

BUILDING CAPACITY FOR SIMPLY AMAZING, A NONPROFIT

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*“If you mess it up then dress it up -- your work is one of a kind, simply amazing, just like you!”  
by Emily Smith (1990-2017)*

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## I. Executive Summary

This capstone project focused on assessing the current health of Simply Amazing (SA), a community-based nonprofit organization, and how to build capacity to achieve its goal of expansion and growth. Founded in 2018, Simply Amazing (SA) is a 501 (c)(3) private foundation inspired by Emily Smith. The organization is located in Winter Springs, Florida, and has been operating in communities throughout the Central Florida area. Simply Amazing's mission is to provide art and craft supplies that inspire creativity and empower deserving children. Simply Amazing's creative boxes are donated to children living in temporary housing, foster care, or participating in at-risk youth programs, such as the Boys and Girls Club and other organizations that serve children in similar situations.

The study addressed two questions: 1) What types of critical strengths does SA possess within dimensions of organizational capacity (vision and mission, leadership, resources, outreach, and products and services)? 2) What types of critical challenges does SA face related to these dimensions of organizational capacity, and how should the organization address these challenges? These questions are relevant and directly pertain to SA's sustainability and the organization's desire for growth and expansion.

A literature review was conducted, looking into areas of capacity building, leadership, volunteer recruitment, organizational story, and social media presence. De Vita, Fleming, and Twombly (2001) *Framework for Addressing Non-Profit Capacity Building* was selected as the study's theoretical framework, as its capacity building for nonprofit community-based organizations was found in much of the literature as relevant to understanding the process.

Data sources collected for the study included semi structured interviews, a survey and documentation analysis. The study shed light on seven findings concerning the two research questions. Findings 1-3 address RQ1, and findings 4-7 address RQ2.

*RQ1: What types of critical strengths does SA possess within dimensions of organizational capacity (vision and mission, leadership, resources, outreach and products and services)?*

### **Finding 1: Clear mission**

Considering the first research question, which identifies SA strengths the results show that SA mission is clear and understood by stakeholders. As explained by De Vita et al. (2001), the vision and mission together provide context for measuring the organization's work effectiveness. While the mission offers a short statement for its existence, the vision provides a map for achieving its goals and mission.

### **Finding 2: Resources (Fundraising planning and budgeting)**

SA's financial planning included details of how to raise funds, how to allocate them, and a timeline of implementing their plans. SA's financial resources appear to contribute to its capacity building.

### **Finding 3: SA uses a variety of channels for outreach**

The outreach component was widely discussed during the interviews with the CEO and a stakeholder of a partner organization. Interview participants perceived that nonprofits tend to increase outreach from partnerships with other organizations. Thus, SA's current outreach capacity can be seen as a strength of the organization.

### **Finding 4: Products and Services**

While the Simply Amazing Creative Boxes sent out were tangible products, SA appeared to be providing additional products and services not accounted for in their mission. For example,

in addition to the creative arts and crafts boxes, the organization has a “Fun Pack” summer initiative for the communities they serve.

*RQ2: What types of critical challenges does SA face related to these dimensions of organizational capacity, and how should the organization address these challenges?*

#### **Finding 5: SA’s organizational storytelling incomplete**

After reviewing documents and the SA's website, the author discovered that the story was not complete. Essential parts were missing, one of them being the cause of Emily's death. While an organization's mission gives a snapshot of its goals, the organization's story is equally important in the process of compelling stakeholders (volunteers and donors) to assist the organization.

#### **Finding 6: Lack of diversity in leadership**

The communities SA serves are largely made up of people of color in marginalized communities. Tapia (2009) highlights the importance of having a racially diverse board, leading an organization. Apart from racial diversity, the partner organization's representative revealed in the interview that SA might also need to diversify their board members' skills.

#### **Finding 7: Lack of volunteer recruitment strategies**

The volunteer pool mainly consists of friends of the family, founder colleagues, and Emily's friends. The human resource pool may not be adequate to satisfy SA’s goal of expanding and growing beyond the Central Florida area.

#### **Finding 8: Limited social media presence**

SA has a social media presence; however, it is limited. Based on the answers to the survey and interviews, the organization is aware of the limitations and would like ideas on how to increase their presence. In an interview with the CEO, she shared that Facebook and Instagram

are the two platforms mainly used because these are the ones, she and the communications director are comfortable using.

Based on these findings, the study makes three recommendations.

**Recommendation 1:** Develop partnerships to improve SA communication strategies

**Recommendation 2:** Develop a formalized volunteer recruitment plan

**Recommendation 3:** Examine the current board members' skill sets and create an intentional recruitment plan to secure additional members to allow for a well-rounded board.

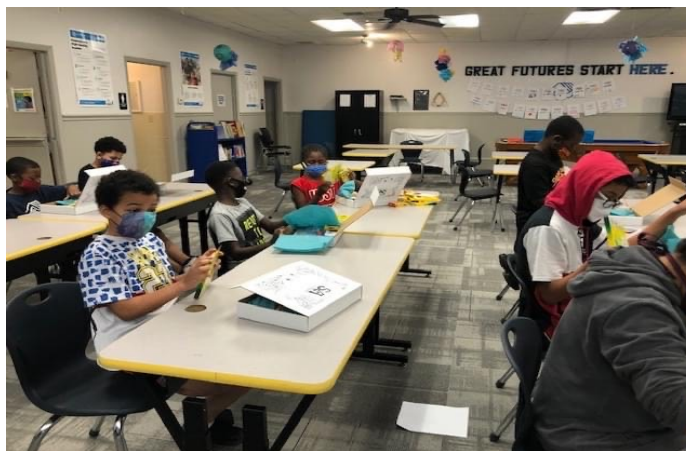
Like all research, this project has limitations, including a low number of participants. Nonetheless, it can still be suggested with some degree of confidence, and by connecting the results to the literature, the organization should enact several recommendations to build capacity and achieve the organization's desire to expand and grow.



## II. Introduction

### A. Site Description

Founded in 2018, Simply Amazing (SA) is a 501 (c)(3) private foundation inspired by “the positive creative energy of Emily Smith.”<sup>1</sup> The organization is located in Orlando, Florida, and has been operating in communities throughout the Central Florida area. Simply Amazing's mission is to provide art and craft supplies that inspire creativity and empower deserving children. Simply Amazing's creative boxes are donated to children living in temporary housing, foster care, or participating in at-risk youth programs, such as the Boys and Girls Club and other organizations that serve children in similar situations. Each creative box given to a child includes crayons, markers, modeling clay, coloring pages, glitter glue, scissors, craft projects, and many fun, creative self-expression supplies.



*SA event at the Boy and Girls Club of Orlando.*

Simply Amazing was founded by Emily Smith's mother, Susan Walts-Hieptas, immediately after Emily's passing from a fentanyl overdose on November 22, 2017. She felt this would be the best way to honor her daughter's life as well as impact the lives of those in need of an escape from their daily challenges that often led to drug abuse. Emily was an avid art and

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<sup>1</sup> [www.simplyamazing.org](http://www.simplyamazing.org)

crafts lover from a very young age; she always traveled with a sketchpad and pencils to capture the beauty of her surroundings. She was kind and wanted everyone to be treated fairly with respect and dignity. She knew the power of words, the strength of small actions, and the joy of impromptu opportunities. Emily's smile lit up a room and scattered happiness like confetti at a surprise party. Her creative nature, love of art, and “give until it hurt” spirit continues to drive the organization's mission.



**Susan Walts-Hieptas, Emily’s mother. As the CEO of SA, she was named Champion of the week by the local news in Orlando.**

## **B. Problem of Practice**

De Vita, Fleming, and Twombly (2001) explained that community-based nonprofit initiatives are essential to help measure and understand social, political, spiritual, and economic outcomes within communities. For these reasons, one of Simply Amazing’s goals is to expand its sphere of influence through their program outside of the Central Florida area. In order to achieve this goal, Simply Amazing needed a clear understanding of the health of the organization and how to build capacity for a nonprofit community-based organization. What is capacity? As a

concept, “capacity is one of those words that mean all things to all people, and nonprofits have approached and interpreted capacity building in many different ways” (McKinsey & Company, 2001, p. 33). For this project, capacity building will refer to the activities that strengthen an organization. As explained by Light, Hubbard, and Kibbe (2004), “capacity building focuses on improving the leadership, management, and/or operation of an organization—the skills and systems that enable a nonprofit to define its mission, gather and manage relevant resources and, ultimately, produce the outcomes it seeks” (p. 10). It refers to the implementation of activities that can sustain an organization to fulfill its mission successfully, thus increasing its impact on communities. As an early-stage nonprofit organization, SA has sought to carry out its mission and expand its reach to other communities.

The purpose of this capstone project was to help SA in developing informed recommendations to support strategic growth and development for the organization's future. Assessing and understanding the existing organization's capacity building was vital to its sustainability/stability and its goal to expand beyond its current outreach.

### **C. Importance of the Study**

Members of the Simply Amazing Board of Directors and leaders will have access to this study's findings. They will be able to utilize the information to effectively design strategies that support the organization's desire to grow and expand beyond its outreach capabilities.

### **III. Literature Review**

#### **A. Community-Based Organizations**

Community-Based Organizations (CBOs) are public and private nonprofit organizations engaged in attending to a defined geographic area's social and economic needs. These organizations work to assist in creating improvements within a community. Many of these organizations are volunteer-driven, and most of their funding is assigned to fulfill the organization's mission and objectives. The work of CBOs highlights issues that need to be addressed within communities.

As seen in the research, CBOs often play a representative role in communities, and when they succeed, they speak on behalf of the disadvantaged and marginalized where their voices are often excluded (Berry & Arons, 2003; Grogan & Gusmano, 2007; LeRoux, 2008; Mosley, 2011; Taub, Surgeon, Lindholm, Otti, & 3 Bridges, 1977). As a result, CBOs become a link between citizens and the government and are often thought to be more responsive to community concerns than government agencies or private businesses (Berger & Neuhaus, 1977; LeRoux, 2007; Mosley & Grogan, 2012; Warren, 2001).

As with any community-based organization, there are multiple categories and types of CBOs. The most common categories are highlighted and defined in the following table and the types are listed in Table 1. There are strengths and weaknesses to utilizing a CBO structure for community support. Table 2 summarizes the advantages and disadvantages that CBOs can face in communities.

**Table 1. CBO Categories (Anasti, T., Grogan, C. M., & Mosley, J. E., 2013)**

<b>Community Interest Groups (CIG)</b>	These CBOs are usually organizations that involve community members who have shared goal(s) and interest(s). These can be rather simple and are flexible enough to be modified while still retaining its core structure. As a result, CIGs are a fairly common CBO type present in communities and community development.
<b>Micro-Finance Institutions (MFI)</b>	The focus of these CBOs is on financial elements in the community, like lending and savings. MFIs are not banks, per se, but they do offer similar services for poor communities.
<b>Village Development Committees (VDC)</b>	VDCs tend to be CBOs that act as a collective governance in villages. They have a set of rules that govern not only the VDC's actions, but the community as a whole. A VDC can also be set up in addition to a village's current government, and the two can work in tandem.
<b>Faith-Based Organizations (FBO)</b>	FBOs are CBOs and non-profits with a religious twist to them. They can have similarities to other types of CBOs, depending on how they are initially set up. There is quite a bit of controversy and criticism regarding FBOs, which does mean that some of the disadvantages listed later in this article may be more of an issue for this type than others

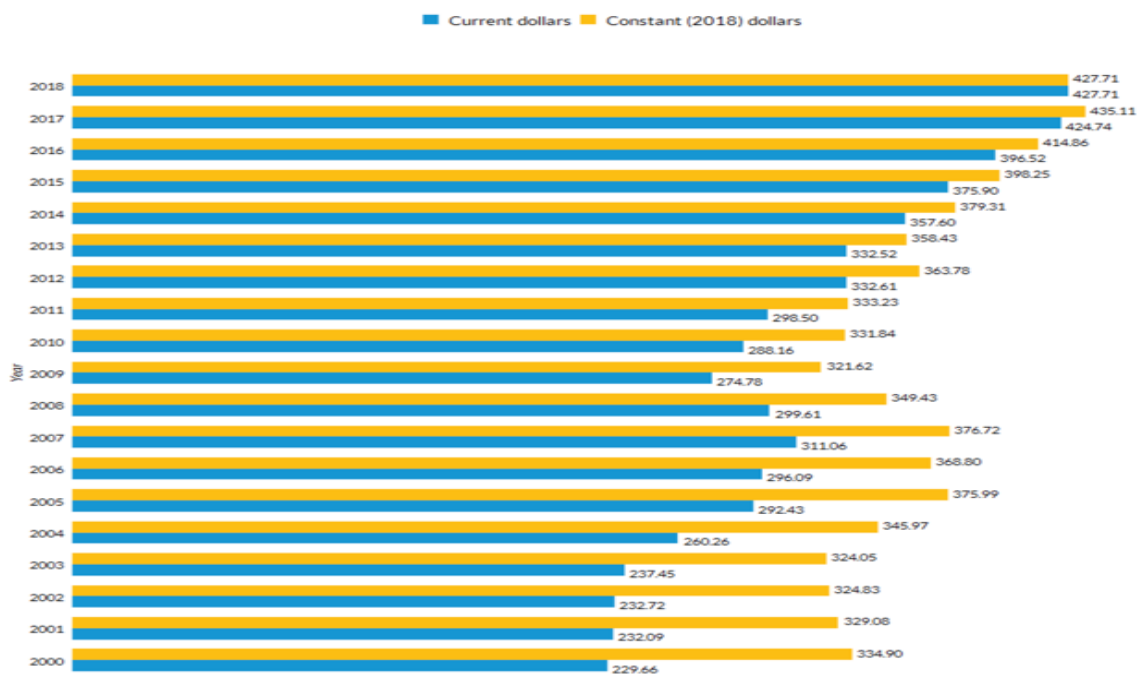
**Table 2. CBO Advantages & Disadvantages (Anasti, T., Grogan, C. M., & Mosley, J. E., 2013)**

<b>Advantages</b>	<b>Disadvantages</b>
<b>Tax-Exempt Status.</b> Not having to pay taxes for the actions taken by the group can actually help if there is limited funding in the first place. Any money that the CBO earns on its own-e.g. through fundraising-can be used to fund its efforts in full. Tax-exemption status also as additional financial advantages, such as access to public service announcements (a.k.a. PSAs), advertising discounts, and reduced mail rates.	<b>Financial Restrictions.</b> Money is often going to be an issue for any CBO, as their actions are going to be dependent on the funding they have. Progression towards the group's goals and their movement through the community development process can be delayed if there are any financial issues at hand, like a lack of money. Fundraising and donations are often the only source of money for a CBO, and that can restrict their abilities if there isn't enough.
<b>Direct Benefits.</b> A CBO is designed specifically for the community it operates in, thus ensuring that any benefits the organization offers goes to those it is intended for. Because the CBOs efforts are not going to those that don't necessarily need it or are being divided in any way, the community is getting help in full. It makes it easier to make sure that the issues in the community are getting as much attention as they need in order to find and administer a solution.	<b>Workforce.</b> CBOs are dependent on people being involved in the organization, and their workforce is primarily made up of volunteers. While this can be a good thing-volunteers tend to have a genuine passion for their cause(s)-it can backfire if there isn't enough volunteers to get things done. People are busy, they have other responsibilities, and that may mean that they don't have enough spare time to offer. They are a necessary resource for CBOs and community development, and one person can only do so much.
<b>Perpetuity.</b> Since a CBO is an established organization, it is separate from any one individual and is eligible for organizational perpetuity. Even if the person who initially began and operates the CBO leaves for whatever reason-quits, retires, dies, etc.-the organization isn't going to necessarily end because they are gone.	<b>Social Pressures.</b> Even when there is support within the community for CBOs and community development, there can also be resistance. <sup>12</sup> The goals and/or methods of a CBO may not have widespread acceptance in the community. It is incredibly important in this regard for a CBO to pay attention to the atmosphere of the community and the attitudes of its residents when it takes action. This is often the case with FBOs, as the religious tenants of these organizations are not necessarily going to mesh with the beliefs of everyone in the community.
<b>Liability Protection.</b> The separation that CBOs have from individuals as organizations means that they have some built-in liability protection in place. If a member's personal actions lead to consequences like fines or lawsuits, the CBO isn't going to be impacted on a legal standpoint. Should a CBO be sued directly or have any kind of legal consequences for its actions, they it is able to have its own liability insurance coverage to protect it as it is considered a type of non-profit.	

According to the Urban Institute (2020), approximately 1.54 million nonprofits were registered with the Internal Revenue Service (IRS) in 2016, an increase of 4.5 percent from 2006. This sector contributed an estimated \$1.047.2 trillion to the US economy in 2016, which represents 5.6 percent of the country's gross domestic product. Of the total nonprofit organizations registered with the IRS, 501(c)(3) public charities accounted for just over three-quarters of the revenue and expenses for the nonprofit sector as a whole (\$2.04 trillion and \$1.94 trillion, respectively) and just under two-thirds of the nonprofit sector's total assets (\$3.79 trillion).

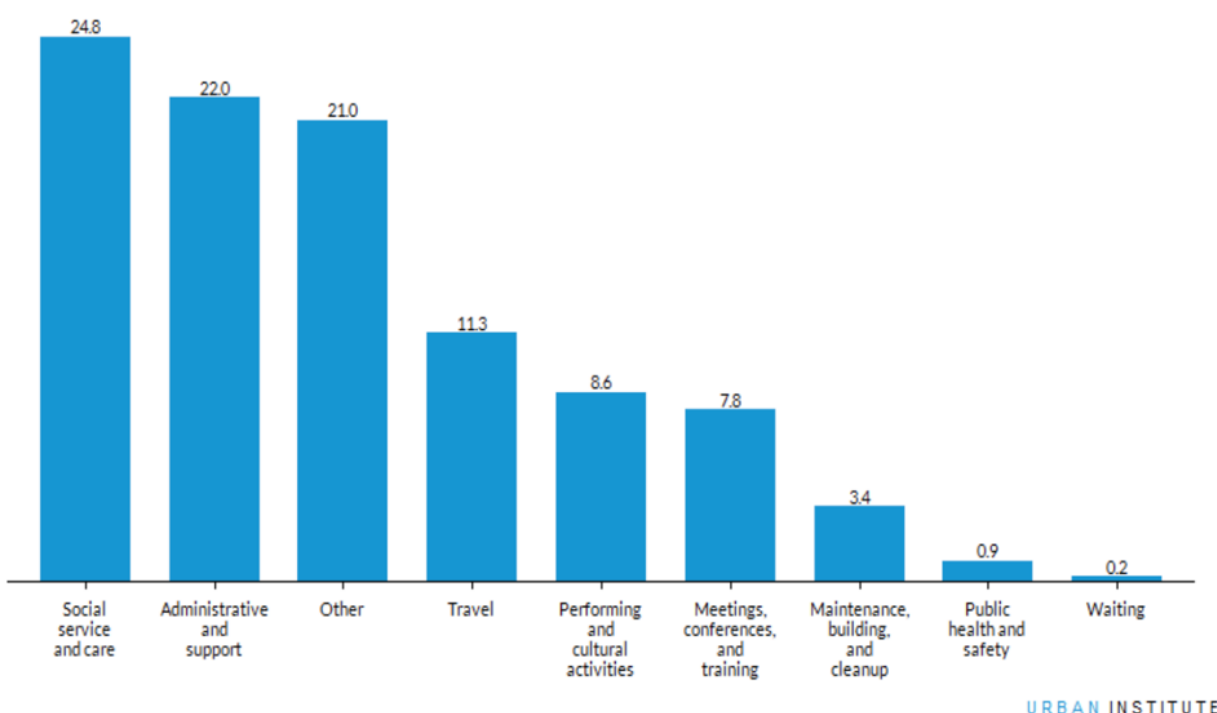
According to this report in 2018, total private giving from individuals, foundations, and businesses totaled \$427.71 billion, a decrease of -1.7 percent from 2017 (after adjusting for inflation). As published by Giving USA (2018) total charitable giving rose for consecutive years from 2014 to 2017, making 2017 the largest single year for private charitable giving, even after adjusting for inflation.

**Figure 1:** *Private Charitable Contributions 2000-2018 (Team, N., 2020)*



An estimated 25.1 percent of US adults volunteered in 2017, contributing an estimated 8.8 billion hours. This is a 1.6 percent increase from 2016. The value of these hours is approximately \$195.0 billion. Overall, nonprofits in the United States have approximately \$3 trillion in assets. The sector represents six percent of the total national income and employs (excluding volunteers) over nine percent of the labor force (Boris, 2006).

**Figure 2:** *Distribution of Volunteer Time by Activity, 2018 (present) (Team, N., 2020)*



Overall, in 2018, the nonprofit sector remained relatively healthy, with continuous financial growth and increases in nonprofits throughout various subsectors. Given these numbers and the social and economic impact these organizations have in communities, it is essential to continue providing support to COBs to ensure their sustainability, growth and expansion, impact, and outcomes.

## **B. Building Capacity**

### **a. What is capacity building?**

Nonprofit capacity building is not new; however, research indicates that such efforts to assess it have become increasingly important to improving the nonprofit sector's effectiveness. In the nonprofit research, organizational capacity has emerged as a foundation upon which to identify a set of organizational attributes that influence organizational effectiveness, or as Eisinger (2002) notes, “the ability of an organization to accomplish its mission effectively” (p. 115). Eisinger (2002) explains, that the attributes an organization has, is what warrants the organization’s capacity profile—thus, said attributes or capacity must be mobilized to fulfill the organizational mission (p. 117).

The term nonprofit encompasses a vast diversity within itself, referring to everything from a handful of volunteers in a neighborhood banding together in their spare time to plant flowers, to huge universities and health care systems. Whatever capacity building might be, it will not look the same across a variety of different organizations (Wing, 2004, p. 154). Further, community building researchers note that the quantity of nonprofit management and governance assistance services has significantly increased over the past decade. Even though the quality of capacity building and capacity-building service providers (individuals, organizations, and nonprofits) varies widely within communities, research confirms its importance and the benefits to community-based nonprofit organizations (Connolly et al., 2003). At the national level, there is a growing community of investors, capacity-building organizations, and individual consultants giving attention to nonprofit organizations' capacity needs, particularly community-based organizations.



In 2001, McKinsey and Company posited that there is limited information about what works and what does not in building organizational capacity in nonprofits. They added that the limitation is primarily due to the sector's historic inattention to capacity building, which has not been adequately supported by funders and has been of secondary importance to nonprofit managers trying to deliver programs and services to people who need them (p. 13). In other words, managers and organizers at the grassroots level are focused more on providing their programs and services. As a result, they lack the time needed to understand their own capacity to build growth and development.

For this study, capacity building refers to the implementation of activities that can bolster an organization to fulfill its mission effectively, thus increasing its positive impact on communities. Sample activities can include cultivating clear and engaging mission and vision statements, implementing and measuring programs, recruiting and attracting talented people, developing leadership at all levels of the organization, expanding the organization's resources, and building community support through outreach (McKinsey & Company, 2001).

### **b. Importance of capacity building**

Much of the literature suggests that many nonprofit organizations are created to deal with government and business deficiencies to address communities' needs. As De Vita and Fleming (2001) explained:

[N]on-profit organizations are important to communities because they address the flaws of competitive markets. For example, Weisbrod (1988) notes that nonprofit organizations can overcome government failure. Government tends to respond to majority concerns

and, as a result, some minority concerns are not addressed through public action. For example, there may be a need for after-school programs for children in low-income urban areas, but if the constituency for such programs is not large or strong enough to produce government action, a nonprofit organization may form to supply the after-school care. Nonprofit organizations often provide public goods where government fails to respond to the preferences of small groups of citizens. (p. 10)

While the demands for capacity building may look different from one organization to the next, most stem from environmental trends—budget cuts at state levels, recessions, and unemployment, to name a few. As such, small nonprofits will require to adjust and cope in new and different ways to achieve their mission and operate more effectively (Kapucu, Healy, & Arslan, 2011).

Since capacity building is about improving organizational effectiveness, it becomes a lens to help community-based nonprofits understand their work's significance at the macro and micro level. As Glickman and Servon (1998) explained, “Capacity is built from within and from without: It involves the development of the physical and financial assets of community organizations and the neighborhoods they serve” (p. 502). Capacity building focuses on an organization’s ability to improve its current way of doing things and its ability to do new things. It enhances the organization’s performance and enhances its ability to function and continue to stay relevant in a changing environment. It can be complicated, time-consuming, and expensive in the short run; most nonprofit managers would prefer to spend their dollars on programs (McKinsey & Company, 2001). Nonprofit culture tends to glorify program work over administrative functions or even higher-level institutional functions such as strategic planning.

The most effortless dollars to raise have always been for high-impact capital campaigns with very tangible outcomes, while the hardest have been for general administrative costs—including efforts to build organizational capacity (McKinsey & Company, 2001). As explained by Doherty and Mayer (2003), "nonprofits will not engage in capacity-building activities when there is a lack of understanding of how strengthening the whole organization can contribute to achieving its mission and of how improving “back office” functions can contribute to better programs" (p. 3).

### **c. Models and frameworks for capacity building**

The literature review on capacity building in the nonprofit ecosystem has identified organizational capacity as an essential conceptual framework that can provide the basis for a holistic analysis of the factors involved in goal attainment and, more broadly, organizational effectiveness (Eisinger, 2002). These factors are generally regarded as multidimensional concepts, comprising a range of attributes that are considered critical to an organization’s ability to achieve its goal (McKinsey & Company, 2001).

Capacity frameworks vary in the number of dimensions integrated, ranging from three to seven (see Chaskin, 2001; Eisinger, 2002; Glickman & Servon, 1998; Hall et al., 2003; McKinsey & Company, 2001). Although the specific capacity dimensions within each framework may vary in name, as Misener and Doherty (2009) explain, there are similar features or characteristics among them. Features such as “financial and/or capital resources, human resources, formalization, and external linkages” (p. 459).

In researching nonprofit organizational capacity, Misener and Doherty (2009) argue “the nature and impact of each dimension should be considered individually, and the connections


among dimensions examined while accounting for the differences in organizational context" (p. 460).

Table 3 highlights four organizational capacity conceptual frameworks with a brief description of their respective dimensions. Different terminology has been used to describe each framework; nonetheless many frameworks on nonprofit organizational capacity are typically characterized by similar dimensions.

McKinsey & Company (2001) argued that by combining the different dimensions of organizational capacity into a coherent model, it emphasizes the importance of examining each dimension both individually and in relation to the others as well as in the context of the organization. This is echoed by De Vita, Fleming, and Twombly (2001) and Hall et al. (2003). Additionally, they emphasized the importance of examining connections between dimensions as critical strengths or challenges in one area (e.g., financial capacity) may have noticeable implications for other areas of capacity (e.g., human resources capacity (Svensson & Hambrick, 2016).

The Marguerite Casey Foundation Organizational Capacity Assessment Tool was adapted from the Capacity Assessment Grid created by McKinsey and Company in 2001 and it helps assess an organization through four dimensions instead of seven. They explain that the needs of a community must be understood before developing a capacity building strategy and once these strategies are identified and implemented, the progress must be assessed and monitored periodically.

**Table 3: Models and Frameworks for Capacity Building**

<i>The Capacity Framework by McKinsey &amp; Company (2001)</i>	<i>Framework for Addressing Non-Profit Capacity Building by De Vita, Fleming, and Twombly (2001)</i>	<i>A Process Model of Capacity Building by Millar &amp; Doherty (2016)</i>	<i>Three-Dimensional Capacity Framework by Hall, et al. (2003)</i>	<i>Organizational Capacity Assessment Tool<sup>2</sup> by Marguerite Casey Foundation (2005)</i>
<p>Dimensions:</p> <ol style="list-style-type: none"> <li><b>Aspirations:</b> organization's mission, vision and overarching goals, which collectively articulates its common purpose and direction.</li> <li><b>Strategy:</b> Coherent set of actions and programs aimed at fulfilling the organization's overarching goal.</li> <li><b>Organizational Skills:</b> The sum of the organization's capabilities, including such things (among others) as performance measurement, planning, resource management, and external relationship building.</li> <li><b>Human Resources:</b> The collective capabilities, experiences, potential and commitment of the organization's board, management team, staff, and volunteers.</li> <li><b>Systems and Infrastructure:</b> The organization's planning, decision making, knowledge management, and administrative systems, as well as the physical and technological assets that support the organization.</li> <li><b>Organizational Structure:</b> The combination of governance, organizational design, interfunctional coordination, and individual job descriptions that shapes the organization's legal and management structure.</li> <li><b>Culture:</b> The connective tissue that binds together the organization, including shared values and practices, behavior norms, and most important, the organization's orientation towards performance</li> </ol>	<p>Dimensions:</p> <ol style="list-style-type: none"> <li><b>Vision and Mission:</b> this is starting point to assess the organization's capacity and needs. It directly answers the question of why the organization exists.</li> <li><b>Leadership</b> (board, staff, volunteers): to build capacity in the leadership component, two factors must be considered: 1) enhancing existing leadership, and 2) developing new leadership.</li> <li><b>Outreach</b> (dissemination, public education, collaboration, advocacy): mechanism through which to build a base of support.</li> <li><b>Resources</b> (financial, technological, human)</li> <li>Products and Services: (outputs, outcomes, performance) an organization must demonstrate that their products and services are making a difference to society and that they are effectively using their resources to do so.</li> </ol>	<p>Dimensions:</p> <ol style="list-style-type: none"> <li><b>Capacity Building Stimulus</b> (internal/external force; response).</li> <li><b>Organizational Capacity Needs</b> (assessment).</li> <li><b>Readiness for Capacity Building</b> (Org. Readiness; Congruence; Capacity to Build; Capacity to Sustain.</li> </ol> <p>Implementation</p>  <ol style="list-style-type: none"> <li><b>Capacity Building Outcomes:</b> Impact; Maintenance; Assessment</li> </ol>	<p>Dimensions:</p> <ol style="list-style-type: none"> <li><b>Human Resources Capacity:</b> ability to mobilize and deploy human capital</li> <li><b>Financial Capacity:</b> ability to solicit and expend financial capital in a sustainable manner</li> <li><b>Structural Capacity:</b> ability to leverage processes, support systems, and organizational infrastructure enabling the organization to carry out its work.</li> </ol>	<p>Dimensions:</p> <ol style="list-style-type: none"> <li><b>Leadership:</b> the capacity of organizational leaders to inspire, prioritize, make decisions, provide direction, and innovate.</li> <li><b>Adaptive:</b> the capacity of a nonprofit organization to monitor, assess, and respond to internal and external changes.</li> <li><b>Management:</b> the capacity of a nonprofit organization to ensure the effective and efficient use of organizational resources.</li> <li><b>Operational:</b> the capacity of a nonprofit organization to implement key organizational and programmatic functions</li> </ol>

<sup>2</sup> The Marguerite Casey Foundation Organizational Capacity Assessment Tool is a derivative product of the Capacity Assessment Grid created by McKinsey and Company for Venture Philanthropy Partners ([www.vppartners.org](http://www.vppartners.org)), and published in *Effective Capacity Building in Nonprofit Organizations* (2001). It was modified, reorganized and assembled in electronic format for the Marguerite Casey Foundation ([www.caseygrants.org](http://www.caseygrants.org)) by Blueprint Research & Design, Inc. ([www.blueprintrd.com](http://www.blueprintrd.com)) and is used with permission from Venture Philanthropy Partners.

Millar and Doherty (2016) developed their framework, A Process Model for Capacity Building, rooted in de Groot's interpretative-theoretical methodology, consisting of four qualitative phases: exploration, analysis, classification, and explanation. These phases promote a systematic approach to knowledge extension that is fundamental to model building. They explained that de Groot's methodology provides a tool to develop a framework that is coherent and facilitates a systematic evaluation of an organization's needs.

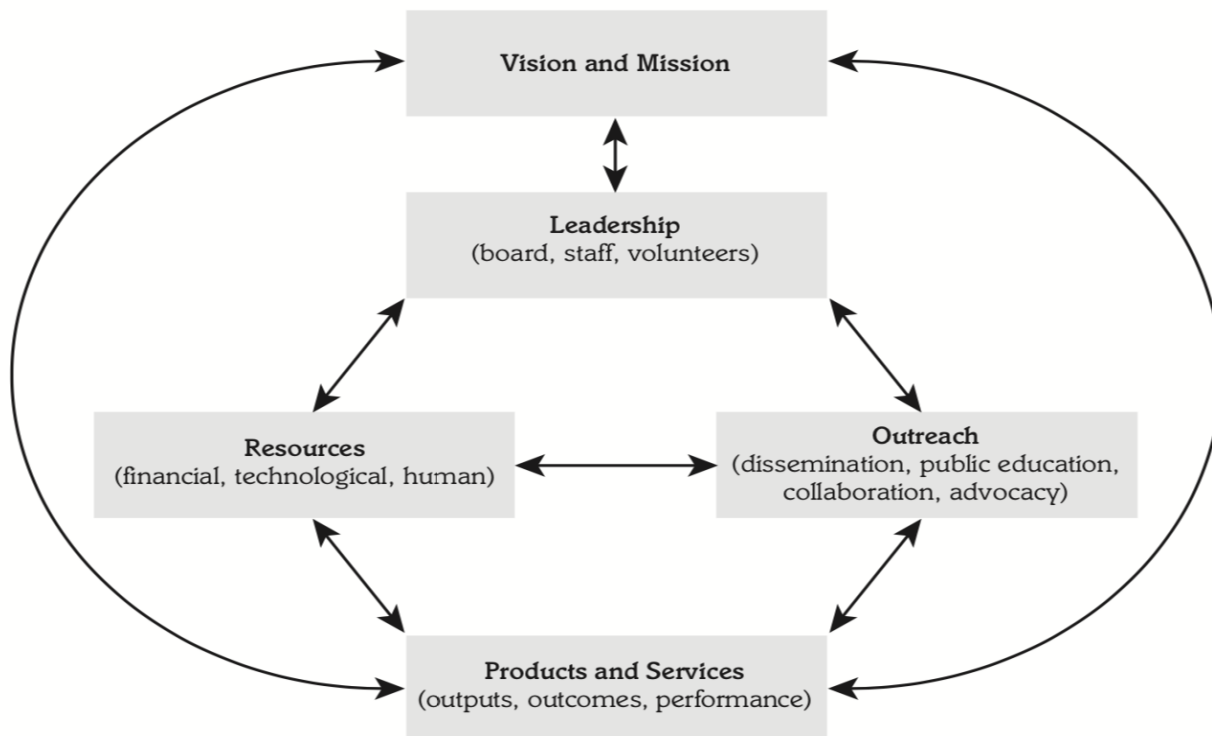
Based on the literature, understanding capacity building as it applies to a community-based nonprofit organization, such as Simply Amazing, is essential to its goal to grow and expand. This capstone project was designed to assist SA in its efforts to expand its outreach by assessing its organizational capacity by exploring the five dimensions (vision and mission, leadership, resources, outreach, and products and services) as developed by De Vita, Fleming, and Twombly (2001).

#### **IV. Conceptual Framework**

After careful review of several conceptual frameworks, the “Framework for Addressing Non-Profit Capacity Building,” as developed by De Vita, Fleming, and Twombly (2001), guided and informed the research and recommendations in this study. This framework consists of five components that are fundamental to the foundation of the capacity in a nonprofit organization such as Simply Amazing: vision and mission, leadership, resources, outreach, and products and services. As De Vita et al. (2001) explained, these five factors are interrelated and mutually dependent on one another; each can reinforce and bolster the other. Each component contains unique concepts, metaphors, and values that provide the scaffolding necessary to structure our understanding of an organization's capacity. While all of the components (vision and mission, leadership, resources, outreach, and products and services) may not be present at the same time, for this study, all five were used in order to yield a clearer picture of the organization’s health and to help identify to what extent it needs to reframe its practices to attain its goals of expanding outreach and impact.

The research questions that guided this project stem from each of the framework's previously mentioned components to assess the organization's building capacity as perceived by multiple stakeholders. This capstone aimed to provide Simply Amazing with an in-depth analysis of the organization's capacity and offer informed recommendations based on the results of this study on how to effectively build capacity, facilitate growth, and expand in its outreach and impact.

The following figure provides an overview of each component within the “Framework for Addressing Non-Profit Capacity Building” (De Vita et al., 2001, p. 17):



**Figure 3:** *Framework for Addressing Non-Profit Capacity Building (De Vita et al. 2001)*

As illustrated in Figure 3, each component of the framework helps explore and assess the different parts of an organization. The *vision and mission* serve as a starting point to assess the organization's capacity and needs. As explained by De Vita et al. (2001), “It is the vision and mission statement of an organization that more directly answers the question of why the organization exists. A clear statement will articulate what is unique or distinctive about the organization and can serve as a long-range planning tool for the organization” (p. 16). Moreover, the vision and mission statements reflect the types of programs and services offered by the organization, which would help to attract leaders who share their goals. In turn, these leaders will be influential in setting, maintaining, and/or redirecting the mission (De Vita et al., 2001). The



vision and mission also provide context for measuring the effectiveness of the organization's work.

The second component refers to the *leadership* of an organization that is tightly connected to the vision and mission. As explained by De Vita et al. (2001), "strong leadership can make the difference between success and failure in implementing programs and services" (p. 18). In order to build capacity in the leadership component, two factors must be considered: 1) enhancing existing leadership, and 2) developing new leadership.

The third component refers to *resources*, which do come in many forms. They can include financial, technological, and human resources; all of which must be well managed. Financial resources are central to an organization's resource pool since they facilitate the recruitment of talented individuals and the acquisition of physical resources, such as computer-based technologies. Equally important is investing in upgrading individuals' skills and revamping established procedures by training staff, volunteers, and board members in order to stretch limited resources (De Vita et al., 2001).

The fourth component is *outreach*, which is the mechanism through which to build a base of support. As De Vita et al. (2001) explained, "an organization can have a vital mission, good leadership, and sufficient resources, but unless it is known in the community, its impact will be limited" (p. 21). The organization needs to let people know what programs and services they offer. "Increased networking and greater outreach mean access to more people" (De Vita et al. 2001, p. 21).

The fifth and final component of this framework is *products and services*. Organizations must demonstrate that their products and services are making a difference to society and that

they are effectively using their resources to do so. In other words, funders and serving communities want to know how well a program is working and what it has accomplished (De Vita et al., 2001). By evaluating outcomes and outputs through qualitative and quantitative lenses, an assessment can be made on the extent to which the program has produced desired benefits or changes. Identifying output and outcomes can provide valuable feedback that connects to other elements in the framework, enhancing or diminishing their availability and capacity (De Vita et al., 2001).

## **V. Study Design**

### **A. Research Questions**

The research questions for this study are:

- 1) What types of critical strengths does SA possess within dimensions of organizational capacity (vision and mission, leadership, resources, outreach, and products and services)?
- 2) What types of critical challenges does SA face related to these dimensions of organizational capacity, and how should the organization address these challenges?

### **B. Methodology**

This study followed an instrumental case study methodology as defined by Robert E. Stake (2010). An instrumental case study is the study of one case and its ability to shed understanding and conceptual and empirical patterns that can be transferred to other settings with similar context and conditions (Stake, 2010, p.18). This study reflected a constructivist perspective as explained by Guba and Lincoln (2004), Patton, (2002) and Schwandt (2001) which valued multiple individual perspectives to enhance understanding about the nature of capacity within community-based organizations. This study integrated a mixed-methods approach in which qualitative and quantitative data were collected in order to consider different and multiple perspectives.

### **C. Data Collection**

The research was conducted between June 2020 and October 2020. The study design incorporated three approaches to data gathering. Surveys were sent to 15 stakeholders, and participated, resulting in a 66.66% response rate. The pool was diverse and included board members, CEOs, donors, volunteers, and members of partner organizations. The questions were rooted in De Vita et al. 's (2001) framework and were delivered electronically.

The second form of data collection was a semi-structured interview. Three stakeholders of Simply Amazing and its partners were interviewed, the CEO, a volunteer, and the director of a partner organization. The interviews lasted about 40 minutes each and were conducted via Zoom.

The third form of data collection was documentation analysis. Historical material was collected from Simply Amazing in order to gain perspective on the organization and its practices, as well as any other demographic data on budgeting, event planning, and minutes from board of directors' meetings.

### **D. Data Analysis**

Each interview was recorded and transcribed verbatim using the Zoom transcription feature. The interview topics were guided by the five dimensions described by De Vita et al.'s (2001) framework. The five components were vision and mission, leadership, resources, outreach, and products and services.

The data collected was uploaded to NVivo (see Appendix 6) and coded based on the "Framework for Addressing Non-Profit Capacity Building" Framework as explained by De Vita et al. (2001).

**Table 4.** *Coding Scheme Based on De Vita et al. (2001) Framework*

<b>Current organization Capacity (42)</b>	<b>Capacity needed to facilitate expansion and growth (20)</b>
<b>Leadership (3)</b> board members – 2 rotation of tasks, committees and leaders - 1	<b>Leadership (5)</b> delegating tasks – 3 diversity – 2
<b>Outreach (23)</b> e-mail conversation – 2 e-mail newsletter – 2 events – 3 partnerships – 7 social media engagement – 4 tapping local personalities – 1 tv exposure – 1 volunteerism – 2 word of mouth – 1	<b>Outreach (6)</b> getting volunteers to share social media post – 1 make other times to volunteer available – 1 wider reach – 1 lack of face-to-face interaction due to pandemic – 3
<b>Resources (10)</b> budget plan – 2 financial report discussed in meeting – 2 fundraising – 2 solicitation plan – 3	<b>Resources (5)</b> fundraising – 2 partnerships with other organizations to increase human resource – 1 solid volunteer plan - 2
<b>Products and Services (5)</b> create a card program – 1 sending boxes – 4	<b>Products and Services (2)</b> increase volume – 2
<b>Vision and mission (1)</b>	<b>Vision and Mission (2)</b> no vision statement – 1

## IV. Findings

### A. Research Question 1

Research Question 1 was developed to understand the strengths of Simply Amazing's situation in regard to its organizational capacity. Four themes emerged to answer RQ1. The findings were: (a) SA has a clear mission, (b) Resources (positive fundraising planning and budgeting), (c) SA uses a variety of channels for outreach ,and (d) Products and Services.

An overview of the findings with the number of participants and references supporting the themes is shown in Table 5.

**Table 5.** *RQ1 Findings*

Findings	Number of Participants	Number of References
Clear mission	3	3
Resources (positive fundraising planning and budgeting)	3	10
A variety of channels used for outreach	5	23
Products and Services	3	5

#### **Finding 1: Clear mission**

Simply Amazing has been in operation since 2018. The organization's work has been guided by its mission, "Simply Amazing is a non-profit 501(c)(3) whose mission is to provide art and craft supplies that inspire creativity and empower deserving children". In the website, "Deserving children" are defined as "children living in temporary housing, foster care, or participating in youth at-risk (Simply Amazing, Inc. n.d.)." As part of the author's review of documents and the organization's website, answers to the survey, and interviews with the CEO, it was learned that SA has not revised the mission of the organization and has not developed a vision. The CEO revealed, "We have not, and I think will probably do that next year. Yet we

don't actually have a vision. We don't have a vision statement, we only have a mission statement, right.”

Visions are essential because they can create a practical guide for building plans, setting goals and objectives, making decisions, and coordinating and evaluating any project's work, large or small. As explained by De Vita et al. (2001), the vision and mission together provide context for measuring the organization’s work effectiveness. While the mission offers a short statement for its existence, the vision provides a map for achieving its goals and mission.

In the survey question *To what extent does the mission describe the work and purpose of your existence and express the values operating within the organization?* 55.56% of the respondents answered *high*, while 44.44% answered *exceptional*. Survey results regarding the mission, vision, and values are presented in Table 6.

**Table 6. Mission, Vision and Values**

	Not Well	Some	Moderate	High	Exceptional	N/A
2. To what extent does the mission describe the work and purpose of your existence and express the values operating within the organization?	0	0	0	55.56%	44.44%	0
3. Please indicate the level of shared understanding that exists for the organization’s mission and vision among stakeholders?	0	0	11.11%	44.44%	44.44%	0
4. Is the vision of the organization clearly articulated with an inspiring view of the future?	0	0	22.22%	33.33%	44.44%	0
	Every 5 yrs	Every 4 yrs	Every 3 yrs	Every 2 yrs	Annually	N/A
5. How often is the mission, vision, and values reviewed or revised?	0	0	0	11.11%	44.44%	44.44%

The majority of the respondents also perceived that stakeholders generally had *high* (44.44%) and *exceptional* (44.44%) shared understanding of the mission statement. However, in an interview with one volunteer, who will be part of the board later in 2020, there was some

indication that stakeholders might be having difficulty differentiating SA from other organizations based on their understanding of its mission:

When you talk to people, how [do] they know this is different from...any other you know charitable organization...getting people to know you know what the goals are for this...once people kind of understand you know how things were set up and why you know the organization was formed, then yeah, you know, I think you can be able to grab a certain amount of people that you know that may be interested in the objectives of the organization.

Nonetheless, in the observation of one board meeting and in the review of the minutes of that meeting, the author identified evidence that the CEO continuously strives to align SA's mission with the actual work they do. This excerpt from the meeting minutes in an example:

[M] reported on the last Community Event SA attended: Kids & Family Expo at convention center with Z88.3. [M] and [CEO] had an art activity table at the Z88.3 booth with hand puppets. They gathered good leads for those who want to be involved and will work on follow-up with all the ideas people suggest to decide if the organizations align with SA mission.

Therefore, while the CEO was aware of the lack of a vision statement, the stakeholders generally had a shared understanding of the mission statement. Active stakeholders and the CEO endeavor to align the mission statement with their work. This finding could reflect how SA might be effective in communicating its reason for existing, as well as how it aims to attend to their stakeholders. However, in the absence of a vision statement, SA might not be clearly communicating their future-oriented aims, or what it hopes to become based on its mission (De Vita et al., 2001).



**Finding 2: Resources (positive fundraising planning and budgeting )**

When discussing its resources, SA board mainly focused on finances aspect. In the board meeting observation, the board members generally discussed plans for fundraising and budgeting and the financial report. In fundraising, the plans involved preparation for an event. The board members set goals to match or surpass the funds raised in the same event during the previous year.

In another board meeting conducted during the fall of 2019, the board members discussed solicitation plans. The board members described the plans in detail, beginning from the draft letter of invite for the donors to follow-up e-mails to sending tokens of gratitude. The minutes of the meeting included:

[L] reviewed the fall solicitation plan and we reviewed the draft letter... Letter will drop the first week of September 16. The email follow-up first week of October, the event then occurs in November, and a follow-up email will go out the first week of December.

[J] suggested including In Honor Of/In Memory of giving ... Group discussed stewardship ideas of a thank you to IMO/IHO donor with a certificate or picture; personalizing thank-you's.

In a board meeting conducted in February of 2020, the board members discussed solicitation plans. One board member reiterated, "Our first solicit of the year will go out in the spring, then a mid-year update, and clean up solicit in the fall." In the same board meeting, a new board member was introduced. The new board member is an accountant who was tasked to take over the tax reports. The minutes of the meeting contained, "In the past, [M] and their personal accountant has completed the Simply Amazing tax returns. ...[A] (new board member) will be doing our taxes and offering financial advice." The new board member reviewed the 2020

budget during the same meeting. The notes involved, “She advised that it is a good practice to have some money in reserve. Requested that the budget be approved. A motion was made by [J], [Ma] seconded, and motion approved.” The minutes of the meeting from September 2019 evidenced how M was responsible for the financial reporting. The notes included, “[M]’s presented the financial report and highlights of the balance sheet.” However, the volunteer who was interviewed for this project highlighted that the actual implementation of budget and solicitation plans may be the problem. This volunteer has experience working with a larger, more known organization. He stated:

Once people know, because like with [big organization], it such a big organization... So they already know who you are when you go there and ask them to... donate for this you know it's real easy. Now [SA] is a lot smaller organization, [so it is more difficult to solicit].

In the survey, the majority of the respondents (77.78%) revealed that the CEO/ED was mainly responsible for conducting fundraising. However, the respondents had conflicting views on the extent to which the performance-to-budget was closely and regularly monitored. Nonetheless, the majority of the respondents perceived that monthly or quarterly budget reports were highly (44.44%) or exceptionally (33.33%) developed and distributed to responsible staff. In addition, fundraising was also perceived to be highly (44.44%) or exceptionally (33.33%) conducted utilizing fundraising plans.

**Table 7. Resources**  
(Fundraising)

	Program staff	CEO/ED	Professional consultant	Internal Professional		
58. Who is responsible for conducting fundraising?	22.22	77.78	0	0		
	Not Well	Some	Moderate	High	Exceptional	N/A
59. To what extent is performance-to-budget closely and regularly monitored?	0	11.11	22.22	33.33	22.22	11.11
60. To what extent is monthly or quarterly budget reports developed and distributed to responsible staff?	0	0	22.22	44.44	33.33	0
61. To what degree is fundraising conducted utilizing fundraising plan?	0	0	22.22	44.44	33.33	0

Resources is one of the components of non-profit capacity building (De Vita et al., 2001). Plans and strategies for financial resources could boost the capacity building of a non-profit, as well-managed finances could impact the organization's operation. However, planning is only one part of increasing resources. The other critical factor is to properly utilize the finances (De Vita et al., 2001). SA's financial planning included details of how to raise funds, how to allocate the funds, and a timeline of implementing their plans. Therefore, SA's financial resources appear to contribute to its capacity building.

Nonetheless, resources is not limited to finances. Resources also include manpower, infrastructure, equipment, and other assets. Findings related to some of these resources will be discussed later.

### **Finding 3: SA uses a variety of channels for outreach**

The outreach component was widely discussed during the interviews with the CEO and a stakeholder of a partner organization. Both interview participants perceived that nonprofits tend to increase outreach from partnerships with other organizations. While the CEO perceived that

the coronavirus disease (Covid-19) brought challenges in opportunities for partnerships, she shared past experiences of participating in other organizations' events. The CEO shared:

And then you know what I try to do too is be involved with other organizations but not this year. But last year [M] and I worked for the Boys and Girls Club for their gala and we were volunteers I think we were spotters for the auction and then we cleaned up. So I try to, you know, help out the other organizations and also that way. You know, I see people that I know, and they see that we're helping there and that were involved.

Similarly, the partner organization representative shared that she often tries to promote SA's events within their organization. The participant expressed:

I promote it within our organization all the time, even her event coming up....You know the fundraiser that she has...in March. I told ...[our team members and senior leaders]... let's make a night of it. Like, let's all go because I went to the first one. It was so much fun. But I'm, like, you know she supports us and...It's an awesome organization, everyone would have a good time.

In the minutes of the meeting dated February 2020, the board members discussed, "We had a booth at Baldwin First Friday in January. The weather was cold — so not too many attendees — but good contacts were made." The CEO often used events held by SA or other organizations to increase outreach. In the board meeting dated September 2019, the members reported:

[CEO] engaged with a community member who is new to the area and already offered to get her husband's company involved through volunteering time and expense for boxes. They raffled a large art kit to collect contact info. and gained 250 new names. We should use this concept at future community events.

Apart from face-to-face methods, the CEO also relied on social media and e-mail newsletters to increase outreach. The CEO shared:

So, for example, for our upcoming auction, I've made relationships with artists. So I make sure that I am always looking at the work that they post on Instagram and I comment and tell them I love it, or that makes me happy or things like that. So then when I reach out to them and ask them this year. They're all like I'm on board.

In the survey, the majority of the respondents (66.67%) perceived that SA highly used social media to promote the work being done. Survey results under the sub-scale Outreach are shown in Table 8.

**Table 8. Outreach**

	Not Well	Some	Moderate	High	Exceptional	N/A
47. To what extent are social media platforms used to promote the work being done?	0	0	0	66.67%	33.33%	0
48. What is the status of the organization's website?	0	11.11%	0	44.44%	44.44%	0
49. To what extent do all employees have access to and are supported in personal development?	0	22.22%	11.11%	11.11%	0	44.44%
50. To what extent are resources included in the budget to ensure training is available to increase the skills and knowledge of the workforce?	0	22.22%	33.33%	11.11%	0	33.33%
51. To what extent is there well-thought-out and targeted plans for key employees/positions?	0	44.44%	11.11%	0	11.11%	33.33%
52. To what degree are relevant and regular internal and external training, job rotation, coaching/feedback and consistent performance appraisals institutionalized?	11.11%	44.44%	11.11%	0	33.33%	0
53. To what extent does fiscal management include budget planning and forecasting budget operations?	0	11.11%	44.44%	11.11%	33.33%	0
54. To what extent is the budget reflective of the organization's needs and objectives?	0	11.11%	0	66.67%	22.22%	0
55. To what extent is the performance-to-budget closely and regularly monitored?	0	0	0	55.56%	44.44%	0

In the September 2019 board meeting, the members discussed their use of social media in that:

[CEO] reported on the Office Space and Ribbon Cutting which had 25 attendees and great social media exposure. The event helped spread awareness about SA and Jake and Susan are working on analyzing impressions so far to plan for the future... We used the opportunity to collect addresses to build the database and included those who had attended last year's event, given for the first-time, engaged with SA on Facebook and Instagram, and those who have expressed interest.

In an interview with one volunteer, he shared that he was introduced to SA by a friend who is already a board member. The volunteer also personally knew the CEO and her family. He stated, "Every now and then,...they'll say, hey, can you know contribute [sic] financial [or]come out to the event, and so forth. And so, yeah, I've always tried to be there for both of them."

Therefore, SA's current outreach organizational capacities are based on various channels, including partnerships with other organizations, social media engagement, e-mail newsletters, and word-of-mouth. The assortment of outreach channels can help reinforce and expand the organization's network (De Vita et al., 2001). More people in the community will be informed of the organization's products and services; hence, the organization may receive additional support from the community. De Vita et al. (2001) suggested that increasing outreach capacity would be especially beneficial for smaller organizations that are starting. Thus, SA's current outreach capacity may be an advantage for the organization in the long run.

#### **Finding 4: Products and services**

The focus of SA is on the arts and its positive effect on at-risk children. While the Simply Amazing Creative Boxes sent out were tangible products, SA appeared to be providing additional products and services not aligned with their mission. For example, in addition to the

creative arts and crafts boxes, the organization has a “Fun Pack” summer initiative for the communities they serve. In these backpacks, each child receives school supplies in addition to the arts and crafts supplies they would get in one of the creative boxes. This enables each child to take their materials wherever they go.

From the interviews, the author discovered a third initiative that will start in early November 2020, called the “create a card for the holidays.” This program will provide all the materials necessary to approximately 1,000 children through SA’s partner organizations so that each child will be able to create five-holiday cards. The initiative is not religious-focused; instead, it seeks to distribute the material to children so they may express themselves regardless of their beliefs or cultural backgrounds. These two initiatives go beyond merely providing art and crafts supplies; they are a variation to the original art boxes. Survey results are shown in Table 9.

The CEO and the partner organization's representative emphasized in the interviews that SA Creative Boxes were becoming known in the community. The representative reported, “She's getting more requests, even for boxes.” The CEO explained:

I think that one of the biggest compliments that we can get right now is when people reach out to us and ask us for our product which is starting to happen. Hey, I heard about you through so and so and our program can use this, and you know that’s really great. And I want more of that to happen. But you know I’m pleased, where we're at right now and it's been it'll be two years. Our first box delivery will be two years this coming February, so really [we]only been doing this [for]18 months. We're new we've had a lot of traction without a lot of great media coverage and we've helped we've been in touch with over 4000 kids.

**Table 9. Products and Services**

	Not Well	Some	Moderate	High	Exceptional	N/A
62. To what extent are core programs of quality and are well regarded?	0	0	11.11%	33.33%	55.56%	0
63. To what extent does the organization operate programs that demonstrate tangible outcomes commensurate with the resources invested?	0	0	11.11%	55.56%	33.33%	0
64. To what extent can existing programs be modified to create new programs?	0	0	0	66.67%	33.33%	0
65. To what degree does the organization have formal mechanisms for assessing internal and external factors that affect the achievement of goals?	11.11%	11.11%	33.33%	11.11%	22.22%	11.11%
66. To what degree does the organization utilize program evaluation results to inform its strategic goals?	11.11%	0	33.33%	22.22%	33.33%	0
67. To what extent do program staff experience/education support the requirements of the positions?	0	0	11.11%	22.22%	22.22%	44.44%
68. To what extent does the work being done by Simply Amazing compel people to volunteer?	0	0	11.11%	33.33%	55.56%	0
69. To what extent is the service provided by Simply Amazing making a difference in communities?	0	11.11%	11.11%	33.33%	44.44%	0

Reports of the CEO and other board members personally distributing boxes were also included in the board meeting. In the February 2020 board meeting, it was reported that:

SACB in addition to the 200 boxes that were delivered to CHS in Jacksonville, 30 boxes were delivered to the Grove which is a voluntary residential program serving adolescents ages 13 to 17 with substance abuse and/or behavioral health issues. Last year at this time we had only delivered eight boxes.



Tangible products and services are vital in letting the community know the concrete accomplishments of the organization (De Vita et al., 2001). The accomplishments are measured through outputs and outcomes. In SA, while the mission is to “provide art and craft supplies that inspire creativity and empower deserving children,” the CEO and the members measured their accomplishments through the number of Creative Boxes they sent out.

## **B. Research Question 2**

Research Question 2 was developed in search of the challenges SA needs to address in order to facilitate expansion and growth. The following four findings emerged from the data to answer RQ2: (a) SA’s organizational storytelling is inadequate, (b) Lack of diversity in leadership, (c) Lack of volunteer recruitment strategies, and (d) Limited social media presence. The number of participants and references supporting the themes for RQ2 are presented in Table 13.

**Table 10. RQ2 Findings**

Findings	Number of Participants	Number of References
SA’s organizational storytelling is inadequate	3	3
Lack of diversity in leadership	3	5
Lack of volunteer recruitment strategies	2	5
Limited social media presence	3	6

### **Finding 1: SA’s organizational storytelling is inadequate.**

*“If you mess it up then dress it up -- your work is one of a kind, simply amazing, just like you!”*

*by Emily*

After reviewing documents and the SA's website, the author discovered that the story was not complete. Essential parts were missing, one of them being the cause of Emily's death. While an organization's mission gives a snapshot of its goals, the organization's story is equally

important in the process of compelling stakeholders (volunteers and donors) to assist the organization. According to the volunteer who was interviewed for this project, stakeholders might be having difficulty separating SA from other organizations because of its small size and because the objectives might not be fully reflective of the organization's purpose for existing. He shared, "Once you're able to talk with people explain you know what organization is and what's the mission and why was created, it's a unique story...Some people will gravitate towards that..."

As Lee et al. (2013) explained, organizational leaders often use stories to share their vision and to promote expected organizational mindsets and behaviors. The stories shared are about an aspect of the organization or a person--in the case of SA, Emily's story. Each story provides an understanding of the cultural, political and emotional aspects of an organization. Further, stories can transfer tacit knowledge and are often said to generate learning (Harris & Barnes, 2006).

Recently, Emily's story has been updated on the website to reflect her cause of death: a lethal fentanyl overdose. In an interview with the CEO, she shared that initially she did not feel comfortable telling Emily's stories because of the stigma surrounding drug usage. She did not want anyone thinking any less of Emily because of a mental health issue. Over time, she realized that sharing Emily's story is extremely important and valuable in removing the stigma around drug usage and mental health issues. While steps towards correcting this issue have been taken, more should be done.

### **Finding 2: Lack of diversity in leadership.**

During the interview with the CEO, the CEO shared, "We have three men...eight women [on the board]." By attending board of directors' meetings, the author observed that all 11 board

members were Caucasian. The CEO did note in her interview that in January 2021, an African American male will be joining the board of directors. In the February 2020 board meeting, the members discussed the “need to diversify” based on a matrix prepared by one of the members. The minutes of the meeting included, “[CEO] presented our board development plans. We reviewed the board matrix which [L] created, discussed our need to diversify. The matrix shows that we lack HR and legal expertise. We can have up to 15 board members.” Members nominated potential board members.

The communities SA serves are largely made up of people of color in marginalized communities. Tapia (2009) highlights the importance of having a racially diverse board, leading an organization. He stated that “when there are more people who 'look like me' up the succession path, more employees [volunteers and stakeholders] can hope that they, too, have a chance to succeed" (p.274). Further, when community members of the organizations see themselves in the people serving them, it promotes a sense of value and respect for individuals and the community. It can also incentivize participation and retention.

Apart from racial diversity, the partner organization's representative revealed in the interview that SA might also need to diversify the skills of their board members. The representative emphasized that while the CEO was hands-on in her work, SA grew and expanded as an organization. As a result, the CEO might need to learn to delegate tasks to members with a variety of skillsets. The representative elucidated:

[Come] up with a solid plan on if you're not hiring staff...going in the direction of finding those people that can support so volunteer board members because I know she has a board I don't know how large that board is, um, but even relying on them to do

more and delegate more evenly volunteer opportunities, you know, and maybe that up opens up some more.

The new board member described by the CEO in the interview started working with the organization as a volunteer. In the interview with a current volunteer who will be joining the board in late 2020, he perceived that the CEO wanted to expand and diversify the board, which was why she approached him, a lawyer. He stated:

The organization moving and I know that she's in the process of, you know, there's a few board members that may be leaving and she tried to bring some others on and she had approached me probably a year or so ago because I'm an attorney, so they did want to have an attorney on the board for a while to kind of handle some of...the legal challenges of things and from time to time.

Through working with SA, he saw the importance of the work being done and when asked to serve on the board, he accepted. He is an attorney in the Central Florida community and is involved with several community based nonprofit organizations serving this area. This was a good first step towards diversifying the leadership; nonetheless, the board makeup still doesn't match the constituency.

**Finding 3: Lack of volunteer recruitment strategies.**

Interview, observation, and survey data revealed that the main focus of discussion on resources centered on finances, while minimal attention was given to volunteer recruitment plans. SA has a healthy pool of volunteers dedicated to the mission of the organization. In an interview, the CEO shared that all of the personnel working for SA are volunteers. This volunteer pool mainly consists of friends of the family, founder colleagues, and Emily's friends. The human resource pool may not be adequate to satisfy SA's goal to expand and grow beyond

the Central Florida area. In the interview with the representative from a partner organization, the participant cited that SA's CEO might not be anticipating the sudden growth of the organization.

The representative noted:

I mean they're small, right? So, it was its manageable for her, but I just can see it getting a lot larger. Which is awesome. I love [Sue] and the work that she does. So, I think that would definitely be that challenge though is. And like I said, not even hiring on staff but putting together a solid volunteer plan, it would be helpful.

Some survey respondents (44.44%) indicated that a well-planned process to recruit, develop, and retain key managers and staff was not applicable to SA, while other survey respondents perceived that SA has limited (22.22%) or adequate (22.22%) plans. In that case, the organization will need to develop an intentional, strategic plan in order to compel individuals outside of the friend's pool to volunteer their time to the organization. If people understand and can connect to the organization, they will be more likely to engage. However, an additional challenge that might hinder volunteer recruitment strategies was the restrictions brought by Covid-19. According to the CEO:

You don't have those face to face context, it's difficult...even like during in March, April and May we had over 900 boxes created and delivered it was [M] and me because...I couldn't get any volunteers...I'm not afraid of coronavirus but I'm not going to judge anyone ...if we have a huge outbreak in the fall...And I know it's a lot a lot of elderly people, but there's still, you know, people without that aren't symptomatic that are younger, that gets sick, too. So, you just don't know.

The volunteer interviewed for this project also believed similarly, "Right now, because of Covid... It's going to be a little difficult to get people to do much of anything right now as far as

volunteering, as far as financing, everything.” Adopting a motivational perspective to the process and inquiring about the motivations that may encourage individuals to seek out volunteer opportunities can be an effective approach to understanding what compels them (Clary et al., 1998). Wemlinger and Berlan, (2016) further explained that volunteerism is rooted in sociological and organizational realms as a means of a collective relationship. They introduced six key elements that should be present when creating events to compel individuals to volunteer. The six elements are: 1) voluntary action; 2) little to no compensation; 3) longevity; 4) planfulness; 5) non-obligation; 6) organizational context. Each element should be connected to a specific audience. For instance, *planfulness volunteerism* suggests that volunteering is a planned rather than spontaneous action. As noted by Davis et al. (1999), individuals are more likely to volunteer when they foresee positive emotional responses as well as personal fulfillment from the activity. As such, these findings support the idea that volunteerism is, to an extent, a planned action based on rational deliberation of the effect and satisfaction likely to be derived from it.

**Finding 4: Limited social media presence.**

In finding 3 RQ1, the author mentioned, SA has a social media presence; however, it is limited to Facebook and Instagram, therefore it appears to be a strength and a weakness. Based on the interviews, the organization is aware of the limitations and would like ideas on how to increase their presence. In an interview with the CEO, she shared that Facebook and Instagram are the two platforms mainly used because these are the ones, she and the communications director are comfortable using. The representative from a partner organization shared that social media activity was only one part of its effectiveness. The other part was about knowing how to use each platform properly. She shared:

Everyone talks and so then everyone like oh they're doing this, like we want something for our kids like we're gonna sign up to, you know, that word of mouth gets around. But I think in the role of nonprofits engaging in the community in general and getting your mission out there. And what you do is always a challenge. So, [I]think social media plays a big part in it and it's the easiest way to kind of get more out [of it] if it's written correctly. So, I know it's a challenge. And it can be very time consuming, but I find it to be most effective, especially for a small organization.

When survey participants were asked “*To what extent are social media platforms used to promote the work being done*” 67% of participants answered exceptionally, and 33% answered high to the use of social media. Yet, considering that SA is almost exclusively using Facebook and Instagram, there are challenges as well. Based on the survey’s responses to the question, there is a disconnect between SA’s current use of social media platforms and recommended usage from the literature.

As explained by Bortree and Seltzer (2009) and Lovejoy, Waters, and Saxton (2012), social media’s interactive and decentralized platforms can provide a low-cost way for organizations to mobilize supporters, foster dialogic interactions with large audiences, and attract attention to issues that might otherwise be ignored by traditional media. When survey participants were asked

In addition to their limited social media presence, how the messages are written with the intention to target specific audiences is an issue of concern. I asked the CEO if they had communication strategies to draft the posted messages, she answered no. She explained that she or any of the volunteers would do it spontaneously without putting too much thought into the audience they were trying to target.

While SA's social media capacity may have already been effective in reaching out to people, Guo and Saxton (2014) suggested that maximizing social media engagement involved two other steps: keeping the flame alive and stepping up to action. The CEO revealed that SA began working on keeping the flame alive through continuously engaging with artists in Instagram; however, Guo and Saxton recommended engagement with networks of supporters and new audiences. Furthermore, the authors endorsed sustaining the engagement and mobilizing the audience to act. Thus, SA needs to improve social media presence.



## VII. Recommendations

By connecting the findings to the literature, the conceptual framework, and the data collected, the following recommendations were determined:

### **Recommendation 1: Develop partnerships to improve SA communication strategies**

Finding 1RQ1, shows SA might be effective in communicating its reason for existing, as well as how it aims to attend to their stakeholders. However, in the absence of a vision statement, SA is not clearly communicating its future-oriented aims, or what it hopes to become based on its mission (De Vita et al. 2001). Visions are an essential component because they create a practical guide for building plans, settings goals and objectives, decision making, and coordinating and evaluating any project's work, large or small. As explained by De Vita et al. (2001), the vision and mission provide context for measuring the organization's work effectiveness. While the mission offers a concise statement for its existence, the vision creates a map for achieving its goals. In the absence of a vision statement, SA is not be clearly communicating its future-oriented aims, or what it hopes to become based on its mission (De Vita et al., 2001).

While Finding 3 RQ1, shows that SA has been making connections by partnering up with other organization, emails, newsletters, and social media engagement, its social media engagement needs to expand beyond Facebook and Instagram. Finding 4 RQ2, identifies limited social media presence as a challenge due to its exclusive presence on Facebook and Instagram. Therefore, social media presence is a strength and challenge. The literature highlights the importance of using multiple social media platforms as a low-cost way for organizations to mobilize supporters, foster dialogic interactions with large audiences, and attract attention to issues that might otherwise be ignored by traditional media. One way to accomplish this is to

look for partnerships with local colleges and universities to offer internships for students in the communication field (Bortree & Seltzer, 2009; Lovejoy, Waters & Saxton, 2012).

Based on the findings, while SA appears to be using Facebook and Instagram effectively, they need to expand the organization's social media presence at least to include Twitter, YouTube, and LinkedIn.

Finding 1 RQ2 showed that after review of the documents, SA's website, the author discovered that the story was not complete. Essential parts of Emily's death were missing. While an organization's mission gives a snapshot of its goals, the organization's story is equally important in the process of compelling stakeholders (volunteers and donors) to assist the organization.

As Lee et al. (2013) explained, organizational leaders often use stories to share their vision and to promote expected organizational mindsets and behaviors. The stories shared are about an aspect of the organization or a person--in the case of SA, Emily's story. Each story provides an understanding of the cultural, political and emotional aspects of an organization. Further, stories can transfer tacit knowledge and are often said to generate learning (Harris & Barnes, 2006). SA should build out and better communicate its inspirational founding story, and create new stories centering around the positive changes its programs are making in people's lives.

Two ways to improve SA communication strategies include: (1) seek partnerships with local colleges and universities to offer internships to students in the communications field; (2) seek support from pro bono programs such as the Center for Social Impact Communication at Georgetown University (<https://csic.georgetown.edu/>) to learn how to improve its communication skills and engagement.

**Recommendation 2: Develop a formalized volunteer recruitment plan.**

Finding 3 RQ2 revealed that there are no volunteer recruitment strategies in place and that SA's volunteer pool mainly consists of friends of the family, founder colleagues, and Emily's friends. The human resource pool may not be adequate to satisfy SA's goal to expand and grow beyond the Central Florida area. Adopting a motivational perspective to the process and inquiring about the motivations that may encourage individuals to seek out volunteer opportunities can be an effective approach to understanding individuals and what compels them to give their time to a specific cause (Clary et al., 1998). Wemlinger and Berlan, (2016), explained that volunteerism is rooted in sociological and organizational realms as a means of a collective relationship. They introduced six key elements that should be present when creating events to compel individuals to volunteer. The six elements are: 1) voluntary action; 2) little to no compensation; 3) longevity; 4) planfulness; 5) non-obligation; 6) organizational context. Each element should be connected to a specific audience.

For SA to break away from the Friends and Family model, they need to develop and implement a plan that compels volunteers from different backgrounds to participate and help facilitate the growth and expansion SA seeks.

**Recommendation 3: Examine the current board members' skill sets and create an intentional recruitment plan to go out into the community and secure additional members to allow for a well-rounded board.**

Finding 2 RQ2, shows that the current board of directors lacks racial and skill diversity. Currently, there are 11 members, three men and eight women, all white. SA serves in marginalized communities that are largely made up of people of color. As Tapia (2009)

explained, when community members can see themselves in the people serving them, it promotes a sense of value and respect for individuals and the community, and it also promotes engagement and retention.

The interview with the CEO revealed that SA can have up to 15 members on the board. Currently, SA has 11 board members. One way to address the lack of racial and skill diversity is by adding individuals with diverse skill sets, of different genders and ethnic backgrounds. This way the board can begin to look like the communities and clients they serve and have a healthy balance around skill sets.

A tool that can assist SA with this is the Marguerite Casey Foundation Assessment Tool. The Marguerite Casey Foundation Organizational Capacity Assessment Tool was adapted from the Capacity Assessment Grid created by McKinsey and Company in 2001 and it helps assess an organization's capacity through four dimensions (Leadership, Adaptive, Management, Operational). This tool provides an organization the ability to assess and understand its needs, thus, allowing the organization to evaluate and adjust to meet the demands of the ever-changing ecosystem of the nonprofit environment. The progress must be assessed and monitored periodically.

## **VIII. Study Limitations and Future Research Recommendations**

### **A. Limitations**

1. The author had a full-time job and doctoral coursework to manage concurrent with this study.
2. Several considerations limited the time and other resources for this study.
3. Due to the Covid-19 pandemic, event observations and participations were not possible.
4. Only three stakeholders agreed to an interview. One limitation is the population sampled. Generalizability is limited, given the sample size.
5. The results of research from a smaller organization such as SA cannot necessarily be generalized to a larger organization of similar focus.
6. One limitation may be the researcher's personal bias, given that a close family member suffers from substance abuse.

### **B. Recommendations for Future Research**

1. Identify a larger organization offering comparable services.
2. Repeat this study to include multiple organizations of the same size offering equivalent services.
3. While we have gained insight into the motivation of volunteers, explore motivation of donors.

## **IX. Conclusion**

The proposed study examined the nature and impact of organizational capacity in the nonprofit organization, Simply Amazing, to identify the factors that affected the organization's ability to fulfill its mandate to provide arts and crafts supplies that inspire creativity and empower deserving children through expansion and growth. The capstone project was conducted over several months. Findings from this capstone project will be used to assist Simply Amazing in its efforts to expand its outreach and impact.

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## Appendix 1

### INFORMED CONSENT FOR PARTICIPATION IN RESEARCH ACTIVITIES

You are invited to participate in a capstone project that is assessing Simply Amazing's capacity-building potential which is of vital importance to the sustainability and stability of the organization and its goal to expand beyond its existing outreach. This survey should take about [30-45] minutes to complete. Participation is voluntary and responses will be kept anonymous to the degree permitted by the instrument being used.

You have the option to refrain from response on any question. Participation or nonparticipation will not impact your relationship with Simply Amazing.

Submission of the survey will be interpreted as your informed consent to participate and your affirmation that you are at least 18 years of age\*.

If you have any questions about the project, please contact the Principal Investigator, Annette Galindo, via email at [annette.galindo@vanderbilt.edu](mailto:annette.galindo@vanderbilt.edu) or the faculty advisor, Dr. Tracey Armstrong, at [tracey.m.armstrong@vanderbilt.edu](mailto:tracey.m.armstrong@vanderbilt.edu). If you have any questions regarding your rights as a participant in this study, contact the Vanderbilt Institutional Review Board (IRB) at (615) 322-2918.

Print a copy for your records.

*\*I have read the above information and agree to participate in this capstone project.*

## Appendix 2

### CAPACITY SURVEY OF COMMUNITY-BASED NONPROFIT ORGANIZATIONS CONDUCTED BY ANNETTE GALINDO<sup>3</sup>

#### Mission, Vision, and Values

1. To what extent does the mission describe the work and purpose of your existence and express the values operating within the organization?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

2. Please indicate the level of shared understanding that exists for the organization's mission and vision among stakeholders?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

3. Is the vision of the organization clearly articulated with an inspiring view of the future?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6-N/A

4. How often is the mission, vision, and values reviewed or revised?

1- every 5 years 2- every 4 years 3- 3years 4- 2 years 5- annually 6- N/A

#### Board of Governance and Leadership

5. To what extent does the Board's membership include a variety of fields of practice and expertise drawn from a broad spectrum of constituencies (nonprofit, academia, corporate, government, community, clients, etc.)?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

6. To what extent does the Board have a willingness and proven track record of investing in learning about the organization and addressing its issues?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

7. To what extent do board subcommittees meet to focus on issues of the organization?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

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<sup>3</sup> This survey has been adapted from Valerie K. Wright with her permission. Four questions from the original survey( 46, 47, 65 deleted, 68 & 69) have been modified or replaced.

8. To what extent does the Board meet in person regularly, with good attendance to conduct the business of the organization?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

9. At what level does the Board function according to the by-laws?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

10. To what extent does the Board provide strong direction, support, and accountability to programmatic leadership and engage as a strategic resource?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

11. To what degree does communication between board and leadership reflect mutual respect, appreciation for roles and responsibilities, shared commitment and valuing of collective wisdom?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

12. To what extent do the Board review budgets, audits, and other fiscal matters?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

13. To what extent does the Board review the CEO's performance and hold the CEO accountable?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

14. What is the education level of the Executive/Leader?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

15. What is the average term of the Executive/Leader?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

16. What is the level of passion and commitment of the Executive/Leader?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

17. To what extent is the Executive/Leader able to compellingly articulate the path to achieving the vision that enables others to see where they are going?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

18. To what degree is he/she capable of providing sound financial judgment and decision-making?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

19. What level of analytical and strategic thinking is he/she capable of?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

20. What level of nonprofit management experience does he/she have?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

21. To what degree is Executive/Leader capable of developing and growing relationships with funders and donors?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

22. To what degree does the Executive/Leader guide the organization to succeed simultaneously in dual mission of social impact and optimal financial efficiency?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

### **Resources**

23. To what extent are the roles and responsibilities of all organizational entities formalized, clear and complement each other?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

24. To what extent does the organization develop and refine concrete, realistic and detailed operational plans?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

25. To what extent are operational plans linked to strategic planning activities and systematically used to direct operations?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

26. To what extent does the organization have a critical mass of internal expertise in operational planning?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

27. To what extent are processes well-designed and in place in all areas to ensure the effective and efficient functioning of the organization?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

28. To what extent are processes widely known, used and accepted and as key to ensuring the full impact of the organization?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

29. To what extent are processes continually monitored and assessed and systematic improvement made?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

30. To what extent are there clear, formal lines/systems for decision making that involve as broad participation as practical and appropriate along with dissemination/interpretation of decision?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

31. To what extent are there clear, formal systems for data collection in all relevant areas?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

32. To what extent is internal HR activities regularly carried out by trained, dedicated HR managers?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

33. To what extent is the organization able to develop and refine concrete, realistic, and detailed HR plans?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

34. To what extent is HR planning tightly linked to strategic planning activities and systematically used to direct HR activities?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

35. To what degree is there a well-planned process to recruit, develop, and retain key managers and staff?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A



36. How would you describe the experience of the management team?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

37. What level of nonprofit management experience does the management team possess?

1 - limited 2 - adequate 3 - most 4 - high 5 - exceptional 6- N/A

38. How often does your organization engage in Strategic Planning?

1- Annually 2-Semi-Annually 3- Quarterly 4- Monthly

39. Please indicate all of the groups who participate in strategic planning?

1-Clients 2-Volunteers 3- Program 4- Staff 5- Managers 6-CEO 7-Board Members

40. How well is the strategic plan carried out in daily activities?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

41. Who conducts/facilitates strategic planning sessions?

1- Outside Consultant 2-Internal Consultant/Managers 3- CEO/ED 4- Board Member 5- N/A

42. To what degree is data used systematically to support planning effort and to improve it?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

### **Technology**

43. What is the status of the organization's databases and management reporting system?

1- none 2- basic 3- comprehensive 4- sophisticated 5- N/A

44. Who is responsible for managing the organization's technology function?

1- untrained staff 2- staff as secondary function 3- outside consultant 4- IT manager 5- N/A

45. To what extent do all employees have access to computers, applications, network, and email?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

### Outreach

\*46. To what extent are social media platforms used to promote the work being done?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

47. What is the status of the organization's website?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

48. To what extent do all employees have access to and are supported in personal development?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

49. To what extent are resources included in the budget to ensure training is available to increase the skills and knowledge of the workforce?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

50. To what extent is there well-thought-out and targeted plans for key employees/positions?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

51. To what degree are relevant and regular internal and external training, job rotation, coaching/feedback and consistent performance appraisal institutionalized?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

52. To what extent does fiscal management include budget planning and forecasting, budget operations?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

53. To what extent is the budget reflective of the organization's needs and objectives?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

54. To what extent is the performance-to-budget closely and regularly monitored?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

55. To what extent are monthly or quarterly budget reports developed and distributed to responsible authority?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

### **Fundraising**

56. To what degree is fundraising conducted to support the overall operation of the organization?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

57. To what extent does the funding model support diversified funding across multiple source types?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

58. Who is responsible for conducting fundraising?

1- program staff 2-CEO/ED 3- professional consultant 4- internal professional

59. To what extent is performance-to-budget closely and regularly monitored?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

60. To what extent is monthly or quarterly budget reports developed and distributed to responsible staff?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

61. To what degree is fundraising conducted utilizing fundraising plan?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

### **Program Development/Management**

#### **Products & Services**

62. To what extent are core programs of quality and well regarded?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

63. To what extent does the organization operate programs that demonstrate tangible outcomes commensurate with the resources invested?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

64. To what extent can existing programs be modified to create new programs?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

65. To what degree does the organization have formal mechanisms for assessing internal and external factors that affect the achievement of goals?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

66. To what degree does the organization utilize program evaluation results to inform its strategic goals?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

67. To what extent do program staff experience and education support the requirements of the positions?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

\*68. To what extent the work being done by Simply Amazing compels people to volunteer?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

\*69. To what extent is the service provided by Simply Amazing making a difference in communities?

1 - not well 2 - some 3 - moderate 4 - high 5 - exceptional 6- N/A

**Additional Comments**

Please feel free to provide any other information that will be useful in understanding your organization's performance.

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## Appendix 3

### Potential questions for semi-structured interviews<sup>4</sup>

#### Vision and Mission

1. What is the organization's greatest challenge with respect to fulfilling its mission?
2. Is there anything that you would like to see changed in your organization's external environment to help strengthen your organization's ability to fulfill your mission and vision?
3. Is there anything you would like to see changed internally to help strengthen your organization to fulfill your mission and vision?

#### Leadership (board, staff, volunteers)

1. What is your organization's greatest challenge in the area of leadership?
2. Is there a system for joint decision-making?
3. Are other team members empowered to lead?
4. What is your organization's greatest challenge in the area of the board?
5. Do you have any problems obtaining the kinds of contributions you would like from your board members?
6. Is the community clearly represented in the board composition?
7. Does the Board and leadership conduct joint "strategic planning"? How often?
8. Is there anything that you would like to see changed in your organization's external environment to help strengthen the contributions of your board?
9. What is your organization's greatest challenge in the area of volunteers?
10. Do you have problems obtaining the kinds of contributions you would like from your volunteers?
11. Is there anything that you would like to see changed in your organization's external environment to help strengthen the contributions of your volunteers?
12. Is there anything that you would like to see changed internally to help strengthen the contributions of your volunteers?

#### Resources (financial, technological, human)

1. What is your organization's greatest challenge with respect to its ability to finance its activities and to manage its finances?

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<sup>4</sup>These questions have been adapted from A Qualitative Study of the Challenges Facing Canada's Nonprofit and Voluntary Organizations, Hall, Michael & Andrukow, Alison & Barr, Cathy & Brock, Kathy & Wit, Margaret & Embuldeniya, Don & Jolin, Louis & Lasby, David & Lévesque, Benoît & Malinsky, Eli & Stowe, Susan & Vaillancourt, Yves (2003) and Valerie K. Wright.

2. Is there anything that you would like to see changed in your organization's external environment to help strengthen your organization's finances?
3. Is there anything you would like to see changed internally to help strengthen your organization's finances?
4. What is your organization's greatest challenge in the area of human resources?
5. Is there anything that you would like to see changed in your organization's external environment to help strengthen your organization's human resources?
6. What is your organization's greatest challenge in the area of technology?
7. Is there anything that you would like to see changed in your organization's external environment to help strengthen your organization's technology?

### **Products and Services (outputs, outcomes, performance)**

1. What is your organization's greatest challenge in the area of structural capacity?
2. What is your organization's greatest challenge with respect to developing its vision for the future and a plan to get there?
3. How satisfied are you that your organization is working towards its objectives, mission, and vision, or following the strategic plans developed?
4. Is there anything that you would like to see changed in your organization's external environment to help strengthen your organization's development?
5. Is there anything that you would like to see changed internally to help strengthen your organization's development?
6. What sorts of relationships or networks are important to your organization?

### **Outreach (dissemination, public education, collaboration, advocacy)**

1. What is the organization's greatest challenge with respect to establishing meaningful connections with communities?
2. Is there anything that you would like to see changed in your organization's external environment to help strengthen your organization's ability to make meaningful connections with communities?
3. What sorts of relationships or networks are important to your organization?
4. How satisfied are you with your organization's ability to build and maintain these relationships?
5. Is there anything you would like to see changed internally to help strengthen your organization's ability to make meaningful connections with communities?
6. What is your organization's greatest challenge with respect to relationships and networks?
7. What is your organization's greatest challenge with respect to organizational infrastructure, processes, and systems?

## Appendix 4

### RE: Permission to use research instruments

Valerie Wright <WrightValerieK@aol.com>

Fri 2/28/2020 5:27 AM

To:

- Galindo, Annette <annette.galindo@vanderbilt.edu>

1 attachments (115 KB)

Survey Questions.doc;

Good morning Annette,

Congratulations on your doctoral journey.

You have my permission to use the instrument from my Masters research project. I have attached a copy for your use. I have also attached a copy of the free McKinsey assessment tool.

Wishing you much success with your dissertation.

Blessings and Peace,  
*Valerie*

Valerie K. Wright, MSOD, BCC  
Chief Executive Officer  
**Wright Ideas Unlimited**  
561.439.3069 Office  
619.507.3886 Mobile  
[WrightValerieK@aol.com](mailto:WrightValerieK@aol.com)

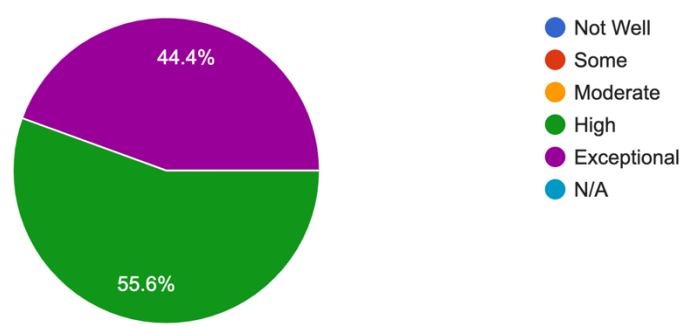
## Appendix 5

### Survey Results

#### Mission, Vision, and Values

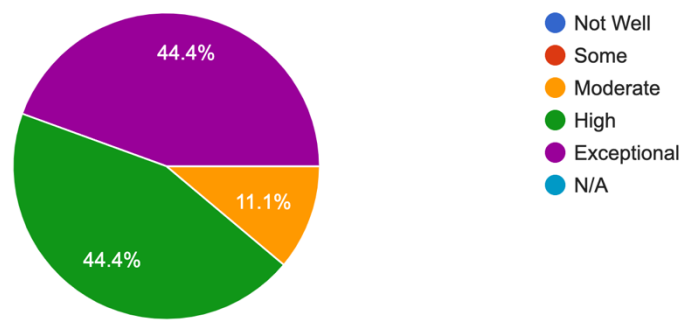
To what extent does the mission describe the work and purpose of your existence and express the values operating within the organization?

9 responses



Please indicate the level of shared understanding that exists for the organization's mission and vision among stakeholders?

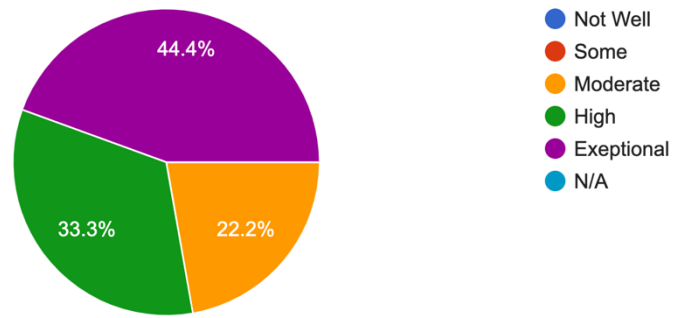
9 responses





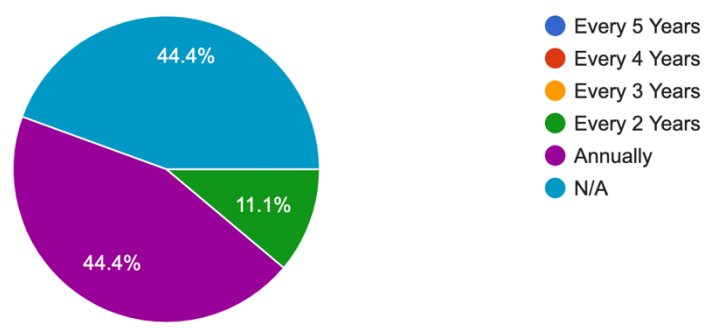
Is the vision of the organization clearly articulated with an inspiring view of the future?

9 responses



How often is the mission, vision, and values reviewed or revised?

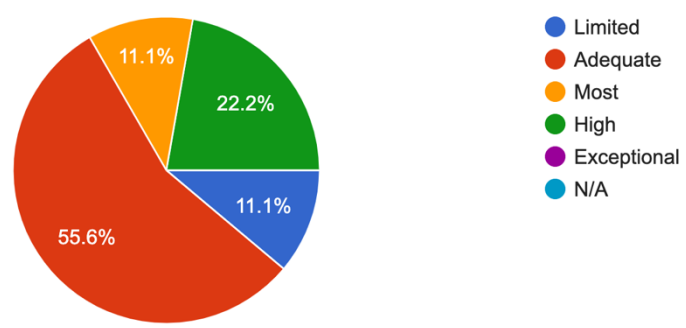
9 responses



### Board of Governance and Leadership

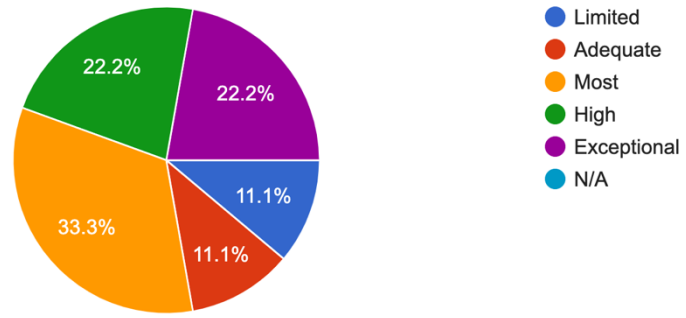
To what extent does the Board's membership include a variety of fields of practice and expertise drawn from a broad spectrum of constituencies (no...orporate, government, community, clients, etc.)?

9 responses



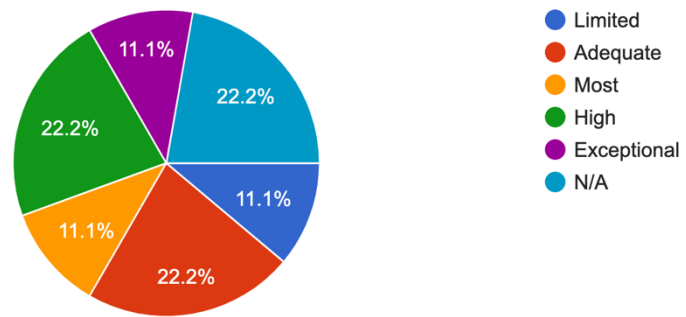
To what extent does the Board have a willingness and a proven track record of investing in learning about the organization and addressing its issues?

9 responses



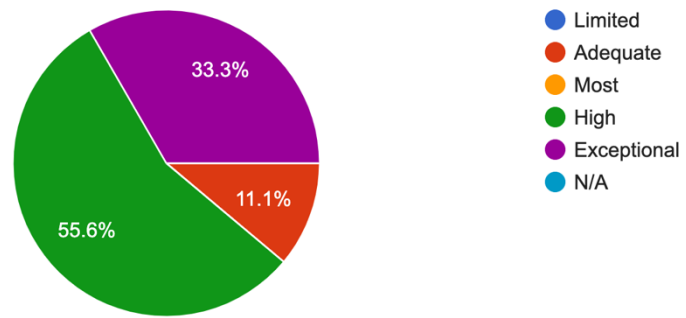
To what extent do board subcommittees meet to focus on issues of the organization?

9 responses



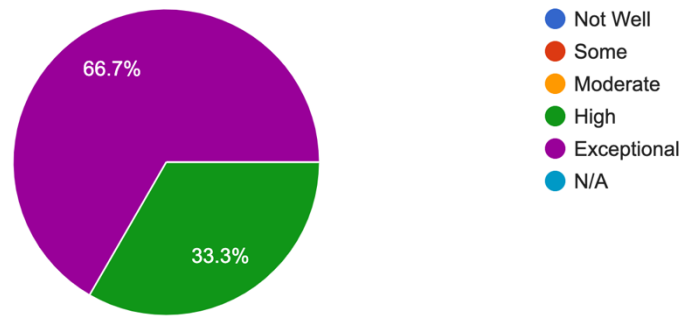
To what extent does the Board meet in person regularly, with good attendance to conduct the business of the organization?

9 responses



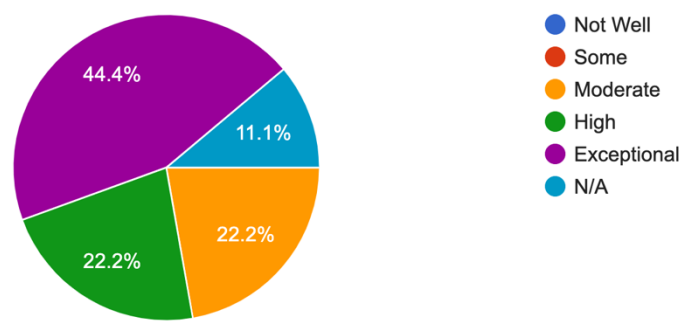
At what level does the Board function according to the by-laws?

9 responses



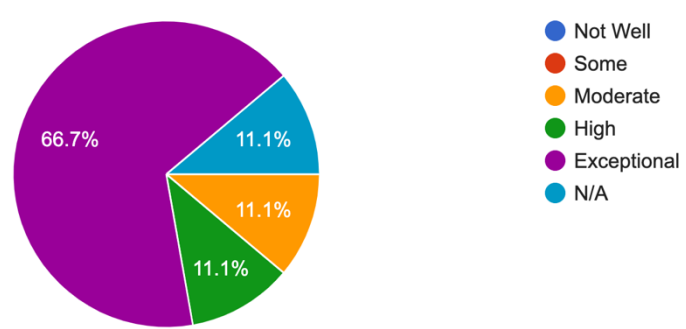
To what extent does the Board provide strong direction, support, and accountability to programmatic leadership and engage as a strategic resource?

9 responses



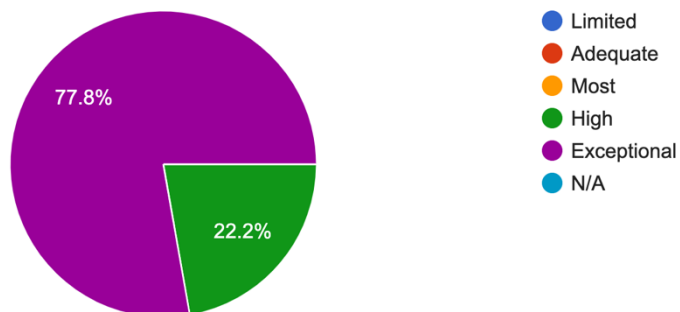
To what degree does communication between board and leadership reflect mutual respect, appreciation for roles and responsibilities, shared commitment and the value of collective wisdom?

9 responses



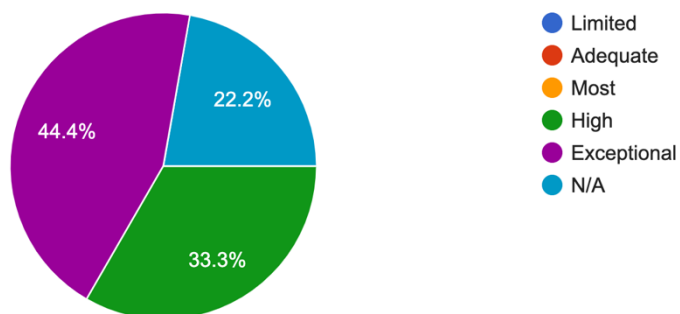
To what extent does the Board review budgets, audits, and other fiscal matters?

9 responses



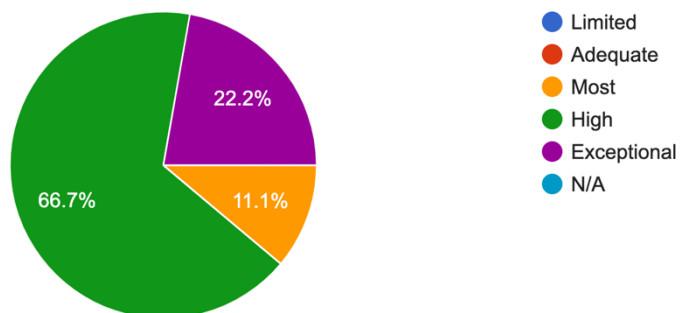
To what extent does the Board review the CEO's performance and hold the CEO accountable?

9 responses



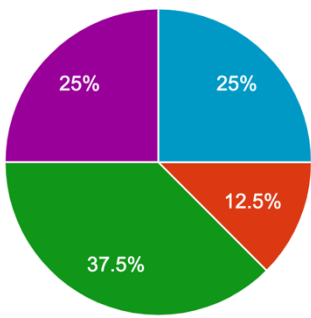
What is the education level of the Executive/Leader?

9 responses



### What is the average term of the Executive/Leader?

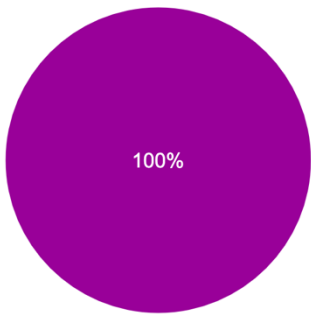
8 responses



- Limited
- Adequate
- Most
- High
- Exceptional
- N/A

### What is the level of passion and commitment in the Executive/Leader?

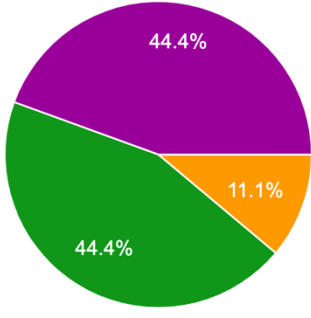
8 responses



- Limited
- Adequate
- Most
- High
- Exceptional
- N/A

### To what extent is the Executive/Leader able to compellingly articulate a path to achieving the vision that enables others to see where they are going?

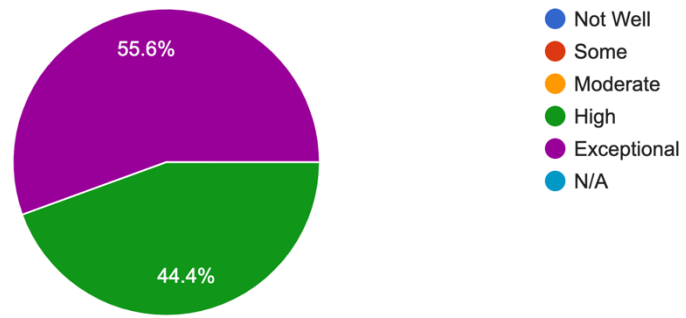
9 responses



- Limited
- Adequate
- Most
- High
- Exceptional
- N/A

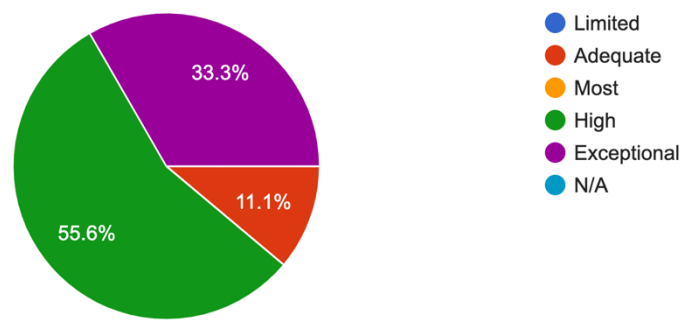
To what degree is he/she capable of providing sound financial judgment and decision-making?

9 responses



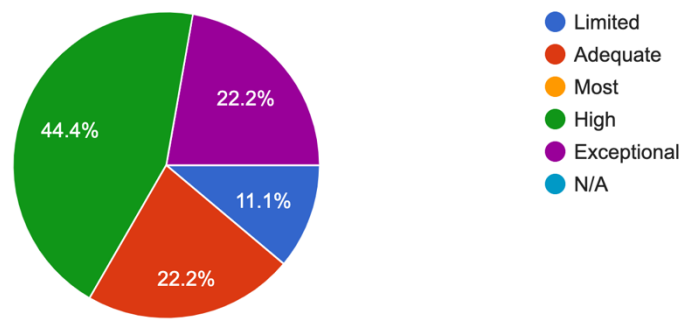
What level of analytical and strategic thinking is he/she capable of?

9 responses



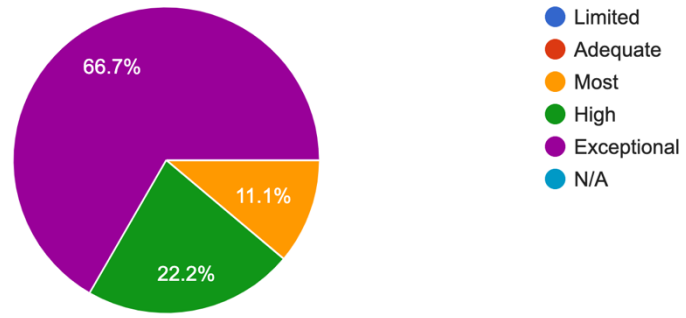
What level of nonprofit management experience does he/she have?

9 responses



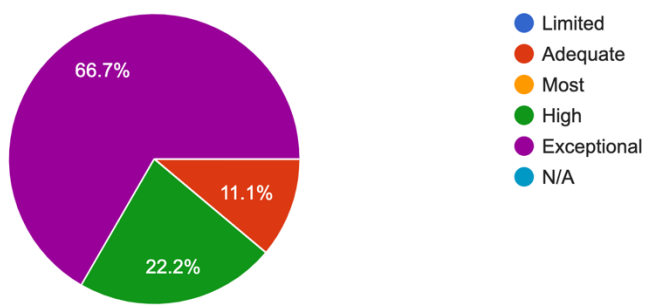
To what degree is the Executive/Leader capable of developing and growing relationships with funders and donors?

9 responses



To what degree does the Executive/Leader guide the organization to succeed simultaneously in dual mission of social impact and optimal financial efficiency?

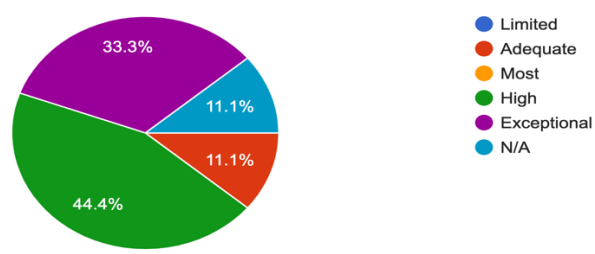
9 responses



### Organization/Operations Resources

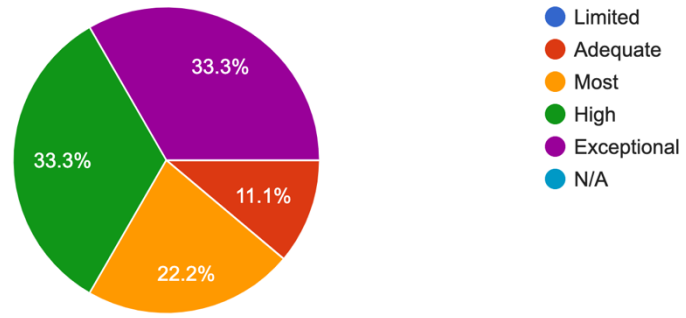
To what extent are the roles and responsibilities of all organizational entities formalized, clear, and complementary of each other?

9 responses



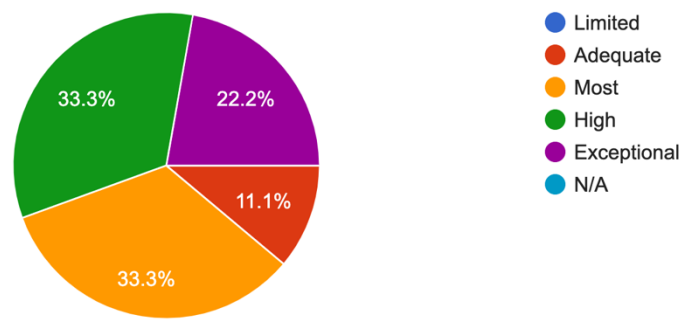
To what extent does the organization develop and refine concrete, realistic, and detailed operational plans?

9 responses



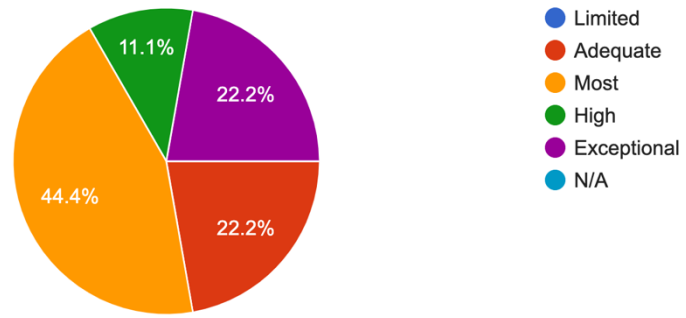
To what extent are operational plans linked to strategic planning activities and systematically used to direct operations?

9 responses



To what extent does the organization have a critical mass of internal expertise in operational planning?

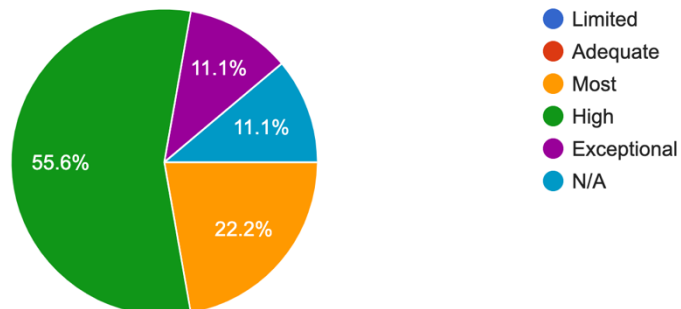
9 responses





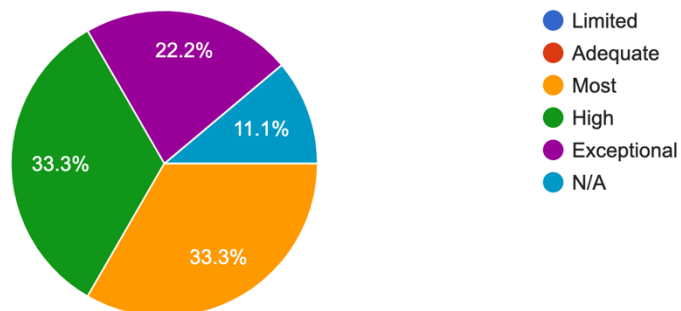
To what extent are processes well-designed and in place in all areas to ensure the effective and efficient functioning of the organization?

9 responses



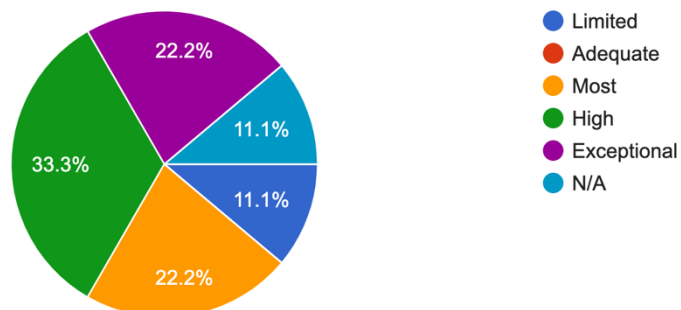
To what extent are processes widely known, used, and accepted as key to ensuring the full impact of the organization?

9 responses



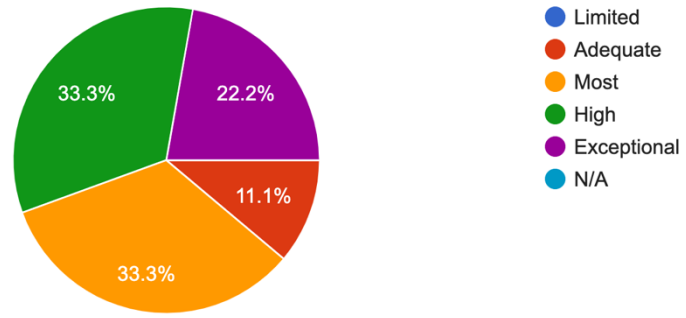
To what extent are processes continually monitored and assessed and systematic improvement made?

9 responses



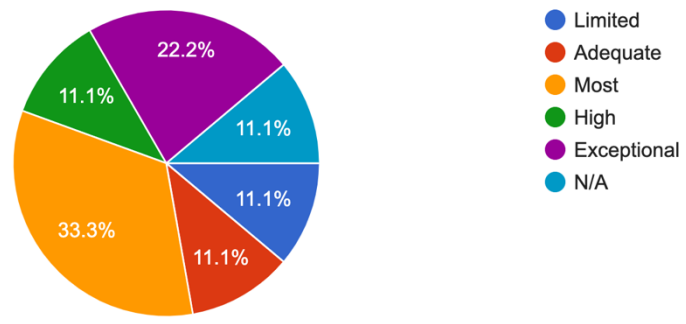
To what extent are there clear, formal lines/systems for decision making that involve as broad participation as practical and appropriate along with dissemination/interpretation of decision?

9 responses



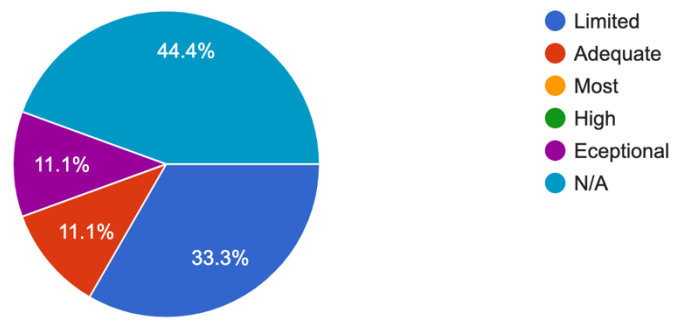
To what extent are there clear, formal systems for data collection in all relevant areas?

9 responses



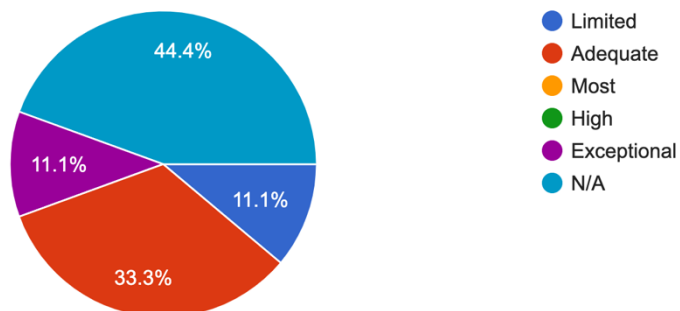
To what extent are internal HR activities regularly carried out by trained, dedicated HR managers?

9 responses



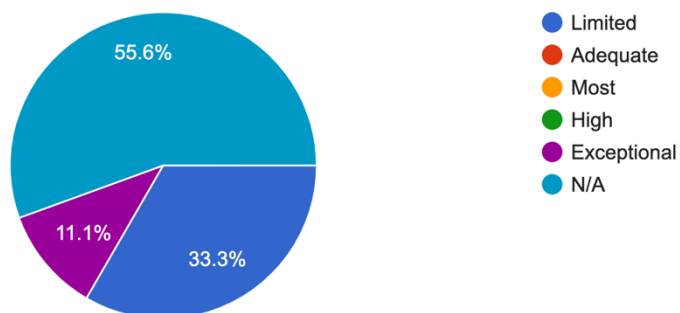
To what extent is the organization able to develop and refine concrete, realistic, and detailed HR plans?

9 responses



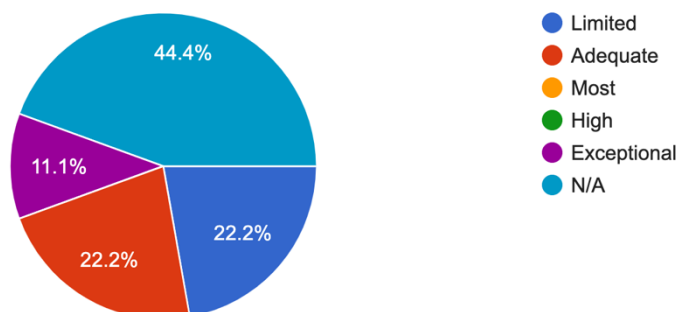
To what extent is HR planning tightly linked to strategic planning activities and systematically used to direct HR activities?

9 responses



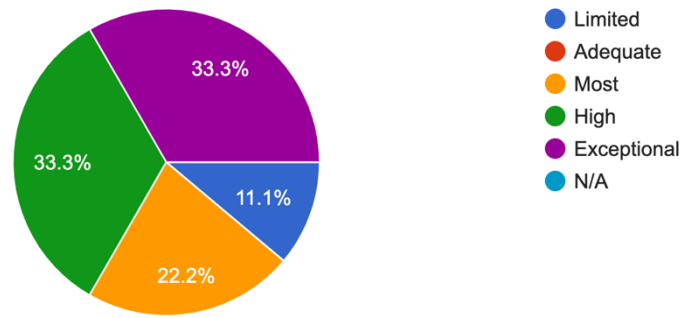
To what degree is there a well-planned process to recruit, develop, and retain key managers and staff?

9 responses



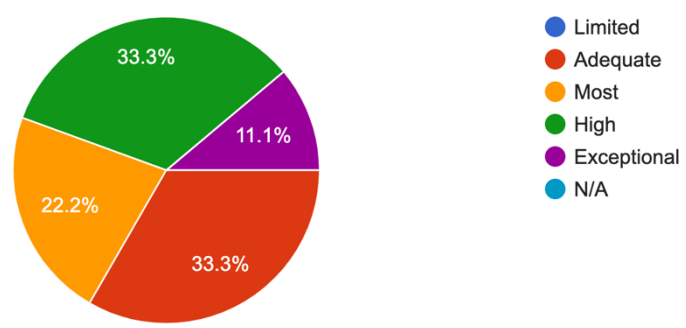
### How would you describe the experience of the management team?

9 responses



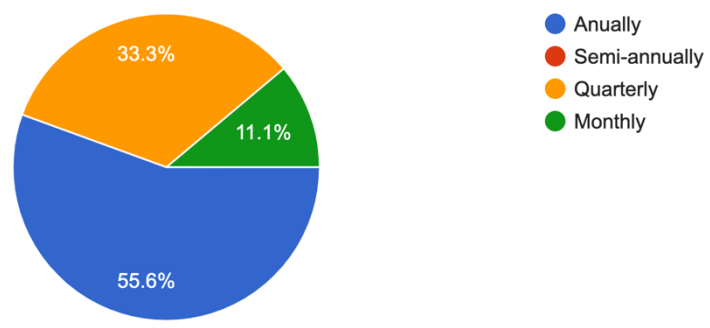
### What level of nonprofit management experience does the management team possess?

9 responses



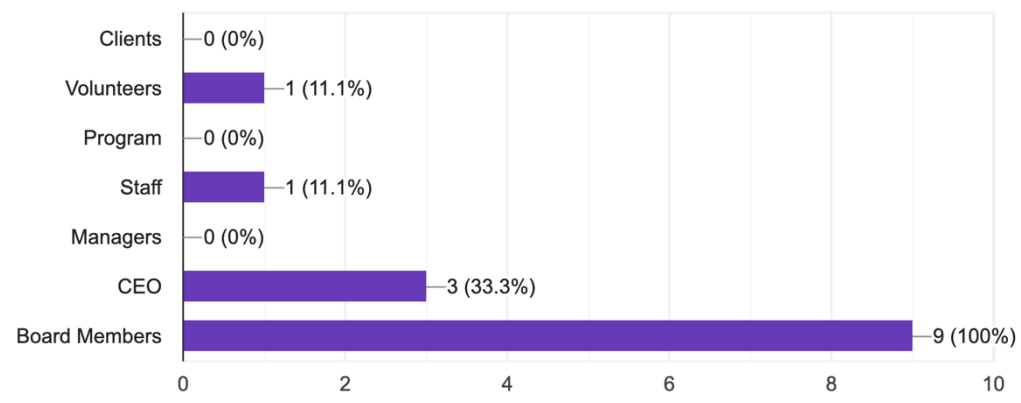
### How often does your organization engage in Strategic Planning?

9 responses



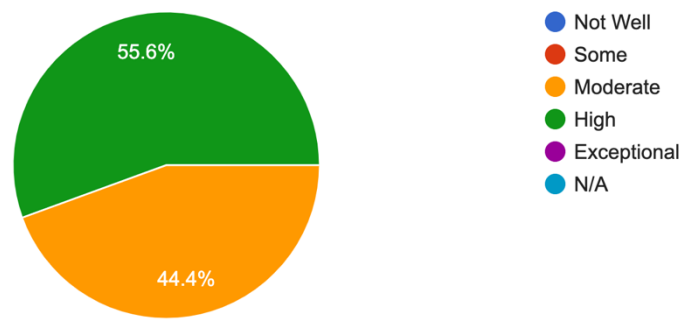
### Please indicate all of the groups who participate in strategic planning?

9 responses



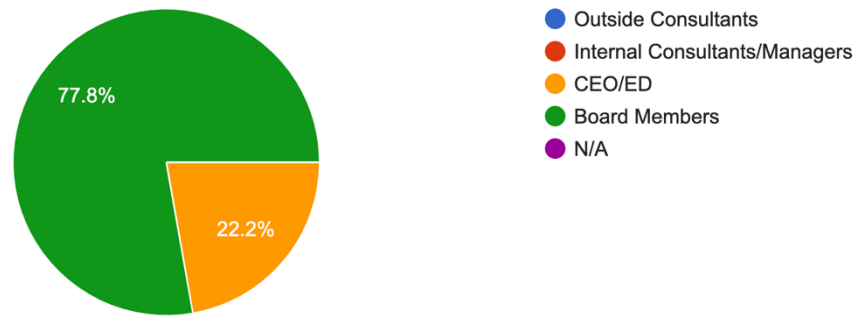
### How well is the strategic plan carried out in daily activities?

9 responses



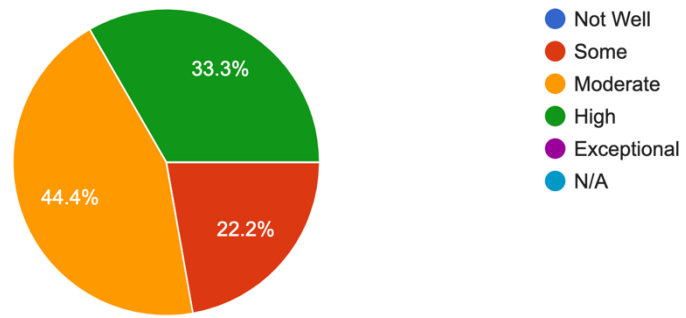
### Who conducts/facilitates strategic planning sessions?

9 responses



To what degree is data used systematically to support planning effort and to improve it?

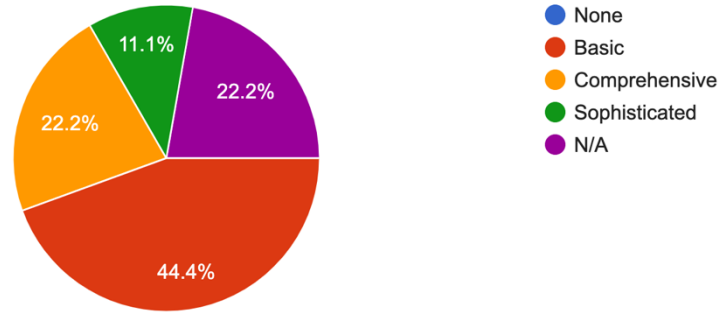
9 responses



### Technology

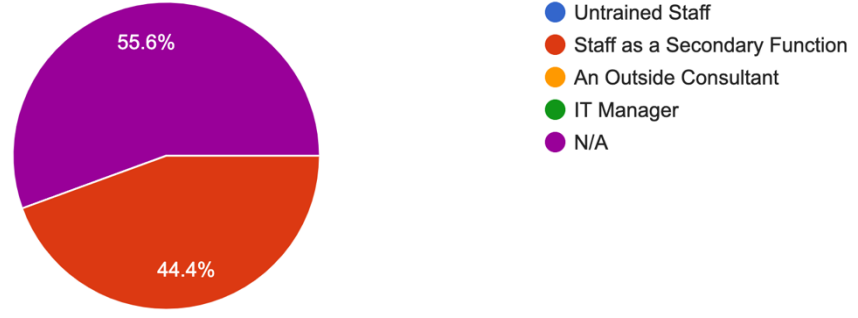
What is the status of the organization's databases and management reporting system?

9 responses



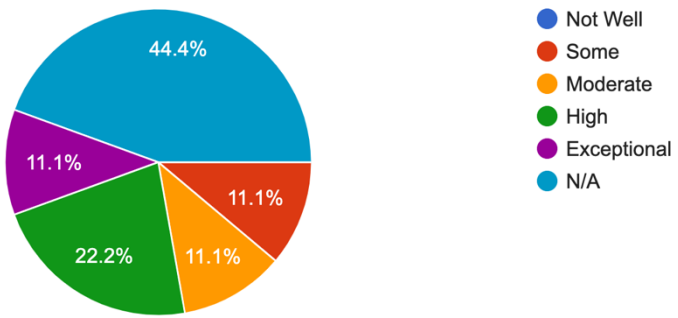
Who is responsible for managing the organization's technology function?

9 responses



To what extent do all employees have access to computers, applications, network, and email?

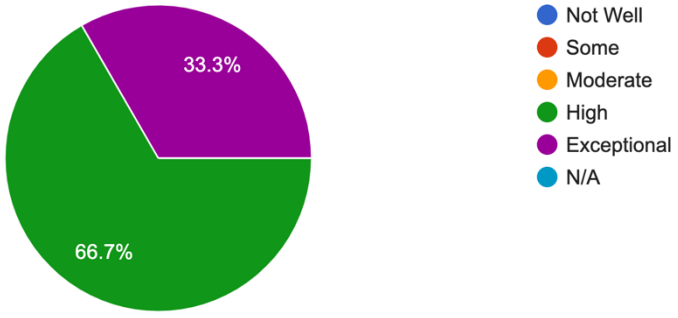
9 responses



### Outreach

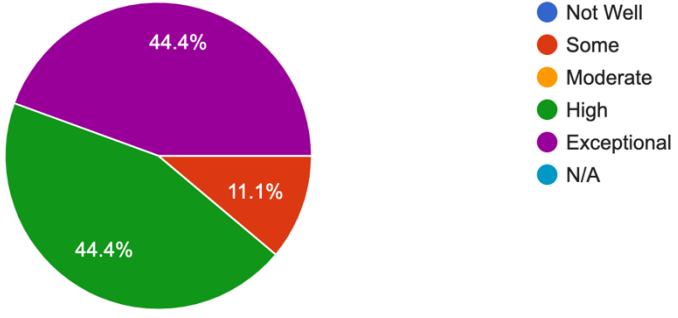
To what extent are social media platforms used to promote the work being done?

9 responses



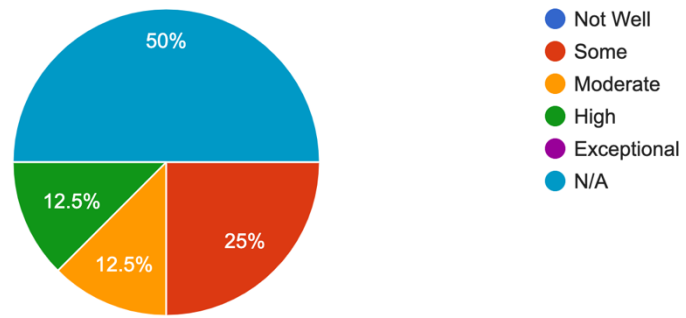
What is the status of the organization's website?

9 responses



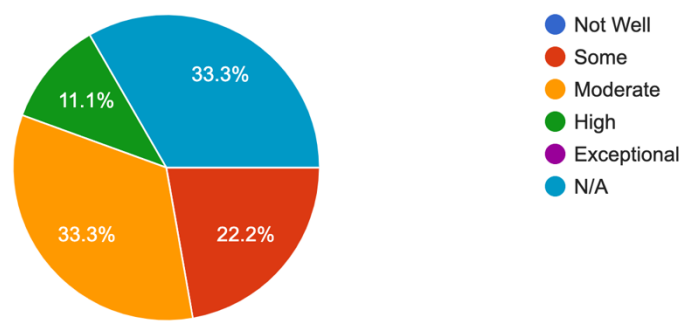
To what extent do all employees have access to and are supported in personal development?

8 responses



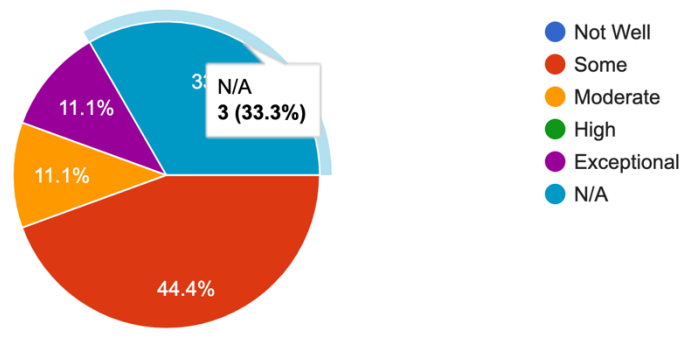
To what extent are resources included in the budget to ensure training is available to increase the skills and knowledge of the workforce?

9 responses



To what extent is there well-thought-out and targeted plans for key employees/positions?

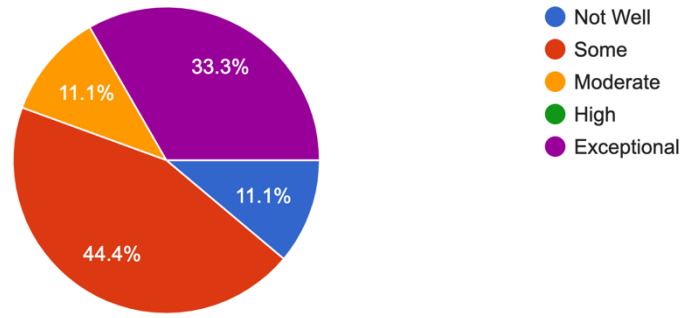
9 responses





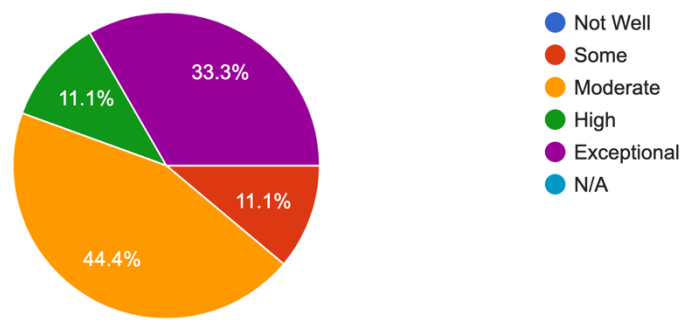
To what degree are relevant and regular internal and external training, job rotation, coaching/feedback and consistent performance appraisals institutionalized?

9 responses



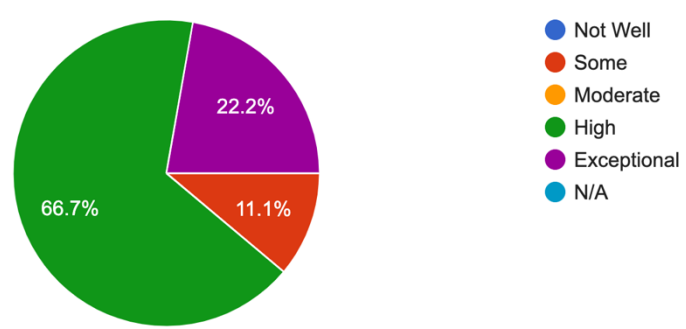
To what extent does fiscal management include budget planning and forecasting budget operations?

9 responses



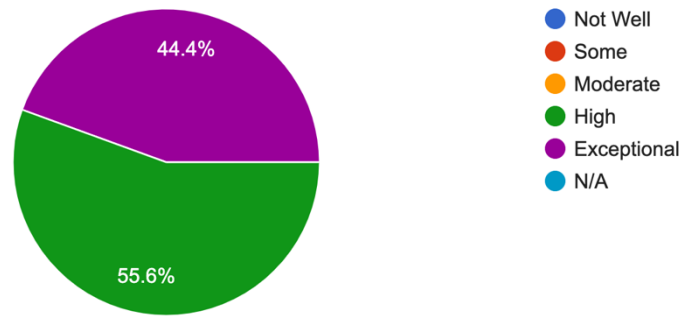
To what extent is the budget reflective of the organization's needs and objectives?

9 responses



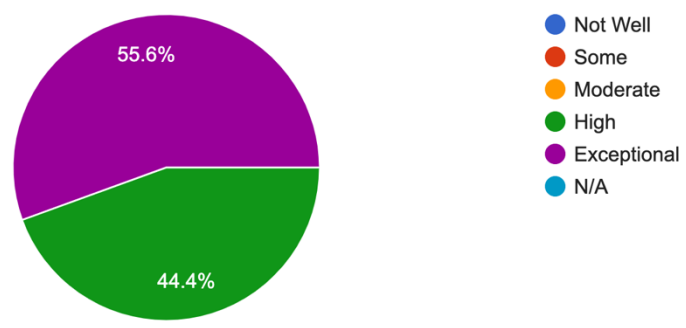
To what extent is the performance-to-budget closely and regularly monitored?

9 responses



To what extent are monthly or quarterly budget reports developed and distributed to responsible authority?

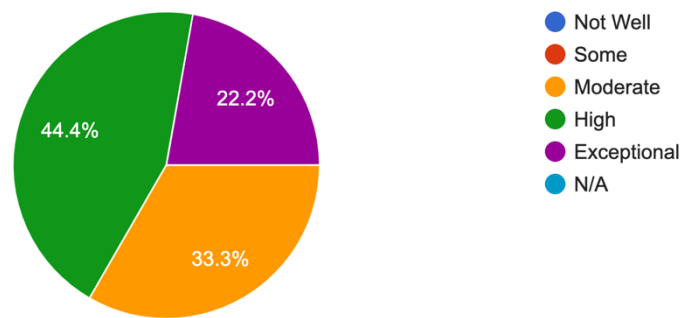
9 responses



### Fundraising

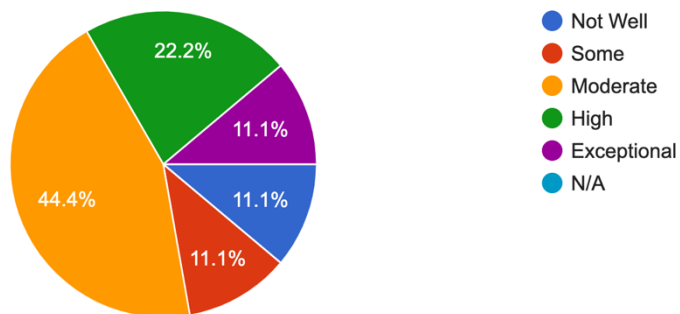
To what degree is fundraising conducted to support the overall operation of the organization?

9 responses



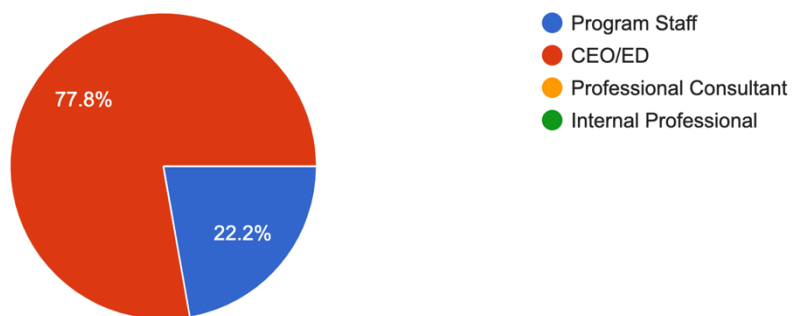
To what extent does the funding model support diversified funding across multiple source types?

9 responses



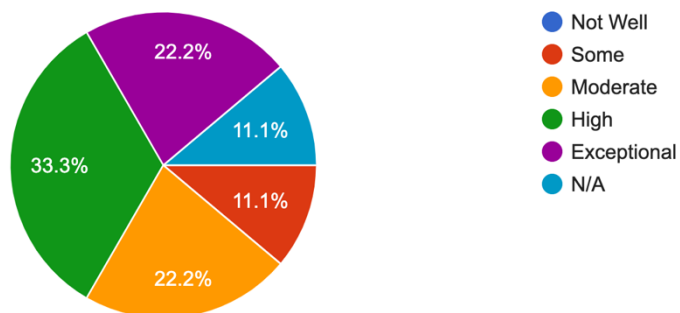
Who is responsible for conducting fundraising?

9 responses



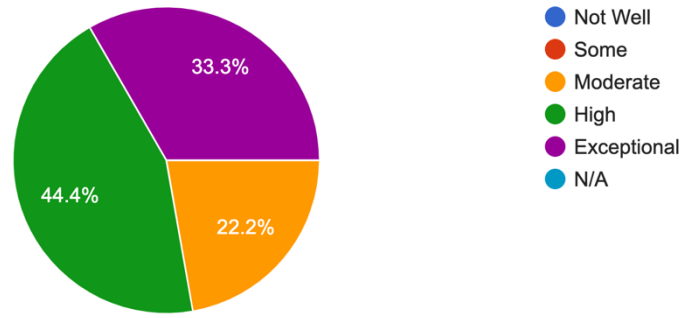
To what extent is performance-to-budget closely and regularly monitored?

9 responses



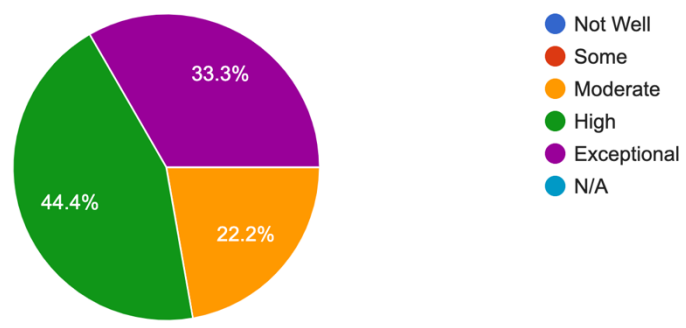
To what extent is monthly or quarterly budget reports developed and distributed to responsible staff?

9 responses



To what degree is fundraising conducted utilizing fundraising plan?

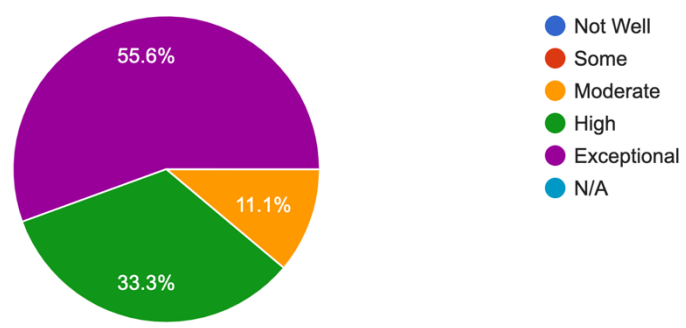
9 responses



### Program Development/Management Products and Services

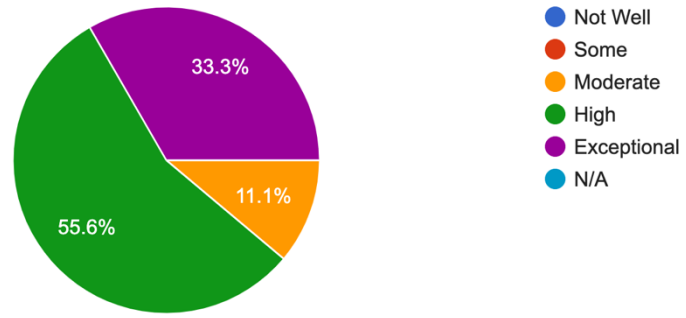
To what extent are core programs of quality and are well regarded?

9 responses



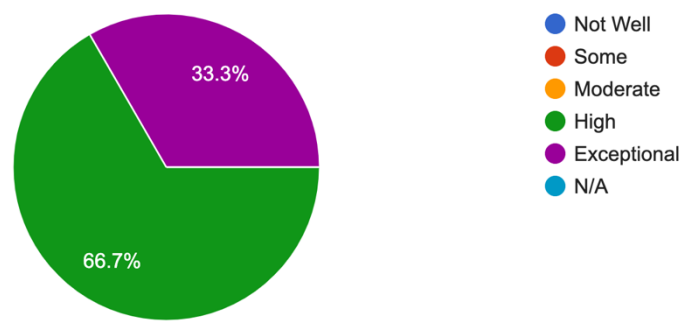
To what extent does the organization operate programs that demonstrate tangible outcomes commensurate with the resources invested?

9 responses



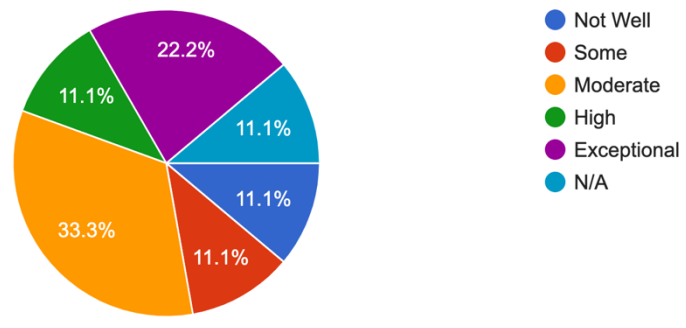
To what extent can existing programs be modified to create new programs?

9 responses



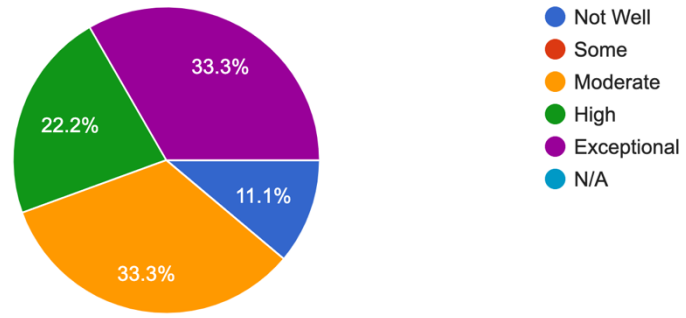
To what degree does the organization have formal mechanisms for assessing internal and external factors that affect the achievement of goals?

9 responses



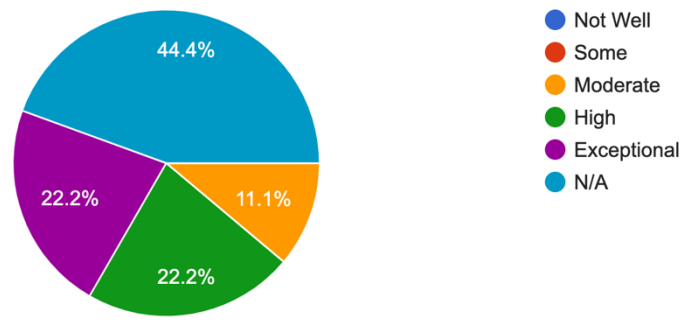
To what degree does the organization utilize program evaluation results to inform its strategic goals?

9 responses



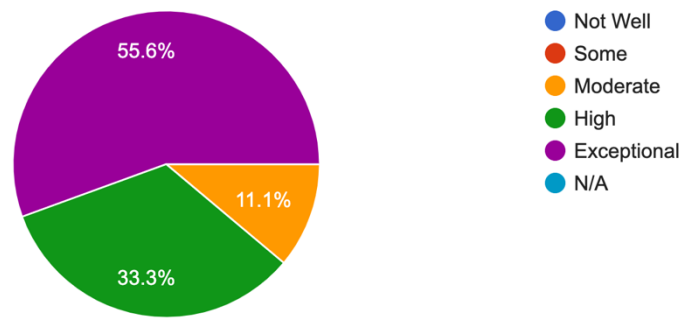
To what extent do program staff experience/education support the requirements of the positions?

9 responses



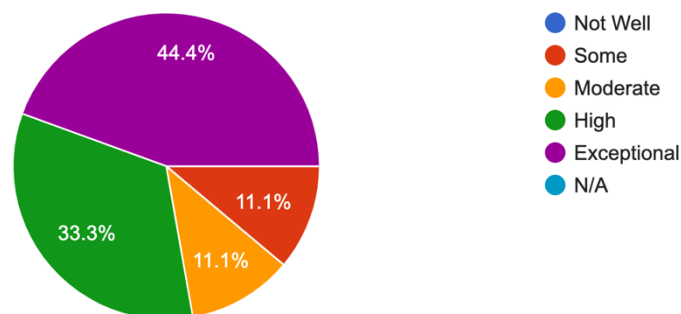
To what extent does the work being done by Simply Amazing compel people to volunteer?

9 responses



To what extent is the service provided by Simply Amazing making a difference in communities?

9 responses



### Additional Comments

Please feel free to provide any other information that will be useful in understanding your organization's performance. 3 responses

Answers were based on Board being the employees since we do not have any employees.

Simply Amazing is a wonderful organization and is checking all of the boxes when it comes to being transparent, organized, and supported. It is also "band-aid" approach (which is completely fine and needed), but also understand that it is a not a long-term solution to the premise that disadvantaged young people do not have access to art supplies (much like low-income families not having access to fresh fruits and vegetables. If a short-term, "band-aid" philanthropy is the direction of the organization we need to really take a deeper look at who we are serving and what creative supplies are needed (for example, a coloring book in Spanish). Simply Amazing provides a top down giving model in that the art boxes are filled with things that the organization thinks will be well received. My fear is that this top-down giving approach could turn into a "Cluck You: Bolivia Rejects Bill Gates' Donation of Hens" situation if we are not careful and thoughtful about who we are serving. All of this to say, I am so proud of Susan and the work she has done to get this organization off the ground. I have also seen first-hand in the students that I work with just how limited art truly is in poor communities, so I truly believe in the mission.

Given the early stage of this young organization and small size of the board - currently made up of close advisors, family and enthusiastic contributors, I feel that the organization is very well positioned to grow and develop further in many of the functional and operational areas highlighted in the above questions. Some of the questions are not as relevant newness of the organization, its market presence, and the lack of budget to support paid staff vs. the volunteer group currently operating the organization.

## Appendix 6

### Survey Results Table

#### *Capacity Survey of Community-Based Nonprofit Organizations*

##### Mission, Vision and Values

	Not Well	Some	Moderate	High	Exceptional	N/A
2. To what extent does the mission describe the work and purpose of your existence and express the values operating within the organization?	0	0	0	55.56%	44.44%	0
3. Please indicate the level of shared understanding that exists for the organization's mission and vision among stakeholders?	0	0	11.11%	44.44%	44.44%	0
4. Is the vision of the organization clearly articulated with an inspiring view of the future?	0	0	22.22%	33.33%	44.44%	0
	Every 5 Years	Every 4 Years	Every 3 Years	Every 2 Years	Annually	N/A
5. How often is the mission, vision, and values reviewed or revised?	0	0	0	11.11%	44.44%	44.44%

##### Board of Governance and Leadership

	Limited	Adequate	Most	High	Exceptional	N/A
6. To what extent does the Board's membership include a variety of fields of practice and expertise drawn from a broad spectrum of constituencies (nonprofit, academia, corporate, government, community, clients, etc.)?	11.11%	55.56%	11.11%	22.22%	0	0
7. To what extent does the Board have a willingness and a proven track record of investing in learning about the organization and addressing its issues?	11.11%	11.11%	33.33%	22.22%	22.22%	0
8. To what extent do board subcommittees meet to focus on issues of the organization?	11.11%	22.22%	22.22%	22.22%	11.11%	11.11%
9. To what extent does the Board meet in person regularly, with good attendance to conduct the business of the organization?	0	11.11%	0	55.56%	33.33%	0
10. At what level does the Board function according to the by-laws?	0	0	0	33.33%	66.67%	0
11. To what extent does the Board provide strong direction, support, and accountability to programmatic leadership and engage as a strategic resource?	0	0	22.22%	22.22%	44.44%	11.11%
12. To what degree does communication between board and leadership reflect mutual respect, appreciation for roles and responsibilities, shared commitment and the value of collective wisdom?	0	0	11.11%	11.11%	66.67%	11.11%
13. To what extent does the Board review budgets, audits, and other fiscal matters?	0	0	0	22.22%	77.78%	0



14. To what extent does the Board review the CEO's performance and hold the CEO accountable?	0	0	0	33.33%	44.44%	22.22%
15. What is the education level of the Executive/Leader?	0	0	11.11%	66.67%	22.22%	0
16. What is the average term of the Executive/Leader?	0	11.11%	0	33.33%	22.22%	22.22%
17. What is the level of passion and commitment in the Executive/Leader?	0	0	0	0	88.89%	0
18. To what extent is the Executive/Leader able to compellingly articulate a path to achieving the vision that enables others to see where they are going?	0	0	11.11%	44.44%	44.44%	0
19. To what degree is he/she capable of providing sound financial judgment and decision-making?	0	0	0	44.44%	55.56%	0
20. What level of analytical and strategic thinking is he/she capable of?	0	11.11%	0	55.56%	33.33%	0
21. What level of nonprofit management experience does he/she have?	11.11%	22.22%	0	44.44%	22.22%	0
22. To what degree is the Executive/Leader capable of developing and growing relationships with funders and donors?	0	0	11.11%	22.22%	66.67%	0
23. To what degree does the Executive/Leader guide the organization to succeed simultaneously in dual mission of social impact and optimal financial efficiency?	0	11.11%	0	22.22%	66.67%	0

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**Organization/Operations - Resources**


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	Limited	Adequate	Most	High	Exceptional	N/A
24. To what extent are the roles and responsibilities of all organizational entities formalized, clear, and complementary of each other?	0	11.11%	0	44.44%	33.33%	11.11%
25. To what extent does the organization develop and refine concrete, realistic, and detailed operational plans?	0	11.11%	22.22%	33.33%	33.33%	0
26. To what extent are operational plans linked to strategic planning activities and systematically used to direct operations?	0	11.11%	33.33%	33.33%	22.22%	0
27. To what extent does the organization have a critical mass of internal expertise in operational planning?	0	22.22%	44.44%	11.11%	22.22%	0
28. To what extent are processes well-designed and in place in all areas to ensure the effective and efficient functioning of the organization?	0	0	22.22%	55.56%	11.11%	11.11%
29. To what extent are processes widely known, used, and accepted as key to ensuring the full impact of the organization?	0	0	33.33%	33.33%	22.22%	11.11%
30. To what extent are processes continually monitored and assessed and systematic improvement made?	11.11%	0	22.22%	33.33%	22.22%	11.11%
31. To what extent are there clear, formal lines/systems for decision making that	0	11.11%	33.33%	33.33%	22.22%	0

involve as broad participation as practical and appropriate along with dissemination/interpretation of decision?

32. To what extent are there clear, formal systems for data collection in all relevant areas?	11.11%	11.11%	33.33%	11.11%	22.22%	11.11%
33. To what extent are internal HR activities regularly carried out by trained, dedicated HR managers?	33.33%	11.11%	0	0	11.11%	44.44%
34. To what extent is the organization able to develop and refine concrete, realistic, and detailed HR plans?	11.11%	33.33%	0	0	11.11%	44.44%
35. To what extent is HR planning tightly linked to strategic planning activities and systematically used to direct HR activities?	33.33%	0	0	0	11.11%	55.56%
36. To what degree is there a well-planned process to recruit, develop, and retain key managers and staff?	22.22%	22.22%	0	0	11.11%	44.44%
37. How would you describe the experience of the management team?	11.11%	0	22.22%	33.33%	33.33%	0
38. What level of nonprofit management experience does the management team possess?	0	33.33%	22.22%	33.33%	11.11%	0

	Annually	Semi-Annually	Quarterly	Monthly		
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39. How often does your organization engage in Strategic Planning?	55.56%	0	33.33%	11.11%		
--	--------	---	--------	--------	--	--

	Board Members	Clients	Volunteers	Program	Staff	Managers
--	---------------	---------	------------	---------	-------	----------

40. Please indicate all of the groups who participate in strategic planning?	9	0	1	0	1	0
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	Not Well	Some	Moderate	High	Exceptional	N/A
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41. How well is the strategic plan carried out in daily activities?	0	0	44.44%	55.56%	0	0
---	---	---	--------	--------	---	---

	Outside Consultants	Internal Consultants / Managers	CEO/ED	Board Members	N/A	
--	---------------------	---------------------------------	--------	---------------	-----	--

42. Who conducts/facilitates strategic planning sessions?	0	0	22.22%	77.78%	0	
---	---	---	--------	--------	---	--

	Not Well	Some	Moderate	High	Exceptional	N/A
--	----------	------	----------	------	-------------	-----

43. To what degree is data used systematically to support planning effort and to improve it?	0	22.22%	44.44%	33.33%	0	0
--	---	--------	--------	--------	---	---

#### Organization/Operations - Technology

	None	Basic	Comprehensive	Sophisticated	N/A	
--	------	-------	---------------	---------------	-----	--

44. What is the status of the organization's databases and management reporting system?	0	44.44%	22.22%	11.11%	22.22%	
---	---	--------	--------	--------	--------	--

	Untrained Staff	Staff as a Secondary Function	An Outside Consultant	IT Manager	N/A	
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45. Who is responsible for managing the organization's technology function?	0	44.44%	0	0	55.56%	0
---	---	--------	---	---	--------	---

	Not Well	Some	Moderate	High	Exceptional	N/A
46. To what extent do all employees have access to computers, applications, network, and email?	0	11.11%	11.11%	22.22%	11.11%	44.44%
Organization/Operations - Outreach						
	Not Well	Some	Moderate	High	Exceptional	N/A
47. To what extent are social media platforms used to promote the work being done?	0	0	0	66.67%	33.33%	0
48. What is the status of the organization's website?	0	11.11%	0	44.44%	44.44%	0
49. To what extent do all employees have access to and are supported in personal development?	0	22.22%	11.11%	11.11%	0	44.44%
50. To what extent are resources included in the budget to ensure training is available to increase the skills and knowledge of the workforce?	0	22.22%	33.33%	11.11%	0	33.33%
51. To what extent is there well-thought-out and targeted plans for key employees/positions?	0	44.44%	11.11%	0	11.11%	33.33%
52. To what degree are relevant and regular internal and external training, job rotation, coaching/feedback and consistent performance appraisals institutionalized?	11.11%	44.44%	11.11%	0	33.33%	0
53. To what extent does fiscal management include budget planning and forecasting budget operations?	0	11.11%	44.44%	11.11%	33.33%	0
54. To what extent is the budget reflective of the organization's needs and objectives?	0	11.11%	0	66.67%	22.22%	0
55. To what extent is the performance-to-budget closely and regularly monitored?	0	0	0	55.56%	44.44%	0
56. To what extent are monthly or quarterly budget reports developed and distributed to responsible authority?	0	0	0	44.44%	55.56%	0
Organization/Operations - Fundraising						
	Not Well	Some	Moderate	High	Exceptional	N/A
57. To what degree is fundraising conducted to support the overall operation of the organization?	0	0	33.33%	44.44%	22.22%	0
58. To what extent does the funding model support diversified funding across multiple source types?	11.11%	11.11%	44.44%	22.22%	11.11%	0
59. Who is responsible for conducting fundraising?	22.22%	77.78%	0	0	0	0
60. To what extent is performance-to-budget closely and regularly monitored?	0	11.11%	22.22%	33.33%	22.22%	11.11%
61. To what extent is monthly or quarterly budget reports developed and distributed to responsible staff?	0	0	22.22%	44.44%	33.33%	0
62. To what degree is fundraising conducted utilizing fundraising plan?	0	0	22.22%	44.44%	33.33%	0
Program Development/Management - Products & Services						

	Not Well	Some	Moderate	High	Exceptional	N/A
63. To what extent are core programs of quality and are well regarded?	0	0	11.11%	33.33%	55.56%	0
64. To what extent does the organization operate programs that demonstrate tangible outcomes commensurate with the resources invested?	0	0	11.11%	55.56%	33.33%	0
65. To what extent can existing programs be modified to create new programs?	0	0	0	66.67%	33.33%	0
66. To what degree does the organization have formal mechanisms for assessing internal and external factors that affect the achievement of goals?	11.11%	11.11%	33.33%	11.11%	22.22%	11.11%
67. To what degree does the organization utilize program evaluation results to inform its strategic goals?	11.11%	0	33.33%	22.22%	33.33%	0
68. To what extent do program staff experience/education support the requirements of the positions?	0	0	11.11%	22.22%	22.22%	44.44%
69. To what extent does the work being done by Simply Amazing compel people to volunteer?	0	0	11.11%	33.33%	55.56%	0
70. To what extent is the service provided by Simply Amazing making a difference in communities?	0	11.11%	11.11%	33.33%	44.44%	0

## Appendix 7

### NVivo Coding Data

09/11/2020 9:41 AM

<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	<p>But, but, yeah, I have. I'm actually just newly appointed as volunteer. So I've gone to some of their the events in the past and things of that nature. So, yeah.</p> <p>Annette Galindo</p> <p>So you've been kind of been observing volunteers and Sue informed me that you will be joining the board of directors as well.</p> <p>Rick That's correct. I think officially in December.</p>
<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	<p>I don't see that she's had a lot of challenges. I feel like She is especially the last email. I said, You know, I know, she's getting more requests, even for boxes and she's like, I want to make sure my longtime partners are taken care of. So I know</p> <p>Organization wise those partners. I don't think is a challenge for her in the community</p>
<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	<p>I think she's an awesome. I think the organization is great. I know Susan center an awesome job. I just really think it's a cool organization I believe a lot in it. So that's why I was excited to partner have my organization partner with her. So, and I promote it within our organization all the time even her event coming up.</p>
<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	<p>I think that one of the biggest compliments that we can get right now is when people reach out to us and ask us for our product which is starting to happen. Hey, I heard about you through so and so and our program can use this, and you know that's really great. And I want more of that to happen. But you know I'm pleased, where we're at right now and it's been it'll be two years. Our first box delivery will be two years this coming February, so really only been doing this 18 months. We're new we've had a lot of traction without a lot of great media coverage and we've helped we've been in touch with over 4000 kids.</p>
<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	<p>No, I mean everyone there is a volunteer and I think that everyone participates. So you know if they were paid positions. I think it might, you know, it would be different, but as volunteers. I really feel that they are assisting with the planning during our meetings and not everyone this year we were supposed to have all of these outreach events. You know what, like going to great day in the country</p>

and over, you know, but they all got canceled and I know, and everyone was asked, to attend to cover shifted each one and they would have.

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09/11/2020 9:41 AM

**Name** 1 current organizational capacity  
**Number of Files Coded** 5  
**Number of Coding References** 42  
**Parent Name**  
**Coded Text** And then also our partner organizations, you know, which is the boys and girls and all that I talked to them. I mean, I send emails and they're always request, that I stay in touch with them that way.

**Name** 1 current organizational capacity  
**Number of Files Coded** 5  
**Number of Coding References** 42  
**Parent Name**  
**Coded Text** And then you know what I try to do too is be involved with other organizations but not this year. But last year Mark and I worked for the Boys and Girls Club for their gala and we were volunteers I think we were spotters for the auction and then we cleaned up. So I try to, you know, help out the other organizations and also that way. You know, I see people that I know, and they see that we're helping there and that were involved.

**Name** 1 current organizational capacity  
**Number of Files Coded** 5  
**Number of Coding References** 42  
**Parent Name**  
**Coded Text** Ann reviewed the budget. She advised that it is a good practice to have some money in reserve. Requested that the budget be approved. A motion was made by Joanne, Marti seconded, and motion approved.

**Name** 1 current organizational capacity  
**Number of Files Coded** 5  
**Number of Coding References** 42  
**Parent Name**  
**Coded Text** Contact with the Jacksonville agency was made through the local children's home Society. The Palm Beach County children's home Society has also requested 200 boxes.

**Name** 1 current organizational capacity  
**Number of Files Coded** 5  
**Number of Coding References** 42  
**Parent Name**  
**Coded Text** FALL EVENT – 5K  
 The 5K will have a dual purpose: to get our name out into the community and to raise money. Last year's event had \$16,500 in sponsors. Susan feels we will be able to raise at least that much this year. Our event will be on The Track Shack website.  
 • Proposed of logo designs were shown by Marti. • Name of TRICK OR TROT was chosen for the event. • Mini Monster Mile for children — simple medal (?) / no t-shirt • Diaper Dash for crawlers and toddlers • Trick or Treat loop for kids (treats from vendors) • Possible after party • We will have a time clock but no chips  
 • Need to finalize logo and general plans within 30 days Joanne suggested that the children we serve be invited  
 We need to determine costs for medals, bibs, trick or treat bags, and other needed material so we can make the event budget.

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09/11/2020 9:41 AM

<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	<p>FALL EVENT – 5K</p> <p>The 5K will have a dual purpose: to get our name out into the community and to raise money. Last year’s event had \$16,500 in sponsors. Susan feels we will be able to raise at least that much this year. Our event will be on The Track Shack website.</p> <ul style="list-style-type: none"> <li>• Proposed of logo designs were shown by Marti.</li> <li>• Name of TRICK OR TROT was chosen for the event.</li> <li>• Mini Monster Mile for children — simple medal (?) / no t-shirt</li> <li>• Diaper Dash for crawlers and toddlers</li> <li>• Trick or Treat loop for kids (treats from vendors)</li> <li>• Possible after party</li> <li>• We will have a time clock but no chips</li> <li>• Need to finalize logo and general plans within 30 days</li> </ul> <p>Joanne suggested that the children we serve be invited</p> <p>We need to determine costs for medals, bibs, trick or treat bags, and other needed material so we can make the event budget.</p>
<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	For our partner organizations and our donors, at least the ones that we, I guess our donors, because I have their email addresses, we're in touch quarterly with our newsletter.
<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	<p>FUNDRAISING 2020</p> <p>Our first solicit of the year will go out in the spring, then a mid-year update, and clean up solicit in the fall</p>
<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	<p>In the past, Mark and their personal accountant has completed the Simply Amazing tax returns. Thanks to Ann, Gerald Sutton, who is a Trinity Prep grad, will be doing our taxes and offering financial advice.</p>
<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	<p>Leslie reviewed the fall solicitation plan and we reviewed the draft letter. Peter complimented the writing and story telling that Susan drafted. The letter will be segmented into 1) past donors, 2) those who donated supplies, and 3) those who have participated but not ever given. Letter will drop the first week of September 16. The email follow-up first week of October, the event then occurs in November, and a follow-up email will go out the first week of December. Joanne suggested including In Honor Of/In Memory of Of giving which would incorporate well with year-end giving. Discussed adding IHO/IMO language on the back of the pledge card, as well as Peter’s idea of putting larger levels of 50 boxes. Group discussed stewardship ideas of a thank you to IMO/IHO donor with a certificate or picture; personalizing thank-yous; and matching of kids with groups. Leslie and Susan to work on pledge card to accompany mailing and also a stewardship plan.</p>

<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	Mark reported on the last Community Event SA attended: Kids & Family Expo at convention center with Z88.3. Mark and Susan had an art activity table at the Z88.3 booth with hand puppets. They gathered good leads for those who want to be involved and will work on follow-up with all the ideas people suggest to decide if the organizations align with SA mission.
<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	Mark's presented the financial report and highlights of the balance sheet. Two larger gifts were included in the revenues; a \$1,000 donor as well as Trinity Prep's contribution from the senior class gift. The art supply expense is under control and we are in a strong cash po position due to cash from carry over from last year. We have supplies for 250 boxes (\$11 value each).
<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	Mark's presented the financial report and highlights of the balance sheet. Two larger gifts were included in the revenues; a \$1,000 donor as well as Trinity Prep's contribution from the senior class gift. The art supply expense is under control and we are in a strong cash po position due to cash from carry over from last year. We have supplies for 250 boxes (\$11 value each).
<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	Next on Saturday, a week from tomorrow for our auxiliary we have a second auxiliary program. So we have our boxes and then we have the backpacks in the summer. And then we're starting a Create a card program. So they are coloring cards that you holiday cards. They're not any denomination, but that sort of hits and they'll get colored pencils with them. So they'll get five different cards and they're branded. Turner construction underwrote the project. We're packing the cards. We are individually packaging them. Will have 1000 sets and they're going to organizations that we have been working with that we serve.
<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	Of course, it was a pandemic year right we none of us did events, but I know she was in talks about doing like a five k or like so. Some a couple more like an outreach events like that I think would be helpful and also fun like Kara Kerlin Yeah so utilizing, you know, not just volunteers my interns, even in the social media aspect on because college kids, no more than we do. Right. And that's what they're on all the time and they know how to And a lot of people are going to school for it and you know you could pick up an intern first and let them run your social media pages for a while, you know, depending, and it Yeah, and it'll be Yeah, it would take a lot of time off of her because even the social media, the ones that are going to school for it. They are great with like creating the content and everything.



Like always, she would have to do was kind of manage and just make sure you know nothing gets out but she doesn't want to get out. But yeah, they're awesome with doing that, you know, By utilizing they is it and all cells close by, even where her office location is at so That would be a good one too, because they have a lot of communication people there.

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**Name** 1 current organizational capacity

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**Number of Coding References** 42

**Parent Name**

**Coded Text** Once people know because like with Big Brothers it such a big organization. So nice national organization. So they already know who you are when you go there and ask them to, you know, donate

You know, donate for that donate for this you know it's real easy. So now this is a lot smaller organization.

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**Name** 1 current organizational capacity

**Number of Files Coded** 5

**Number of Coding References** 42

**Parent Name**

**Coded Text**

Peter shared 2019 Budget overview and 2020 Budget planning:

Cash flow 2019 reviewed; we bought inventory, paid deposit on rent, outfitted the office. Exhibited good expense management and also planned for additional giving. Budgeted out event separately with \$15,000 estimated net; 1,400 boxes estimated for 2019 year-end needs.

2020 budget: consider adding expense for treating donors and contacts out for meals, need to include phone costs, and can use board development grant to help grow the board. Need to add board members who have financial capacity. Peter suggests 3-year budget to show how big we want to be. Potential donors will want us to have a serious plan and budget should match long-term vision. Jake recommends 80/20 to use board members for work and Susan coming in to secure them at the end.

Identified need to know Susan's three-year vision. Shorter term goals: double revenue next year, 3,000 donated in 2020, integrated into Orange Co. and want to grow into Seminole and Osceola (Tupperware as potential donor), potentially add Volusia/Brevard for donation of boxes, and work on corporate involvement plan focused on volunteerism.

Susan recommended vision and budget planning should be focus of December board meeting.

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**Name** 1 current organizational capacity

**Number of Files Coded** 5

**Number of Coding References** 42

**Parent Name**

**Coded Text**

Peter suggests considering local sports/celebrities:

Jake suggested Ashlyn Harris and Allie Krieger, married soccer players

Aaron Gordon Orlando Magic player who is a collector (challenging with agent)

Mark suggests McKenzie Milton- UCF quarterback

Peter suggested new to area folks or those who haven't selected a local charity to support

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**Name** 1 current organizational capacity

**Number of Files Coded** 5

**Number of Coding References** 42

**Parent Name**

**Coded Text**

SACB In addition to the 200 boxes that were delivered to CHS in Jacksonville, 30 boxes were delivered to the Grove which is a voluntary residential program serving adolescents ages 13 to 17 with substance abuse and/or behavioral health issues.

Last year at this time we had only delivered eight boxes.

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<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	Selected by Glenda B Morgan Charitable foundation to be a sponsor of Taste on September 14, fundraiser for Second Harvest Food Bank, from Mary Beth Morgan

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<b>Name</b>	1 current organizational capacity
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<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	So we were one of the long time organizations and She's always reaching out to us and vice versa. So that capacity to keep a relationship going is there for sure. And she acknowledges like At least reaching out and having conversations even throughout the year just to make sure, like your partners are okay um I think she does all that very well. So I think that her relationship with partners is solid.

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<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	So when we're doing a box redesign starting in January. So we're just planning on every to every two years, we'll have three different like guts of the box inside and every, every two years, we're going to change it. And we'll have to redesign. So we had a committee that research different things and four of us, and then when we get to this year's event for March where I'm going to have committees and have people lead different things. I can't keep doing all of it,

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<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	So, I mean, we have a lot of different relationships. So, for example, for our upcoming auction, I've made relationships with artists. So I make sure that I am always looking at the work that they post on Instagram and I comment and tell them I love it, or that makes me happy or things like that. So then when I reach out to them and ask them this year. They're all like I'm on board. So that's one way for artists.

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<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	Susan and Mark delivered 200 boxes to the Children's Home Society (CHS) in Jacksonville a couple of weeks ago. Susan shared a photo that was taken of a cut out that two brothers at completed. Included was a letter from the director. She said the boys made it in honor of their father who had recently died. She said, "All the children all loved their boxes — this worked!"

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<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	Susan engaged with a community member who is new to the area and already offered to get her husband's company involved through volunteering time and expense for boxes. They raffled a large

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art kit to collect contact info. and gained 250 new names. We should use this concept at future community events. Great day in the country is coming up in October.

<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	Susan introduced our new treasurer and board member Ann Barretta. Ann is a CPA with her own business and also has played Mickey Mouse at Disney last 13 years. She is grateful that Ann has taken over this role.

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<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	Susan reported on the Office Space and Ribbon Cutting which had 25 attendees and great social media exposure. The event helped to spread awareness about SA and Jake and Susan are work on analyzing impressions so far to plan for the future.

<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	Susan reported that she has been very busy and a lot of activity has been focused on reaching out to artists to solicit donations for the auction. The new office space is working well.

<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	42
<b>Parent Name</b>	
<b>Coded Text</b>	<p>Susan reviewed Sponsorship Solicitation Materials. Tickets included in packages; 2 tickets already for the creative sponsor (Signature Wealth). Susan already solicited all the big players in town and now needs our personal connections. Board members asked to solicit two sponsors each.</p> <p>Gayle asking Lake Mary Montessori; Ricky lawyer</p> <p>Joanne suggests: Ticonderoga in Lake Mary, Sam Flax (OMA 1st Thursday events), Sukuro, Rifle Paper Company</p> <p>Northwest mutual credit union; we are part of their charter now, they have Maitland office, solicit them, get volunteers</p> <p>TD Bank- Peter will ask about getting involved</p> <p>Volunteer Val Solomen will help us brainstorm and identify sponsors</p> <p>Two media Oviedo Winter Springs Magazine, WESH 2, Jillian and Iheart radio</p> <p>Art Solicitation reviewed by Susan. Kathy donating a piece, Joanne donating a piece, Joanne asked Elizabeth Nelson (name?) to donate a big piece, Joanne working on a group event where they make 10 x 10 pieces to donate, Robin Mead donated a piece too, considering coming to the event.</p> <p>Orlando Arts ad for event and call to artists. Joanne suggested Sam Flax for call to artists. Jake working with Jay, the unsigned artist, to do call to action to his artist network.</p> <p>Susan shared updated on the Giving from the Heart Wall – Marti is making hearts, Hood College alums making beeswax hearts, Peter asking Tom Mann for pewter hearts, can include items like printer, supplies, cash, \$300 to cover one month rent etc.</p> <p>Susan secured wine donation by Spill and liquor donation by Brewstillery. The Band will be Layla and accompanist piece.</p>

<b>Name</b>	1 current organizational capacity
<b>Number of Files Coded</b>	5

**Number of Coding References** 42  
**Parent Name**  
**Coded Text** Susan reviewed the Newsletter /MailChimp Stats:  
 248 opt-in  
 Increase in page visits since May, over 350 visitors  
 Home page is largest visited page, inspiration is the 2nd  
 Leslie suggested we consider highlighting Emily more in messaging, as she is the passion and heart  
 with all SA work and people are drawn to the inspiration  
 September is first month of pushing call for submission. Susan requested that we all share call to  
 artists with our own networks.  
 Mail chimp stats: better open rate and click through rate than industry average for non-profits

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**Name** 1 current organizational capacity  
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**Number of Coding References** 42  
**Parent Name**  
**Coded Text** This year in actually in April there's a nonprofit called Cannonball Kid cancer here in the area they  
 raised over a million dollars in every year at their dealer and they've asked if I would run their silent  
 auction. not getting the items. But once the items come in like the whole back end of it where you  
 start to bid on them. They've asked that I trained volunteers and do that. So, you know, just helping  
 out other organizations. And that's the way I can get to know other volunteers and other places right  
 now volunteer or become our donors.

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**Name** 1 current organizational capacity  
**Number of Files Coded** 5  
**Number of Coding References** 42  
**Parent Name**  
**Coded Text** This year we have two all day events – TASTE OF OVIEDO and GREAT DAY IN THE COUNTRY. Full day  
 events are grueling, and Susan and Mark need help with them. Asked for volunteers.  
 All are welcome to attend other events also.  
 We had a booth at BALDWIN FIRST FRIDAY in January. The weather was cold — so not too many  
 attendees — but good contacts were made. Two more FIRST FRIDAYS are on our calendar this year.

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**Name** 1 current organizational capacity  
**Number of Files Coded** 5  
**Number of Coding References** 42  
**Parent Name**  
**Coded Text** Volunteer Opportunity – September 21, 9:30-11:30 a.m.

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**Name** 1 current organizational capacity  
**Number of Files Coded** 5  
**Number of Coding References** 42  
**Parent Name**  
**Coded Text** We used the opportunity to collect addresses to build the database and included those who had  
 attended last year's event, given for the first-time, engaged with SA on Facebook and Instagram, and  
 those who have expressed interest

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**Name** 1 current organizational capacity  
**Number of Files Coded** 5  
**Number of Coding References** 42  
**Parent Name**  
**Coded Text**

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Well, I know. Susan for a while so your prior to this, and I knew her daughter as well. So, so I knew you know all the things that had gone on and how things happen and so forth and Just, you know, wanted to be supportive of her and I've also been friends with. I don't know if you know Gail on the board.

For example, yeah Gail probably one of my best friends. We've known each other for a long time and I know everything that they've been working on. And yeah, every now and then they've got, you know, something on they'll say, hey, can you know contribute sometimes financial You know, or whatever, you know, come out to the event, and so forth. And so, yeah, I've always tried to be there for both of them.

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**Name** 1 current organizational capacity

**Number of Files Coded** 5

**Number of Coding References** 42

**Parent Name**

**Coded Text** WESH TV's Stewart Moore visited Simply Amazing offices last week and filmed a segment for Community Champion of the Week. He interviewed Susan and Kara Kerlin from local CHS. The segment will air on Thursday, February 20, and be available streaming on their website.

**Name** 1 current organizational capacity

**Number of Files Coded** 5

**Number of Coding References** 42

**Parent Name**

**Coded Text** You know the fundraiser that she has think it's in March. I Told like our team members are like senior leaders. I'm like, let's make a night of it. Like, let's all go because I went to the first one. It was so much fun. But I'm like you know she supports us and It's an awesome organization, everyone would have a good time. So I think that she's done great especially juggling at all.

**Name** 2 needed capacities to facilitate expansion and growth

**Number of Files Coded** 4

**Number of Coding References** 20

**Parent Name**

**Coded Text** And I think especial Expanding and getting larger. She, she's very hands on. And as you get larger and larger, you'll have to like figure out a way to kind of step out of some of those duties. Delegate yeah you know and that's when a lot of volunteers come into play. So building up that volunteer basis that you can like trust and rely on

**Name** 2 needed capacities to facilitate expansion and growth

**Number of Files Coded** 4

**Number of Coding References** 20

**Parent Name**

**Coded Text** I think that one of the biggest compliments that we can get right now is when people reach out to us and ask us for our product which is starting to happen. Hey, I heard about you through so and so and our program can use this, and you know that's really great. And I want more of that to happen. But you know I'm pleased, where we're at right now and it's been it'll be two years. Our first box delivery will be two years this coming February, so really only been doing this 18 months. We're new we've had a lot of traction without a lot of great media coverage and we've helped we've been in touch with over 4000 kids.

**Name** 2 needed capacities to facilitate expansion and growth

**Number of Files Coded** 4

**Number of Coding References** 20

**Parent Name****Coded Text**

And even a partnership. I know we just haven't got to move forward, which I mean I know, too. She's doing this and working so and yeah, I would assume so. Because I think there's opportunity for Partnerships to grow meaning like my organization. We don't have a ton of volunteer opportunities, but we have a ton of groups that want to volunteer with us, um, and I've talked to her before about partnering where You know the boxes are coming to our kids. Anyways, so it'd be like I can do a handoff of a donor that contacts me and says, like, hey, I would love being involved in new volunteer opportunity and I know tag team with Susan to like host this volunteer opportunity then and it be a shared group.

So then they get to see her organization and what she does. But then the side of it. Like what's happening in these are going to see Hs and this is our organization and what they help support. So I think even tapping into some of those Community research sources that she's built partnerships with and I know there's a few other that she has really close partnerships with I think that would even help him brought in her reach

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2 needed capacities to facilitate expansion and growth

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**Number of Coding References**

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**Parent Name****Coded Text**

And I think it's something that A program yeah and i i think that her opportunity to is something that someone would really jump on because it's a new

Like a growing organization. So to be a part of that, you know, that would look good for them to as an intern like jumping on and helping expand and organizations growth.

You know, looks good for them also. So I think that, yeah, that would be a really great way for her to get some help and support in that area.

**Name**

2 needed capacities to facilitate expansion and growth

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**Number of Coding References**

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**Parent Name****Coded Text**

but like I said, then I don't know how many people actually the challenge. I guess might come from the organization being small and how many people know about it and know what it is.

So I think within our circle of people talking, you know, in the nonprofit world. It's like when an organization like hers comes along.

Everyone talks and so then everyone like oh they're doing this, like we want something for our kids like we're gonna sign up to, you know, that word of mouth gets around

But I think in the role of nonprofits engaging in the community in general and getting your mission out there. And what you do is always a challenge. So, I think social media plays a big part in it and it's the easiest way to kind of get more it out if it's written correctly. So I know it's a challenge. And it can be very time consuming but I find it to be most effective, especially for a small organization.

**Name**

2 needed capacities to facilitate expansion and growth

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**Number of Coding References**

20

**Parent Name****Coded Text**

Getting volunteers, getting the word out there, which I know she uses social media, which is always good, but remaining Relevant on social media is super important and getting people to share your information. She does pretty well with like posting stuff, but I don't know if she has challenges of people sharing

Because I run our social media page OUR Facebook PAGE AND I KNOW.

Everyone's like, we want our Facebook page to grow and only well I can create all the content in the world. But if our board members and our volunteers and our supporters' don't share our information. It's not getting out there.

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<b>Name</b>	2 needed capacities to facilitate expansion and growth
<b>Number of Files Coded</b>	4
<b>Number of Coding References</b>	20
<b>Parent Name</b>	
<b>Coded Text</b>	I would think the biggest challenge, which is kind of similar to my biggest challenge I find working with my organization. Is to continue to find support like the volunteers and the donors support side of it because I think that there's always a need. So supply wise i know i mean she supplies us. I can't even tell you how many boxes craft boxes we have gotten for our kid. Throughout the last like two years. So I don't think the need is probably always there. I would think the greatest challenge would be always coming up with though that finding those donors those reoccurring donors as new donors and in the volunteer side of it, too.

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<b>Name</b>	2 needed capacities to facilitate expansion and growth
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<b>Number of Coding References</b>	20
<b>Parent Name</b>	
<b>Coded Text</b>	Is the greatest challenge. There's two. Okay. I'd say fundraising especially during this time And the other one is Using social platforms to get our information out because if I were to put on that I was had a new haircut. I'd have 500 people reply, I know I say you say you got a grant three people.

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<b>Name</b>	2 needed capacities to facilitate expansion and growth
<b>Number of Files Coded</b>	4
<b>Number of Coding References</b>	20
<b>Parent Name</b>	
<b>Coded Text</b>	Leslie was ill with the flu, so Susan presented our board development plans. We reviewed the board matrix which Leslie created, discussed our need to diversify. The matrix shows that we lack HR and legal expertise. We can have up to 15 board members. <ul style="list-style-type: none"> <li>• Gayle is nominating a friend who is an art lover, big brother, and attorney. He attended A Party from the Heart.</li> <li>• Susan will nominate Lisa San Filippo — she is an architect and has a passion for the arts. Susan will send us all nomination forms. New board members will be added in the late summer or early fall.</li> </ul>

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<b>Name</b>	2 needed capacities to facilitate expansion and growth
<b>Number of Files Coded</b>	4
<b>Number of Coding References</b>	20
<b>Parent Name</b>	
<b>Coded Text</b>	Of course, it was a pandemic year right we none of us did events, but I know she was in talks about doing like a five k or like so. Some a couple more like an outreach events like that I think would be helpful and also fun like

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<b>Name</b>	2 needed capacities to facilitate expansion and growth
<b>Number of Files Coded</b>	4
<b>Number of Coding References</b>	20
<b>Parent Name</b>	
<b>Coded Text</b>	People in person. So, um, I guess, you know, like said, you know, just continuing to get out there. Meeting with members of the community business more so business people on these kind of have that in order to be successful. So, you know, I don't Like said until we get past beyond the scope of the issue that's really kind of the biggest challenge that I can see it continue to expand because right now.

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You know, with the economy, the way it is. It's going to be a little difficult to get people to do much of anything right now as far as volunteering as far as financing everything. And so let's just hope that turns around here. It's

Hopefully soon as our next year. Yeah. Yeah, absolutely. I think so many

**Name** 2 needed capacities to facilitate expansion and growth

**Number of Files Coded** 4

**Number of Coding References** 20

**Parent Name**

**Coded Text** So I would think get just the recruitment of volunteers and then maybe as you expand to that. Offering different up availabilities for some volunteer opportunities because I think from what I've seen. I know she always does like Saturday mornings early, which is probably what works for her right, she's doing it by herself so  
But I think that would be helpful to reach a broader audience if you had some different availabilities from time to time.

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**Name** 2 needed capacities to facilitate expansion and growth

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**Number of Coding References** 20

**Parent Name**

**Coded Text** So that's all we'll probably stay at for a while. We're going to increase our box production next year because we want to grow out into other counties. So will serve more next year we'll have a 3000 is our is where we're planning on being. We're hoping to increase the backpacks to 2000 if we can get a grant for the other thousand and then We'll see how successful the cards are and then we'll have two fundraisers, a year. One is the art auction, which is March. Right. And then the other one is we were supposed to have in October family five K event right around Halloween time

**Name** 2 needed capacities to facilitate expansion and growth

**Number of Files Coded** 4

**Number of Coding References** 20

**Parent Name**

**Coded Text** Um, you know, I think, I think our relationships are great. I think the biggest challenge right now is with the challenges for everyone is that you can't network really no one wants to network in face to face, and You know you're inundated with emails and trying to you know newsletters and you don't have those face to face context, it's difficult. It's really difficult. So, even like during in March, April and May we had over 900 boxes created and delivered it was Mark and me because no one would, you know, I couldn't get any volunteers. I didn't want any volunteers sure anyone else. But, you know, so that was tough. And I don't know, you know, who knows what the next six months is going to hold for the country. I'm not afraid of coronavirus but I'm not going to judge anyone that is I mean your own deal so like if we have a huge outbreak in the fall. And that goes into like February, I don't know what's going to happen. Mm hmm. I don't know. I know. And I know it's a lot a lot of elderly people, but there's still, you know, people without that aren't symptomatic that are younger, that gets sick, too. So you just don't know. You just don't know.

**Name** 2 needed capacities to facilitate expansion and growth

**Number of Files Coded** 4

**Number of Coding References** 20

**Parent Name**

**Coded Text** We have not and I think will probably do that next year. Yet we don't actually have a vision. We don't have a vision statement, we only have a mission statement, right.

**Name** 2 needed capacities to facilitate expansion and growth

**Number of Files Coded** 4

**Number of Coding References** 20



**Parent Name****Coded Text**

Well, I'm going to go off of our new board that starting. We have three men. Okay. Going to think how many women eight women. One person who's black.

Annette: women or men?

Sue: A guy. Okay. Yeah, he's starting in January.

Annette: Anyone with another ethnicity? Minority me maybe?

Sue: We don't.

Annette: All right, good. Um, prior to this one black man joining all board members were white people?

Sue: Right.

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**Number of Coding References**

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**Parent Name****Coded Text**

When you talk to people. How did they know this is different from, you know, from any other you know charitable organization that's out there and just getting people to know you know what the goals are for this and how and why this is unique. And why is because, you know, once people kind of understand you know how things were set up and why you know the organization was formed, then yeah, you know, I think you can be able to grab a certain amount of people that you know that may be interested in the objectives of the organization.

**Name**

2 needed capacities to facilitate expansion and growth

**Number of Files Coded**

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**Number of Coding References**

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**Parent Name****Coded Text**

Yeah, I mean I think everything I touched on so far is kind of along the lines of that and it's all normal stuff to as the organization grows and she started out so small. It's just an idea. Right. And I'm sure she didn't think it would take off like it has either So I think just realizing that and setting forth that good plan going forward into, like, if you're going to grow that big. Yes. If you know even Coming up with a solid plan on if you're not hiring staff. If you're not going in that direction. But still, like, going in the direction of finding those people that can support so volunteer board members because I know she has a board I don't know how large that board is um but even relying on them to do more and delegate more evenly volunteer opportunities, you know, and maybe that up opens up some more.

Shifts for some volunteer opportunities if she put the board members like everyone has to host one or something, you know, to mean like so just delegating out and relying on some people like that.

**Name**

2 needed capacities to facilitate expansion and growth

**Number of Files Coded**

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**Number of Coding References**

20

**Parent Name****Coded Text**

Yeah, I think it's, it's definitely that i mean they're small, right. So it was it's manageable for her but I just can see it getting a lot larger. Which is awesome. I love Susan and the work that she does. So I think that would definitely be that challenge though is. And like I said, not even hiring on staff but putting together a solid volunteer plan, it would be helpful.

**Name**

2 needed capacities to facilitate expansion and growth

**Number of Files Coded**

4

**Number of Coding References**

20

**Parent Name****Coded Text**

Yeah, I think that that's really it. Because I know I've worked with her for a while now to we were. I was actually introduced to the organization through a co-worker they attended an event that heard about it and then we were like the first organization. She gave any boxes to so with that being said, I've kind of seen her grow. Also, even with us. So our nonprofit is statewide. So she's even distributed now boxes to us for not just locally in central she brought like boxes to, so yeah, I would just say, as it gets larger, that's just super important is to is to put together a good base of whether it even board members, you know, step in as volunteers and just delegate some of those roles, because it's a lot to host volunteer events and manage those events and then be the one to deliver those boxes and all that.

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<b>Name</b>	board members
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\1 current organizational capacity\leadership
<b>Coded Text</b>	But, but, yeah, I have. I'm actually just newly appointed as volunteer. So I've gone to some of their the events in the past and things of that nature. So, yeah. Annette Galindo So you've been kind of been observing volunteers and Sue informed me that you will be joining the board of directors as well. Rick That's correct. I think officially in December.
<b>Name</b>	board members
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\1 current organizational capacity\leadership
<b>Coded Text</b>	Susan introduced our new treasurer and board member Ann Barretta. Ann is a CPA with her own business and also has played Mickey Mouse at Disney last 13 years. She is grateful that Ann has taken over this role.
<b>Name</b>	budget plan
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\1 current organizational capacity\resources
<b>Coded Text</b>	Ann reviewed the budget. She advised that it is a good practice to have some money in reserve. Requested that the budget be approved. A motion was made by Joanne, Marti seconded, and motion approved.
<b>Name</b>	budget plan
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\1 current organizational capacity\resources
<b>Coded Text</b>	Peter shared 2019 Budget overview and 2020 Budget planning: Cash flow 2019 reviewed; we bought inventory, paid deposit on rent, outfitted the office. Exhibited good expense management and also planned for additional giving. Budgeted out event separately with \$15,000 estimated net; 1,400 boxes estimated for 2019 year-end needs. 2020 budget: consider adding expense for treating donors and contacts out for meals, need to include phone costs, and can use board development grant to help grow the board. Need to add board members who have financial capacity. Peter suggests 3-year budget to show how big we want to be. Potential donors will want us to have a serious plan and budget should match long-term vision. Jake recommends 80/20 to use board members for work and Susan coming in to secure them at the end.

Identified need to know Susan's three-year vision. Shorter term goals: double revenue next year, 3,000 donated in 2020, integrated into Orange Co. and want to grow into Seminole and Osceola (Tupperware as potential donor), potentially add Volusia/Brevard for donation of boxes, and work on corporate involvement plan focused on volunteerism.

Susan recommended vision and budget planning should be focus of December board meeting.

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<b>Name</b>	create a card program
<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	1
<b>Parent Name</b>	Codes\\1 current organizational capacity\products and services
<b>Coded Text</b>	Next on Saturday, a week from tomorrow for our auxiliary we have a second auxiliary program. So we have our boxes and then we have the backpacks in the summer. And then we're starting a Create a card program. So they are coloring cards that you holiday cards. They're not any denomination, but that sort of hits and they'll get colored pencils with them. So they'll get five different cards and they're branded. Turner construction underwrote the project. We're packing the cards. We are individually packaging them. Will have 1000 sets and they're going to organizations that we have been working with that we serve.
<b>Name</b>	delegating tasks
<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	3
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\leadership
<b>Coded Text</b>	And I think especial Expanding and getting larger. She, she's very hands on. And as you get larger and larger, you'll have to like figure out a way to kind of step out of some of those duties. Delegate yeah you know and that's when a lot of volunteers come into play. So building up that volunteer basis that you can like trust and rely on
<b>Name</b>	delegating tasks
<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	3
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\leadership
<b>Coded Text</b>	Yeah, I mean I think everything I touched on so far is kind of along the lines of that and it's all normal stuff to as the organization grows and she started out so small. It's just an idea. Right. And I'm sure she didn't think it would take off like it has either So I think just realizing that and setting forth that good plan going forward into, like, if you're going to grow that big. Yes. If you know even Coming up with a solid plan on if you're not hiring staff. If you're not going in that direction. But still, like, going in the direction of finding those people that can support so volunteer board members because I know she has a board I don't know how large that board is um but even relying on them to do more and delegate more evenly volunteer opportunities, you know, and maybe that up opens up some more. Shifts for some volunteer opportunities if she put the board members like everyone has to host one or something, you know, to mean like so just delegating out and relying on some people like that.
<b>Name</b>	delegating tasks
<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	3
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\leadership
<b>Coded Text</b>	Yeah, I think that that's really it. Because I know I've worked with her for a while now to we were. I was actually introduced to the organization through a co-worker they attended an event that heard about it and then we were like the first organization. She gave any boxes to so with that being said, I've kind of seen her grow. Also, even with us. So our nonprofit is statewide. So she's even distributed now boxes to us for not just locally in central she brought like boxes to, so yeah, I would

just say, as it gets larger, that's just super important is to is to put together a good base of whether it even board members, you know, step in as volunteers and just delegate some of those roles, because it's a lot to host volunteer events and manage those events and then be the one to deliver those boxes and all that.

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<b>Name</b>	diversity
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\leadership
<b>Coded Text</b>	<p>Leslie was ill with the flu, so Susan presented our board development plans. We reviewed the board matrix which Leslie created, discussed our need to diversify. The matrix shows that we lack HR and legal expertise. We can have up to 15 board members.</p> <ul style="list-style-type: none"> <li>• Gayle is nominating a friend who is an art lover, big brother, and attorney. He attended A Party from the Heart.</li> <li>• Susan will nominate Lisa San Filippo — she is an architect and has a passion for the arts.</li> </ul> <p>Susan will send us all nomination forms. New board members will be added in the late summer or early fall.</p>
<b>Name</b>	diversity
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\leadership
<b>Coded Text</b>	<p>Well, I'm going to go off of our new board that starting. We have three men. Okay. Going to think how many women eight women. One person who's black.</p> <p>Annette: women or men?</p> <p>Sue: A guy. Okay. Yeah, he's starting in January.</p> <p>Annette: Anyone with another ethnicity? Minority me maybe?</p> <p>Sue: We don't.</p> <p>Annette: All right, good. Um, prior to this one black man joining all board members were white people?</p> <p>Sue: Right.</p>
<b>Name</b>	e-mail conversation
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	<p>And then also our partner organizations, you know, which is the boys and girls and all that I talked to them. I mean, I send emails and they're always request, that I stay in touch with them that way.</p>
<b>Name</b>	e-mail conversation
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	<p>So we were one of the long time organizations and She's always reaching out to us and vice versa. So that capacity to keep a relationship going is there for sure. And she acknowledges like At least reaching out and having conversations even throughout the year just to make sure, like your partners are okay um I think she does all that very well. So I think that her relationship with partners is solid.</p>
<b>Name</b>	e-mail newsletter
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2

**Parent Name** Codes\\1 current organizational capacity\outreach  
**Coded Text** For our partner organizations and our donors, at least the ones that we, I guess our donors, because I have their email addresses, we're in touch quarterly with our newsletter.

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09/11/2020 9:41 AM**Name** e-mail newsletter**Number of Files Coded** 2**Number of Coding References** 2**Parent Name** Codes\\1 current organizational capacity\outreach

**Coded Text** Susan reviewed the Newsletter /MailChimp Stats:  
 248 opt-in  
 Increase in page visits since May, over 350 visitors  
 Home page is largest visited page, inspiration is the 2nd  
 Leslie suggested we consider highlighting Emily more in messaging, as she is the passion and heart with all SA work and people are drawn to the inspiration  
 September is first month of pushing call for submission. Susan requested that we all share call to artists with our own networks.  
 Mail chimp stats: better open rate and click through rate than industry average for non-profits

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**Name** events**Number of Files Coded** 2**Number of Coding References** 3**Parent Name** Codes\\1 current organizational capacity\outreach

**Coded Text** FALL EVENT – 5K  
 The 5K will have a dual purpose: to get our name out into the community and to raise money. Last year's event had \$16,500 in sponsors. Susan feels we will be able to raise at least that much this year. Our event will be on The Track Shack website.  
 • Proposed of logo designs were shown by Marti. • Name of TRICK OR TROT was chosen for the event. • Mini Monster Mile for children — simple medal (?) / no t-shirt • Diaper Dash for crawlers and toddlers • Trick or Treat loop for kids (treats from vendors) • Possible after party • We will have a time clock but no chips  
 • Need to finalize logo and general plans within 30 days Joanne suggested that the children we serve be invited  
 We need to determine costs for medals, bibs, trick or treat bags, and other needed material so we can make the event budget.

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**Name** events**Number of Files Coded** 2**Number of Coding References** 3**Parent Name** Codes\\1 current organizational capacity\outreach

**Coded Text** Susan engaged with a community member who is new to the area and already offered to get her husband's company involved through volunteering time and expense for boxes. They raffled a large art kit to collect contact info. and gained 250 new names. We should use this concept at future community events. Great day in the country is coming up in October.

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**Name** events**Number of Files Coded** 2**Number of Coding References** 3**Parent Name** Codes\\1 current organizational capacity\outreach

**Coded Text** This year we have two all day events – TASTE OF OVIEDO and GREAT DAY IN THE COUNTRY. Full day events are grueling, and Susan and Mark need help with them. Asked for volunteers. All are welcome to attend other events also.  
 We had a booth at BALDWIN FIRST FRIDAY in January. The weather was cold — so not too many attendees — but good contacts were made. Two more FIRST FRIDAYS are on our calendar this year.

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<b>Name</b>	financial report discussed in meeting
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\1 current organizational capacity\resources
<b>Coded Text</b>	In the past, Mark and their personal accountant has completed the Simply Amazing tax returns. Thanks to Ann, Gerald Sutton, who is a Trinity Prep grad, will be doing our taxes and offering financial advice.
<b>Name</b>	financial report discussed in meeting
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\1 current organizational capacity\resources
<b>Coded Text</b>	Mark's presented the financial report and highlights of the balance sheet. Two larger gifts were included in the revenues; a \$1,000 donor as well as Trinity Prep's contribution from the senior class gift. The art supply expense is under control and we are in a strong cash po position due to cash from carry over from last year. We have supplies for 250 boxes (\$11 value each).
<b>Name</b>	fundraising
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\1 current organizational capacity\resources
<b>Coded Text</b>	FALL EVENT – 5K The 5K will have a dual purpose: to get our name out into the community and to raise money. Last year's event had \$16,500 in sponsors. Susan feels we will be able to raise at least that much this year. Our event will be on The Track Shack website. <ul style="list-style-type: none"> <li>• Proposed of logo designs were shown by Marti.</li> <li>• Name of TRICK OR TROT was chosen for the event.</li> <li>• Mini Monster Mile for children — simple medal (?) / no t-shirt</li> <li>• Diaper Dash for crawlers and toddlers</li> <li>• Trick or Treat loop for kids (treats from vendors)</li> <li>• Possible after party</li> <li>• We will have a time clock but no chips</li> <li>• Need to finalize logo and general plans within 30 days</li> </ul> Joanne suggested that the children we serve be invited We need to determine costs for medals, bibs, trick or treat bags, and other needed material so we can make the event budget.
<b>Name</b>	fundraising
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\1 current organizational capacity\resources
<b>Coded Text</b>	Once people know because like with Big Brothers it such a big organization. So nice national organization. So they already know who you are when you go there and ask them to, you know, donate You know, donate for that donate for this you know it's real easy. So now this is a lot smaller organization.
<b>Name</b>	fundraising
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\resources
<b>Coded Text</b>	I would think the biggest challenge, which is kind of similar to my biggest challenge I find working with my organization. Is to continue to find support like the volunteers and the donors support side of it because I think that there's always a need. So supply wise i know i mean she supplies us. I can't

even tell you how many boxes craft boxes we have gotten for our kid. Throughout the last like two years. So I don't think the need is probably always there. I would think the greatest challenge would be always coming up with though that finding those donors those reoccurring donors as new donors and in the volunteer side of it, too.

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<b>Name</b>	fundraising
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\resources
<b>Coded Text</b>	Is the greatest challenge. There's two. Okay. I'd say fundraising especially during this time And the other one is Using social platforms to get our information out because if I were to put on that I was had a new haircut. I'd have 500 people reply, I know I say you say you got a grant three people. getting volunteers to share social media post
<b>Name</b>	getting volunteers to share social media post
<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	1
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\outreach
<b>Coded Text</b>	Getting volunteers, getting the word out there, which I know she uses social media, which is always good, but remaining Relevant on social media is super important and getting people to share your information. She does pretty well with like posting stuff, but I don't know if she has challenges of people sharing Because I run our social media page OUR Facebook PAGE AND I KNOW. Everyone's like, we want our Facebook page to grow and only well I can create all the content in the world. But if our board members and our volunteers and our supporters' don't share our information. It's not getting out there.
<b>Name</b>	increase volume
<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\products and services
<b>Coded Text</b>	I think that one of the biggest compliments that we can get right now is when people reach out to us and ask us for our product which is starting to happen. Hey, I heard about you through so and so and our program can use this, and you know that's really great. And I want more of that to happen. But you know I'm pleased, where we're at right now and it's been it'll be two years. Our first box delivery will be two years this coming February, so really only been doing this 18 months. We're new we've had a lot of traction without a lot of great media coverage and we've helped we've been in touch with over 4000 kids.
<b>Name</b>	increase volume
<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\products and services
<b>Coded Text</b>	So that's all we'll probably stay at for a while. We're going to increase our box production next year because we want to grow out into other counties. So will serve more next year we'll have a 3000 is our is where we're planning on being. We're hoping to increase the backpacks to 2000 if we can get a grant for the other thousand and then We'll see how successful the cards are and then we'll have two fundraisers, a year. One is the art auction, which is March. Right. And then the other one is we were supposed to have in October family five K event right around Halloween time
<b>Name</b>	lack of face-to-face interaction due to pandemic
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	3
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\outreach

**Coded Text** Of course, it was a pandemic year right we none of us did events, but I know she was in talks about doing like a five k or like so. Some a couple more like an outreach events like that I think would be helpful and also fun like

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**Name** lack of face-to-face interaction due to pandemic  
**Number of Files Coded** 3  
**Number of Coding References** 3  
**Parent Name** Codes\\2 needed capacities to facilitate expansion and growth\outreach  
**Coded Text** People in person. So, um, I guess, you know, like said, you know, just continuing to get out there. Meeting with members of the community business more so business people on these kind of have that in order to be successful. So, you know, I don't Like said until we get past beyond the scope of the issue that's really kind of the biggest challenge that I can see it continue to expand because right now.  
 You know, with the economy, the way it is. It's going to be a little difficult to get people to do much of anything right now as far as volunteering as far as financing everything. And so let's just hope that turns around here. It's  
 Hopefully soon as our next year. Yeah. Yeah, absolutely. I think so many

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**Name** lack of face-to-face interaction due to pandemic  
**Number of Files Coded** 3  
**Number of Coding References** 3  
**Parent Name** Codes\\2 needed capacities to facilitate expansion and growth\outreach  
**Coded Text** Um, you know, I think, I think our relationships are great. I think the biggest challenge right now is with the challenges for everyone is that you can't network really no one wants to network in face to face, and You know you're inundated with emails and trying to you know newsletters and you don't have those face to face context, it's difficult. It's really difficult. So, even like during in March, April and May we had over 900 boxes created and delivered it was Mark and me because no one would, you know, I couldn't get any volunteers. I didn't want any volunteers sure anyone else. But, you know, so that was tough. And I don't know, you know, who knows what the next six months is going to hold for the country. I'm not afraid of coronavirus but I'm not going to judge anyone that is I mean your own deal so like if we have a huge outbreak in the fall. And that goes into like February, I don't know what's going to happen. Mm hmm. I don't know. I know. And I know it's a lot a lot of elderly people, but there's still, you know, people without that aren't symptomatic that are younger, that gets sick, too. So you just don't know. You just don't know.

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**Name** leadership  
**Number of Files Coded** 3  
**Number of Coding References** 3  
**Parent Name** Codes\\1 current organizational capacity  
**Coded Text** But, but, yeah, I have. I'm actually just newly appointed as volunteer. So I've gone to some of their the events in the past and things of that nature. So, yeah.  
 Annette Galindo  
 So you've been kind of been observing volunteers and Sue informed me that you will be joining the board of directors as well.  
 Rick That's correct. I think officially in December.

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**Name** leadership  
**Number of Files Coded** 3  
**Number of Coding References** 3  
**Parent Name** Codes\\1 current organizational capacity  
**Coded Text** So when we're doing a box redesign starting in January. So we're just planning on every to every two years, we'll have three different like guts of the box inside and every, every two years, we're going to

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change it. And we'll have to redesign. So we had a committee that research different things and four of us, and then when we get to this year's event for March where I'm going to have committees and have people lead different things. I can't keep doing all of it,

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<b>Name</b>	leadership
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	3
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	Susan introduced our new treasurer and board member Ann Barretta. Ann is a CPA with her own business and also has played Mickey Mouse at Disney last 13 years. She is grateful that Ann has taken over this role.
<b>Name</b>	leadership
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	5
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	And I think especial Expanding and getting larger. She, she's very hands on. And as you get larger and larger, you'll have to like figure out a way to kind of step out of some of those duties. Delegate yeah you know and that's when a lot of volunteers come into play. So building up that volunteer basis that you can like trust and rely on
<b>Name</b>	leadership
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	5
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	Leslie was ill with the flu, so Susan presented our board development plans. We reviewed the board matrix which Leslie created, discussed our need to diversify. The matrix shows that we lack HR and legal expertise. We can have up to 15 board members. <ul style="list-style-type: none"> <li>• Gayle is nominating a friend who is an art lover, big brother, and attorney. He attended A Party from the Heart.</li> <li>• Susan will nominate Lisa San Filippo — she is an architect and has a passion for the arts. Susan will send us all nomination forms. New board members will be added in the late summer or early fall.</li> </ul>
<b>Name</b>	leadership
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	5
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	Well, I'm going to go off of our new board that starting. We have three men. Okay. Going to think how many women eight women. One person who's black. <p>Annette: women or men?</p> <p>Sue: A guy. Okay. Yeah, he's starting in January.</p> <p>Annette: Anyone with another ethnicity? Minority me maybe?</p> <p>Sue: We don't.</p> <p>Annette: All right, good. Um, prior to this one black man joining all board members were white people?</p> <p>Sue: Right.</p>

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<b>Name</b>	leadership
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	5
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	<p>Yeah, I mean I think everything I touched on so far is kind of along the lines of that and it's all normal stuff to as the organization grows and she started out so small. It's just an idea. Right. And I'm sure she didn't think it would take off like it has either So I think just realizing that and setting forth that good plan going forward into, like, if you're going to grow that big. Yes. If you know even Coming up with a solid plan on if you're not hiring staff. If you're not going in that direction. But still, like, going in the direction of finding those people that can support so volunteer board members because I know she has a board I don't know how large that board is um but even relying on them to do more and delegate more evenly volunteer opportunities, you know, and maybe that up opens up some more.</p> <p>Shifts for some volunteer opportunities if she put the board members like everyone has to host one or something, you know, to mean like so just delegating out and relying on some people like that.</p>
<b>Name</b>	leadership
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	5
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	<p>Yeah, I think that that's really it. Because I know I've worked with her for a while now to we were. I was actually introduced to the organization through a co-worker they attended an event that heard about it and then we were like the first organization. She gave any boxes to so with that being said, I've kind of seen her grow. Also, even with us. So our nonprofit is statewide. So she's even distributed now boxes to us for not just locally in central she brought like boxes to, so yeah, I would just say, as it gets larger, that's just super important is to is to put together a good base of whether it even board members, you know, step in as volunteers and just delegate some of those roles, because it's a lot to host volunteer events and manage those events and then be the one to deliver those boxes and all that.</p>
<b>Name</b>	make other times to volunteer available
<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	1
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\outreach
<b>Coded Text</b>	<p>So I would think get just the recruitment of volunteers and then maybe as you expand to that. Offering different up availabilities for some volunteer opportunities because I think from what I've seen. I know she always does like Saturday mornings early, which is probably what works for her right, she's doing it by herself so</p> <p>But I think that would be helpful to reach a broader audience if you had some different availabilities from time to time.</p>
<b>Name</b>	no vision statement
<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	1
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\vision and mission
<b>Coded Text</b>	<p>We have not and I think will probably do that next year. Yet we don't actually have a vision. We don't have a vision statement, we only have a mission statement, right.</p>

<b>Name</b>	outreach
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<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	6
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	<p>but like I said, then I don't know how many people actually the challenge. I guess might come from the organization being small and how many people know about it and know what it is.</p> <p>So I think within our circle of people talking, you know, in the nonprofit world. It's like when an organization like hers comes along.</p> <p>Everyone talks and so then everyone like oh they're doing this, like we want something for our kids like we're gonna sign up to, you know, that word of mouth gets around</p> <p>But I think in the role of nonprofits engaging in the community in general and getting your mission out there. And what you do is always a challenge. So, I think social media plays a big part in it and it's the easiest way to kind of get more it out if it's written correctly. So I know it's a challenge. And it can be very time consuming but I find it to be most effective, especially for a small organization.</p>
<b>Name</b>	outreach
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	6
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	<p>Getting volunteers, getting the word out there, which I know she uses social media, which is always good, but remaining Relevant on social media is super important and getting people to share your information. She does pretty well with like posting stuff, but I don't know if she has challenges of people sharing</p> <p>Because I run our social media page OUR Facebook PAGE AND I KNOW.</p> <p>Everyone's like, we want our Facebook page to grow and only well I can create all the content in the world. But if our board members and our volunteers and our supporters don't share our information. It's not getting out there.</p>
<b>Name</b>	outreach
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	6
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	<p>Of course, it was a pandemic year right we none of us did events, but I know she was in talks about doing like a five k or like so. Some a couple more like an outreach events like that I think would be helpful and also fun like</p>
<b>Name</b>	outreach
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	6
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	<p>People in person. So, um, I guess, you know, like said, you know, just continuing to get out there.</p> <p>Meeting with members of the community business more so business people on these kind of have that in order to be successful. So, you know, I don't Like said until we get past beyond the scope of the issue that's really kind of the biggest challenge that I can see it continue to expand because right now.</p> <p>You know, with the economy, the way it is. It's going to be a little difficult to get people to do much of anything right now as far as volunteering as far as financing everything. And so let's just hope that turns around here. It's</p> <p>Hopefully soon as our next year. Yeah. Yeah, absolutely. I think so many</p>

<b>Name</b>	outreach
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	6

<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	So I would think get just the recruitment of volunteers and then maybe as you expand to that. Offering different up availabilities for some volunteer opportunities because I think from what I've seen. I know she always does like Saturday mornings early, which is probably what works for her right, she's doing it by herself so But I think that would be helpful to reach a broader audience if you had some different availabilities from time to time.
<b>Name</b>	outreach
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	6
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	Um, you know, I think, I think our relationships are great. I think the biggest challenge right now is with the challenges for everyone is that you can't network really no one wants to network in face to face, and You know you're inundated with emails and trying to you know newsletters and you don't have those face to face context, it's difficult. It's really difficult. So, even like during in March, April and May we had over 900 boxes created and delivered it was Mark and me because no one would, you know, I couldn't get any volunteers. I didn't want any volunteers sure anyone else. But, you know, so that was tough. And I don't know, you know, who knows what the next six months is going to hold for the country. I'm not afraid of coronavirus but I'm not going to judge anyone that is I mean your own deal so like if we have a huge outbreak in the fall. And that goes into like February, I don't know what's going to happen. Mm hmm. I don't know. I know. And I know it's a lot a lot of elderly people, but there's still, you know, people without that aren't symptomatic that are younger, that gets sick, too. So you just don't know. You just don't know.
<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	I think she's an awesome. I think the organization is great. I know Susan center an awesome job. I just really think it's a cool organization I believe a lot in it. So that's why I was excited to partner have my organization partner with her. So, and I promote it within our organization all the time even her event coming up.
<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	No, I mean everyone there is a volunteer and I think that everyone participates. So you know if they were paid positions. I think it might, you know, it would be different, but as volunteers. I really feel that they are assisting with the planning during our meetings and not everyone this year we were supposed to have all of these outreach events. You know what, like going to great day in the country and over, you know, but they all got canceled and I know, and everyone was asked, to attend to cover shifted each one and they would have.
<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	And then also our partner organizations, you know, which is the boys and girls and all that I talked to them. I mean, I send emails and they're always request, that I stay in touch with them that way.

<b>Name</b>	outreach
<b>Number of Files Coded</b>	5

<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	And then you know what I try to do too is be involved with other organizations but not this year. But last year Mark and I worked for the Boys and Girls Club for their gala and we were volunteers I think we were spotters for the auction and then we cleaned up. So I try to, you know, help out the other organizations and also that way. You know, I see people that I know, and they see that we're helping there and that were involved.
<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	Contact with the Jacksonville agency was made through the local children's home Society. The Palm Beach County children's home Society has also requested 200 boxes.
<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	FALL EVENT – 5K The 5K will have a dual purpose: to get our name out into the community and to raise money. Last year's event had \$16,500 in sponsors. Susan feels we will be able to raise at least that much this year. Our event will be on The Track Shack website. <ul style="list-style-type: none"> <li>• Proposed of logo designs were shown by Marti.</li> <li>• Name of TRICK OR TROT was chosen for the event.</li> <li>• Mini Monster Mile for children — simple medal (?) / no t-shirt</li> <li>• Diaper Dash for crawlers and toddlers</li> <li>• Trick or Treat loop for kids (treats from vendors)</li> <li>• Possible after party</li> <li>• We will have a time clock but no chips</li> <li>• Need to finalize logo and general plans within 30 days</li> </ul> Joanne suggested that the children we serve be invited We need to determine costs for medals, bibs, trick or treat bags, and other needed material so we can make the event budget.
<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	For our partner organizations and our donors, at least the ones that we, I guess our donors, because I have their email addresses, we're in touch quarterly with our newsletter.

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<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	Of course, it was a pandemic year right we none of us did events, but I know she was in talks about doing like a five k or like so. Some a couple more like an outreach events like that I think would be helpful and also fun like Kara Kerlin Yeah so utilizing, you know, not just volunteers my interns, even in the social media aspect on because college kids, no more than we do. Right. And that's what they're on all the time and they know how to And a lot of people are going to school for it and you know you could pick up an intern first and let them run your social media pages for a while, you know, depending, and it

Yeah, and it'll be Yeah, it would take a lot of time off of her because even the social media, the ones that are going to school for it. They are great with like creating the content and everything. Like always, she would have to do was kind of manage and just make sure you know nothing gets out but she doesn't want to get out. But yeah, they're awesome with doing that, you know, By utilizing they is it and all cells close by, even where her office location is at so That would be a good one too, because they have a lot of communication people there.

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**Name** outreach  
**Number of Files Coded** 5  
**Number of Coding References** 23  
**Parent Name** Codes\\1 current organizational capacity  
**Coded Text** Peter suggests considering local sports/celebrities:  
 Jake suggested Ashlyn Harris and Allie Krieger, married soccer players  
 Aaron Gordon Orlando Magic player who is a collector (challenging with agent)  
 Mark suggests McKenzie Milton- UCF quarterback  
 Peter suggested new to area folks or those who haven't selected a local charity to support

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**Name** outreach  
**Number of Files Coded** 5  
**Number of Coding References** 23  
**Parent Name** Codes\\1 current organizational capacity  
**Coded Text** Selected by Glenda B Morgan Charitable foundation to be a sponsor of Taste on September 14, fundraiser for Second Harvest Food Bank, from Mary Beth Morgan

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**Name** outreach  
**Number of Files Coded** 5  
**Number of Coding References** 23  
**Parent Name** Codes\\1 current organizational capacity  
**Coded Text** So we were one of the long time organizations and She's always reaching out to us and vice versa. So that capacity to keep a relationship going is there for sure. And she acknowledges like At least reaching out and having conversations even throughout the year just to make sure, like your partners are okay um I think she does all that very well. So I think that her relationship with partners is solid.

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**Name** outreach  
**Number of Files Coded** 5  
**Number of Coding References** 23  
**Parent Name** Codes\\1 current organizational capacity  
**Coded Text** So, I mean, we have a lot of different relationships. So, for example, for our upcoming auction, I've made relationships with artists. So I make sure that I am always looking at the work that they post on Instagram and I comment and tell them I love it, or that makes me happy or things like that. So then when I reach out to them and ask them this year. They're all like I'm on board. So that's one way for artists.

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**Name** outreach  
**Number of Files Coded** 5  
**Number of Coding References** 23  
**Parent Name** Codes\\1 current organizational capacity  
**Coded Text** Susan engaged with a community member who is new to the area and already offered to get her husband's company involved through volunteering time and expense for boxes. They raffled a large art kit to collect contact info. and gained 250 new names. We should use this concept at future community events. Great day in the country is coming up in October.

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**Name** outreach

<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	Susan reported on the Office Space and Ribbon Cutting which had 25 attendees and great social media exposure. The event helped to spread awareness about SA and Jake and Susan are work on analyzing impressions so far to plan for the future.
<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	Susan reported that she has been very busy and a lot of activity has been focused on reaching out to artists to solicit donations for the auction. The new office space is working well.
<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	Susan reviewed the Newsletter /MailChimp Stats: 248 opt-in Increase in page visits since May, over 350 visitors Home page is largest visited page, inspiration is the 2nd Leslie suggested we consider highlighting Emily more in messaging, as she is the passion and heart with all SA work and people are drawn to the inspiration September is first month of pushing call for submission. Susan requested that we all share call to artists with our own networks. Mail chimp stats: better open rate and click through rate than industry average for non-profits
<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	This year in actually in April there's a nonprofit called Cannonball Kid cancer here in the area they raised over a million dollars in every year at their dealer and they've asked if I would run their silent auction. not getting the items. But once the items come in like the whole back end of it where you start to bid on them. They've asked that I trained volunteers and do that. So, you know, just helping out other organizations. And that's the way I can get to know other volunteers and other places right now volunteer or become our donors.

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<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	This year we have two all day events – TASTE OF OVIEDO and GREAT DAY IN THE COUNTRY. Full day events are grueling, and Susan and Mark need help with them. Asked for volunteers. All are welcome to attend other events also. We had a booth at BALDWIN FIRST FRIDAY in January. The weather was cold — so not too many attendees — but good contacts were made. Two more FIRST FRIDAYS are on our calendar this year.
<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23

<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	Volunteer Opportunity – September 21, 9:30-11:30 a.m.
<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	We used the opportunity to collect addresses to build the database and included those who had attended last year's event, given for the first-time, engaged with SA on Facebook and Instagram, and those who have expressed interest
<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	Well, I know. Susan for a while so your prior to this, and I knew her daughter as well. So, so I knew you know all the things that had gone on and how things happen and so forth and Just, you know, wanted to be supportive of her and I've also been friends with. I don't know if you know Gail on the board. For example, yeah Gail probably one of my best friends. We've known each other for a long time and I know everything that they've been working on. And yeah, every now and then they've got, you know, something on they'll say, hey, can you know contribute sometimes financial You know, or whatever, you know, come out to the event, and so forth. And so, yeah, I've always tried to be there for both of them.
<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	WESH TV's Stewart Moore visited Simply Amazing offices last week and filmed a segment for Community Champion of the Week. He interviewed Susan and Kara Kerlin from local CHS. The segment will air on Thursday, February 20, and be available streaming on their website.

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<b>Name</b>	outreach
<b>Number of Files Coded</b>	5
<b>Number of Coding References</b>	23
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	You know the fundraiser that she has think it's in March. I Told like our team members are like senior leaders. I'm like, let's make a night of it. Like, let's all go because I went to the first one. It was so much fun. But I'm like you know she supports us and It's an awesome organization, everyone would have a good time. So I think that she's done great especially juggling at all.
<b>Name</b>	partnerships
<b>Number of Files Coded</b>	4
<b>Number of Coding References</b>	7
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	I think she's an awesome. I think the organization is great. I know Susan center an awesome job. I just really think it's a cool organization I believe a lot in it. So that's why I was excited to partner have my organization partner with her. So, and I promote it within our organization all the time even her event coming up.



<b>Name</b>	partnerships
<b>Number of Files Coded</b>	4
<b>Number of Coding References</b>	7
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	And then you know what I try to do too is be involved with other organizations but not this year. But last year Mark and I worked for the Boys and Girls Club for their gala and we were volunteers I think we were spotters for the auction and then we cleaned up. So I try to, you know, help out the other organizations and also that way. You know, I see people that I know, and they see that we're helping there and that were involved.
<b>Name</b>	partnerships
<b>Number of Files Coded</b>	4
<b>Number of Coding References</b>	7
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	Contact with the Jacksonville agency was made through the local children's home Society. The Palm Beach County children's home Society has also requested 200 boxes.
<b>Name</b>	partnerships
<b>Number of Files Coded</b>	4
<b>Number of Coding References</b>	7
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	Selected by Glenda B Morgan Charitable foundation to be a sponsor of Taste on September 14, fundraiser for Second Harvest Food Bank, from Mary Beth Morgan
<b>Name</b>	partnerships
<b>Number of Files Coded</b>	4
<b>Number of Coding References</b>	7
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	Susan reported that she has been very busy and a lot of activity has been focused on reaching out to artists to solicit donations for the auction. The new office space is working well.

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<b>Name</b>	partnerships
<b>Number of Files Coded</b>	4
<b>Number of Coding References</b>	7
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	This year in actually in April there's a nonprofit called Cannonball Kid cancer here in the area they raised over a million dollars in every year at their dealer and they've asked if I would run their silent auction. not getting the items. But once the items come in like the whole back end of it where you start to bid on them. They've asked that I trained volunteers and do that. So, you know, just helping out other organizations. And that's the way I can get to know other volunteers and other places right now volunteer or become our donors.
<b>Name</b>	partnerships
<b>Number of Files Coded</b>	4
<b>Number of Coding References</b>	7
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	You know the fundraiser that she has think it's in March. I Told like our team members are like senior leaders. I'm like, let's make a night of it. Like, let's all go because I went to the first one. It was so much fun. But I'm like you know she supports us and It's an awesome organization, everyone would have a good time. So I think that she's done great especially juggling at all.
<b>Name</b>	partnerships with other organizations to increase human resource

<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	1
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\resources
<b>Coded Text</b>	<p>And even a partnership. I know we just haven't got to move forward, which I mean I know, too. She's doing this and working so and yeah, I would assume so. Because I think there's opportunity for Partnerships to grow meaning like my organization. We don't have a ton of volunteer opportunities, but we have a ton of groups that want to volunteer with us, um, and I've talked to her before about partnering where You know the boxes are coming to our kids. Anyways, so it'd be like I can do a handoff of a donor that contacts me and says, like, hey, I would love being involved in new volunteer opportunity and I know tag team with Susan to like host this volunteer opportunity then and it be a shared group.</p> <p>So then they get to see her organization and what she does. But then the side of it. Like what's happening in these are going to see Hs and this is our organization and what they help support. So I think even tapping into some of those Community research sources that she's built partnerships with and I know there's a few other that she has really close partnerships with I think that would even help him brought in her reach</p>
<b>Name</b>	products and services
<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	<p>I think that one of the biggest compliments that we can get right now is when people reach out to us and ask us for our product which is starting to happen. Hey, I heard about you through so and so and our program can use this, and you know that's really great. And I want more of that to happen. But you know I'm pleased, where we're at right now and it's been it'll be two years. Our first box delivery will be two years this coming February, so really only been doing this 18 months. We're new we've had a lot of traction without a lot of great media coverage and we've helped we've been in touch with over 4000 kids.</p>

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<b>Name</b>	products and services
<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	<p>So that's all we'll probably stay at for a while. We're going to increase our box production next year because we want to grow out into other counties. So will serve more next year we'll have a 3000 is our is where we're planning on being. We're hoping to increase the backpacks to 2000 if we can get a grant for the other thousand and then We'll see how successful the cards are and then we'll have two fundraisers, a year. One is the art auction, which is March. Right. And then the other one is we were supposed to have in October family five K event right around Halloween time</p>
<b>Name</b>	products and services
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	5
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	<p>I don't see that she's had a lot of challenges. I feel like She is especially the last email. I said, You know, I know, she's getting more requests, even for boxes and she's like, I want to make sure my longtime partners are taken care of. So I know</p> <p>Organization wise those partners. I don't think is a challenge for her in the community</p>
<b>Name</b>	products and services
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	5

**Parent Name** Codes\\1 current organizational capacity  
**Coded Text** I think that one of the biggest compliments that we can get right now is when people reach out to us and ask us for our product which is starting to happen. Hey, I heard about you through so and so and our program can use this, and you know that's really great. And I want more of that to happen. But you know I'm pleased, where we're at right now and it's been it'll be two years. Our first box delivery will be two years this coming February, so really only been doing this 18 months. We're new we've had a lot of traction without a lot of great media coverage and we've helped we've been in touch with over 4000 kids.

**Name** products and services

**Number of Files Coded** 3

**Number of Coding References** 5

**Parent Name** Codes\\1 current organizational capacity

**Coded Text** Next on Saturday, a week from tomorrow for our auxiliary we have a second auxiliary program. So we have our boxes and then we have the backpacks in the summer. And then we're starting a Create a card program. So they are coloring cards that you holiday cards. They're not any denomination, but that sort of hits and they'll get colored pencils with them. So they'll get five different cards and they're branded. Turner construction underwrote the project. We're packing the cards. We are individually packaging them. Will have 1000 sets and they're going to organizations that we have been working with that we serve.

**Name** products and services

**Number of Files Coded** 3

**Number of Coding References** 5

**Parent Name** Codes\\1 current organizational capacity

**Coded Text** SACB In addition to the 200 boxes that were delivered to CHS in Jacksonville, 30 boxes were delivered to the Grove which is a voluntary residential program serving adolescents ages 13 to 17 with substance abuse and/or behavioral health issues. Last year at this time we had only delivered eight boxes.

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**Name** products and services

**Number of Files Coded** 3

**Number of Coding References** 5

**Parent Name** Codes\\1 current organizational capacity

**Coded Text** Susan and Mark delivered 200 boxes to the Children's Home Society (CHS) in Jacksonville a couple of weeks ago. Susan shared a photo that was taken of a cut out that two brothers at completed. Included was a letter from the director. She said the boys made it in honor of their father who had recently died. She said, "All the children all loved their boxes — this worked!"

**Name** resources

**Number of Files Coded** 2

**Number of Coding References** 5

**Parent Name** Codes\\2 needed capacities to facilitate expansion and growth

**Coded Text** And even a partnership. I know we just haven't got to move forward, which I mean I know, too. She's doing this and working so and yeah, I would assume so. Because I think there's opportunity for Partnerships to grow meaning like my organization. We don't have a ton of volunteer opportunities, but we have a ton of groups that want to volunteer with us, um, and I've talked to her before about partnering where You know the boxes are coming to our kids. Anyways, so it'd be like I can do a handoff of a donor that contacts me and says, like, hey, I would love being involved in new volunteer opportunity and I know tag team with Susan to like host this volunteer opportunity then and it be a shared group. So then they get to see her organization and what she does. But then the side of it. Like what's happening in these are going to see Hs and this is our organization and what they help support.

So I think even tapping into some of those Community research sources that she's built partnerships with and I know there's a few other that she has really close partnerships with I think that would even help him brought in her reach

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**Name** resources  
**Number of Files Coded** 2  
**Number of Coding References** 5  
**Parent Name** Codes\\2 needed capacities to facilitate expansion and growth  
**Coded Text** And I think it's something that A program yeah and i i think that her opportunity to is something that someone would really jump on because it's a new Like a growing organization. So to be a part of that, you know, that would look good for them to as an intern like jumping on and helping expand and organizations growth. You know, looks good for them also. So I think that, yeah, that would be a really great way for her to get some help and support in that area.

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**Name** resources  
**Number of Files Coded** 2  
**Number of Coding References** 5  
**Parent Name** Codes\\2 needed capacities to facilitate expansion and growth  
**Coded Text** I would think the biggest challenge, which is kind of similar to my biggest challenge I find working with my organization. Is to continue to find support like the volunteers and the donors support side of it because I think that there's always a need. So supply wise i know i mean she supplies us. I can't even tell you how many boxes craft boxes we have gotten for our kid. Throughout the last like two years. So I don't think the need is probably always there. I would think the greatest challenge would be always coming up with though that finding those donors those reoccurring donors as new donors and in the volunteer side of it, too.

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**Name** resources  
**Number of Files Coded** 2  
**Number of Coding References** 5  
**Parent Name** Codes\\2 needed capacities to facilitate expansion and growth  
**Coded Text** Is the greatest challenge. There's two. Okay. I'd say fundraising especially during this time And the other one is Using social platforms to get our information out because if I were to put on that I was had a new haircut. I'd have 500 people reply, I know I say you say you got a grant three people.

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**Name** resources  
**Number of Files Coded** 2  
**Number of Coding References** 5  
**Parent Name** Codes\\2 needed capacities to facilitate expansion and growth  
**Coded Text** Yeah, I think it's, it's definitely that i mean they're small, right. So it was it's manageable for her but I just can see it getting a lot larger. Which is awesome. I love Susan and the work that she does. So I think that would definitely be that challenge though is. And like I said, not even hiring on staff but putting together a solid volunteer plan, it would be helpful.

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**Name** resources  
**Number of Files Coded** 3  
**Number of Coding References** 10  
**Parent Name** Codes\\1 current organizational capacity  
**Coded Text** Ann reviewed the budget. She advised that it is a good practice to have some money in reserve. Requested that the budget be approved. A motion was made by Joanne, Marti seconded, and motion approved.

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**Name** resources  
**Number of Files Coded** 3

<b>Number of Coding References</b>	10
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	FALL EVENT – 5K The 5K will have a dual purpose: to get our name out into the community and to raise money. Last year’s event had \$16,500 in sponsors. Susan feels we will be able to raise at least that much this year. Our event will be on The Track Shack website. <ul style="list-style-type: none"> <li>Proposed of logo designs were shown by Marti.</li> <li>Name of TRICK OR TROT was chosen for the event.</li> <li>Mini Monster Mile for children — simple medal (?) / no t-shirt</li> <li>Diaper Dash for crawlers and toddlers</li> <li>Trick or Treat loop for kids (treats from vendors)</li> <li>Possible after party</li> <li>We will have a time clock but no chips</li> <li>Need to finalize logo and general plans within 30 days Joanne suggested that the children we serve be invited</li> </ul> We need to determine costs for medals, bibs, trick or treat bags, and other needed material so we can make the event budget.
<b>Name</b>	resources
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	10
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	FUNDRAISING 2020 Our first solicit of the year will go out in the spring, then a mid-year update, and clean up solicit in the fall
<b>Name</b>	resources
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	10
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	In the past, Mark and their personal accountant has completed the Simply Amazing tax returns. Thanks to Ann, Gerald Sutton, who is a Trinity Prep grad, will be doing our taxes and offering financial advice.

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<b>Name</b>	resources
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	10
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	Leslie reviewed the fall solicitation plan and we reviewed the draft letter. Peter complimented the writing and story telling that Susan drafted. The letter will be segmented into 1) past donors, 2) those who donated supplies, and 3) those who have participated but not ever given. Letter will drop the first week of September 16. The email follow-up first week of October, the event then occurs in November, and a follow-up email will go out the first week of December. Joanne suggested including In Honor Of/In Memory of Of giving which would incorporate well with year-end giving. Discussed adding IHO/IMO language on the back of the pledge card, as well as Peter’s idea of putting larger levels of 50 boxes. Group discussed stewardship ideas of a thank you to IMO/IHO donor with a certificate or picture; personalizing thank-yous; and matching of kids with groups. Leslie and Susan to work on pledge card to accompany mailing and also a stewardship plan.
<b>Name</b>	resources
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	10
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	Mark’s presented the financial report and highlights of the balance sheet. Two larger gifts were included in the revenues; a \$1,000 donor as well as Trinity Prep’s contribution from the senior class

gift. The art supply expense is under control and we are in a strong cash po position due to cash from carry over from last year. We have supplies for 250 boxes (\$11 value each).

<b>Name</b>	resources
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	10
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	Mark's presented the financial report and highlights of the balance sheet. Two larger gifts were included in the revenues; a \$1,000 donor as well as Trinity Prep's contribution from the senior class gift. The art supply expense is under control and we are in a strong cash po position due to cash from carry over from last year. We have supplies for 250 boxes (\$11 value each).
<b>Name</b>	resources
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	10
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	Once people know because like with Big Brothers it such a big organization. So nice national organization. So they already know who you are when you go there and ask them to, you know, donate You know, donate for that donate for this you know it's real easy. So now this is a lot smaller organization.

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<b>Name</b>	resources
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	10
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	Peter shared 2019 Budget overview and 2020 Budget planning: Cash flow 2019 reviewed; we bought inventory, paid deposit on rent, outfitted the office. Exhibited good expense management and also planned for additional giving. Budgeted out event separately with \$15,000 estimated net; 1,400 boxes estimated for 2019 year-end needs. 2020 budget: consider adding expense for treating donors and contacts out for meals, need to include phone costs, and can use board development grant to help grow the board. Need to add board members who have financial capacity. Peter suggests 3-year budget to show how big we want to be. Potential donors will want us to have a serious plan and budget should match long-term vision. Jake recommends 80/20 to use board members for work and Susan coming in to secure them at the end. Identified need to know Susan's three-year vision. Shorter term goals: double revenue next year, 3,000 donated in 2020, integrated into Orange Co. and want to grow into Seminole and Osceola (Tupperware as potential donor), potentially add Volusia/Brevard for donation of boxes, and work on corporate involvement plan focused on volunteerism. Susan recommended vision and budget planning should be focus of December board meeting.
<b>Name</b>	resources
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	10
<b>Parent Name</b>	Codes\\1 current organizational capacity
<b>Coded Text</b>	Susan reviewed Sponsorship Solicitation Materials. Tickets included in packages; 2 tickets already for the creative sponsor (Signature Wealth). Susan already solicited all the big players in town and now needs our personal connections. Board members asked to solicit two sponsors each. Gayle asking Lake Mary Montessori; Ricky lawyer

Joanne suggests: Ticonderoga in Lake Mary, Sam Flax (OMA 1st Thursday events), Sukuro, Rifle Paper Company  
 Northwest mutual credit union; we are part of their charter now, they have Maitland office, solicit them, get volunteers  
 TD Bank- Peter will ask about getting involved  
 Volunteer Val Solomen will help us brainstorm and identify sponsors  
 Two media Oviedo Winter Springs Magazine, WESH 2, Jillian and Iheart radio  
 Art Solicitation reviewed by Susan. Kathy donating a piece, Joanne donating a piece, Joanne asked Elizabeth Nelson (name?) to donate a big piece, Joanne working on a group event where they make 10 x 10 pieces to donate, Robin Mead donated a piece too, considering coming to the event.  
 Orlando Arts ad for event and call to artists. Joanne suggested Sam Flax for call to artists. Jake working with Jay, the unsigned artist, to do call to action to his artist network.  
 Susan shared updated on the Giving from the Heart Wall – Marti is making hearts, Hood College alums making beeswax hearts, Peter asking Tom Mann for pewter hearts, can include items like printer, supplies, cash, \$300 to cover one month rent etc.  
 Susan secured wine donation by Spill and liquor donation by Brewstillery. The Band will be Layla and accompanist piece.

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<b>Name</b>	rotation of tasks, committees and leaders
<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	1
<b>Parent Name</b>	Codes\\1 current organizational capacity\leadership
<b>Coded Text</b>	So when we're doing a box redesign starting in January. So we're just planning on every to every two years, we'll have three different like guts of the box inside and every, every two years, we're going to change it. And we'll have to redesign. So we had a committee that research different things and four of us, and then when we get to this year's event for March where I'm going to have committees and have people lead different things. I can't keep doing all of it,

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<b>Name</b>	sending boxes
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	4
<b>Parent Name</b>	Codes\\1 current organizational capacity\products and services
<b>Coded Text</b>	I don't see that she's had a lot of challenges. I feel like She is especially the last email. I said, You know, I know, she's getting more requests, even for boxes and she's like, I want to make sure my longtime partners are taken care of. So I know Organization wise those partners. I don't think is a challenge for her in the community

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<b>Name</b>	sending boxes
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	4
<b>Parent Name</b>	Codes\\1 current organizational capacity\products and services
<b>Coded Text</b>	I think that one of the biggest compliments that we can get right now is when people reach out to us and ask us for our product which is starting to happen. Hey, I heard about you through so and so and our program can use this, and you know that's really great. And I want more of that to happen. But you know I'm pleased, where we're at right now and it's been it'll be two years. Our first box delivery will be two years this coming February, so really only been doing this 18 months. We're new we've had a lot of traction without a lot of great media coverage and we've helped we've been in touch with over 4000 kids.

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<b>Name</b>	sending boxes
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	4
<b>Parent Name</b>	Codes\\1 current organizational capacity\products and services

<b>Coded Text</b>	SACB In addition to the 200 boxes that were delivered to CHS in Jacksonville, 30 boxes were delivered to the Grove which is a voluntary residential program serving adolescents ages 13 to 17 with substance abuse and/or behavioral health issues. Last year at this time we had only delivered eight boxes.
<b>Name</b>	sending boxes
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	4
<b>Parent Name</b>	Codes\\1 current organizational capacity\products and services
<b>Coded Text</b>	Susan and Mark delivered 200 boxes to the Children's Home Society (CHS) in Jacksonville a couple of weeks ago. Susan shared a photo that was taken of a cut out that two brothers at completed. Included was a letter from the director. She said the boys made it in honor of their father who had recently died. She said, "All the children all loved their boxes — this worked!"
<b>Name</b>	social media engagement
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	4
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	Of course, it was a pandemic year right we none of us did events, but I know she was in talks about doing like a five k or like so. Some a couple more like an outreach events like that I think would be helpful and also fun like Kara Kerlin Yeah so utilizing, you know, not just volunteers my interns, even in the social media aspect on because college kids, no more than we do. Right. And that's what they're on all the time and they know how to And a lot of people are going to school for it and you know you could pick up an intern first and let them run your social media pages for a while, you know, depending, and it Yeah, and it'll be Yeah, it would take a lot of time off of her because even the social media, the ones that are going to school for it. They are great with like creating the content and everything. Like always, she would have to do was kind of manage and just make sure you know nothing gets out but she doesn't want to get out. But yeah, they're awesome with doing that, you know, By utilizing they is it and all cells close by, even where her office location is at so That would be a good one too, because they have a lot of communication people there.

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<b>Name</b>	social media engagement
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	4
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	So, I mean, we have a lot of different relationships. So, for example, for our upcoming auction, I've made relationships with artists. So I make sure that I am always looking at the work that they post on Instagram and I comment and tell them I love it, or that makes me happy or things like that. So then when I reach out to them and ask them this year. They're all like I'm on board. So that's one way for artists.
<b>Name</b>	social media engagement
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	4
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	Susan reported on the Office Space and Ribbon Cutting which had 25 attendees and great social media exposure. The event helped to spread awareness about SA and Jake and Susan are work on analyzing impressions so far to plan for the future.
<b>Name</b>	social media engagement
<b>Number of Files Coded</b>	3
<b>Number of Coding References</b>	4



<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	We used the opportunity to collect addresses to build the database and included those who had attended last year's event, given for the first-time, engaged with SA on Facebook and Instagram, and those who have expressed interest
<b>Name</b>	solicitation plan
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	3
<b>Parent Name</b>	Codes\\1 current organizational capacity\resources
<b>Coded Text</b>	FUNDRAISING 2020 Our first solicit of the year will go out in the spring, then a mid-year update, and clean up solicit in the fall
<b>Name</b>	solicitation plan
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	3
<b>Parent Name</b>	Codes\\1 current organizational capacity\resources
<b>Coded Text</b>	Leslie reviewed the fall solicitation plan and we reviewed the draft letter. Peter complimented the writing and story telling that Susan drafted. The letter will be segmented into 1) past donors, 2) those who donated supplies, and 3) those who have participated but not ever given. Letter will drop the first week of September 16. The email follow-up first week of October, the event then occurs in November, and a follow-up email will go out the first week of December. Joanne suggested including In Honor Of/In Memory of Of giving which would incorporate well with year-end giving. Discussed adding IHO/IMO language on the back of the pledge card, as well as Peter's idea of putting larger levels of 50 boxes. Group discussed stewardship ideas of a thank you to IMO/IHO donor with a certificate or picture; personalizing thank-yous; and matching of kids with groups. Leslie and Susan to work on pledge card to accompany mailing and also a stewardship plan.

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<b>Name</b>	solicitation plan
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	3
<b>Parent Name</b>	Codes\\1 current organizational capacity\resources
<b>Coded Text</b>	Susan reviewed Sponsorship Solicitation Materials. Tickets included in packages; 2 tickets already for the creative sponsor (Signature Wealth). Susan already solicited all the big players in town and now needs our personal connections. Board members asked to solicit two sponsors each. Gayle asking Lake Mary Montessori; Ricky lawyer Joanne suggests: Ticonderoga in Lake Mary, Sam Flax (OMA 1st Thursday events), Sukuro, Rifle Paper Company Northwest mutual credit union; we are part of their charter now, they have Maitland office, solicit them, get volunteers TD Bank- Peter will ask about getting involved Volunteer Val Solomen will help us brainstorm and identify sponsors Two media Oviedo Winter Springs Magazine, WESH 2, Jillian and Iheart radio Art Solicitation reviewed by Susan. Kathy donating a piece, Joanne donating a piece, Joanne asked Elizabeth Nelson (name?) to donate a big piece, Joanne working on a group event where they make 10 x 10 pieces to donate, Robin Mead donated a piece too, considering coming to the event. Orlando Arts ad for event and call to artists. Joanne suggested Sam Flax for call to artists. Jake working with Jay, the unsigned artist, to do call to action to his artist network. Susan shared updated on the Giving from the Heart Wall – Marti is making hearts, Hood College alums making beeswax hearts, Peter asking Tom Mann for pewter hearts, can include items like printer, supplies, cash, \$300 to cover one month rent etc.

Susan secured wine donation by Spill and liquor donation by Brewstillery. The Band will be Layla and accompanist piece.

**Name** solid volunteer plan  
**Number of Files Coded** 1  
**Number of Coding References** 2  
**Parent Name** Codes\\2 needed capacities to facilitate expansion and growth\resources  
**Coded Text** And I think it's something that A program yeah and i i think that her opportunity to is something that someone would really jump on because it's a new Like a growing organization. So to be a part of that, you know, that would look good for them to as an intern like jumping on and helping expand and organizations growth. You know, looks good for them also. So I think that, yeah, that would be a really great way for her to get some help and support in that area.

**Name** solid volunteer plan  
**Number of Files Coded** 1  
**Number of Coding References** 2  
**Parent Name** Codes\\2 needed capacities to facilitate expansion and growth\resources  
**Coded Text** Yeah, I think it's, it's definitely that i mean they're small, right. So it was it's manageable for her but I just can see it getting a lot larger. Which is awesome. I love Susan and the work that she does. So I think that would definitely be that challenge though is. And like I said, not even hiring on staff but putting together a solid volunteer plan, it would be helpful.

**Name** tapping local personalities  
**Number of Files Coded** 1  
**Number of Coding References** 1  
**Parent Name** Codes\\1 current organizational capacity\outreach  
**Coded Text** Peter suggests considering local sports/celebrities:  
 Jake suggested Ashlyn Harris and Allie Krieger, married soccer players  
 Aaron Gordon Orlando Magic player who is a collector (challenging with agent)  
 Mark suggests McKenzie Milton- UCF quarterback  
 Peter suggested new to area folks or those who haven't selected a local charity to support

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**Name** tv exposure  
**Number of Files Coded** 1  
**Number of Coding References** 1  
**Parent Name** Codes\\1 current organizational capacity\outreach  
**Coded Text** WESH TV's Stewart Moore visited Simply Amazing offices last week and filmed a segment for Community Champion of the Week. He interviewed Susan and Kara Kerlin from local CHS. The segment will air on Thursday, February 20, and be available streaming on their website.

**Name** vision and mission  
**Number of Files Coded** 1  
**Number of Coding References** 1  
**Parent Name** Codes\\1 current organizational capacity  
**Coded Text** Mark reported on the last Community Event SA attended: Kids & Family Expo at convention center with Z88.3. Mark and Susan had an art activity table at the Z88.3 booth with hand puppets. They gathered good leads for those who want to be involved and will work on follow-up with all the ideas people suggest to decide if the organizations align with SA mission.

**Name** vision and mission  
**Number of Files Coded** 2  
**Number of Coding References** 2

<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	We have not and I think will probably do that next year. Yet we don't actually have a vision. We don't have a vision statement, we only have a mission statement, right.
<b>Name</b>	vision and mission
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth
<b>Coded Text</b>	When you talk to people. How did they know this is different from, you know, from any other you know charitable organization that's out there and just getting people to know you know what the goals are for this and how and why this is unique. And why is because, you know, once people kind of understand you know how things were set up and why you know the organization was formed, then yeah, you know, I think you can be able to grab a certain amount of people that you know that may be interested in the objectives of the organization.
<b>Name</b>	volunteerism
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	No, I mean everyone there is a volunteer and I think that everyone participates. So you know if they were paid positions. I think it might, you know, it would be different, but as volunteers. I really feel that they are assisting with the planning during our meetings and not everyone this year we were supposed to have all of these outreach events. You know what, like going to great day in the country and over, you know, but they all got canceled and I know, and everyone was asked, to attend to cover shifted each one and they would have.
<b>Name</b>	volunteerism
<b>Number of Files Coded</b>	2
<b>Number of Coding References</b>	2
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	Volunteer Opportunity – September 21, 9:30-11:30 a.m.

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<b>Name</b>	wider reach
<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	1
<b>Parent Name</b>	Codes\\2 needed capacities to facilitate expansion and growth\outreach
<b>Coded Text</b>	but like I said, then I don't know how many people actually the challenge. I guess might come from the organization being small and how many people know about it and know what it is. So I think within our circle of people talking, you know, in the nonprofit world. It's like when an organization like hers comes along. Everyone talks and so then everyone like oh they're doing this, like we want something for our kids like we're gonna sign up to, you know, that word of mouth gets around. But I think in the role of nonprofits engaging in the community in general and getting your mission out there. And what you do is always a challenge. So, I think social media plays a big part in it and it's the easiest way to kind of get more it out if it's written correctly. So I know it's a challenge. And it can be very time consuming but I find it to be most effective, especially for a small organization.
<b>Name</b>	word of mouth
<b>Number of Files Coded</b>	1
<b>Number of Coding References</b>	1
<b>Parent Name</b>	Codes\\1 current organizational capacity\outreach
<b>Coded Text</b>	

Well, I know. Susan for a while so your prior to this, and I knew her daughter as well. So, so I knew you know all the things that had gone on and how things happen and so forth and Just, you know, wanted to be supportive of her and I've also been friends with. I don't know if you know Gail on the board.

For example, yeah Gail probably one of my best friends. We've known each other for a long time and I know everything that they've been working on. And yeah, every now and then they've got, you know, something on they'll say, hey, can you know contribute sometimes financial You know, or whatever, you know, come out to the event, and so forth. And so, yeah, I've always tried to be there for both of them.

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