

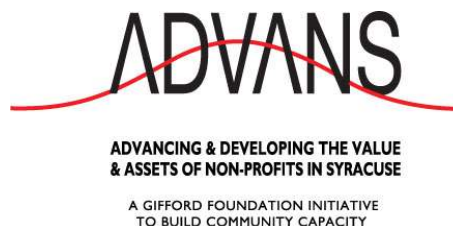
# Building Nonprofit Capacity in Central New York

The 10-year Impact of  
the Gifford Foundation's  
ADVANS Program



## Memo from the Foundation

In 2007, the Gifford Foundation created ADVANS—now our flagship program—to help nonprofit organizations better build their internal capacity. Nearly four million dollars and more than a decade later, we recognized the need to take a step back and have a neutral third party evaluate this program. Staff interviewed three evaluation firms, ultimately selecting 8 Bridges Workshop. This team was chosen to conduct this evaluation in large part due to their preexisting familiarity with the Lifecycles approach to nonprofit development as well as their experience in evaluating other capacity building programs across the country.



In December of 2018, the Gifford Foundation Board approved a staff-generated proposal to hire 8 Bridges Workshop to complete a comprehensive external program evaluation. Gifford Foundation staff member Lindsay McClung worked extensively throughout 2019 with the 8 Bridges Workshop evaluation team to facilitate the creation of the enclosed report. The completion of this report marks the first time in the Gifford Foundation's history that a program evaluation of this nature and magnitude has been conducted. It should be noted that the continuation of the ADVANS program has currently been put on hold until the results been thoroughly reviewed.





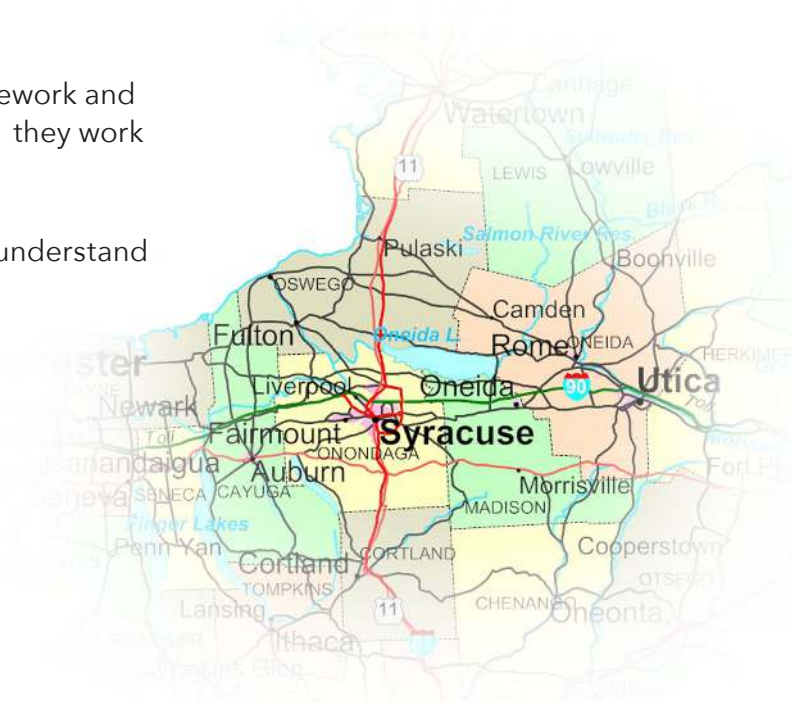
The following evaluation examines the first full decade of the ADVANS program's history, using information collected from ADVANS cohorts 1 through 5. The report offers analyses of the impact through specific participating organizations and contextualizes this information within a broader analysis of the Central New York nonprofit and philanthropic landscape. Due to the large timeline under review and the high number of participating organizations, we chose to focus on the most recent program cohorts. Participants from 11 of the 29 ADVANS organizations were interviewed directly, while participants from the remaining 18 organizations provided their responses through surveys distributed by the evaluators.

Capacity building is widely recognized as an integral part of the Gifford Foundation mission and identity. Participating in this evaluation created an opportunity to better understand the extent to which we have influenced our ADVANS participants and the Central New York community as a whole. In addition, it provided staff with the opportunity to understand the scope of our own capacity as it pertains to external program evaluation—something that is new to us. In its entirety, the report serves as a unique tool and resource in the conversation about the future of ADVANS and the Gifford Foundation itself.

## More than half of participants said that they regularly or occasionally continue to draw upon ADVANS Lifecycles learnings

### If you draw upon learnings, how?

- 40%** » Continue to use the Lifecycle framework and ADVANS tools in other orgs where they work or volunteer
- 36%** » Continue to use the framework to understand their ongoing work



## Methodology

The study's methodology was multifaceted and included document review, on-site interviews, and surveys. Gifford provided 8 Bridges with applicants' letters of inquiry, proposals, and reports; internal documents related to grant decision making and program renewal; consultant recruitment and selection documentation; consultants' training materials and their final reports; and the self-assessments and implementation plans for each ADVANS organization.

After reviewing these materials, 8 Bridges created a rubric for the evaluation process to guide the inquiry. The rubric

was built to capture the program's intended dimensions of impact and to develop shared language around ways that different levels of impact could be assessed.

Twenty-five individuals representing participants in the ADVANS program responded to the survey request. For the focus of the in-person site visits in Syracuse, Gifford selected the 11 participants in ADVANS 4 and 5. These organizations had completed the program recently enough to reflect on both the effort required and the outcomes of this work. (Survey questions are in Appendix A.)

## Rubric

DIMENSION	PROBLEMATIC	ADEQUATE	HOPED-FOR
<b>ORGANIZATIONS</b> Through ADVANS, participants built lasting capacity that has enabled them to strengthen their service to Central New York.	ADVANS's programmatic activities were a distraction we had to pursue in order to get the grant money that came with the program.	Our participation in ADVANS helped us diagnose areas of organizational capacity where we could make improvements, and through working on these our organization is stronger.	ADVANS participation resulted in significant and long-lasting capacity improvements and gave us a mindset and tools that we frequently refer to when considering opportunities and roadblocks.
<b>CONSULTANTS</b> ADVANS consultants learned new skills and approaches that they have brought to other consulting work in the region.	ADVANS forced me into a prescriptive mindset that I found constraining.	ADVANS helped organize and strengthen my thinking around capacity building and gave me new tools and connections for supporting nonprofits in our region.	ADVANS training and the connections with lead trainer Susan Stevens have significantly strengthened my skills and confidence in working to assess and advance nonprofit organizations across a range of capabilities, and have fostered stronger relationships among participating consultants.
<b>NONPROFIT SECTOR</b> Skill-building across the staff, board, and consultants involved in ADVANS has resulted in a stronger nonprofit sector in Syracuse.	No one outside the participating organizations seems to know anything about ADVANS, or it has a poor reputation in the community.	Awareness of ADVANS has influenced other funders and nonprofits in the greater Syracuse region to think more consistently about the relationship of nonprofit capacity to community service.	ADVANS' approaches and results set the standard that other funders hope to achieve when considering what role they can play in nonprofit capacity building.
<b>FOUNDATION</b> Because of ADVANS, the Gifford Foundation staff and board have developed a deeper understanding of nonprofit capacity and have brought this knowledge to other grantmaking programs.	The Gifford staff and board saw ADVANS as a side project that didn't relate to the rest of the grantmaking portfolio.	Gifford staff members share information about the effectiveness of ADVANS across the foundation, and ADVANS concepts frequently inform in-house discussions.	ADVANS has transformed the foundation's grantmaking; capacity assessment has become an essential component of staff and board grantmaking considerations. Gifford is frequently contacted for program information as others consider replication.

In September 2019, 8 Bridges' principal Sarah Lutman and collaborator Colin Hamilton met on site with each of the 11 ADVANS 4 and 5 organizations. Questions probed the learnings these organizations derived from ADVANS, asked whether the Lifecycles framework had made a lasting imprint and in what ways, and invited organizations to provide any feedback that might strengthen the ADVANS experience. Short profiles of five of these organizations are included in this report. (Site visit questions are in Appendix B.)

Lutman and Hamilton interviewed Susan Kenny Stevens, who was the ADVANS lead consultant until 2016, and Stephanie Small, who has been the lead consultant since then. They also interviewed four additional ADVANS consultants and eleven observers of the Syracuse nonprofit ecosystem representing grantmakers and civic leaders. A full list of these interviewees is included in Appendix E.

Once the review of materials, site visits, and survey results were completed and analyzed, the 8 Bridges team documented and synthesized their findings. The resulting report was reviewed by the Gifford Foundation for accuracy and completeness.

**This report is divided into two sections.**

- » The first section includes a detailed background on the ADVANS program, the Lifecycles framework on which the program is built, and the implementation of the program in Central New York.
- » The second section provides key findings from the evaluation research with details on the program's strengths and lasting impacts, as well as offers observations for shifts in the program that the foundation could consider in response to this research.

**ADVANS has had a powerful impact on its program participants. Without question, participants described ways in which seemingly modest grants—as a percentage of their operating budgets—when combined with expert consultant support, resulted in greater mission clarity, fuller organizational alignment, more confidence, and readiness to tackle obstacles and respond to opportunities.**

## Survey respondents said:

- 52% »** "ADVANS resulted in long-lasting and significant improvements in our organization's capacity to achieve our mission"
- 36% »** "ADVANS provided a helpful structure that gave us a better understanding of our current state and prepared us to take important next steps"



## History of the ADVANS Program

In 2007 the Gifford Foundation launched the ADVANS program—Advancing and Developing the Value and Assets of Nonprofits in Syracuse. This multi-year capacity-building program was designed to support nonprofits across distinct development stages by building core awareness, skills, infrastructure, and collaborative approaches that enable organizations to tackle immediate challenges and plan for the future.

A cohort-based program, ADVANS gathers regional nonprofits whose work varies in focus, sector, and budget size for shared learning and meetings. Each ADVANS organization forms a leadership team and is paired with a consultant who facilitates an organizational self-assessment, keeps the organization on track in moving toward goals, and assists the team in overcoming roadblocks. The Gifford Foundation funds group sessions for reporting out and learning, pays for consulting services

over the program's duration, and also provides grant funding to address a key organizational need or capacity-building project identified through the self-assessment process.

From its beginnings 12 years ago to the time of this writing, the Gifford Foundation has invested over \$3.9 million in ADVANS, supporting 34 organizations across four counties and engaging more than 150 individual nonprofit executives, staff, and board members. Collectively, these organizations support thousands of community members across Onondaga, Madison, Cayuga, and Oswego counties with programs that address critical services such as health care, human services, basic needs for people with disabilities, homelessness services, community centers, childcare advocacy, summer youth activities, arts, and services for people managing chronic illnesses.

## Lifecycles Program Structure

The ADVANS capacity-building approach is rooted in the Lifecycles model, which was developed by Susan Kenny Stevens, Ph.D., and detailed in her book *Nonprofit Lifecycles: Stage-Based Wisdom for Nonprofit Capacity* (2001, 2nd Edition 2008). The Lifecycles approach provides nonprofits with a framework for viewing their work within a spectrum of developmental stages: idea, start-up, growth, maturity, decline, turnaround, and (in some instances) terminal. This stage-based framework is facilitated by a consultant trained in the Lifecycles tools and approach, who helps craft interventions that are tailored to each organization's phase of development and their readiness to achieve realistic next-step goals.

Lifecycles targets four foundational components: management, governance, financial resources, and administrative systems, which in turn support an organization's ability to provide quality programs for its constituents. The Lifecycles framework provides a nonjudgmental approach that meets organizations where they are, viewing organizations as fitting within what Stevens describes as "discrete stages defined by the competencies and performance measurements associated with each stage." By tailoring activities to fit the relevant lifecycle stage, ADVANS avoids overwhelming organizations not ready for ambitious steps, or hindering those who are prepared to tackle demanding goals. In this way, Lifecycles provides a ground for stage-appropriate interventions.



Source: Nonprofit Capacity "Table Legs." (ADVANS Leadership Team Meeting Consultant PowerPoint Presentation; May 22, 2016.)

### Foundational components of Lifecycles

- » Management
- » Governance
- » Financial resources
- » Administrative systems

## Lifecycles in Syracuse

The ADVANS program begins with a cohort meeting during which organizations are introduced to the Lifecycles model; review the program goals and timeline; and develop shared understandings of Lifecycles stages, the elements of capacity, and the self-assessment process.

### Self-assessment

Subsequently, organizations in the ADVANS cohort use specific program tools to diagnose their Lifecycles stage facilitated by a trained Lifecycles consultant who then guides the remainder of the program. This process reveals whether specific elements, such as governance or finance, are out of alignment with other areas of the organization. Following initial Lifecycles review, organizations form leadership teams comprised of staff leaders and board members who work to compile materials such as organizational charts, financial data, board rosters, and program brochures to prepare for deeper self-assessments with their assigned consultant. The work proceeds over several months and delves into organizational history, values, mission and programs, market and external environment, management and staff structure, governance, financial health, facilities, and systems. The self-assessment builds toward developing a capacity improvement work plan, connected to a financial request to the Gifford Foundation.

### Implementation

Following funding approval, the implementation phase begins. This phase is marked by a mid-point reflection, which is connected to a second-year funding request. In addition to focused work with consultants, organizations within the cohort continue to meet periodically throughout the program cycle and conclude with a final group meeting during which participants share experiences and reflections.

Funded ADVANS projects have included preparation for or implementation of leadership succession, identifying sustainable revenue streams, technology upgrades, board development, and organizational branding. The variety of activities underscores the aim of the program to provide individualized support while also creating a framework that participants can return to for continued learning, assessment, and goal setting even after their involvement in ADVANS.

### Program Goals

In establishing ADVANS as a capacity-building program, the Gifford Foundation seeks to give area nonprofits support beyond funding, provide tools for strengthening their ability to define goals, and identify obstacles within their organization's structure and practice. This approach helps participants make significant strides toward addressing their immediate needs while also providing a foundation for sustained, intentional planning and management. The participating nonprofits are trained to use their skills to work nimbly and collaboratively and navigate both opportunities and challenges as they arise.

Through ADVANS, capacity building goes hand in hand with grantmaking, enabling organizations to set realistic, stage-based goals and to maximize the Foundation's investments. The Gifford Foundation has designed the ADVANS program to plant seeds in individual organizations that can be shared and applied in new settings as participating board members, consultants, and organization staff move amongst nonprofits and to other community organizations.

### ADVANS Core Program Goals:

- » Strengthen key grantee partners in support of their mission sustainability
- » Provide a tool for holistic assessment and planning tailored to each grantee's lifecycle
- » Build toward common language defining the elements of organizational health
- » Deepen local expertise in nonprofit management as a practice





## Participant Selection Process

Each ADVANS cycle begins with the Gifford Foundation identifying potential participants within the Central New York community and sending letters of invitation to apply. Initial screening of preliminary proposals results in site visits to a small number of organizations. From these, the Foundation selects ADVANS cohort members.

The program prioritizes participants that are ready to undertake the work. This means that organizations must be willing to take a hard look at their capabilities, needs, and obstacles. An organization's capacity for growth while in the program hinges on an openness to identify areas for improvement, collaboratively seek solutions to challenges, and commit to learning and continuous improvement. These endeavors can be difficult for both individuals and organizations. Readiness is key.

Over the course of six iterations, the Gifford Foundation has experimented with one-, two-, and three-year ADVANS formats. In recent years, the program has regularly taken a two-year structure, allowing time for onboarding, self-assessment, project planning, project implementation, and evaluation phases.

### Selection criteria includes:

- » Receptivity to change (including a committed leadership team)
- » The organization is thought to be in late start-up to maturity in Lifecycle phase
- » Ability to field a leadership team (ideally a combination of board and staff committed to remaining through the self-assessment and subsequent plan implementation)

### Additional factors:

- » Provides services vital to the Syracuse community
- » The cohort is distributed geographically in the region
- » The cohort represents organizations with different sized budgets
- » Lead consultant site visit to assess readiness





## LEAD CONSULTANT, 2007-2016

**Susan Kenny Stevens**, lead consultant until 2016, is a nationally recognized consultant, author, speaker, and the creator of the Lifecycles model. She authored *Nonprofit Lifecycles: Staged-Based Wisdom for Nonprofit Capacity* and founded the Nonprofit Lifecycles Institute ([nonprofitlifecycles.com](http://nonprofitlifecycles.com)), a community of nonprofits, foundations, consultants, and academics dedicated to modeling and promoting the Lifecycles approach.

Stevens led the development, launch, and leadership of the ADVANS program from its inception through July 2016. She recruited, selected, and trained consultants to deploy the Lifecycles model and paired them to work directly with ADVANS organizations; provided ongoing oversight, supervisions, and support for consultants during the program; established a firewall between participants and the Foundation so that organizations could work through roadblocks or internal concerns confidentially; and keep the Gifford Foundation apprised of the program's progress.

## LEAD CONSULTANT, 2016-2018

**Stephanie Small** is the founder of Synergy Partners Consulting and has a background as a nonprofit executive with experience in organizations of varying sectors and sizes, including growing Free Arts of Arizona from a start-up to an organization with a budget of \$1.2 million. Small began her work in ADVANS shadowing Stevens during the first year of ADVANS 5, collaboratively conducting site visits, selecting participants, and matching consultants. Small was selected as lead consultant for the ADVANS program starting with the second year of ADVANS 5 in 2016 and has since managed the full cycle of the ADVANS 6 cohort.

### Gifford Financial Investments

Since the program's inception in 2007, Gifford's \$3.9 million investment has funded program development, consultant fees, grants to organizations, and administrative costs.

ADVANS grantmaking budgets have varied over the course of program cycles and formats. For the three-year version of ADVANS 1, organizations applied for a grant of up to \$20,000 grant upon acceptance of their self-assessment, and an additional \$100,000 in funding upon the approval of their implementation plan and the submission of required reports. The one-year ADVANS 2 format provided participants with one grant of up to \$25,000. The two-year structure provided ADVANS 4 and 5 participant organizations with grants totaling up to \$45,000 and paid in two installments at timeline milestones. While the consultant fees varied slightly based on the program length and structure in the 2-year version consultants were paid \$24,500.

### OTHER CONSULTANTS

#### ADVANS 1:

Susan Burgess  
Margie Connor  
Katie Doucette  
Maria Fibiger  
Karin Franklin-King  
Kathy Hanna  
Nadia Prescott

#### ADVANS 2:

Susan Burgess  
Maria Fibiger  
Nadia Prescott  
Steve Schack

#### ADVANS 3:

Susan Burgess  
Katie Doucette  
Maria Fibiger  
Terry Flynn  
Jeff Grimshaw  
Andrea Wandersee

#### ADVANS 4:

Susan Burgess  
Katie Doucette  
Maria Fibiger  
Cynthia O'Connor  
Steve Schack

#### ADVANS 5:

Susan Burgess  
Katie Doucette  
Beth Leibrick  
Cynthia O'Connor  
Steve Schack

#### ADVANS 6:

Maria Fibiger  
Beth Leibrick  
Cynthia O'Connor  
Steve Schack  
Helen Stepowany  
Patty Weisse

## Related Gifford Foundation Activities

While the goal of the program is to serve local nonprofits, the Foundation also designed and engaged in ADVANS in order to learn about nonprofit capacity and gain experience in the field. In 2019, the Foundation launched its own self-assessment to better understand its own organizational Lifecycles stage and identify areas for improvement, learning, and growth. Having completed the self-assessment in December 2019, Gifford will move toward implementing learnings in 2020.

In 2015, the Gifford Foundation established the POWER initiative as a complement to ADVANS and in order to focus on community-based organizations that are ready to tackle ambitious projects. POWER—People & Organizations with Energy & Resilience—serves grassroots organizations in the Syracuse area. In this one-year capacity-building program, also built on the Lifecycles approach, an organization's leadership team works with a consultant on a modified organizational self-assessment and capacity-building work plan, with implementation supported by a modest grant. Through POWER, Gifford supports grassroots organizations that serve as platforms for diverse community voices and as avenues for addressing emerging challenges.

**Gifford supports grassroots organizations that serve as platforms for diverse community voices and as avenues for addressing emerging challenges.**





## The ADVANS self-assessment created a mandate to balance service expansion with internal capacity building.

According to Executive Director Wil Murtaugh, ACR Health entered ADVANS at a time of “dramatic growth.” After a 30-year focus on HIV/AIDS, the organization had recently expanded its services across a nine-county region to encompass a broader range of chronic diseases including diabetes, obesity, mental health, hepatitis C, and substance use disorders. This expansion, a response to the era of managed care, resulted in multiple years of 30 to 40 percent budget growth and the addition of 100 new positions. In addition, ACR Health was preparing for a transition of its leadership team, including the departure of its long-term executive director and financial director.

The ADVANS self-assessment created a mandate to balance service expansion with internal capacity building. “It revealed staff discontent on issues ranging

from leadership transition to lack of clear direction with our mission and vision. Having to act became an obligation,” Murtaugh observes, and he credits Susan Kenny Stevens with creating an environment in which the team could plan “without fear.” In partnership with their consultant, whom Murtaugh describes as “a supportive taskmaster,” they set to work.

ACR Health updated its mission, vision, and values. It launched a new marketing strategy anchored around a new website and brand guidelines and supported by a revamped advertising campaign. Through a deeper analysis of their business model, ACR Health recognized they had to be more efficient and enhance infrastructure at their service centers. Once corrected, this resulted in both better service and a stronger base of funding. A new leadership team

“We are more focused on mission and values. We plan better. We still have problems, but things don’t fester. Input is sought and heard, and decisions get made.”

—Wil Murtaugh

grew into their roles, and a process has begun to refresh and expand the board.

Murtaugh credits ADVANS with getting them “more focused on problem solving. We are more focused on mission and values. We plan better. We still have problems, but things don’t fester. Input is sought and heard, and decisions get made.”

At ACR Health, the Lifecycles model remains active. The organization conducts annual anonymous staff surveys and places a greater emphasis on strategic planning. The vocabulary also endures, at least among the senior team. “We still talk about the ADVANS Model and our capacity all the time,” says Murtaugh.



[acrhealth.org](http://acrhealth.org)





**ARISE was able to leverage Gifford's investment to achieve more equity and transparency in staff compensation without layoffs or financial destabilization.**



**"ADVANS actually forces you to do things and connect with people—in ways you would not do on your own. It has made a lasting difference here."**

—Tania Anderson

**ariseinc.org**

Tania Anderson had just taken the helm as CEO at ARISE Child & Family Service, Inc., when the organization began the ADVANS program in 2016. She succeeded the longtime director Tom McKeown, who, over his 14 years, had grown the organization's budget four-fold and expanded both its geographic reach and the number of people served. To advance its mission to "work with people of all abilities to create a fair and just community in which everyone can fully participate," ARISE provides education, employment, and skill-building; health and wellness services; and recreation and art activities for more than 7,000 individuals annually, and advocates for these constituents in the community and among policymakers.

The ADVANS self-assessment helped ARISE restructure both programs and administrative staff as prompted by the leadership transition. With Gifford funds, ARISE engaged a human resources specialist to work through a detailed review of positions, establish external salary comparability and benchmarks, and move the organization's personnel into a new staffing

framework. This required shifts in the compensation levels of many staff, totaling over \$500,000 in new annual expense. Through the self-assessment process and by rethinking the effectiveness of individual programs, ARISE was able to leverage Gifford's investment to achieve more equity and transparency in staff compensation without layoffs or financial destabilization. Anderson reports a stronger and more resilient organization and a more stable workforce, now made up of some 700 people.

An added benefit of the ADVANS program was the interaction among cohort participants at a time when Anderson was new in her role as CEO. "The ADVANS network is a source of strength, contact, collaboration, and friendship for me," Anderson explains. For example, she has deepened the ARISE partnership with the Everson Art Museum, worked collaboratively with both Toomey Residential and Community Services and LAUNCH through the Independent Practice Association, and developed regular check-ins with executives from other ADVANS organizations.



**CCS leadership recognized that ADVANS offered a rare opportunity to focus on structure rather than services.**

Child Care Solutions (CCS) entered ADVANS at a time when its executive director was retiring after 27 years; in-person childcare training programs, a long-time staple of programming and revenue, were being displaced by less expensive online classes; organizational debt had reached a point that constrained innovation; and external partners were pressuring CCS into work that felt off-mission. As the leadership team learned from the ADVANS self-assessment, staff morale was “mortifyingly” low. While it was a harrowing time, the leadership also recognized opportunity: ADVANS offered a rare chance “to focus on your structure rather than your services.” Their consultant, who “got in the weeds,” “pushed,” and “brought new ideas,” helped the team shape a plan of action.

“We went from being reactive to proactive,” explains Lori Schakow, executive director. CCS was able to break down internal barriers and rebuild organizational unity through a physical redesign of their primary office, the elimination of a problematic performance review process, and a refreshed mission. They launched a new marketing plan and turned a fundraising



program—which in some years operated at a deficit—into a source of flexible funds. CCS overhauled a number of outdated programs and reorganized staffing to better take advantage of skills.

“Previously, we let technology deteriorate until it became an unavoidable crisis,” Schakow says. “Now we operate with a continual improvement plan.” Similarly, CCS began to set the community’s agenda on childcare. They co-authored a major report on local needs, which led the

county executive to fund new quality improvement programs. Recognized as a thought leader, Schakow has since been included in a federal planning meeting and is now at the table with local business leaders.

To keep the ADVANS work active, CCS has formed an on-going Capacity Improvement Committee comprised of rotating staff and board members. New employees are encouraged to read Nonprofit Lifecycles and CCS’s ADVANS report.

**“Things that used to cause anxiety don’t anymore because we approach them differently. Everything in childcare is changing, but we aren’t freaking out. We feel ready.”** —Lori Schakow

[childcaresolutionsny.org](http://childcaresolutionsny.org)



## Self-assessment helped identify and prioritize building needs that were holding the museum back.



**"We have momentum. The timing was perfect for us. I was new, and the board was ready to dig in. The program becomes like a taskmaster; you have to do it. And that really helped."**

—Elizabeth Dunbar



"ADVANS helped us push the reset button," says Elizabeth Dunbar, director of the Everson Museum of Art. At the time of its ADVANS self-assessment, the museum had been running annual deficits and planned to use ADVANS resources to research and model new revenue streams and examine staff structures. Home to 11,000 works of art, including one of the largest collections of ceramics in the nation, the Everson wanted to build on its history and position as one of Central New York's leading cultural organizations. "It was a bonding experience for those participating," Dunbar says, "and this has been important to our ability to move forward."

The self-assessment process helped identify and prioritize building needs that were holding the museum back both because of the expense of maintenance and the building's design.

The iconic I. M. Pei-designed building did not support the community programs, education services, and rentals that the museum had identified as crucial to its relevance and revenue, both in terms of contributed dollars and earned income.

With the teambuilding fostered by ADVANS, the organization was ready to lay the groundwork for a capital campaign, a need identified by the self-assessment. The Everson launched a \$17 million capital campaign after ADVANS ended (the campaign is nearing completion, having raised over \$15 million), the largest campaign in the organization's history. An added benefit of the program has been the long-term relationship the Everson has formed with its ADVANS consultant.

[everson.org](https://everson.org)





**SNCC's goals were to take a comprehensive look at the organization's status and build a road map for next steps.**

One of the unexpected benefits of ADVANS, says Michael Collins, executive director of Syracuse Northeast Community Center (SNCC), was learning to “act like what we want to become.” Collins says, “We are more involved in civic policy, and we sit at a lot more tables because we were encouraged to act like we should be there, and it worked. ADVANS helped us punch above our weight.”

SNCC works to strengthen the neighborhood, offering a lively hub for meals, recreational activities, educational programs, support for seniors, and a one-stop resource for referrals and information. Attached to the largest elementary school in the district, with a community garden, and a branch of the local library system, SNCC is recognized as one of the most vibrant among neighborhood-based service providers in Syracuse.

At the time when SNCC applied for ADVANS, it had recently experienced organizational turmoil. Collins was the latest executive director after three years of two different people in that position. SNCC had also had turnover in financial management roles over the

same time period, had just named a new board president, and was operating at a deficit. SNCC's goals were to take a comprehensive look at the organization's status and build a road map for next steps.

During ADVANS, the leadership team worked to strengthen administration and governance, which included purchasing updated technology systems for client and financial tracking and reporting. SNCC also developed resources for board recruitment, orientation, and training; updated their bylaws; and invested in leadership coaching. “Funders want more information about what and how we measure our work,” Collins reflects. “ADVANS helped us sequence the many things we need to do and create a plan that still sits on my desktop. I refer to it often.”

Asked about his wish list today, Collins says, “We hope the Gifford Foundation will shine the brightest possible light on the need for strong infrastructure to achieve the community impact we all want. Because of ADVANS, our impact is more durable, and our work is more efficient.”



**“We hope the Gifford Foundation will shine the brightest possible light on the need for strong infrastructure to achieve the community impact we all want.”**

—Michael Collins

**snccsyr.org**

## KEY FINDING 1

### The ADVANS program's targeted interventions consistently generated significant and often sustained organizational change.

Although ADVANS implementation grants typically accounted for less than 1 percent of grantees' operating budgets, the investment was referred to by many participants—even years after the program itself had concluded—as “transformative.” Some participants went so far as to say, “It was the best thing to happen to this agency” and “it turned us around and allowed us to change” and “we did a 180” and, the more personal, “I wouldn’t have survived without [ADVANS].”

Those who benefited most described consistent themes and a pattern of experience that highlight the program's most essential elements.

**The Funding Matters.** The majority of participating organizations are heavily dependent on government grants, which in many cases account for 90 percent or more of their total funding. These revenue streams are tightly restricted, leaving minimal dollars for administration or organizational development. In addition, most of the participating organizations have only modest bases of individual philanthropic support relative to their overall budgets, which similarly limits flexible funding for priorities beyond core service delivery.

Given this funding dynamic, ADVANS grants represent unique opportunities for most grantees: the chance, or even obligation, to focus on internal capacity and growth. Many grantees were unequivocal in reporting that without this dedicated source of funds, it was unlikely that organizational leaders at either the staff or board level would prioritize investments of time or other resources into capacity-building elements like planning, financial and technology systems, team building, succession

planning, or marketing. Many recognized that their long-term neglect of these elements had shifted from missed opportunities to genuine operational threats.

**Self-Assessments Clarify and Propel.** While most, if not all, of the grantees had used occasional strategic planning processes, the ADVANS self-assessment clearly generated a different—and powerful—vision of organizational health, threats, and priorities. As such, the ADVANS self-assessment process proved to be a reliable catalyst for new thinking and action.

Participants reported several aspects of the self-assessment as critical. The inclusive input process allowed anonymous feedback from staff across an organization, staff that often had different views from sometimes isolated leadership teams. Some leadership teams learned that staff morale was lower than they had perceived, or that long-standing and valued programs had diminished in quality or relevance, or that organizations had drifted from or lost sight of mission. The Lifecycles model itself, with its emphasis on stages and cycles rather than a reductive “good/bad” binary, allowed critical feedback to be heard with minimal judgment or blame. Many participants described the self-assessments as surprising in their honesty and revelatory in substance.

In case after case, the self-assessments helped prioritize and sequence action. The Lifecycles consulting provided by each organization's consultant helped organizations internalize that they do not—and cannot—be everything for all people and that it is appropriate to put some challenges aside and focus on what matters most. Many also credited Susan Kenny Stevens for inspiring a kind of fearlessness in participants, who often experienced a surging confidence in their capacity to grow and change.



## KEY FINDING 1

**Consultants Drive Action.** “It’s an incredible amount of work” was a common refrain, and even after the self-assessment helped identify and prioritize areas of capacity building, most leadership teams would have struggled to remain focused on the work without a partner to guide the process. In this sense, the role of the primary consultants is less centered on skill development and transfer than on executive coaching, mentoring, and even herding. A number of participants said the consultants “forced” them to get the work done, and they said it with gratitude. Participants frequently expressed a sense that they were well matched with their consultants. In a few cases, participants developed on-going relationships with consultants, though more often the relationships concluded with the end of project funding.

**Program Responds to Organizational Needs.** While the initial steps of ADVANS are consistent across participants, the work post-assessment varied significantly among organizations and was adaptable to their distinct stages, cycles, and needs.

Most organizations report being in stronger positions after the program, and this claim is generally reflected in their financial reporting. A number of organizations significantly increased their budgets and established or deepened their reserves.

Beyond balance sheets, many participants also described achieving a greater degree of internal unity and shared priorities among senior teams, the organizational staff, and boards of directors. This resulted from organizations being more intentional in articulating both mission and priorities, and more inclusive in solicitation of feedback throughout the organization, beyond existing leadership silos.

### Most valuable aspects of ADVANS

- 68%** » Conducting a facilitated in-depth organizational self-assessment
- 60%** » Receiving grant funding to tackle organizational capacity
- 40%** » Planning for multi-year organizational development
- 40%** » Working with an experienced ADVANS consultant

**Building Capacity Can Anchor Culture that Enables Change.** While the ADVANS program identified specific, tangible work priorities for all participating organizations, the most enthusiastic participants described the real outcome as something deeper: an enduring mindset and language that have helped organizations remain more flexible and adaptive to change.

This enhanced capacity for change resulted in more consistent planning, better unified organizations and leadership teams, clarity of mission, an ability to turn down less relevant or appropriate opportunities, and simple confidence. Many credited Susan Kenny Stevens and the consultant cohort with helping them believe they can achieve outcomes that previously felt beyond their reach.

**The range of work undertaken by participating organizations varied across the cycles and included the following.**

- » Succession planning and implementation, with many organizations transitioning from leaders with 15- to 20-year tenures to integrating new executives
- » Board restructuring, redesign, and revitalization
- » Revisiting and refreshing missions, visions, and values
- » Team building and organizational unity
- » Overhauling development and fundraising programs
- » Reinvestment in technology and financial systems
- » Review and realignment of existing programs
- » Organizational planning around flexible revenue and financial reserves



## KEY FINDING 2

### ADVANS has had mixed success elevating nonprofit capacity building as a concept and priority in Central New York.

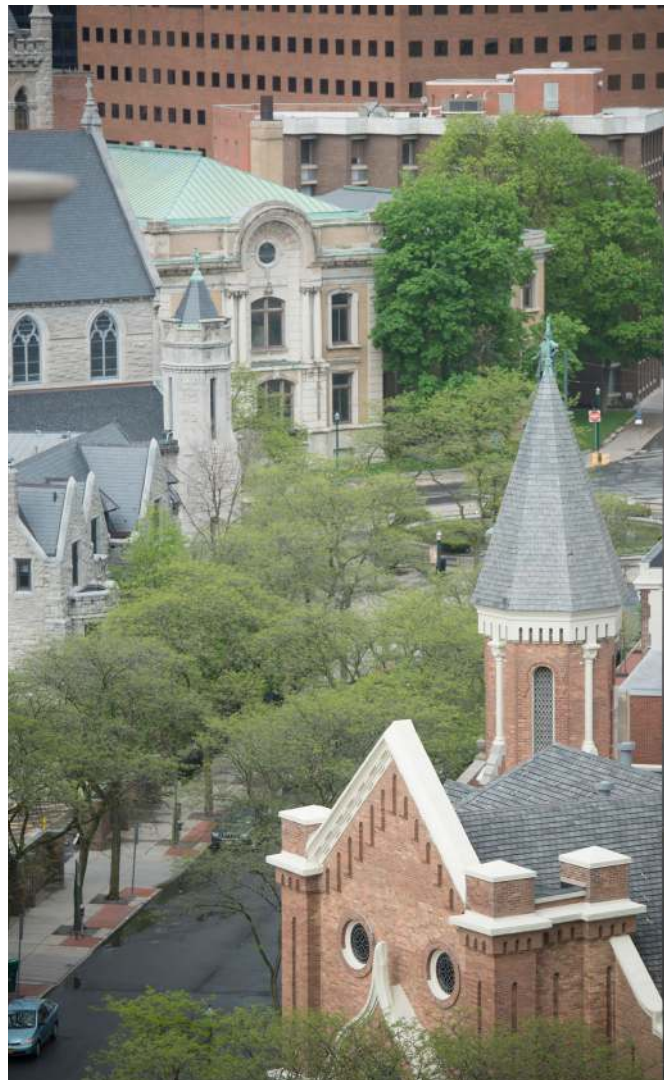
In addition to strengthening participating organizations and, through those organizations, serving a substantial cross section of the Central New York community, the ADVANS program also aims to instill a greater appreciation and urgency for paying attention to the organizational health and capacity of nonprofits across the region. The Gifford Foundation aspires to more fully integrate capacity-building programs and mindsets into a wide range of the region's organizations and funding programs. The results at this level are more mixed and more difficult to specify than the clearly favorable results at the organizational level.

The broadest transference of ADVANS language and concepts has occurred through the consultants themselves. Many have integrated the Lifecycles framework into their consulting practices and shared its principles beyond the ADVANS cohort. Collectively, the ADVANS consultants serve a network of organizations that far exceeds those that have or will participate directly in ADVANS.

#### Many board members have brought elements of the Lifecycles model to other organizations in which they participate.

Also significant, many board members, and especially those most actively involved in the ADVANS working committees, have brought elements of the Lifecycles model to other organizations in which they participate. In a few cases, this has generated a push from those organizations to be considered as ADVANS invitees, but even when that has not occurred, board members have helped circulate capacity-building principles into planning discussions.

While ADVANS and the Lifecycles model are now recognized, understood, and appreciated by other institutional partners in the region, and although there are examples of other funders joining with Gifford in select cases, interviewees reflected that ADVANS has generally not influenced other grant makers in significant or identifiable ways. One challenge may be that "capacity building" has become so strongly identified with the Gifford Foundation that the region's funders seek other opportunities to distinguish and differentiate themselves. Alternatively, while ADVANS may not have drawn in a cohort of funders, it has set Gifford apart and solidified a distinct position for the foundation within the Central New York philanthropic community.



### KEY FINDING 3

## Recognizable factors diminished the benefits of ADVANS for some participants.

While many groups greatly benefited from ADVANS, there were others for which it generated more mixed or modest results. In these cases, some combination of the following conditions was typically at play.

- » External threats
- » Lack of buy-in
- » Timing of participation
- » Poor match
- » Turnover
- » Existing capacity
- » Disconnect

- » A few organizations were so consumed by existential external threats that they were unable to prioritize internal capacity.
- » A lack of buy-in from the executive director, the board of directors, or others in the organization who felt they couldn't turn away the funding or an opportunity to work with the Gifford Foundation but were not prepared to initiate deep organizational change.
- » Timing of participation, particularly around leadership transitions. Some of the ADVANS program's interventions might occur too early in a succession process, which can result in focusing expectations on a leader who may be change resistant or simply less interested in "what's next" and thereby missing the opportunity to support a willing executive. At the same time, newly installed leaders are often overwhelmed by organizational demands and can struggle to fully invest in capacity building that early in their tenure.
- » A poor match between organization and consultant can disrupt one of the essential components of the program and, at least in a few cases, lessened the organization's ability to deliver on the envisioned priorities.
- » Turnover—of organizational leaders at both staff and board level—can dissipate Lifecycles learning before key principles are ingrained in organizational practices.
- » Higher degrees of existing capacity resulted in ADVANS insights that were less powerful or self-assessments that didn't generate a mandate and direction for change.
- » An organization felt disconnected from the cohort as a whole, which led to passive rather than engaged participation.



A handful of themes were identified as opportunities to revise or update the ADVANS program model in ways that best align with the evolving needs of the Central New York nonprofit community.

- » Rethink the cohort model
- » Provide more direction to groups transitioning out of ADVANS and help reinforce Lifecycles principles over time
- » Consider balancing the intense internal focus of ADVANS with a more rigorous external scan
- » Open the application process
- » Update ADVANS's vision of organizational capacity to include an explicit emphasis on diversity, equity, and inclusion (DEI)



**Rethink the cohort model.** While there are some enthusiasts for it, a number of participants questioned the value of the cohort model. Although participants recognized cohort meetings as an opportunity to both network and share learnings, those things seem to only have been modestly or sporadically achieved. In a highly demanding, time-intensive process, the cohort meetings were underrealized, in part because of the emphasis on reporting and presentation rather than mutual engagement.

**Provide more direction to groups transitioning out of ADVANS and help reinforce Lifecycles principles over time.** The initial stages of ADVANS had a powerful ability to set a course of action, but some participants regretted there wasn't an equally defined exit plan, continued access to consultants (e.g. funding of), and/or ongoing support and engagement in subsequent years. While in many cases the program's values and principles persisted, the organizations themselves continued to change,

including turnover of staff and board. Some of the most enthusiastic respondents were also those appealing for greater follow-up and opportunities to refresh learning. Although Gifford has experimented with follow-up meetings, some participants seemed either unaware of these efforts or considered them less substantive than what they believed they need.

**Consider balancing the intense internal focus of ADVANS with a more rigorous external scan.** While the self-assessments proved to be a powerful tool for elevating areas of concern within an organization, some questioned whether these elements needed to be balanced with a more rigorous environmental review that focuses on external threats and opportunities. Given the number of participating organizations struggling to adapt to changing health care structures, for instance, it is worth considering how the program's priorities might shift with a more balanced internal and external assessment.



## KEY FINDING 4

**Open the application process.** The challenge of identifying the right organizations at the right time is faced by the Gifford staff, and it appears that most of the time they select organizations that will benefit from the ADVANS experience. There was, however, an undercurrent of feedback that questioned whether the opportunity to participate—something that is highly valued within the nonprofit community—should be made available to more groups through an open application process, which could expand the program’s reach beyond Gifford’s existing network and overcome an occasional perception that program access is based on “who you know.”

**Update ADVANS’s vision of organizational capacity to include an explicit emphasis on diversity, equity, and inclusion (DEI).** Since ADVANS was launched in 2007, much of the nonprofit world has evolved to recognize that an organization’s ability to fully embrace the breadth of a community’s talent is central to its ability to evolve, adapt to new ideas, and best serve the public. Although in some

cases the self-assessment process identified needs around diversity, equity, and inclusion, the structure of that process is less explicit on this core element of organizational dynamics than some observers expected or felt was necessary. In addition, some observers questioned whether the closed application process created a barrier to participation for organizations led by people of color. These appear to be significant missed opportunities. The Gifford Foundation could use ADVANS to focus on DEI as values and practices that prepare organizations to thrive in our times, just as it has helped many organizations deepen their sophistication around planning, succession, and governance. For that to consistently occur, however, some of the core tools of the Lifecycles model—the table leg model, the self-assessment—will need to be refreshed to more openly address DEI as a structural element of organizational capacity.



## APPENDIX A | ADVANS Organizations

ADVANS	Organization	Location	Mission / Work
1 (3-year)	Arc of Onondaga	Syracuse	Since 1951, Arc of Onondaga has assisted individuals with developmental disabilities achieve their fullest potential. Across nearly 40 sites throughout Central New York, Arc offers services that include residential, day, employment, clinical, and recreation programs.
1 (3-year)	Baltimore Woods Nature Center	Marcellus	Baltimore Woods Nature Center fosters environmental stewardship by offering immersive programs for visitors to cultivate appreciation for and personal connections with nature through environmental education, recreation, play, and research. In addition to on-site teaching and interactive programs, Baltimore Woods brings programs to urban, suburban, and rural communities in Central New York.
1 (3-year)	Huntington Family Centers	Syracuse	Rooted in the “settlement house” tradition, since 1919, HFC has been dedicated to the dignity and self worth of all individuals and committed to enhancing the lives of families and children for the future of the Syracuse community. The organization runs Pre-K, Youth, and Teen Programs, as well as family and senior services.
1 (3-year)	LiteracyCNY (formerly Literacy Volunteers of Greater Syracuse)	Syracuse	LiteracyCNY provides Basic Literacy and ESOL tutoring for adults. Since its founding in 1962, the organization has stressed learner-centered instruction and currently provides one-on-one tutoring and small group classroom instruction to more than 500 adults in the Syracuse community each year.
1 (3-year)	Spanish Action Ligue/La Liga	Syracuse	La Liga creates opportunities, economic development, and education, striving to support a diverse community facing a variety of barriers, including language barriers. Programs focus on careers, housing, domestic violence, family support, youth development, radio, and language services.
1 (1-year)	Cazenovia Area Community Development Association	Cazenovia	CACDA was formed to assist local organizations, governments and residents to accomplish goals through: consensus building, planning, cooperative efforts, networking, locating funding sources, grant writing, project implementation, and programs that educate the public on environmental and quality of life concerns.
1 (1-year)	Dunbar Center	Syracuse	Inspired by the settlement house movement and launched 1918, the Dunbar Center works to enhance quality of life, break cycles of generational poverty, and develop racial equality in the Syracuse community. In addition to after school and summer programs for youth and teens, the center provides services to seniors in the areas of healthcare, transportation, housing, food stamps, and more.
1 (1-year)	Hiscock Legal Aid Society	Syracuse	Hiscock Legal Aid Society was founded in 1949 to provide free legal assistance to low income residents of Onondaga County. Beginning in 2004, the organization began to provide complete legal representation to adults in Family Court cases and parole revocation and extradition defense, as well as serving as a major legal advocate for domestic violence victims in Onondaga County.
1 (1-year)	Redhouse Arts Center	Syracuse	Redhouse is a multi-arts organization dedicated to the production and presentation of interdisciplinary works, theatre, music, and visual art. Additionally, the organization is a regional provider of community based arts education, with an emphasis on arts experiences for youth at risk and individuals with disabilities.

## APPENDIX A | ADVANS Organizations (continued)

ADVANS	Organization	Location	Mission/Work
2 (1-year) & 3 (3-year)	Cooperative Federal Union	Syracuse	A combination of a traditional credit union and a non-profit community development organization, Cooperative Federal works to rebuild the local economy in ways that foster justice, serve people and communities that are under-served by conventional financial institutions, and responsibly manage members' assets.
2 (1-year)	Farnham Family Services	Fulton and Oswego	Farnham endeavors to free families and communities from the destructive grip of drug and alcohol addiction, offering solutions to problems created by substance abuse through comprehensive treatment and prevention programs.
2 (1-year)	Matilda Joslyn Gage Foundation	Fayetteville	The Matilda Joslyn Gage Foundation is dedicated to celebrating and promoting Gage's legacy as a vitally important suffragist. At its house museum, rooms are dedicated to Gage's social justice work, including women's rights, Native American justice, religious freedom, the underground railroad, and local history. The foundation also runs a research library and serves as an educational resource for discussion and dialogue on human rights.
2 (1-year)	Sage Upstate	Syracuse	Sage Upstate promotes the health and well being of lesbian, gay, bisexual, transgender, and questioning people in Central New York as they age. Serving Cayuga, Cortland, Jefferson, Madison, Oneida, Onondaga, and Oswego counties, the organization provides health and wellness programming, support groups, social activities, and education for health care providers.
3 (3-year)	Community ACTION Partnership of Madison County	Canastota and Morrisville	Established in 1986, CAP works for and with low- and moderate-income families in Madison County to provide education, guidance, and resources for individuals and families striving for economic self-sufficiency. Programs include school readiness, mentorship, supplemental nutrition (WIC), and home visits for expectant parents, new parents, and caregivers.
3 (3-year)	Home Headquarters	Syracuse	Both a housing and community development organization and a certified Community Development Financial Institution, Home Headquarters provides low-interest home improvement loans and grants, first mortgage financing and closing cost assistance, homeowner education and counseling, foreclosure prevention, and real estate property development throughout Central New York.
3 (3-year)	InterFaith Works	Syracuse	Founded in 1976, InterFaith Works builds bridges of understanding among people of different religions and across racial divides through education, service, and dialogue. The agency works to create relationships and understanding, in addition to social service programs that address the needs of people who are vulnerable, low-income, targets of oppression, and refugees.
3 (3-year)	Samaritan Center	Syracuse	The Samaritan Center is an interfaith effort committed to serving the hungry and those in need since 1981. The center promotes welfare, dignity, and self-sufficiency, while serving hot meals 365 days a year, more than 124,000 meals annually.
3 (1-year)	McMahon Ryan Child Advocacy Center	Syracuse	Dedicated to ending child abuse in the Syracuse community, the center focuses on prevention, intervention, and education. The multidisciplinary team provides youth education programs; victim support services; medical evaluations; advocacy support; and child abuse prevention training for businesses, organizations, and individuals.

## APPENDIX A | ADVANS Organizations (continued)

ADVANS	Organization	Location	Mission/Work
4 (2-year)	ACR Health (formerly known as AIDS Community Resources)	Canton, Syracuse, Utica, and Watertown	ACR Health provides an array of support services for individuals affected by a wide range of chronic diseases. Programs focus areas include HIV/AIDS; assistance with health insurance decisions; syringe exchange and a Drug User Health Hub; sexual health services, youth to adults; and Q Center, a safe space for LGBTQ youth.
4 (2-year)	Child Care Solutions	Auburn and Syracuse	CCS educates, advocates for, and supports families and early childhood professionals, with a mission to build excellence in early care and learning systems and advance equal access for all children in the community. CCS began as a grassroots campaign in 1975, later expanding to oversee state-registered child care programs, moving to a new facility and renaming itself Child Care Solutions in 2004.
4 (2-year)	E. John Gavras Center	Auburn	Founded in 1953 as a clinic within the Auburn Memorial Hospital, today the Gavras Center serves consumers and families with developmental disabilities. The mission of the organization is to provide the highest quality habilitative and therapeutic services in Cayuga and Onondaga counties to help children, families, and individuals grow as independent, healthy, and productive citizens. The Center's participation in ADVANS was sponsored by the Allyn Family Foundation.
4 (2-year)	Onondaga Community Living	Syracuse	Formed in 1987, OCL provides individualized support to persons with developmental disabilities to live, work, and socialize safely in the community. The organization serves youth and young to older adults across Onondaga, Oswego, and parts of Cayuga, Cortland, and Madison counties.
4 (2-year)	Oswego County Opportunities	Fulton	Incorporated in 1966 as part of the Economic Opportunity Program, OCO was formed to address poverty issues and was reformed in 1971 as a broader human services organization. Today OCO serves 30,000 people per year through more than 50 programs including educational services; assistance for the homeless; meals for elderly, homeless, and youth; health care; mental illness services; housing for the disabled; safety for the abused; and transportation.
4 (2-year)	Syracuse Community Connections (formerly Syracuse Model Neighborhood Facility)	Syracuse	Recently renamed Syracuse Community Connections (SCC), SMNF was established in 1975 as a human services organization to serve African American and low-income residents in the Syracuse area. In addition to providing health, youth and family, and community services, the site houses a public library, parks and recreation facilities, a food pantry, a satellite of the Syracuse Police Station, and the local credit union Syracuse Cooperative Federal Credit Union.
5 (2-year)	ARISE	Auburn, Chittenango, Fulton, Oneida, Oswego, and Syracuse	The mission of ARISE is to work with people of all abilities to create a fair and just community in which everyone can fully participate. As a non-residential Independent Living Center, the organization promotes the inclusion of people with disabilities in the community, and more than half of the staff and board of directors are people who have a disability.
5 (2-year)	Everson Museum of Art	Syracuse	The Everson Museum of Art opened in 1968 but dates back to 1897 when the Syracuse Museum of Fine Arts was founded. In 1911, the museum dedicated itself to collecting American art, becoming the first museum to do so, and today it is home to 11,000 works of art, including one of the nation's largest collections of ceramics.



## APPENDIX A | ADVANS Organizations (continued)

ADVANS	Organization	Location	Mission/Work
5 (2-year)	LAUNCH (formerly Learning Disabilities Association of Central New York)	East Syracuse and Syracuse	LAUNCH was formed in 1985 and provides educational services to help children with learning disabilities at various stages. Programs include educational consulting, summer programs, ADHD support, and custodial training.
5 (2-year)	Syracuse Northeast Community Center	Syracuse	SNCC was founded in 1978 to address community issues of poverty, crime, poor housing, alcohol and drug use and abuse, domestic violence, teen pregnancy, and other concerns. The mission of the center is to improve the quality of life for area residents and promote neighborhood stability.
5 (2-year)	Toomey Residential & Community Services	Syracuse	Founded in 1990, Toomey provides developmental disabilities services, behavioral health and care management services, and foster care services. The organization's mission is to help individuals achieve their highest level of capability and increase opportunities for their future success.
6 (2-year)	AccessCNY	Syracuse	AccessCNY provides services to over 3,000 individuals in five primary areas: programs for individuals with developmental disabilities or acquired brain injuries, services for those with mental health issues, clinical services for those with disabilities, preschool education, and Consumer Directed Homecare. AccessCNY was established in 2015 by merging Enable and Transitional Living Services.
6 (2-year)	Center for Community Alternatives	New York City, Rochester, and Syracuse	CCA promotes reintegrative justice and a reduced reliance on incarceration through advocacy, services, and public policy development in pursuit of civil and human rights.
6 (2-year)	Child Advocacy Center of Oswego	Fulton and Pulaski	The CAC provides a safe, child-friendly environment that supports a timely, multi-disciplinary response to child sexual abuse and physical abuse and trauma while promoting healing for victims and their families. By gathering agencies and services into one setting, the organization minimizes unnecessary interviews, reducing the discomfort of discussing abuse.
6 (2-year)	Clear Path for Veterans	Chittenango	Clear Path serves as a hub for information, programs, and resources for Veterans, Guard, Reserves, and their families. Resting on 76 rural acres, Clear Path offers military members and their families a home for wellness, mutual respect, and understanding, centrally located in both Madison and Onondaga counties.
6 (2-year)	Volunteer Lawyers Project on Onondaga County	Syracuse	A nonprofit legal aid organization, the Volunteer Lawyers Project of Onondaga County provides equal access to justice to those in need through offering free legal information, assistance, and representation in civil legal matters to low-income people. Volunteer attorneys provide services, assisted by law students and staff.

## APPENDIX B | Survey questions, ADVANS groups 1–3

### 1. Please describe your involvement with ADVANS:

- ☐ I was the Executive Director when my organization went through ADVANS
- ☐ I am the current Executive Director, but was not at the organization when it participated in ADVANS
- ☐ I was a staff member, not the E.D., on my organization's ADVANS Leadership Team
- ☐ I am a board member of an organization that participated in ADVANS
- ☐ I was a board member of an organization in ADVANS but no longer serve on the board
- ☐ I do not remember
- ☐ Other: \_\_\_\_\_

### 2. Thinking back on the experience, how valuable was ADVANS to your organization?

- ☐ ADVANS was a distraction from what we needed to be learning about / improving as an organization
- ☐ ADVANS was generally useful, but the results were modest
- ☐ ADVANS provided a helpful structure that gave us a better understanding of our current state and prepared us to take important next steps
- ☐ ADVANS resulted in long-lasting and significant improvements in our organization's capacity to achieve our mission

### 3. The ADVANS program design included multiple elements. Which were most valuable for your organization? (Please select your top three.)

- ☐ Gaining new language and a framework that helped clarify our organization's place on the life cycle continuum
- ☐ Conducting a facilitated in-depth organizational self-assessment
- ☐ Working with an experienced ADVANS consultant
- ☐ Networking with and learning from peer organizations in our ADVANS cohort
- ☐ Building a shared understanding of organizational needs and priorities
- ☐ Planning for multi-year organizational development
- ☐ Receiving grant funding to tackle organizational capacity
- ☐ Other \_\_\_\_\_

### 4. How often does your organization continue to draw upon ADVANS / Lifecycles learnings?

- ☐ Never
- ☐ Rarely
- ☐ Occasionally
- ☐ Regularly
- ☐ I am no longer involved in the organization.

### 5. If you continue to draw upon the ADVANS experience, which elements remain the most valuable at this time?

- ☐ Using the framework to understand our on-going work
- ☐ Continued work with the consultant
- ☐ Continued networking with / learning from cohort members
- ☐ Continued emphasis on capacity building
- ☐ Continue relationship with Gifford Foundation
- ☐ Using the lifecycle framework and ADVANS tools in other organizations where I work or volunteer

### 6. If there is anything that you would like us to know, please use this space to share thoughts, questions, suggestions, etc.

APPENDIX C | Site visit questions, ADVANS groups 4 and 5

1. What was your organization’s status when it joined ADVANS and what were your goals for the program?  
[Note: I am attaching the executive summary of your original assessment.]

2. Did the ADVANS program help your organization achieve its desired goals, and specifically, which aspects of the program proved to be very helpful, somewhat helpful or not particularly helpful? Please be as specific as possible.

3. How would you describe your financial health pre- and post-ADVANS, and what financial indicators are you most focused on?

4. What, if any, unexpected results occurred as a result of the program?

5. In the time that has passed since the end of the ADVANS program, how has the organization continued to use the professional skills and organizational capacity developed through ADVANS to diagnose and address challenges? To what extent, if any, have the ADVANS skills been passed on to new staff and board members?
6. In the time that has passed since the end of the ADVANS program, have the desired outcomes been maintained? What, if any, further interventions have been required to maintain and/or build upon earlier progress? How, if at all, did the ADVANS training prepare the organization for either on-going capacity building work or the management of new challenges?

7. How did the cohort model influence the experience? What, if any, relationship and/or partnerships have you maintained with your fellow participants?

8. In what form, if any, have you continued to engage with your ADVANS consultant?

9. With your current perspective, how would you describe the overall value of ADVANS and how would you recommend modifying it for future cohorts?

10. Is there anything we haven’t discussed that is on your mind that you would like to tell us about the ADVANS program experience?

APPENDIX D | Individuals Interviewed

In addition to leadership from all participating organizations in ADVANS 4 and 5, 8 Bridges interviewed the following individuals:

Susan Burgess	Lindsay McClung
Katie Doucette	Cynthia O’Connor
Nancy Kern Eaton	Stephanie Pasquale
Maria Fibiger	Frank Ridzi
Lisa Fasolo Frishman	Stephanie Small
Heidi Holtz	Sheena Solomon
Tony Malavenda	Susan Kenny Stevens
Mike Melara	Kara Williams
Sarah Merrick	

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