

# COMMUNITY SHARES OF WISCONSIN

## CURRENT STATE REPORT: SUMMARY

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# Table of Contents

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- *Executive Summary.*
- *Data from:*
  - *Self-Assessment Survey.*
  - *Key Informant Interviews.*
- *Conclusion.*

# EXECUTIVE SUMMARY

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Community Shares of Wisconsin (CSW) is an established, well-respected nonprofit that primarily operates within Dane County to support over 70-member nonprofit organizations in strengthening their financial position through CSW led fundraising projects, including workplace giving, the Big Share and the CHIP program. To further their 2023 Strategic Planning process, CSW embarked upon a discovery process to understand the **Current State** of the organization, facilitated by a consulting team from Elevate Together.

The Current State phase of the overall Strategic Planning project comprised of the following activities:

- **Document review:** CSW provided Elevate Together with documents to support contextualizing the current state of the organization. These documents included prior strategic plans, annual reports and DE&I documentation, among others. Evident from these resources are that CSW has been in a period of reflection and transition for some time, resulting from external and internal factors including the COVID-19 pandemic.
- **Self-Assessment Surveys:** The Executive Director, 12 members of Board of Directors and 3 Staff members completed 3 self-assessment surveys, which gathered quantitative and qualitative data across all domains of CSW's operations.
- **SWOT Analysis:** The same group that completed the self-assessment surveys also carried out a SWOT Analysis to identify the current strengths, weaknesses, opportunities and threats that CSW faces.
- **Key Informant Interviews:** ET held one-on-one calls with 6 staff members of CSW, as well as group calls with 8 members of the Executive Committee, 19 members of the larger board and one key supporter of the organization. These calls provided affiliated individuals to share, in an open and confidential space, their perspectives and priorities for the organization.

The consultant team undertook an analysis of this collection of inputs to preliminarily identify **1) critical challenges facing the organization 2) immediate opportunities to strengthen operations 3) longer term opportunities to support achieving CSWs mission.**

Emerging from this project are several key themes for areas of potential focus for the organization. While many ideas and opportunities were generated throughout this process, we see most falling into the key themes below.

- **People Operations & Workplace Culture.**
- **Membership.**

- **Fundraising.**
- **Board Governance.**
- **DE&I.**

## **Key Themes**

### **People Operations & Workplace Culture**

Community Shares seeks to have an established and dynamic culture of delegated decision making, collaboration and shared leadership, however challenges in creating this desired reality create an opportunity to dive deeply into strengthening people operations and workplace culture.

ET Assessment of the Current State of People Operations & Workplace Culture: CSW is not currently achieving the workplace culture, retention and staff engagement levels that are necessary to ensure the long-term sustainability of the organization. Low morale, unclear roles, uneven workloads and a sense of a lack of consistency in decision making, expectations and accountability are all contributing to reduced effectiveness, conflict among the staff at the organization and a weakened sense of collaboration and mutual support. With a small team, the effectiveness and satisfaction of each employee is critical to the overall ability of CSW to achieve its mission and serve its member organizations. Improving workplace culture and clarifying how the staff will perform their roles is a critical element of beginning to improve the challenging dynamics the organization is currently experiencing.

#### **Objectives:**

- Have a workplace culture of collaboration, innovation and excellence through empowering and equipping staff and leadership to excel in their roles supporting CSW's mission.
- Roles and responsibilities, decision making, delegation of authority and operational processes are clear, understood and inclusive.

#### *Examples of Action Items:*

- Clarify decision making and roles across the organization, to reduce duplication of effort and improve overall efficiency.
- Clarity on roles and responsibilities needed for every staff member over a 12-month period, with key performance metrics established to support accountability and expectation setting.

- Create specific and tangible delegation of authority and decision making.
- Work planning to identify anticipated work, understand capacity constraints and ensure that staff are equipped to manage and successfully implement workflows.
- Evaluate existing project management and other technology platforms to understand if they are optimized for practical usage among staff and determine project management path forward.

## **Membership**

Serving the member organizations is central to the purpose and activities of Community Shares. However, there are opportunities to ensure that members are receiving access to relevant, innovative, and evidence-based support.

ET Assessment of the Current State of Membership: CSW has an extraordinary legacy of supporting impactful organizations across Dane County. However, over time the needs and expectations of member organizations have evolved, leaving CSW in a position where the financial support they provide may not be sufficient to fully realize its mission. As an emphasis on collaboration over competition has grown in the impact space, CSW has not yet taken full advantage of its position as a network leader to provide meaningful opportunities for member organizations to learn, connect and amplify their impact through collaboration. To start, CSW needs to evaluate if the additional support it provides to member organizations is 1) impactful 2) sufficient 3) resourced properly, and better understand what members need, how they want to engage with CSW and one another and aligned with the mission and vision and internal capacity considerations.

### **Objectives:**

- Have clarity and intention guiding how CSW engages with and serves members. Be clear on what type of member organization CSW wants to be.

### *Examples of Action Items:*

- Opportunity to be a community catalyst and cultivate a dynamic member network.
  - Clarify Member value proposition.
  - Review structure of member engagement.
    - Conduct a member needs assessment to all members on an annual basis to determine:
      - Topics for learning sessions.

- Opportunities for members to give back or leverage internal expertise to lead sessions.
  - Member interest in peer collaboration or affinity groups.
  - Challenges faced as a member.
- Improve member to member collaboration and networking opportunities.
- Cultivate intentional member to staff engagement to support staff in understanding those they serve and members in being engaged with CSW.
- Redesign the template for the monthly newsletter to improve clarity and engagement.
- Enhance visibility of CSW's membership through utilizing communications channels strategically to tell the story of the amazing organizations CSW supports.
- Re-imagine membership work hours.
- Continue or accelerate membership expansion efforts to organizations not traditionally served by CSW.
  - Eligibility expansion to organizations of different sizes and profiles.
  - Consider how statewide nonprofit organizations fold into the membership structure.

## **Fundraising**

Community Shares has a strong background in achieving fundraising goals in service of its member organizations, however as the landscape continues to evolve and shift constant innovation and staying focused on emerging trends is critical.

ET Assessment of the Current State of Fundraising: CSW has decades of expertise in successfully meeting its fundraising targets for member organizations. However, this history of strong fundraising does not ensure future success, especially in light of shifts in workplace giving, donor priorities and the overall economic landscape CSW operates within. Without evaluating the overall fundraising approach and goals of the organization CSW risks 1) being left behind or caught by surprise by shifts, 2) not truly providing impactful levels of financial support for all member organizations 3) taking advantage of fundraising potential. It is important for CSW to ensure that fundraising remains innovative, impactful and centered on the needs of all member organizations. It is also important to consider the necessary organizational resources needed to support optimal staff and operations in particular, as CSW examines growing the membership.

### **Objectives:**

- Evaluate shifting philanthropic landscape and examine fundraising strategy for members and CSW operations.

*Examples of Action Items:*

- Identify emerging fundraising trends to replace or supplement workplace giving, such as Donor Advised Funds or Giving Circles.
- Seek increased funding for internal CSW operations to expand staff capacity to enhance current operations and undertake new priorities.
- Examine the Big Share and consider strengthening equity in Big Share prize distribution and other factors.

## **Governance**

Community Shares has a large and dynamic Board of Directors, enhancing how this body operates, including clarifying roles, operations and information management will further enhance the engagement of board members with the organization.

### **Objectives:**

- Established clear expectations and roles for board member engagement, decision making and communication across committees and the larger board.

### *Examples of Action Items:*

- Clarify if the board of directors is a working, advisory or hybrid board.
- Improve board member engagement and voice in decision making at the Executive Committee and full board levels.
- Examine communication around decision making. While overall there was a desire for greater shared decision making at the staff and board level, a significant thread was not understanding how decisions are made, or why certain decisions were reached. While not all decisions can or should be formed through consensus building, when individuals do not understand the rationale or information that drove certain decisions it can create a sense of alienation.
- Board meeting materials are readily accessible to all over the long term with someone responsible for ensuring this.

## **DE&I**

Community Shares has embarked upon an effort to achieve internal transformational change in how it lives its values to support DE&I, but this effort requires long term focus, deep work and consistent prioritization.

ET Assessment of the Current State of DE&I: CSW is currently working to not only become an anti-racist organization itself, but also to ensure that member organizations also engage deeply in this work themselves. While results of the assessment indicate that most of those affiliated with CSW see this work as being deeply committed to by the organization, there was also a clear need to continue to focus on pushing the work done to date further both internally and as it relates to member organizations.

**Objective:**

- CSW continues to incorporate DE&I focus across all operational areas, people served and projects.

*Examples of Action Items:*

- Defining DE&I expectations or metrics and setting clear goals and evaluate them every 6 months or annually.
- Evaluate how CSW mission, vision and communications align with DE&I goals and policies.
- Manage implementation of DE&I policies effectively and with openness to navigating challenges collaboratively, be clear on external support needed to achieve this.



# SELF-ASSESSMENT SURVEYS: RESPONSE DATA

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## Organizational Culture and Decision Making

### What is the staff culture overall?

- 20% respond Individualistic.
- 33% respond Collaborative.
- 7% respond Hierarchical.
- 40% respond Other.

### Overall Challenges: Respondent Comments:

- Trying to more effectively implement changes that meet our organizational values; turnover; acknowledging that individuals' personal values may not necessarily match their specific communication or interpersonal skill level.
- New staff, clarity (or lack thereof) of job responsibility and decision-making authority, communication mechanisms for staff working in a hybrid work environment with different communication styles.
- As a board representative, I am unsure how day-to-day decisions are made and how the culture works.
- The size of the board and varying levels of involvement.
- It's hard for me to know what's going on.
- The size of the full board, the structure of the staff.
- I am not in a position to know enough or regularly see the challenges and how decisions are made but assume that ultimately they are cleared through the E.D.
- Don't know who makes ultimate decision, asked too often for opinions on small things as opposed to higher impact decisions, individualistic, staff do not desire to be collaborative
- Staying engaged and continuing to work towards change, which is slow and difficult.
- Moving to mostly remote work is a challenge for team building,

### Overall Goals and Aspirations: Respondent Comments:

- Increase ownership and decision making among all levels of staff; increase collaboration and communication; increase trust.
- We aspire to have an organization in which people are excited to come to work, understand what is expected of them and get the training and support they need, and accomplish great things as a team.
- That the org culture reflects the equitable practices that CSW works on promoting to its members.
- To acknowledge everyone's culture and reason for making a decision.

## Diversity, Equity and Inclusion

### Challenges: Respondent Comments:

- Consistency; deepening its impact; change at a core level to follow the change from a numbers perspective.
- My only comment is that it's very difficult to live a DEI commitment all the time.
- Madison has a very dominant white, progressive culture that is hard to navigate.
- Many things are in the beginning stages or need to be tested. I think there may be a difference in how staff perceives it and how member organizations are impacted.
- Building participation among new members who represent diverse interests, while effectively supporting current members. Also, we need to ensure that new members have the resources to continue their work without compromising the CSW model.
- Continuous learning and mistakes are part of this work. Keeping a board of 70 committed and active in DEI initiatives is the challenge.
- We need to diversify our board by adding more organizations of color.
- How to commit to being equitable amongst all employees and having uncomfortable conversations about race and equity.
- Making time with other commitments.

### Goals and Aspirations: Respondent Comments:

- Continue to deepen the work; make it a primary function of our work.
- Better representation of marginalized groups among our member organizations and board. Creating tools to help member organizations find ways to improve their DEI commitment (e.g. sample policies, suggestions for changing hiring practices, etc.).
- Continued leading and learning for member groups.
- To be confident that all member orgs embrace this work and its part of their culture as well.
- To stay the course and have meaningful measurements about our progress in this work.
- To show up and keep the work going until change happens.

## Board Governance

*46% of respondents indicated that the board is a Working Board, 46% indicated it is an Advisory Board, 8% selected 'Other'.*

**Board Areas of Oversight and Responsibility:** Percentage of respondents who selected the below option as part of the board's responsibility.

- Strategic Direction and Goal Setting: 100%.
- Funding Strategy: 46%.

- Financial Oversight: 92%.
- Legal and Compliance Oversight: 53%.
- Human Resources: 7%.
- Evaluation (organizational impact): 69%.

### **Challenges: Respondent Comments:**

- Making sure the larger board feels involved and engaged; making sure we are clear about the roles of the executive committee vs the personnel committee.
- The size and continual changing of individuals on the board makes it hard to know who's who and to feel comfortable in knowing that all of the members know what's going on, what their role is, etc.
- I wasn't onboarded so I'm not sure of all the details regarding board and ED relationship.
- I was trained when I first joined, and I am not clear on many aspects of my role as a board member.
- The board is too big, and representatives change. Meetings are held online so it is difficult to get to know other members and staff. The manner of sharing board materials keeps changing, and it is hard to keep track of the methods being used. Board materials should be stored on the members website for every meeting. You cannot go back and retrieve old materials.

### **Goals or Aspirations: Respondent Comments.**

- Continue the same structure; ensure all have a voice and feel engaged.
- More people of color serving on the board.
- To learn more about other members and to vote when appropriate on matters on agenda. Support and evolve mission and vision.
- That it becomes a more engaged and effective board for the staff to rely on.
- Deeper understanding and involvement.
- Continuing to bring in diverse member orgs.
- Opportunities to better interact with fellow board members.

## **People Operations and Management**

### **Challenges: Respondent Comments:**

- Turnover.
- Consistency, different employees with very different needs.
- Staff training, workplace climate/relationships.
- The biggest challenge is hybrid work environment and making sure everyone is engaged and thriving.
- I think the staff is small but the board is large so that inherently makes it difficult.
- Equitable practices would have language that most could understand.

- Training and time management missing staff/ hand/ volunteers.
- Feeling an uneven distribution of workload/responsibility.
- Gaps in roles, others stepping in to cover the work, extra time spent outside of usual job duties leading to delays in other projects.

### **Goals or Aspirations: Respondent Comments:**

- Getting staffing stabilized; getting folks in a position where they feel confident and secure in their roles.
- Developing stability; ensuring training meets the needs of the staff; being able to offload some decision making from the executive director.
- Maintain key staff, be place where people want to work.
- Have a team who engage with each other and truly feel like their strengths are utilized by each other.
- More opportunities to interact in person with staff.
- To have more even distribution of workloads among all staff.
- Employees feel like they can take ownership of their jobs and be relied upon for their expertise in their role.

## **New Business Development & Fundraising**

### **Challenges: Respondent Comments:**

- Data management of workplace giving gifts, with focus on the turnaround time between the campaign and when data is provided to members.
- Adapting to shifts in workplace giving, which is a declining revenue source.
- Finding other opportunities that don't take more time for members to achieve.
- Board not evaluating fundraising activities.
- Loss of seasoned development person at CSW.
- Avoiding burnout during fundraising periods, managing competition between members for funding.

### **Goals and Aspirations: Respondent Comments:**

- Decrease the competitive nature of The Big Share and make it more mutually supportive. The prize structure rewards the big groups or those that rely on volunteers.
- To adapt to new models of community giving that is seamless (or almost) for employers to implement and highlights CSW as a real impactful umbrella organization that is deserving of community and statewide support.
- To have diversified revenue stream.
- Hire development staff member.



# KEY INFORMANT INTERVIEWS

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## Themes & Challenges

### **Membership:**

- Racial Justice: focused on members and some members are resistant. Inconsistency leading to reputation risk.
- Hurdles for newer smaller organization (is and not linked to racial justice).
- Board Member engagement. Virtual only has been a challenge.
- Membership strategy is not clear to members and staff.
- Inconsistent communications and unclear decision making.
- Understanding and prioritizing needs.
- Ability to meet membership requirements.
- Disapproval of bonus prize structure.
- Lack clear communications from the board governance and staff.
- Value of membership benefits.
- Lack of knowledge and understanding of CS work and members' work.
- Disconnect between members and staff.

### **Board of Directors:**

- Clarity around roles as board members versus member organizations.
- Board Governance - record keeping, required filings.
- Scope and influence – rubberstamping.
- Information Management and Communications.
- Clarity around roles EC, BOD and Committees.

### **Fundraising:**

- Corporate Funding is declining and difficult to engage new corporate funders.
- fundraising and other workplace giving is stagnant.
- Reliant on and take for granted Supporters and Members.
- Different member engagement in Big Share still yields the same fundraising result.

### **People Operations:**

- Staff not being maximized, duplications of efforts, not connected.
- Onboarding process is strong and effective.
- Fragmented and non-documented or unclear roles and responsibilities making it hard to have backup and over reliance on ED.
- Turnover.

## CONCLUSION AND NEXT STEPS

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Community Shares of Wisconsin (CSW) has embarked upon a discovery process to understand the current state of the organization, to further their 2023 Strategic Planning process. The Board of Directors, staff, leadership and key supporter carried out several activities, including document review, self-assessment surveys, SWOT analysis, and key informant interviews, to preliminarily identify critical challenges facing the organization, immediate opportunities to strengthen operations, and longer-term opportunities to support achieving CSW's mission.

From these sources of information and feedback, the consultant team from Elevate Together identified several key themes for areas of potential focus for the organization, including people operations and workplace culture, membership, fundraising, board governance, and DE&I. Overall, the organization is in a period of reflection and transition resulting from external and internal factors, creating a unique moment to reimagine the structure and operations of CSW to enhance its ability to achieve its mission for the benefit of those it serves.

Following the conclusion of the Current State phase of the overall Strategic Planning project, CSW will work collaboratively with ET to begin to identify the specific priorities it will focus on over 3 Micro Strategy Plans. These Micro Strategy Plans will be developed and implemented by CSW in tandem with continued work to understand and respond to shifting opportunities and challenges that may arise during the implementation period. As the operations of CSW are complex, implementing the Micro Strategy Plans will require identification and awareness of the interlinked dependencies that altering one area of operations will have on others.

Overall, this period of reflection and transition presents an exciting opportunity for CSW to enhance its ability to achieve its mission for the benefit of those it serves. The consulting team looks forward to continuing to engage CSW in the subsequent stages of this project.