Department of Labor and industry for July 2007 to June 2008, and used in the following analysis.

From July 2007 to June 2008, Ravalli County had 43 nonprofit organizations paying wages. These organizations employed 735 people or 1.9% of the 39,641 people employed by nonprofit organizations in Montana. The wages paid by Ravalli County nonprofits totaled \$21.4 million or 1.8% of the \$1.2 billion in total wages paid by nonprofit organizations in the state. The average wage for an employee of a Ravalli County nonprofit organization during that time period was \$29,120. The state average wage was \$30,291.

Nonprofit Wages by County, July 2007-June 2008 – MT Nonprofit Sector Report (MNA)							
Source: MT Dept of Labor & Industry							
County Name	No. of Nonprofits	Employment	Percent Employment	Nonprofit Total Wages	%Total Wages	Average Wage	2010 Population
RAVALLI	43	735	1.90%	\$21,403,529	1.8%	\$29,120	40,212
Statewide	1,438	39,641	100%	\$1,200,780,407	100%	\$30,291	989,415

Strategies for Shaping Sector-Wide Capacity Building Programs: Recommendations from Big Sky Institute for the Advancement of Nonprofits

The responses of Ravalli County nonprofits to the survey on interests in capacity building demonstrated that fundraising for nonprofits in Ravalli County is the top priority. The generous family foundations and private sector funders found in Ravalli County generally lack the resources for making larger scale grants (\$25,000 to \$50,000 and larger) that would be immensely helpful to nonprofits in the Bitterroot Valley. For Ravalli County nonprofits to be competitive on the state, regional and national playing fields where non-government grants of this scale are available, it is critical to demonstrate skill levels and caliber of management that larger funders expect. Strong financial management, effective boards of directors, quality communications and promotional materials – these are all important building blocks for fundraising success.

BSI's work over our first decade has reinforced the importance of thinking about nonprofits from a systems perspective. Many small nonprofits experience success when there is strong leadership at the Board or staff level, but experience instability and decline when that leadership leaves the organization. For many medium-sized nonprofits that develop effective programs and achieve recognition in the community, continued progress is often stymied by the lack of accessible resources – both technical and financial – to support the next stages of development.

To use the metaphor of a garden, cast your seeds upon the soil, and some will take root and grow. But many will wither and die. Plant the seeds carefully, water and fertilize when needed, thin and weed when needed, and the garden produces a bounty. For nonprofit organizations to increase their effectiveness in a sustainable fashion, and to flourish to meet community needs, BSI believes that six core strategies should be undertaken. Specific recommendations for the Ravalli County Nonprofit Partnership to consider follow each core strategy.

1. Develop the whole organization. Too often, workshops and trainings focus on just one part of the organization – the board, or volunteers, or the executive director, or one staff member who is able to attend a training. Successful nonprofit development needs program approaches that concurrently engage and build up the whole organization.

Recommendations:

- Annually, provide a mix of seminars, trainings and other nonprofit educational activities that is balanced to ensure that board members, volunteers, executive directors and other staff are all getting access to education and capacity building knowledge.

- Periodically, conduct trainings on the same topic for all the audiences – board, volunteers, executive directors, other staff – and structure the sessions to help the attendees see and understand the differences in roles, responsibilities and perspectives that each audience has.

2. Develop the community's knowledge and readiness for nonprofit board service.

Educational strategies that broadly strengthen the larger community's capacity to support and strengthen nonprofits will pay huge dividends because many people typically serve on more than one board at the same time. As well, this investment in board training will spill over to additional nonprofits when individuals move from one board to a new one due to changing personal interests.

Recommendations:

- Conduct an annual community-wide training at the beginning of each year on the fundamentals of nonprofit Board responsibilities that is especially designed for individuals who have never received training on nonprofit Board responsibilities, those who are new to Board service, and those who might be new to the Bitterroot Valley.
- Conduct periodic community-wide trainings for nonprofit Boards on various priority topics that give a deeper level of knowledge and skill development than the annual training on fundamentals. [Another opportunity to engage newcomers.]

- Explore with the Bitterroot Valley Chamber of Commerce whether there might be opportunities for collaborating with the Leadership Bitterroot program to conduct introductory sessions about the roles and responsibilities of nonprofit boards, and opportunities for both community service and leadership development through joining nonprofit boards.

3. Develop the nonprofit community's capacity to share resources.

Funders have limited resources and are besieged by requests. Collaborative approaches to training and capacity building that benefit larger numbers of groups and increase the funder's impact have gained favor in recent years. Additionally, funders have become interested in communities that develop a collaborative culture in which existing skills within nonprofits are shared with those that need them. This demonstrates to funders that their investments in capacity building will be leveraged.

Recommendations:

- Utilize existing low-cost training sessions (such as webinars offered by the Montana Nonprofit Association) as opportunities to bring together nonprofits in facilitated sessions that discuss the topics covered in the webinars and explore how to apply what is learned to their respective organizations.
- Encourage nonprofits that have a visiting consultant to conduct a public seminar or skill training session that is open to the larger nonprofit community.

- Explore the possibility of a collaboration with the MAPS Media Institute to record local nonprofit training sessions that are cost-prohibitive to repeat on a sustained basis, that might lend themselves to a documentary format that both provides the training and demonstrates how new knowledge and skills are applied and utilized in a case study format.

4. Develop the staff leadership of nonprofits. Typically when a nonprofit hires its first executive director, it rarely can afford to offer the level of compensation needed to attract an experienced executive director. As well, when there is turnover in the executive director position for small to medium-size nonprofits, this also may be a difficult juncture for being able to offer compensation to attract an experienced executive director. In-depth training for new executive directors regarding the role and responsibilities of this key position, and associated priority skills, can be a strategic investment to help ensure the success of this key staff leadership position.

Recommendations:

- Determine whether there is sufficient interest within the pool of current executive directors of nonprofits in Ravalli County to get intensive skill training for this position, and if so, develop and implement a pilot training program.
- Evaluate the pilot and determine at what frequency it might be offered in the future, and whether participation should be opened up to executive directors in nearby counties who might need this training.

5. Develop the community's capacity to strengthen organizations.

Successful organizational development for nonprofits is not an over-night phenomenon. It is a continuing series of seminars, trainings, resource sharing, and sometimes more intensive organizational development approaches. A growing number of Montana communities is building community-based (or place-based) capacities to provide nonprofit training and capacity building services on an ongoing basis. In several communities, the local or county community foundation has taken on the leadership role to provide these organizational development services. In other communities, networks of nonprofits have come together for the same purposes.

Recommendations:

- Gather information regarding the various community-based approaches to nonprofit capacity building currently underway in Montana, and the funding strategies that supported their successful development.
- Conduct a community conversation, ideally with representatives from some of these community-based programs, to learn more about these various approaches and identify what elements from them would be useful for Ravalli County.
- Visit with existing nonprofit organizations in Ravalli County, such as Bitter Root RC&D Area, Inc., Ravalli County EDA, and Bitterroot College Program, whose respective missions align with supporting the development of nonprofits, to determine their potential interest and capacity for helping deliver capacity building services to area nonprofits.

6. Develop expanded philanthropic resources to support local nonprofits.

Nonprofits need to be very strategic if they want capacity building services to be supported by Bitterroot funders. Given the priority for fundraising skills, nonprofit leaders must be proactive about the realities of “donor exhaustion” that many funders have been experiencing. Seeking underwriting for skill training to enable nonprofits to fundraise more effectively could cause many funders to shudder and want to close their doors, if there isn't a concurrent commitment by Bitterroot nonprofits to work on expanding philanthropic resources in the County.

Moreover, increasing fundraising skills for nonprofits that participate in training sessions – without increasing the size of the philanthropic pie of available funds – will result in some groups getting a larger slice of the pie, and by default, others will get less. In time, this “winners and losers” outcome scenario will create enmity within the nonprofit community, and disenchantment in the funding community. Increasing the philanthropic pie is the best way to ensure against such a negative outcome. Fortunately, 80.6% of survey respondents indicated that “expanding philanthropic resources in the county” was either important, very important, or extremely important, making this topic the number one priority of all the fundraising topics in the survey.

Finally, social services and youth focused organizations that rely significantly on government funding face uncertain times with current economic conditions, and budget cutting underway by the federal government. Philanthropic resources need to be expanded to help fund the nonprofits in Ravalli County more generally, as well as to help support and sustain the nonprofit infrastructure

and capacity building programs currently being explored by the Ravalli County Nonprofit Partnership. To begin planning to create and offer nonprofit capacity building programs without addressing how to fund them on a sustained basis puts these efforts at risk. Conversely, efforts to expand philanthropic resources in the County at a time when efforts are underway to help nonprofits administer the funds they receive as effectively as possible make a more compelling argument for individual donors and other funders to expand their investment in the County's nonprofits.

Recommendations:

- Explore with Ravalli County foundations and corporate funders whether they would be interested in collaborating and/or partnering with funders from outside the County to fund organizations and/or efforts in the Bitterroot that align with shared funding interests.
- Investigate what other Montana counties are doing to expand philanthropic resources within their counties, and determine which successful approaches and strategies make sense for Ravalli County to explore and possibly undertake.
- Investigate potential interest in forming a staffed county-wide community foundation that could engage in a robust effort to build permanently endowed philanthropic funds. Such an effort could include assisting existing local community foundations, such as the Stevensville Community Foundation and the Darby Town Endowment Fund, to help develop their own endowments, if desired.

While considering this framework approach for developing and implementing ongoing capacity building training and assistance programs for the County's nonprofits, the Ravalli County Nonprofit Partnership should concurrently make use of the guidance afforded by the capacity building survey. This suggests that **Fundraising** and **Public Communication** should be priority topics in the first year. Moreover, design of the capacity building programs needs to be responsive to the information provided by

the survey data regarding barriers to participation. Cost being the most significant barrier suggests that a combination of financial underwriting to keep overall costs affordable, and scholarship assistance for nonprofits with very constrained budgets, will help attain desired levels of participation. Similarly, the concerns identified about time for staff and board participation suggest that sessions need to be sensitive to length, as well as the frequency with which sessions are offered.

Capacity Building Programs for the Bitterroot's Nonprofits: A Prototype Example

INTRODUCTION

Using the findings from this report to begin shaping capacity building programs for the Bitterroot's nonprofits is new territory for many people. This prototype was developed to give people an example of an approach that begins to integrate both the survey's findings and the strategies recommended by BSI.

FUNDRAISING SEMINAR SERIES

The results of the survey on capacity building topics clearly demonstrated that **Fundraising** was the number one priority. Experience has shown that over-reliance on any one type of revenue (e.g., government grants; corporate sponsorships; member dues) creates potential vulnerabilities for nonprofits. Therefore, RCNP could consider an extended seminar series on a variety of fundraising topics that focus on imparting knowledge and skill development. The series could kick off with a well known and respected presenter whose session will be invaluable for all kinds of nonprofits.

BSI suggests inviting Joel Kaleva (Crowley-Fleck law firm, Missoula office, foundation and nonprofit specialist) to conduct a seminar on “Deductibility of Charitable Contributions” – critical information for both nonprofit boards as well as staff, in light of increasing levels of scrutiny by the IRS in this arena.

Skill training in fundraising should not take place in a silo-like approach that does not address the all important role of the Board of Directors. Relevant topics associated with board development should be integrated into the proposed fundraising seminar series. Examples include: 1) the role and responsibilities of the nonprofit Board of Directors in fundraising; and 2) the role, responsibilities and structure of the nonprofit Board's fundraising committee.

Well in advance of the kick-off of the seminar series, an orientation session for executive directors should be conducted to introduce the series. The session could include skills training for the executive directors regarding their role in helping the Board of Directors develop their knowledge and skills in fundraising, as well as their role in assisting Board members in carrying out fundraising responsibilities. With sufficient lead time, the executive directors can work with the Board to plan for participation in the series as part of the Board's calendar of activities. This also will allow lead time for budget planning to accommodate participation costs.

The executive directors can be invited to join together in a peer learning community – or what is call a cohort in some circles – to work collaboratively on this important task of helping each organization diversify and strengthen their annual funding. An experienced, skilled nonprofit development consultant should be

retained to facilitate the work of the cohort, including helping the participants develop ground rules about confidentiality and any other potentially sensitive subjects. The cohort would meet monthly for approximately a year to discuss and exchange ideas on how what is being learned through each seminar is actually being put into place in their respective organizations. Cohort members would compare notes on what's working in their organizations, as well as what's not working, and difficulties or challenges they might be encountering. With the assistance of the consultant, cohort members would make use of each other to do problem solving.

Finally, this would be an ideal situation for adding consultant services, utilizing individuals with strong skills in the priority topics being covered by the seminar series. One possibility is to offer a limited number of hours for coaching assistance that nonprofits could purchase in conjunction with their registration for the seminar. Another option is to collaborate among the nonprofits that want more in-depth consulting assistance to put together a packaged request that gets economies through combined purchasing power and coordination of travel.

FINANCING THE SEMINAR SERIES

A well-planned fundraising seminar series with qualified presenters presents a great opportunity to solicit sponsorships from the business community and other interested funders to help underwrite costs. Additional funds can be sought to make scholarships available for organizations with constrained budgets. The pricing structure can be designed to offer a discount incentive for signing up for all of the sessions. Other discounts could be considered for sending more than one person to the session.

Appendices

Appendix A: Ravalli County Nonprofit Survey Respondents

The members of the Steering Committee of the Ravalli County Nonprofit Partnership wish to recognize and thank the following organizations who took the time to complete the survey on nonprofit capacity building topics, and associated important questions:

Area VI RSVP	Feral Cat Rescue Inc
Bitter Root Cultural Heritage Trust Inc	Fly Fishers of The Bitterroot Inc
Bitter Root Humane Association	Footloose Montana
Bitter Root Land Trust Inc	Fox Hollow Animal Project
Bitterroot Audubon Society	Friends of the Bitterroot Public
Bitterroot Casa Inc	Friends of the Darby Community Public Library Inc
Bitterroot Dragon Brigade Corp	Friends of the Hamilton Schools Foundation Inc
Bitterroot Ecological Awareness Resources Inc	Friends of the Lee Metcalf National Wildlife Refuge
Bitterroot Famers Market Project	Greater Ravalli County Foundation
Bitterroot Performing Arts Council	Habitat for Humanity International Inc
Bitterroot Public Library Foundation (2 surveys)	Hamilton Players Inc
Bitterroot Resource Conservation and Development Area Inc.	Hamilton PTA
Bitterroot Therapeutic Riding	Hamilton Senior Center Inc
Bitterroot Valley Historical Society/Ravalli County Museum	Haven House Inc
Bitter Root Water Forum Inc	Historic St. Mary's Mission Inc
Bitterroot Youth Homes	Literacy Volunteers of America-Bitterroot Inc
Daly Mansion Preservation Trust	Marcus Daly Memorial Hospital & Daly Hospital Foundation
Darby Bread Box	Montana A Cappella Society
Darby Community Clubhouse Inc	Montana Companion Animal Network
Darby Loggers Day Inc	Ravalli County 4-H Clubs/Extension Office
Emma's House - Bitterroot Valley Childrens Advocacy Center Inc	Ravalli County Council on Aging
Erwin & Florence Rosten Foundation for the Media Arts Inc	Ravalli County Watchdog
Evergreen Kids Corner Inc	Ravalli Services Corporation

Ravalli Sports Club
Sapphire Community Health Inc
Sapphire Lutheran Homes Inc
South Valley Child and Family Center
Stevensville Clothes Closet
Stevensville Community Foundation Incorporated
Stevensville Historical Society Inc /Museum
Stevensville Main Street Association
Stevensville Pantry Partners Food Band

Stevensville Senior Center Inc
Supporters of Abuse Free Environments Inc
Sustainable Living Systems
The Teller Inc
Trout Unlimited
Valley Veterans Service Center
Victor Heritage Museum Inc
Victor Senior Center Inc
Wind River Bear Institute

Appendix B: Nonprofits of the Bitterroot. This is a list of the 223 nonprofits that had 501(c)(3) designation from the IRS in 2009.

4-H Clubs & Affiliated 4-H Organizations - Bitterroot Saddle Busters
4-H Clubs & Affiliated 4-H Organizations - Bitterroot Shooting Stars
4-H Clubs & Affiliated 4-H Organizations - Clover Club
4-H Clubs & Affiliated 4-H Organizations - Hoofbeats
4-H Clubs & Affiliated 4-H Organizations - Lucky Horse Shoe
4-H Clubs & Affiliated 4-H Organizations - Ravalli County 4-H Council
4-H Clubs & Affiliated 4-H Organizations - Rock N Riders
4-H Clubs & Affiliated 4-H Organizations - Rocky Mountain Ranchers
4-H Clubs & Affiliated 4-H Organizations - Sapphire Shamrocks
4-H Clubs & Affiliated 4-H Organizations - Sidewinders
4-H Clubs & Affiliated 4-H Organizations - South Valley Outlaws
4-H Clubs & Affiliated 4-H Organizations - Summerdale Rebels
4-H Clubs & Affiliated 4-H Organizations- Barnyard Bunch
4-H Clubs & Affiliated 4-H Organizations- Big Sky Horizons
4-H Clubs & Affiliated 4-H Organizations- Big Sky Horizons (2)
4-H Clubs & Affiliated 4-H Organizations- Canyon Creek Echoes
Acts of Kindness
Agape Youth Ranch
All About Youth
American Orff-Schulwerk Association

Ananda Marga of Montana
Aspen Hospice Charitable Foundation Inc
Assembly of God
Autism Family Resources
Bahais of Ravalli County
Ballet Bitterroot Performing Arts Inc
Bangtail Dog Rescue
Banqueting Table of The Lord
Bienusa Ministries International
Birthright of Bitterroot Inc
Bitter Root Cultural Heritage Trust Inc
Bitter Root Humane Association
Bitter Root Land Trust Inc
Bitter Root Resource Conservation And Development Area Inc.
Bitter Root Valley Historical Society
Bitter Root Water Forum Inc
Bitterroot Therapeutic Riding
Bitterroot Audubon Society
Bitterroot Basic Research Inc
Bitterroot Bible Evangelical Free Church

Bitterroot Casa Inc
Bitterroot Christian Ministries Inc
Bitterroot Community Band
Bitterroot Cross Country Ski Club
Bitterroot Dragon Brigade Corp
Bitterroot Ecological Awareness Resources Inc
Bitterroot Payee Services Inc
Bitterroot Public Library Foundation Inc
Bitterroot Red Sox American Legion Baseball
Bitterroot River Protection Association Inc
Bitterroot Swim Team Inc
Bitterroot Valley Calvary Chapel Preschool & Daycare
Bitterroot Valley Chorus
Bitterroot Victor
Bitterroot Wildfire Contractors Association
Bitterrooters For Planning
Burnt Folk Ministry
Calvary Baptist Church of Victor Montana
Canyon View Church of The Christian And Missionary Alliance
Carpenters For Christ Inc
Charlos Heights Community Church of Hamilton Montana
Church Foundation Ministries Inc
Clarence L Moyle Trust FBO Bitterroot Humane Society
Commodity Center Inc
Common Ground Center
Corvallis Community Church
Corvallis Community Events Center Foundation
Corvallis Home And School Association
Corvallis Schools Foundation
Daly Hospital Foundation Inc
Daly Mansion Preservation Foundation Inc

Daly Mansion Preservation Trust Inc
Darby Bread Box
Darby Community Clubhouse Inc
Darby Foursquare Church
Darby Loggers Day Inc
Darby Volunteer Quick Response Unit
Dental Project Peru
Domestic Critter Recovery Inc
Earth & Sky Circle
Ecumenical Christmas Mission
Emma's House - Bitterroot Valley Childrens Advocacy Center Inc
Evergreen Kids Corner Inc
Farmers State Community Foundation Inc
Feral Cat Rescue Inc
First Christian Church
First Church of Christ Scientist
First Responder Institute For Research And Education
Five Rivers Festival
Florence Baptist Church
Florence Carlton Community Church
Florence Carlton Music Boosters Inc
Florence Carlton Soccer Booster Club
Florence Community Center
Florence Foursquare Church
Florence Prever Rosten Foundation For The Media Arts Inc
Fly Fishers of the Bitterroot Inc
Footloose Montana
Four Runners Inc
Fox Hollow Animal Project
Friends of the Bitterroot Inc
Friends of the Darby Community Public Library Inc

Friends of the Hamilton Library
Friends of the Hamilton Schools Foundation Inc
Friends of the Lee Metcalf National Wildlife Refuge
Future Farmers of America and its State Associations &
Local Chapter
Genesis House Inc
Good Nations Education Program
Grace Gospel Fellowship
Grace Lutheran Church
Grantsdale Community Church
Greater Ravalli County Foundation
Habitat For Humanity International Inc
Hamilton Babe Ruth Baseball
Hamilton II Foursquare Church
Hamilton North Foursquare Church
Hamilton Players Inc
Hamilton Senior Center Inc
Hamilton Volunteer Fire Department
Haven House Inc
Heart
Historic St. Mary's Mission Inc
House of Praise
Ideal-Spring International Foundation
Impact On Learning Inc
In One Hope Ministries
International Foundation For Wellness Education A Non-Profit Co.
Kids First of Ravalli County Inc
Light of the Valley Assembly of God
Literacy Volunteers of America-Bitterroot Inc
Living Waters Youth Ranch And Horse Sanctuary
Living Waters-Bread of Life Tabernacle

Marcus Daly Memorial Hospital Corporation
Missions To America Incorporated
Montana A Cappella Society
Montana Companion Animal Network
Montana Congress of Parents Teachers Students
Montana Congress of Parents Teachers Students (2)
Montana Help Our Moral Environment Inc
Montana Jobs Network
Montana State Bass Federation
Mountain View Wesleyan Church
National Council For Geocosmic Research Inc
New Dawn MT Farm Sanctuary
New Hope Southern Baptist Church
Northern Rockies Ambassador Wolf Program Inc
Ocean of Hope Foundation
Oneness Project
Only By Grace Fellowship
Our Savior Lutheran Church
Painted Rocks Fire & Rescue Company
Parents And Friends of Special Needs Children Inc
Parents Families And Friends of Lesbians And Gays
People First of Montana
Performing Arts Company Inc
Rapp Family Foundation Inc
Raptors of the Rockies
Ravalli County Aviation Safety Foundation Inc
Ravalli County Chemical Dependency Services Inc
Ravalli County Council On Aging
Ravalli County Economic Development Authority
Ravalli County Gymnastics Booster Club
Ravalli County Off Road User Association

Ravalli County Park District 2
Ravalli County Reserve Deputy Association
Ravalli Head Start Inc
Ravalli Services Corporation
Ravalli Sports Club
Realization In Truth Church Inc
Rob And Terry Ryan Foundation Inc
Rocky Mountain Grange 116 of The Order of Patrons of Husbandry
RSC Foundation Inc
Run For Adoption Inc
Sanctuary House of Prayer
Sapphire Community Health Inc
Sapphire Homes Inc
Sapphire Lutheran Homes Inc
Sass Stevensville Art & Sculpture Society
Service Corps of Retired Executives Association
Shiloh Training Institute
Silver Tops Senior Citizens
Society of Saint Pius X Victor Montana Inc
Soroptimist International of The Americas Inc
South Valley Child and Family Center
Stevensville Clothes Closet Inc
Stevensville Community Center Complex Inc
Stevensville Community Foundation Incorporated
Stevensville Fire Fighters Association Inc
Stevensville Historical Museum Inc
Stevensville Historical Society Inc
Stevensville Main Street Association
Stevensville Pantry Partners Food Bank
Stevensville Playhouse Inc

Stevensville Rural Firefighters Association
Stevensville Senior Center Inc
Sula Community Church
Supporters of Abuse Free Environments Inc
Sustainable Living Systems
Teller Refuge Inc
The Bitterroot School
The Center For Social Capital
The Emergant Institute
The Heyoka Foundation
The United States Pony Clubs Inc
The United States Pony Clubs Inc (2)
Trout Unlimited
True Vine Foundation Inc
Two Creeks Community School
United States Bowling Congress Inc
United States Masters Swimming Inc
Valley Faith Fellowship
Valley Veterans Service Center
Victor Civic Club
Victor Heritage Museum Inc
Victor Schools Foundation Inc
Victor Senior Center Inc
Victor Youth Athletics Inc
Vision Christian Center
Walkin Endowment
Western Montana Equine Rescue & Rehabilitation Inc
Western Montana Higher Education Council Inc
Willing Servants Inc

Appendix C: Capacity Building Topics – Tables and Charts - By Level of Priority

1. Vision and Organizational Planning. The largest numerical responses reflected that three of the four sub-topics were not a priority. However, 26% of the respondents thought that “evaluating annual organizational performance” was an important priority.

1. Vision and Organizational Planning												
Answer Options ▶	Not a priority		Somewhat of a priority		Important priority		Very important priority		Extremely important priority		Response Count	
Capacity Building Topics ▼	#	%	#	%	#	%	#	%	#	%	#	%
Developing a vision or mission statement	28	45.2%	6	9.7%	10	16.1%	4	6.5%	14	22.6%	62	100.0%
Developing a written strategic plan	19	30.6%	11	17.7%	9	14.5%	12	19.4%	11	17.7%	62	100.0%
Developing an annual operating plan	15	24.2%	11	17.7%	11	17.7%	11	17.7%	14	22.6%	62	100.0%
Evaluating annual organizational performance	15	24.2%	10	16.1%	16	25.8%	9	14.5%	12	19.4%	62	100.0%
<i>answered question</i>											62	
<i>skipped question</i>											3	

2. **Fundraising.** The fundraising topic reflects a substantially different response profile than the mission/vision topic area. The largest responses for four of the five sub-topics saw fundraising as an “important priority,” with one sub-topic, “expanding philanthropic resource in the county,” having the largest number of responses in the “extremely important priority” category.

2. Fundraising												
Answer Options ►	Not a priority		Somewhat of a priority		Important priority		Very important priority		Extremely important priority		Response Count	
	#	%	#	%	#	%	#	%	#	%	#	%
Capacity Building Topics ▼												
Developing an annual fundraising plan	9	14.5%	8	12.9%	20	32.3%	7	11.3%	18	29.0%	62	100.0%
Diversifying sources of annual revenues	5	8.1%	11	17.7%	17	27.4%	16	25.8%	13	21.0%	62	100.0%
Training to improve fundraising success	8	12.9%	11	17.7%	17	27.4%	15	24.2%	11	17.7%	62	100.0%
Evaluating the current mix of revenue sources	14	22.6%	12	19.4%	20	32.3%	10	16.1%	6	9.7%	62	100.0%
Expanding philanthropic resources in the county	8	12.9%	4	6.5%	19	30.6%	9	14.5%	22	35.5%	62	100.0%
<i>answered question</i>											62	
<i>skipped question</i>											3	

3. **Financial Management.** Between 30% and 38% of respondents did not see any of these four sub-topics as a priority.

3. Financial Management												
Answer Options ►	Not a priority		Somewhat of a priority		Important priority		Very important priority		Extremely important priority		Response Count	
	#	%	#	%	#	%	#	%	#	%	#	%
Capacity Building Topics ▼												
Developing a documented annual budget	24	38.7%	9	14.5%	12	19.4%	7	11.3%	10	16.1%	62	100.0%
Developing explicit internal fiscal controls	24	38.7%	9	14.5%	14	22.6%	9	14.5%	6	9.7%	62	100.0%
Developing internal and external fiscal reports	23	37.1%	12	19.4%	11	17.7%	9	14.5%	7	11.3%	62	100.0%
Developing Board level financial oversight	19	30.6%	11	17.7%	14	22.6%	12	19.4%	6	9.7%	62	100.0%
<i>answered question</i>											62	
<i>skipped question</i>											3	

4. **Board of Directors.** The largest number of responders ranked seven out of eight sub-topics in this area as “not a priority.” The exception was “training on the Board's fundraising role and responsibilities,” which was ranked as “an important priority.”

4. Board of Directors												
Answer Options ►	Not a priority		Somewhat of a priority		Important priority		Very important priority		Extremely important priority		Response Count	
Capacity Building Topics ▼	#	%	#	%	#	%	#	%	#	%	#	%
Writing descriptions of roles and responsibilities	26	41.9%	12	19.4%	14	22.6%	3	4.8%	7	11.3%	62	100.0%
Writing descriptions of each committee's role and responsibilities	23	37.1%	15	24.2%	15	24.2%	4	6.5%	5	8.1%	62	100.0%
Training for running effective Board meetings	28	45.2%	17	27.4%	8	12.9%	5	8.1%	4	6.5%	62	100.0%
Protocols for recruiting & orienting new members	16	25.8%	16	25.8%	14	22.6%	9	14.5%	7	11.3%	62	100.0%
Training on the Board's fundraising role and responsibilities	13	21.0%	12	19.4%	17	27.4%	10	16.1%	10	16.1%	62	100.0%
Board conduct and evaluation of its performance	24	38.7%	14	22.6%	12	19.4%	7	11.3%	5	8.1%	62	100.0%
Training on legal, liability and risk management	20	32.3%	15	24.2%	13	21.0%	11	17.7%	3	4.8%	62	100.0%
Supervise, evaluate, manage executive directors	32	51.6%	6	9.7%	14	22.6%	6	9.7%	4	6.5%	62	100.0%
<i>answered question</i>											62	
<i>skipped question</i>											3	

5. **Staff.** The highest percentages in all of the sub-topics areas in this major topic area were in the “not a priority” option, with three of the sub-topics having responses over 50%.

5. Staff												
Answer Options ►	Not a priority		Somewhat of a priority		Important priority		Very important priority		Extremely important priority		Response Count	
	#	%	#	%	#	%	#	%	#	%	#	%
Capacity Building Topics ▼												
Writing job descriptions for all staff	33	53.2%	11	17.7%	6	9.7%	7	11.3%	5	8.1%	62	100.0%
Developing comprehensive personnel policies	35	56.5%	10	16.1%	10	16.1%	3	4.8%	4	6.5%	62	100.0%
Conducting annual performance evaluations	36	58.1%	8	12.9%	9	14.5%	3	4.8%	6	9.7%	62	100.0%
Providing professional development for staff	27	43.5%	11	17.7%	13	21.0%	2	3.2%	9	14.5%	62	100.0%
Supervising, inspiring and managing staff	28	45.2%	6	9.7%	14	22.6%	7	11.3%	7	11.3%	62	100.0%
<i>answered question</i>											62	
<i>skipped question</i>											3	

6. **Volunteers.** This major topic area also had the largest responses in the “not a priority” option for all sub-topics.

6. Volunteers												
Answer Options ►	Not a priority		Somewhat of a priority		Important priority		Very important priority		Extremely important priority		Response Count	
Capacity Building Topics ▼	#	%	#	%	#	%	#	%	#	%	#	%
Annual plan for systematic volunteer recruitment	18	29.0%	15	24.2%	12	19.4%	10	16.1%	7	11.3%	62	100.0%
Orienting and training for new volunteers	17	27.4%	14	22.6%	9	14.5%	16	25.8%	6	9.7%	62	100.0%
Annual plan to recognize & reward volunteers	21	33.9%	14	22.6%	11	17.7%	11	17.7%	5	8.1%	62	100.0%
Leadership development for committed volunteers	22	35.5%	13	21.0%	12	19.4%	10	16.1%	5	8.1%	62	100.0%
Supervising and managing volunteers	18	29.0%	14	22.6%	14	22.6%	8	12.9%	8	12.9%	62	100.0%
<i>answered question</i>											62	
<i>skipped question</i>											3	

7. Public Communications. This major topic area showed the highest number of responses spread between “somewhat important priority” to “very important priority.” It was second only to the major topic of “fundraising” in being identifying as a high priority.

7. Public Communication												
Answer Options▶	Not a priority		Somewhat of a priority		Important priority		Very important priority		Extremely important priority		Response Count	
	#	%	#	%	#	%	#	%	#	%	#	%
Capacity Building Topics ▼												
Materials development for priority audiences	10	16.1%	17	27.4%	16	25.8%	12	19.4%	7	11.3%	62	100.0%
Media training to secure consistent public visibility	8	12.9%	15	24.2%	18	29.0%	14	22.6%	7	11.3%	62	100.0%
Using electronic media to expand communications	10	16.1%	9	14.5%	13	21.0%	20	32.3%	10	16.1%	62	100.0%
Approaches and tools for public feedback	11	17.7%	17	27.4%	11	17.7%	16	25.8%	7	11.3%	62	100.0%
<i>answered question</i>											62	
<i>skipped question</i>											3	

8. **Current Sources You Use for Organizational Development Information.** The Internet was the primary source of information, with 38% of respondents using it “extensively.” The next most highly ranked sources were “used sometimes” and included board members, volunteers, local businesses and organizations, as well as peer organizations working outside of Ravalli County. For each of the balance of information sources, the largest number of respondents reported “not using” any of them.

8. Current Sources You Use for Organizational Development Information										
Answer Options ►	Do not use		Use sometimes		Use fairly often		Use extensively		Response Count	
Current Sources ▼	#	%	#	%	#	%	#	%	#	%
The Internet and associated search engines	5	8.2%	16	26.2%	17	27.9%	23	37.7%	61	100.0%
Skilled people on our Board of Directors	6	9.8%	22	36.1%	21	34.4%	12	19.7%	61	100.0%
Skilled volunteers who assist our organization	11	18.0%	22	36.1%	18	29.5%	10	16.4%	61	100.0%
Local businesses that provide pro bono assistance	17	27.9%	27	44.3%	14	23.0%	3	4.9%	61	100.0%
Local organizations within Ravalli County	17	27.9%	29	47.5%	10	16.4%	5	8.2%	61	100.0%
Local libraries in Ravalli County	42	68.9%	16	26.2%	2	3.3%	1	1.6%	61	100.0%
Peer organizations doing similar work outside the county	17	27.9%	20	32.8%	16	26.2%	8	13.1%	61	100.0%
National association(s) with which our nonprofit is affiliated	24	39.3%	17	27.9%	13	21.3%	7	11.5%	61	100.0%
Consultant(s) who serve our organization	33	54.1%	22	36.1%	2	3.3%	4	6.6%	61	100.0%
Webinars offered by the Montana Nonprofit Association	39	63.9%	15	24.6%	6	9.8%	1	1.6%	61	100.0%

8. Current Sources You Use for Organizational Development Information (Continued)										
Answer Options ►	Do not use		Use sometimes		Use fairly often		Use extensively		Response Count	
Current Sources ▼	#	%	#	%	#	%	#	%	#	%
Workshops provided by the Montana Nonprofit Association	38	62.3%	19	31.1%	4	6.6%	0	0.0%	61	100.0%
Workshops and/or conferences of regional or national associations with which our nonprofit has affiliation	27	44.3%	17	27.9%	13	21.3%	4	6.6%	61	100.0%
Other-1	47	77.0%	6	9.8%	5	8.2%	3	4.9%	61	100.0%
Other-2	49	80.3%	4	6.6%	7	11.5%	1	1.6%	61	100.0%
<i>answered question</i>									61	
<i>skipped question</i>									4	

9. Barriers to Organizational Capacity Building. In all but one of the barriers listed, respondents indicated that the category was “not a barrier.” The outlier was “lack of time for board participation,” and it was identified by the largest number of respondents as a “small barrier.”

9. Barriers to Organizational Capacity Building										
Answer Options ►	Not a barrier		Small barrier		Large barrier		Huge barrier		Response Count	
Barriers ▼	#	%	#	%	#	%	#	%	#	%
Lack of time for staff participation	22	36.7%	12	20.0%	15	25.0%	11	18.3%	60	100.0%
Lack of time for Board participation	17	28.3%	18	30.0%	17	28.3%	8	13.3%	60	100.0%
Lack of support from the Board for staff to participate	44	73.3%	12	20.0%	1	1.7%	3	5.0%	60	100.0%
Lack of interest for Board participation	33	55.0%	16	26.7%	6	10.0%	5	8.3%	60	100.0%
Financial costs for participation	21	35.0%	12	20.0%	15	25.0%	12	20.0%	60	100.0%
Physical access to participate (location of sessions - distance)	23	38.3%	20	33.3%	13	21.7%	4	6.7%	60	100.0%
Quality of training being presented	33	55.0%	23	38.3%	2	3.3%	2	3.3%	60	100.0%
Other-1	50	83.3%	3	5.0%	5	8.3%	2	3.3%	60	100.0%
Other-2	52	86.7%	4	6.7%	1	1.7%	3	5.0%	60	100.0%
<i>answered question</i>									60	
<i>skipped question</i>									5	

Nonprofit Collaboration Training Topics. For each of the sub-topics, the greatest number of respondents reported having “some interest.”

10. Nonprofit Collaboration Training Topics										
Answer Options ►	No interest		Some interest		Strong interest		Extremely strong interest		Response Count	
Collaboration Training Topics ▼	#	%	#	%	#	%	#	%	#	%
The stages of collaboration, from sharing information to partnerships	10	16.7%	24	40.0%	21	35.0%	5	8.3%	60	100.0%
Working effectively with diverse perspectives and differing skill levels	7	11.7%	25	41.7%	18	30.0%	10	16.7%	60	100.0%
Resolving conflicts to serve the greater good (the group or community)	10	16.7%	22	36.7%	16	26.7%	12	20.0%	60	100.0%
Building collaborative partnerships for grantseeking opportunities	5	8.3%	22	36.7%	13	21.7%	20	33.3%	60	100.0%
<i>answered question</i>									60	
<i>skipped question</i>									5	

Capacity Building Topics By Level of Priority and Organizational Annual Revenue

1a. Vision and Organizational Planning										
Topics & Answer Options ▼	Size of Annual Budget									
	less than \$50,000		\$50,000 to \$99,999		\$100,000 to \$199,999		\$200,000 to \$499,999		\$500,000 or greater	
	#	%	#	%	#	%	#	%	#	%
Developing a vision or mission statement										
not a priority	17	51.5%	1	14.3%	4	44.4%	2	25.0%	4	80.0%
somewhat of a priority	2	6.1%	1	14.3%	1	11.1%	1	12.5%	1	20.0%
an important priority	7	21.2%	0	0.0%	2	22.2%	1	12.5%	0	0.0%
a very important priority	2	6.1%	0	0.0%	0	0.0%	2	25.0%	0	0.0%
extremely important priority	5	15.2%	5	71.4%	2	22.2%	2	25.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Developing a written strategic plan										
not a priority	14	42.4%	1	14.3%	1	11.1%	1	12.5%	2	40.0%
somewhat of a priority	5	15.2%	1	14.3%	3	33.3%	0	0.0%	2	40.0%
an important priority	6	18.2%	0	0.0%	1	11.1%	1	12.5%	1	20.0%
a very important priority	5	15.2%	1	14.3%	2	22.2%	4	50.0%	0	0.0%
extremely important priority	3	9.1%	4	57.1%	2	22.2%	2	25.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Developing an annual operating plan										
not a priority	10	30.3%	0	0.0%	1	11.1%	1	12.5%	3	60.0%
somewhat of a priority	9	27.3%	0	0.0%	1	11.1%	1	12.5%	0	0.0%
an important priority	6	18.2%	0	0.0%	3	33.3%	1	12.5%	1	20.0%
a very important priority	4	12.1%	3	42.9%	2	22.2%	1	12.5%	1	20.0%
extremely important priority	4	12.1%	4	57.1%	2	22.2%	4	50.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Evaluating annual organizational performance										
not a priority	13	39.4%	0	0.0%	1	11.1%	0	0.0%	1	20.0%
somewhat of a priority	7	21.2%	1	14.3%	1	11.1%	1	12.5%	0	0.0%
an important priority	8	24.2%	1	14.3%	4	44.4%	2	25.0%	1	20.0%
a very important priority	2	6.1%	1	14.3%	2	22.2%	3	37.5%	1	20.0%
extremely important priority	3	9.1%	4	57.1%	1	11.1%	2	25.0%	2	40.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%

answered question 62
skipped question 3

2a. Fundraising										
	Size of Annual Budget									
Topic and Answer Options ▼	less than \$50,000		\$50,000 to \$99,999		\$100,000 to \$199,999		\$200,000 to \$499,999		\$500,000 or greater	
	#	%	#	%	#	%	#	%	#	%
Developing an annual fundraising plan										
not a priority	6	18.2%	0	0.0%	1	11.1%	1	12.5%	1	20.0%
somewhat of a priority	7	21.2%	0	0.0%	1	11.1%	0	0.0%	0	0.0%
an important priority	8	24.2%	2	28.6%	5	55.6%	2	25.0%	3	60.0%
a very important priority	4	12.1%	1	14.3%	0	0.0%	1	12.5%	1	20.0%
extremely important priority	8	24.2%	4	57.1%	2	22.2%	4	50.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Diversifying sources of annual revenues										
not a priority	4	12.1%	0	0.0%	0	0.0%	1	12.5%	0	0.0%
somewhat of a priority	9	27.3%	1	14.3%	0	0.0%	0	0.0%	1	20.0%
an important priority	9	27.3%	1	14.3%	3	33.3%	3	37.5%	1	20.0%
a very important priority	5	15.2%	4	57.1%	3	33.3%	1	12.5%	3	60.0%
extremely important priority	6	18.2%	1	14.3%	3	33.3%	3	37.5%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Training to improve fundraising success										
not a priority	7	21.2%	1	14.3%	0	0.0%	0	0.0%	0	0.0%
somewhat of a priority	5	15.2%	1	14.3%	3	33.3%	1	12.5%	1	20.0%
an important priority	10	30.3%	2	28.6%	2	22.2%	1	12.5%	2	40.0%
a very important priority	6	18.2%	1	14.3%	2	22.2%	4	50.0%	2	40.0%
extremely important priority	5	15.2%	2	28.6%	2	22.2%	2	25.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Evaluating the current mix of revenue sources										
not a priority	11	33.3%	1	14.3%	1	11.1%	0	0.0%	1	20.0%
somewhat of a priority	7	21.2%	1	14.3%	1	11.1%	1	12.5%	2	40.0%
an important priority	9	27.3%	2	28.6%	4	44.4%	5	62.5%	0	0.0%
a very important priority	3	9.1%	2	28.6%	2	22.2%	1	12.5%	2	40.0%
extremely important priority	3	9.1%	1	14.3%	1	11.1%	1	12.5%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%

2a. Fundraising (continued)										
Size of Annual Budget										
Topic and Answer Options ▼	less than \$50,000		\$50,000 to \$99,999		\$100,000 to \$199,999		\$200,000 to \$499,999		\$500,000 or greater	
	#	%	#	%	#	%	#	%	#	%
Expanding philanthropic resources in the county										
not a priority	7	21.2%	1	14.3%	0	0.0%	0	0.0%	0	0.0%
somewhat of a priority	2	6.1%	1	14.3%	1	11.1%	0	0.0%	0	0.0%
an important priority	11	33.3%	1	14.3%	4	44.4%	2	25.0%	1	20.0%
a very important priority	4	12.1%	3	42.9%	0	0.0%	1	12.5%	1	20.0%
extremely important priority	9	27.3%	1	14.3%	4	44.4%	5	62.5%	3	60.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
answered question 62										
skipped question 3										

3a. Financial Management										
Size of Annual Budget										
Topics and Answer Options ▼	less than \$50,000		\$50,000 to \$99,999		\$100,000 to \$199,999		\$200,000 to \$499,999		\$500,000 or greater	
	#	%	#	%	#	%	#	%	#	%
Developing a documented annual budget										
not a priority	13	39.4%	1	14.3%	4	44.4%	2	25.0%	4	80.0%
somewhat of a priority	6	18.2%	0	0.0%	2	22.2%	1	12.5%	0	0.0%
an important priority	6	18.2%	2	28.6%	0	0.0%	3	37.5%	1	20.0%
a very important priority	5	15.2%	0	0.0%	2	22.2%	0	0.0%	0	0.0%
extremely important priority	3	9.1%	4	57.1%	1	11.1%	2	25.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Developing explicit internal fiscal controls										
not a priority	15	45.5%	1	14.3%	2	22.2%	2	25.0%	4	80.0%
somewhat of a priority	6	18.2%	1	14.3%	1	11.1%	1	12.5%	0	0.0%
an important priority	6	18.2%	2	28.6%	3	33.3%	2	25.0%	1	20.0%
a very important priority	4	12.1%	0	0.0%	2	22.2%	3	37.5%	0	0.0%
extremely important priority	2	6.1%	3	42.9%	1	11.1%	0	0.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Developing internal and external fiscal reports										
not a priority	14	42.4%	1	14.3%	1	11.1%	3	37.5%	4	80.0%
somewhat of a priority	6	18.2%	2	28.6%	3	33.3%	1	12.5%	0	0.0%
an important priority	7	21.2%	1	14.3%	1	11.1%	1	12.5%	1	20.0%
a very important priority	3	9.1%	2	28.6%	3	33.3%	1	12.5%	0	0.0%
extremely important priority	3	9.1%	1	14.3%	1	11.1%	2	25.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Developing Board level financial oversight										
not a priority	12	36.4%	1	14.3%	1	11.1%	2	25.0%	3	60.0%
somewhat of a priority	7	21.2%	1	14.3%	2	22.2%	1	12.5%	0	0.0%
an important priority	5	15.2%	1	14.3%	4	44.4%	2	25.0%	2	40.0%
a very important priority	7	21.2%	1	14.3%	1	11.1%	3	37.5%	0	0.0%
extremely important priority	2	6.1%	3	42.9%	1	11.1%	0	0.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%

answered question 62
skipped question 3

4a. Board of Directors										
Size of Annual Budget										
Topic and Answer Options ▼	less than \$50,000		\$50,000 to \$99,999		\$100,000 to \$199,999		\$200,000 to \$499,999		\$500,000 or greater	
	#	%	#	%	#	%	#	%	#	%
Writing descriptions of roles and responsibilities										
not a priority	17	51.5%	2	28.6%	4	44.4%	1	12.5%	2	40.0%
somewhat of a priority	6	18.2%	0	0.0%	2	22.2%	3	37.5%	1	20.0%
an important priority	7	21.2%	2	28.6%	1	11.1%	2	25.0%	2	40.0%
a very important priority	0	0.0%	1	14.3%	0	0.0%	2	25.0%	0	0.0%
extremely important priority	3	9.1%	2	28.6%	2	22.2%	0	0.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Writing descriptions of each committee's role and responsibilities										
not a priority	17	51.5%	2	28.6%	3	33.3%	0	0.0%	1	20.0%
somewhat of a priority	8	24.2%	0	0.0%	2	22.2%	3	37.5%	2	40.0%
an important priority	6	18.2%	2	28.6%	2	22.2%	3	37.5%	2	40.0%
a very important priority	0	0.0%	2	28.6%	0	0.0%	2	25.0%	0	0.0%
extremely important priority	2	6.1%	1	14.3%	2	22.2%	0	0.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Training for running effective Board meetings										
not a priority	19	57.6%	2	28.6%	3	33.3%	3	37.5%	1	20.0%
somewhat of a priority	8	24.2%	2	28.6%	3	33.3%	3	37.5%	1	20.0%
an important priority	2	6.1%	2	28.6%	1	11.1%	1	12.5%	2	40.0%
a very important priority	2	6.1%	1	14.3%	0	0.0%	1	12.5%	1	20.0%
extremely important priority	2	6.1%	0	0.0%	2	22.2%	0	0.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Protocols for recruiting & orienting new members										
not a priority	12	36.4%	1	14.3%	0	0.0%	1	12.5%	2	40.0%
somewhat of a priority	9	27.3%	0	0.0%	5	55.6%	2	25.0%	0	0.0%
an important priority	5	15.2%	3	42.9%	2	22.2%	4	50.0%	0	0.0%
a very important priority	3	9.1%	2	28.6%	0	0.0%	1	12.5%	3	60.0%
extremely important priority	4	12.1%	1	14.3%	2	22.2%	0	0.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%

4a. Board of Directors (Continued)										
Topic and Answer Options ▼	Size of Annual Budget									
	less than \$50,000		\$50,000 to \$99,999		\$100,000 to \$199,999		\$200,000 to \$499,999		\$500,000 or greater	
	#	%	#	%	#	%	#	%	#	%
Training on the Board's fundraising role and responsibilities										
not a priority	10	30.3%	1	14.3%	1	11.1%	0	0.0%	1	20.0%
somewhat of a priority	9	27.3%	0	0.0%	3	33.3%	0	0.0%	0	0.0%
an important priority	8	24.2%	2	28.6%	2	22.2%	3	37.5%	2	40.0%
a very important priority	3	9.1%	1	14.3%	1	11.1%	3	37.5%	2	40.0%
extremely important priority	3	9.1%	3	42.9%	2	22.2%	2	25.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Board conduct and evaluation of its performance										
not a priority	18	54.5%	0	0.0%	3	33.3%	1	12.5%	2	40.0%
somewhat of a priority	6	18.2%	2	28.6%	3	33.3%	2	25.0%	1	20.0%
an important priority	5	15.2%	2	28.6%	1	11.1%	3	37.5%	1	20.0%
a very important priority	1	3.0%	3	42.9%	1	11.1%	1	12.5%	1	20.0%
extremely important priority	3	9.1%	0	0.0%	1	11.1%	1	12.5%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Training on legal, liability and risk management										
not a priority	15	45.5%	0	0.0%	2	22.2%	1	12.5%	2	40.0%
somewhat of a priority	8	24.2%	0	0.0%	4	44.4%	1	12.5%	2	40.0%
an important priority	4	12.1%	5	71.4%	1	11.1%	3	37.5%	0	0.0%
a very important priority	4	12.1%	2	28.6%	1	11.1%	3	37.5%	1	20.0%
extremely important priority	2	6.1%	0	0.0%	1	11.1%	0	0.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Supervise, evaluate, manage executive directors										
not a priority	26	78.8%	1	14.3%	3	33.3%	0	0.0%	2	40.0%
somewhat of a priority	1	3.0%	1	14.3%	2	22.2%	2	25.0%	0	0.0%
an important priority	4	12.1%	2	28.6%	2	22.2%	3	37.5%	3	60.0%
a very important priority	0	0.0%	2	28.6%	1	11.1%	3	37.5%	0	0.0%
extremely important priority	2	6.1%	1	14.3%	1	11.1%	0	0.2%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
										answered question 62
										skipped question 3

5a. Staff										
Size of Annual Budget										
Topics and Answer Options ▼	less than \$50,000		\$50,000 to \$99,999		\$100,000 to \$199,999		\$200,000 to \$499,999		\$500,000 or greater	
	#	%	#	%	#	%	#	%	#	%
Writing job descriptions for all staff										
not a priority	26	78.8%	2	28.6%	2	22.2%	1	12.5%	2	40.0%
somewhat of a priority	3	9.1%	2	28.6%	2	22.2%	3	37.5%	1	20.0%
an important priority	2	6.1%	0	0.0%	1	11.1%	1	12.5%	2	40.0%
a very important priority	1	3.0%	2	28.6%	2	22.2%	2	25.0%	0	0.0%
extremely important priority	1	3.0%	1	14.3%	2	22.2%	1	12.5%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Developing comprehensive personnel policies										
not a priority	27	81.8%	2	28.6%	2	22.2%	1	12.5%	3	60.0%
somewhat of a priority	3	9.1%	1	14.3%	2	22.2%	4	50.0%	0	0.0%
an important priority	2	6.1%	1	14.3%	2	22.2%	3	37.5%	2	40.0%
a very important priority	0	0.0%	2	28.6%	1	11.1%	0	0.0%	0	0.0%
extremely important priority	1	3.0%	1	14.3%	2	22.2%	0	0.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Conducting annual performance evaluations										
not a priority	27	81.8%	2	28.6%	3	33.3%	2	25.0%	2	40.0%
somewhat of a priority	3	9.1%	1	14.3%	2	22.2%	2	25.0%	0	0.0%
an important priority	2	6.1%	1	14.3%	1	11.1%	2	25.0%	3	60.0%
a very important priority	0	0.0%	1	14.3%	0	0.0%	2	25.0%	0	0.0%
extremely important priority	1	3.0%	2	28.6%	3	33.3%	0	0.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Providing professional development for staff										
not a priority	25	75.8%	1	14.3%	1	11.1%	0	0.0%	0	0.0%
somewhat of a priority	4	12.1%	1	14.3%	3	33.3%	2	25.0%	1	20.0%
an important priority	3	9.1%	2	28.6%	1	11.1%	4	50.0%	3	60.0%
a very important priority	0	0.0%	0	0.0%	0	0.0%	2	25.0%	0	0.0%
extremely important priority	1	3.0%	3	42.9%	4	44.4%	0	0.0%	1	20.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%

5a. Staff (Continued)										
Size of Annual Budget										
Topics and Answer Options ▼	less than \$50,000		\$50,000 to \$99,999		\$100,000 to \$199,999		\$200,000 to \$499,999		\$500,000 or greater	
	#	%	#	%	#	%	#	%	#	%
Supervising, inspiring and managing staff										
not a priority	24	72.7%	1	14.3%	0	0.0%	2	25.0%	1	20.0%
somewhat of a priority	4	12.1%	1	14.3%	1	11.1%	0	0.0%	0	0.0%
an important priority	2	6.1%	1	14.3%	4	44.4%	3	37.5%	4	80.0%
a very important priority	1	3.0%	2	28.6%	1	11.1%	3	37.5%	0	0.0%
extremely important priority	2	6.1%	2	28.6%	3	33.3%	0	0.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%

answered question 62

skipped question 3

6a. Volunteers										
	Size of Annual Budget									
Topics and Answer Options ▼	less than \$50,000		\$50,000 to \$99,999		\$100,000 to \$199,999		\$200,000 to \$499,999		\$500,000 or greater	
	#	%	#	%	#	%	#	%	#	%
Annual plan for systematic volunteer recruitment										
not a priority	11	33.3%	2	28.6%	1	11.1%	2	25.0%	2	40.0%
somewhat of a priority	7	21.2%	2	28.6%	3	33.3%	2	25.0%	1	20.0%
an important priority	6	18.2%	1	14.3%	1	11.1%	3	37.5%	1	20.0%
a very important priority	4	12.1%	0	0.0%	4	44.4%	1	12.5%	1	20.0%
extremely important priority	5	15.2%	2	28.6%	0	0.0%	0	0.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Orienting and training for new volunteers										
not a priority	11	33.3%	2	28.6%	1	11.1%	1	12.5%	2	40.0%
somewhat of a priority	8	24.2%	1	14.3%	2	22.2%	2	25.0%	1	20.0%
an important priority	3	9.1%	0	0.0%	2	22.2%	3	37.5%	1	20.0%
a very important priority	7	21.2%	3	42.9%	3	33.3%	2	25.0%	1	20.0%
extremely important priority	4	12.1%	1	14.3%	1	11.1%	0	0.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Annual plan to recognize & reward volunteers										
not a priority	16	48.5%	2	28.6%	1	11.1%	1	12.5%	1	20.0%
somewhat of a priority	5	15.2%	1	14.3%	3	33.3%	3	37.5%	2	40.0%
an important priority	4	12.1%	0	0.0%	3	33.3%	2	25.0%	2	40.0%
a very important priority	4	12.1%	3	42.9%	2	22.2%	2	25.0%	0	0.0%
extremely important priority	4	12.1%	1	14.3%	0	0.0%	0	0.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
Leadership development for committed volunteers										
not a priority	13	39.4%	2	28.6%	1	11.1%	3	37.5%	3	60.0%
somewhat of a priority	9	27.3%	0	0.0%	2	22.2%	1	12.5%	1	20.0%
an important priority	4	12.1%	2	28.6%	4	44.4%	1	12.5%	1	20.0%
a very important priority	4	12.1%	2	28.6%	1	11.1%	3	37.5%	0	0.0%
extremely important priority	3	9.1%	1	14.3%	1	11.1%	0	0.0%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%

6a. Volunteers (Continued)										
Topics and Answer Options ▼	Size of Annual Budget									
	less than \$50,000		\$50,000 to \$99,999		\$100,000 to \$199,999		\$200,000 to \$499,999		\$500,000 or greater	
	#	%	#	%	#	%	#	%	#	%
Supervising and managing volunteers										
not a priority	13	39.4%	1	14.3%	1	11.1%	1	12.5%	2	40.0%
somewhat of a priority	8	24.2%	2	28.6%	2	22.2%	1	12.5%	1	20.0%
an important priority	5	15.2%	0	0.0%	4	44.4%	3	37.5%	2	40.0%
a very important priority	3	9.1%	1	14.3%	2	22.2%	2	25.0%	0	0.0%
extremely important priority	4	12.1%	3	42.9%	0	0.0%	1	12.5%	0	0.0%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%
answered question 62										
skipped question 3										

7a. Public Communication												
Size of Annual Budget												
Topics and Answer Options ▼	less than \$50,000		\$50,000 to \$99,999		\$100,000 to \$199,999		\$200,000 to \$499,999		\$500,000 or greater		Response Count	
	#	%	#	%	#	%	#	%	#	%	#	%
Materials development for priority audiences												
not a priority	8	24.2%	0	0.0%	0	0.0%	2	25.0%	0	0.0%	10	16.1%
somewhat of a priority	11	33.3%	1	14.3%	3	33.3%	1	12.5%	1	20.0%	17	27.4%
an important priority	5	15.2%	4	57.1%	4	44.4%	0	0.0%	3	60.0%	16	25.8%
a very important priority	5	15.2%	2	28.6%	1	11.1%	3	37.5%	1	20.0%	12	19.4%
extremely important priority	4	12.1%	0	0.0%	1	11.1%	2	25.0%	0	0.0%	7	11.3%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%	62	100.0%
Media training to secure consistent public visibility												
not a priority	6	18.2%	0	0.0%	0	0.0%	2	25.0%	0	0.0%	8	12.9%
somewhat of a priority	8	24.2%	3	42.9%	1	11.1%	1	12.5%	2	40.0%	15	24.2%
an important priority	8	24.2%	2	28.6%	5	55.6%	2	25.0%	1	20.0%	18	29.0%
a very important priority	7	21.2%	1	14.3%	2	22.2%	2	25.0%	2	40.0%	14	22.6%
extremely important priority	4	12.1%	1	14.3%	1	11.1%	1	12.5%	0	0.0%	7	11.3%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%	62	100.0%
Using electronic media to expand communications												
not a priority	7	21.2%	0	0.0%	1	11.1%	2	25.0%	0	0.0%	10	16.1%
somewhat of a priority	5	15.2%	1	14.3%	2	22.2%	0	0.0%	1	20.0%	9	14.5%
an important priority	8	24.2%	1	14.3%	2	22.2%	1	12.5%	1	20.0%	13	21.0%
a very important priority	7	21.2%	4	57.1%	3	33.3%	4	50.0%	2	40.0%	20	32.3%
extremely important priority	6	18.2%	1	14.3%	1	11.1%	1	12.5%	1	20.0%	10	16.1%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%	62	100.0%

7a. Public Communication (Continued)												
Topics and Answer Options ▼	less than \$50,000		\$50,000 to \$99,999		\$100,000 to \$199,999		\$200,000 to \$499,999		\$500,000 or greater		Response Count	
	#	%	#	%	#	%	#	%	#	%	#	%
Approaches and tools for public feedback												
not a priority	6	18.2%	0	0.0%	2	22.2%	2	25.0%	1	20.0%	11	17.7%
somewhat of a priority	10	30.3%	3	42.9%	2	22.2%	1	12.5%	1	20.0%	17	27.4%
an important priority	6	18.2%	0	0.0%	4	44.4%	0	0.0%	1	20.0%	11	17.7%
a very important priority	6	18.2%	3	42.9%	1	11.1%	4	50.0%	2	40.0%	16	25.8%
extremely important priority	5	15.2%	1	14.3%	0	0.0%	1	12.5%	0	0.0%	7	11.3%
	33	100.0%	7	100.0%	9	100.0%	8	100.0%	5	100.0%	62	100.0%

answered question 62
skipped question 3