



NONPROFIT CAPACITY ASSESSMENT

Many Indiana nonprofits find themselves in need of CAPACITY BUILDING and TECHNICAL ASSISTANCE to respond to the challenges and opportunities facing them. However, because the meanings of these concepts vary widely, grantmakers find it difficult to develop grant opportunities that effectively meet the needs of nonprofits.

To develop a common understanding of CAPACITY BUILDING and TECHNICAL ASSISTANCE, the **Indiana Grantmakers Alliance** (a membership association of grantmaking executives, staff and board members that seeks to promote legal, ethical, efficient and effective grantmaking) is partnering with the **Indiana University School of Public and Environmental Affairs** (in collaboration with **IU Center on Philanthropy** and **Lumina Foundation for Education**) to develop a firmer grasp of the underlying dimensions and nuances of these key terms.

We ask for **your help** in this effort by completing the following NONPROFIT CAPACITY ASSESSMENT survey addressed at a select sample of Indiana nonprofits. Most respondents will be able to complete the survey in **less than 20 minutes** and all questions focus only on your organization.

Your participation will **aid Indiana grantmakers** in developing a framework for appropriate grantmaking strategies. It **will benefit** you and other **Indiana nonprofits** by insuring that grantmakers have solid information about the capacity building challenges Indiana nonprofits face and about the utility of key strategies for addressing these challenges.

All responses will be kept in strictest confidentiality. The IU School of Public and Environmental Affairs has sole responsibility for the survey and in no case will anyone at either Indiana Grantmakers Alliance or Lumina Foundation for Education have access to the responses or raw data, nor will any survey respondent ever be identified by name.

As a **special incentive** to complete the survey, we will select at random two respondents to receive a free associate membership with Indiana Grantmakers Alliance (\$80 value each, which you may decline without us informing Alliance of your decision). To make sure you are notified if your organization's name is selected, please verify that we have the correct name and contact information of your organization (these are the last questions on the survey). We will also send a summary of our findings to all respondents who request it.

Your **timely response** to this survey is greatly appreciated! Your participation, thoroughness, and comments are very important if we are to develop a common understanding of how Indiana nonprofits define capacity building and technical assistance. To achieve this goal, we will contact non-respondents to encourage them to respond or to offer our assistance in that process.

For questions about the survey please contact:

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NOTES: This survey is targeted at Indiana public charities and other nonprofit organizations.

Check here if your organization is not an Indiana nonprofit or charity. [If checked, survey terminated]

Please complete all information for your ENTIRE organization, even if the mailing refers to only one of your programs.

Check here if this is a duplicate copy of a survey you have already completed. [If checked, survey terminated]

SECTION I: Many Indiana charities are seeking support for capacity building and/or technical assistance. The following questions will help us to understand how organizations define these terms and how important these challenges are.

Q1 To what extent do the following OPERATIONS and GOVERNANCE activities currently pose a challenge for your organization in fulfilling its mission? Please select ONE response per line.

<i>Operations and Governance</i>	<i>N/A</i>	<i>Not a Challenge</i>	<i>A minor Challenge</i>	<i>A major Challenge</i>
Undertaking strategic planning for your organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving management skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Managing or improving board/staff relations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Establishing organizational culture ¹	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training and/or developing your board	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Performing routine tasks indirectly related to mission	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Managing the facilities or space your organization uses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q1A If you selected “minor” or “major” challenge for any of the items in the previous question (Q1), how helpful would each of these types of assistance to better fulfill your organization’s mission through improved OPERATIONS and GOVERNANCE?

	<i>Don't know</i>	<i>Not helpful</i>	<i>Some-what helpful</i>	<i>Very helpful</i>	
<i>Funding</i>	Multi-year funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	General overhead funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Small grant for operations and governance issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Challenge grants for this specific element	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Low-cost loans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Technical Assistance</i>	Loaned executive to assist with operations/governance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Student intern to assist with operations/governance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Outside consultant for operations/governance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Workshops and other off-site training programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Peer Learning</i>	Joint operation and/or governance with other orgs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Opportunities to interact with and learn from peers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

¹ Such as team work, conflict resolution, etc

Q2 To what extent do the following HUMAN RESOURCE activities currently pose a challenge for your organization in fulfilling its mission? Please select ONE response per line.

<i>Human Resources</i>	<i>N/A</i>	<i>Not a Challenge</i>	<i>A minor Challenge</i>	<i>A major Challenge</i>
Managing human resources (staff and volunteers)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recruiting/keeping qualified staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recruiting/keeping qualified and reliable volunteers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Volunteer training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recruiting/keeping effective board members	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q2A If you selected “minor” or “major” challenge for any of the items in the previous question (Q2), how helpful would each of these types of assistance be to better fulfill your organization’s mission through improved HUMAN RESOURCES?

		<i>Don't know</i>	<i>Not helpful</i>	<i>Some-what helpful</i>	<i>Very helpful</i>
		<i>N/A</i>			
<i>Funding</i>	Multi-year funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	General overhead funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Small grant for human resource issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Challenge grants for this specific element	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Low-cost loans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Technical Assistance</i>	Loaned executive to assist with human resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Student intern to assist with human resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Outside consultant for human resource management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Workshops and other off-site training programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Peer Learning</i>	Joint operation and/or governance with other orgs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Opportunities to interact with and learn from peers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q3 To what extent do the following PROGRAMS and PLANNING activities currently pose a challenge for your organization in fulfilling its mission? Please select ONE response per line.

<i>Programs and Planning</i>	<i>N/A</i>	<i>Not a Challenge</i>	<i>A minor Challenge</i>	<i>A major Challenge</i>
Focusing on the mission and vision	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delivering high quality programs/services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessing community needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attracting new members/clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Evaluating or assessing program outcomes or impact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q3A If you selected “minor” or “major” challenge for any of the items in the previous question (Q3), how helpful would each of these types of assistance be to better fulfill your organization’s mission through improved PROGRAMS and PLANNING?

		<i>Don't know</i> <i>N/A</i>	<i>Not helpful</i>	<i>Some-what helpful</i>	<i>Very helpful</i>
<i>Funding</i>	Multi-year funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	General overhead funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Small grant for program and planning issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Challenge grants for this specific element	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Low-cost loans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Technical Assistance</i>	Loaned executive to assist with programs and planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Student intern to assist with programs and planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Outside consultant to help with programs and planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Workshops and other off-site training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Peer Learning</i>	Joint program delivery or planning with other orgs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Opportunities to interact with and learn from peers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q4 To what extent do the following MARKETING activities currently pose a challenge for your organization in fulfilling its mission? Please select ONE response per line.

<i>Marketing</i>	<i>N/A</i>	<i>Not a Challenge</i>	<i>A minor Challenge</i>	<i>A major Challenge</i>
Defining our constituency groups	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meeting the needs/interests of current members/clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accessing research or information on programs/services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Developing targeted communications to community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adjusting programs/services to meet changing needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communicating with members/clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enhancing the visibility/reputation of your organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q4A If you selected “minor” or “major” challenge for any of the items in the previous question (Q4), how helpful would each of these types of assistance be to better fulfill your organization’s mission through improved MARKETING?

		<i>Don't know</i> <i>N/A</i>	<i>Not helpful</i>	<i>Some-what helpful</i>	<i>Very helpful</i>
Funding	Multi-year funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	General overhead funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Small grant for marketing issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Challenge grants for marketing needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Low-cost loans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technical Assistance	Loaned executive to assist with marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Student intern to assist with marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Outside consultant to help with marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Workshops and other off-site training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

(continued from previous page)		<i>Don't know</i> N/A	<i>Not helpful</i>	<i>Some-what helpful</i>	<i>Very helpful</i>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Peer Learning	Joint marketing with other orgs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Opportunities to interact with and learn from peers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q5 To what extent do the following NETWORKING and ADVOCACY activities currently pose a challenge for your organization in fulfilling its mission? Please select ONE response per line.

Networking and Advocacy	<i>N/A</i>	<i>Not a Challenge</i>	<i>A minor Challenge</i>	<i>A major Challenge</i>
Forming/maintaining relations with other entities ²	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learning best practices from other organizations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strengthening relationships with key policy makers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enhancing public understanding of key policy issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Responding effectively to community expectations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q5A If you selected “minor” or “major” challenge for any of the items in the previous question (Q5), please answer the following:

To better fulfill its mission through improved NETWORKING and ADVOCACY, how helpful would each of these types of assistance be for your organization?		<i>Select best response for each line:</i>			
		<i>Don't know</i> N/A	<i>Not helpful</i>	<i>Some-what helpful</i>	<i>Very helpful</i>
Funding	Multi-year funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	General overhead funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Small grant for networking and advocacy issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Challenge grants for networking and advocacy needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Low-cost loans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technical Assistance	Loaned executive to assist with networking & advocacy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Outside consultant to help with networking & advocacy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Workshops and other off-site training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Information technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Peer Learning	Joint networking and advocacy with other orgs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Opportunities to interact with and learn from peers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q6 To what extent do the following RESOURCE activities currently pose a challenge for your organization in fulfilling its mission? Please select ONE response per line.

Resources	<i>N/A</i>	<i>Not a Challenge</i>	<i>A minor Challenge</i>	<i>A major Challenge</i>
Managing finances or financial accounting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Obtaining funding or other financial resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Writing grant proposals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

² Including other nonprofit organizations, private firms (such as local businesses), philanthropic organizations, and educational or political officials

(continued from previous page)	<i>N/A</i>	<i>Not a Challenge</i>	<i>A minor Challenge</i>	<i>A major Challenge</i>
Securing foundation or corporate grant support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Securing government grants or contracts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Developing a capital campaign for needed expansion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Undertaking effective special events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Expanding the donor base	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Building an endowment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q6A If you selected “minor” or “major” challenge for any of the items in the previous question (Q6), please answer the following:

Select best response for each line:

To better fulfill its mission through improved RESOURCES, how helpful would each of these types of assistance be for your organization?		<i>Don't know</i>	<i>Not helpful</i>	<i>Some-what helpful</i>	<i>Very helpful</i>
		<i>N/A</i>			
Funding	Multi-year funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	General overhead funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Small grant for resource issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Challenge grants for resource needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Low-cost loans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technical Assistance	Loaned executive to assist with resource activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Student intern to assist with resource activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Outside consultant to help with resource activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Workshops and other off-site training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Peer Learning	Joint resource activities with other orgs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Opportunities to interact with and learn from peers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q7 To what extent do the following INFORMATION TECHNOLOGY activities currently pose a challenge for your organization in fulfilling its mission? Please select ONE response per line.

Information Technology	<i>N/A</i>	<i>Not a Challenge</i>	<i>A minor Challenge</i>	<i>A major Challenge</i>
Knowing how technology ³ helps achieve your mission	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Identifying tech tools/resources for service delivery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communicating IT needs to decision-makers or funders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training staff/volunteers in software/applications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Upgrading computers to support new software	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creating a comprehensive and interactive website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creating, updating, and effectively using databases	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Getting IT assistance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

³ This includes hardware such as computers, printers, fax machines, etc; as well as software and applications such as databases, websites, email, etc.

Q7A If you selected “minor” or “major” challenge for any of the items in the previous question (Q7), please answer the following:

Select best response for each line:

To better fulfill its mission through improved INFORMATION TECHNOLOGY, how helpful would each of these types of assistance be for your organization?

Don't know *Not helpful* *Some-what helpful* *Very helpful*
N/A

Funding	Multi-year funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	General overhead funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Small grant for technology issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Challenge grants for technology needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Low-cost loans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technical Assistance	Loaned executive to assist with technology needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Student intern to assist with technology needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Outside consultant to help with technology needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Workshops and other off-site training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Peer Learning	Joint technology use with other orgs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Opportunities to interact with and learn from peers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q8 Please describe the most important CAPACITY BUILDING needs that your organization currently has. In the space next to your answers, please describe what you believe would be the most helpful way to meet those needs:

Most important capacity building needs:

Most effective ways to meet those needs:

1.	1.
2.	2.
3.	3.

Q9 Please describe the most important TECHNICAL ASSISTANCE needs that your organization currently has. In the space next to your answers, please describe what you believe would be the most helpful way to meet those needs:

Most important technical assistance needs:

Most effective ways to meet those needs:

1.	1.
2.	2.
3.	3.

Q10 Does your organization currently have any of the following organizational components?

Select yes or no

<u>Organizational components</u>	<u>Yes</u>	<u>No</u>
Computers available for key staff/volunteers	<input type="radio"/>	<input type="radio"/>
Internal computer network	<input type="radio"/>	<input type="radio"/>
Computerized financial records	<input type="radio"/>	<input type="radio"/>
Computerized client/member/program records	<input type="radio"/>	<input type="radio"/>
Routine backups of your data	<input type="radio"/>	<input type="radio"/>
Broadband internet access	<input type="radio"/>	<input type="radio"/>
Web site for your organization (<i>please list address: _____</i>)	<input type="radio"/>	<input type="radio"/>
Email address for your organization (<i>please list address: _____</i>)	<input type="radio"/>	<input type="radio"/>
Anti-virus / anti-spyware / anti-spam programs	<input type="radio"/>	<input type="radio"/>
Written governance policies or by-laws	<input type="radio"/>	<input type="radio"/>
Written conflict of interest policy	<input type="radio"/>	<input type="radio"/>
Written code of ethics	<input type="radio"/>	<input type="radio"/>
Written strategic plan	<input type="radio"/>	<input type="radio"/>
Written fundraising plan	<input type="radio"/>	<input type="radio"/>
Written job descriptions	<input type="radio"/>	<input type="radio"/>
Written personnel policies	<input type="radio"/>	<input type="radio"/>
Staff/board orientation process	<input type="radio"/>	<input type="radio"/>
Written board manual	<input type="radio"/>	<input type="radio"/>
Formal volunteer recruitment program	<input type="radio"/>	<input type="radio"/>
Formal volunteer training program	<input type="radio"/>	<input type="radio"/>
Annual report produced within the last year	<input type="radio"/>	<input type="radio"/>
Evaluation or assessment of program outcomes/impact within the past 2 years	<input type="radio"/>	<input type="radio"/>
Recent audited financial statement	<input type="radio"/>	<input type="radio"/>
Reserves dedicated to capital improvement	<input type="radio"/>	<input type="radio"/>
Reserves dedicated to maintenance/equipment	<input type="radio"/>	<input type="radio"/>
Endowment	<input type="radio"/>	<input type="radio"/>

SECTION II: So that we can better understand how capacity building needs are related to other activities that Indiana charities undertake, please answer the following questions.

Q11 How have demands for your organization's services or programs changed over the last three years? (Select best response)

- Decreased significantly** (by more than 25 percent)
- Decreased moderately** (by 10 – 25 percent)
- Stayed more or less the same** (*please skip to Q12*)
- Increased moderately** (by 10 – 25 percent)
- Increased significantly** (by more than 25 percent)

Q 11A If demand for your organization's services has changed in the last 3 years, did this impact your organization's need for capacity building and/or technical assistance? (Select best response)

- Yes, need for capacity building and technical assistance **increased**
- Yes, need for capacity building and technical assistance **decreased**
- No, the change in demand **did not impact** need for capacity building or technical assistance

Q12 Is your organization currently involved in formal collaborations (*legal, fiscal, administrative, or programmatic exchanges*) **or in informal networks** (*cooperating, coordinating, or working together in other ways*)? *(Select best response)*

- Yes, involved in one or more **formal collaborations** (legal, fiscal, administrative, or programmatic exchanges) with other organizations *(Please answer Q12A)*
- Yes, involved in one or more **informal networks** (cooperation, coordination, working together) with other organizations *(Please answer Q12A)*
- Yes, involved in **both** formal collaborations **and** informal networks *(Please answer Q12A)*
- No, **not involved** in any collaborations or informal networks *(Please answer Q12B)*

Q12A If involved in collaborations or networks, in general do these relationships make it easier or harder to maintain key organizational capacities?

<u>Impacts your capacity to</u>	<u>Select best response for each type of resource</u>			
	<u>Harder</u>	<u>No impact</u>	<u>Easier</u>	<u>Not applicable</u>
Obtain funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recruit/keep staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recruit/keep board members	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recruit/keep volunteers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meet client/member needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enhance your visibility/reputation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q12B If NOT involved in collaborations or networks, is that due to a need for greater capacity or technical assistance? *(Select best response)*

- Yes, your organization **would** network and/or collaborate with other entities **if it had the capacity and/or technical assistance** to do so.
- No, your organization has the capacity and technical know-how to network and/or collaborate with other entities, but **chooses not to do so** for other reasons.

SECTION III: So that we can better understand how capacity building needs are distributed across Indiana charities, please answer the following questions about your organization.

Q13 In what year was your organization founded? _____ *(year)*

Q14 Please describe briefly your organization’s major purpose or mission:

Q15 Please describe briefly up to three of your organization’s most important programs or activities

Most important program/activity: _____

2nd most important program/activity: _____

3rd most important program/activity: _____

Q16 Does your organization currently have any paid employees? *(Select best response)*

- Yes
- No *(Please skip to Q17)*

Q16A If your organization has paid employees, how many people were employed full-time or part-time on December 31? *(Please exclude vacant positions) (Write – 0 – if none)*

Employed full time as of Dec. 31 _____ # of employees *(not counting vacancies)*

Employed part-time as of Dec. 31 _____ # of employees *(not counting vacancies)*

Q17 During the most recently completed fiscal year, did your organization use any volunteers, other than those that serve on the board of directors? *(Select best response)*

- Yes, you **used volunteers** (other than board members)
- No, you **used no volunteers** (other than board members) *(Please skip to Q18)*

Q17A If your organization used volunteers, how important are volunteers – other than board members – to the work of your organization? *(Select best response)*

- Not at all important**, you could carry out your mission without using volunteers
- Not very important**, you depend on volunteers for only non-essential tasks
- Important**, you depend on volunteers for several key tasks
- Very important**, you depend on volunteers for a wide range of tasks, but not all
- Essential**, you depend entirely on volunteers to carry out your mission

Q18 During the most recently completed fiscal year, did your organization have any revenue or expenses? *(Select best response)*

- Yes, you had revenues and/or expenses *(Please answer Q18A-D)*
- No, you did not have revenue or expenses *(Please skip to Q19)*

Q18A If your organization had revenues and/or expenses, for the most recently completed fiscal year please estimate the following:

	<i>Write -0- if none</i>
Total revenue during most recently completed fiscal year	\$ _____
Total expenses during most recently completed fiscal year	\$ _____
Total net assets at the end of most recently completed fiscal year	\$ _____
Total liabilities at the end of most recently completed fiscal year	\$ _____

Q18B If your organization had revenue, during the most recently completed fiscal year please estimate what percentage of your organization's revenue came from the following sources:

	<i>(Write -0- if none)</i>
<u>Types of revenue</u>	% of revenues
Government or public agencies <i>(e.g., grants, fees, sales, appropriations)</i>	_____ %
Donations & gifts <i>(e.g., United Way, foundations, individuals, corporations)</i>	_____ %
Special events <i>(net of expenses)</i>	_____ %
Dues/membership fees	_____ %
Private sale of goods and services <i>(non-government)</i>	_____ %
Other sources <i>(including endowment, interest)</i>	_____ %
TOTAL (should add to 100%)	100%

Q18C If your organization had revenue during the most recently completed fiscal year, did your organization receive any income from any of the following revenue sources?

<i>A source of revenue during the last fiscal year</i>	<i>Select yes or no</i>	
	Yes	No
Donations from individuals	<input type="radio"/>	<input type="radio"/>
Trusts or bequests from individuals	<input type="radio"/>	<input type="radio"/>
Donations from businesses or corporations	<input type="radio"/>	<input type="radio"/>
Grants from community foundations	<input type="radio"/>	<input type="radio"/>
Grants from other foundations	<input type="radio"/>	<input type="radio"/>
Grants/support from United Way organizations	<input type="radio"/>	<input type="radio"/>
Grants/support from religious organizations	<input type="radio"/>	<input type="radio"/>
Grants/support from religious federated funders	<input type="radio"/>	<input type="radio"/>
Grants/support from other federated funders (<i>like, a women's fund</i>)	<input type="radio"/>	<input type="radio"/>
Government grants	<input type="radio"/>	<input type="radio"/>
Government contracts or fee for service payments	<input type="radio"/>	<input type="radio"/>
Fees/charges/sales (from individuals or non-governmental entities)	<input type="radio"/>	<input type="radio"/>
Fees/charges from private third parties (<i>like insurance programs</i>)	<input type="radio"/>	<input type="radio"/>
Income (or loss) from joint ventures	<input type="radio"/>	<input type="radio"/>
Income (or loss) from for-profit subsidiary	<input type="radio"/>	<input type="radio"/>
Income (or loss) from corporate sponsorships or marketing fees	<input type="radio"/>	<input type="radio"/>
Income (or loss) from any unrelated business activities	<input type="radio"/>	<input type="radio"/>

Q18D If your organization had revenues or expenses, to what extent have your organization's financial indicators changed over the last three years? (*Please consider changes of 25 percent or more to be "significant" and changes of 5-25 percent to be "moderate"*)

<i>Financial Indicator</i>	<i>Select best response for each financial indicator</i>				
	<i>Decreased significantly</i>	<i>Decreased moderately</i>	<i>Stayed the same</i>	<i>Increased moderately</i>	<i>Increased significantly</i>
Total revenue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Total expenses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Total assets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Total liabilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SECTION IV: To ensure we have the correct contact information for your organization and to know whether you would like to be contacted again, please answer the following questions.

Q19 Please provide your name and contact information.

Contact Name: _____ Position _____
 Phone (*include area code*) _____ Email _____

Please update organization name and address if needed.

Organization Name (*updated*) _____
 Street address (*updated*) _____
 City, state, zip code (*updated*) _____
 Web site URL (*updated*) _____

Q20 Two respondents to this survey will be selected at random to receive Associate Membership in the Indiana Grantmakers Alliance. Do you wish to be considered for this random selection?

- Yes (*Please make sure we have your contact information and correct address, see Q19*)
- No

Q21 Would you like to receive a summary of the results of this survey?

- Yes (*Please make sure we have your contact information and correct address, see Q19*)
- No

Q22 Would you be willing to talk to us later about some of your organization's key achievements or major challenges?

- Yes (*Please make sure we have your contact information, see Q19*)
- No

Q23 Do you have any comments on this survey? _____

THANK YOU!!!

For more information about the sponsors of this survey, please see:

Indiana Nonprofits: Scope & Community Dimensions

www.indiana.edu/~nonprof

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