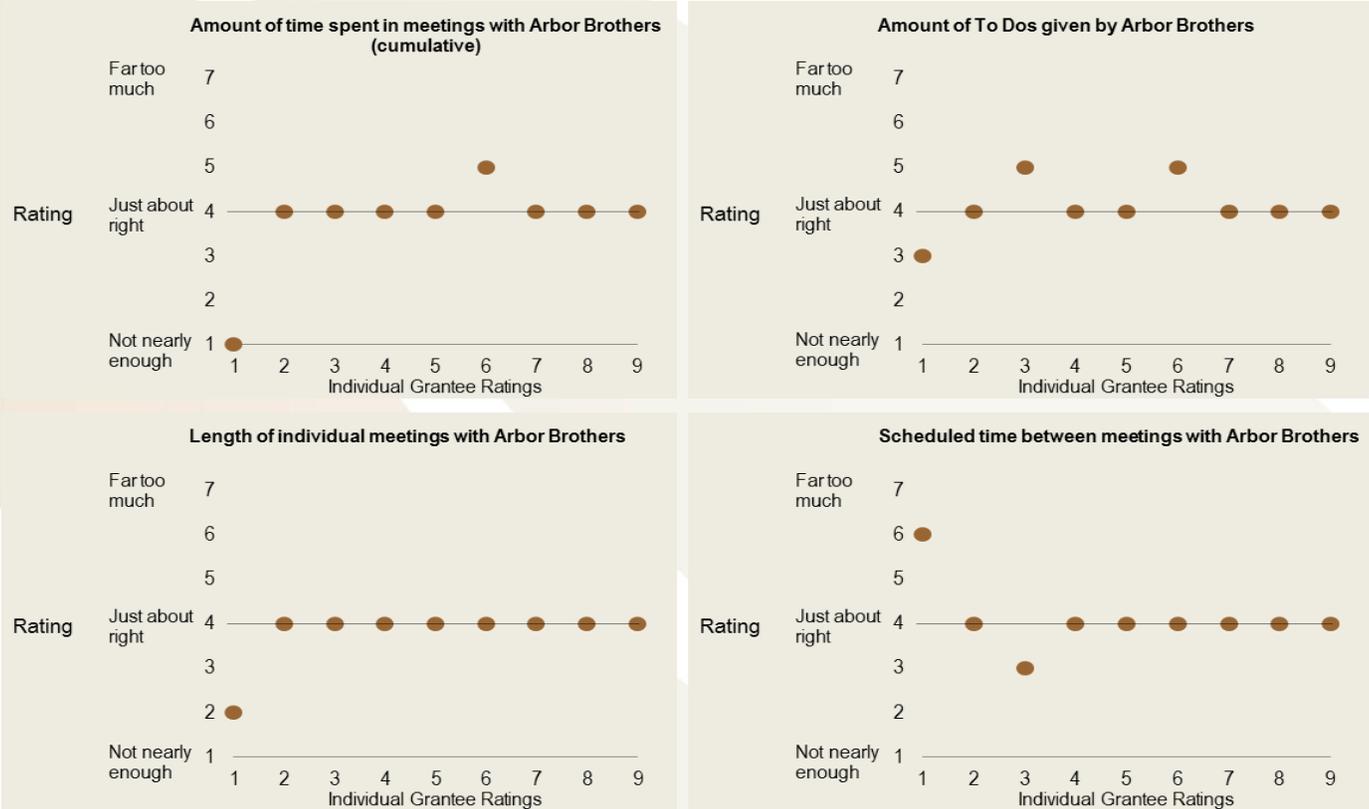


Measuring Arbor Brothers Impact Grantee Evaluation Responses: 2017-2018 Grant Cycle

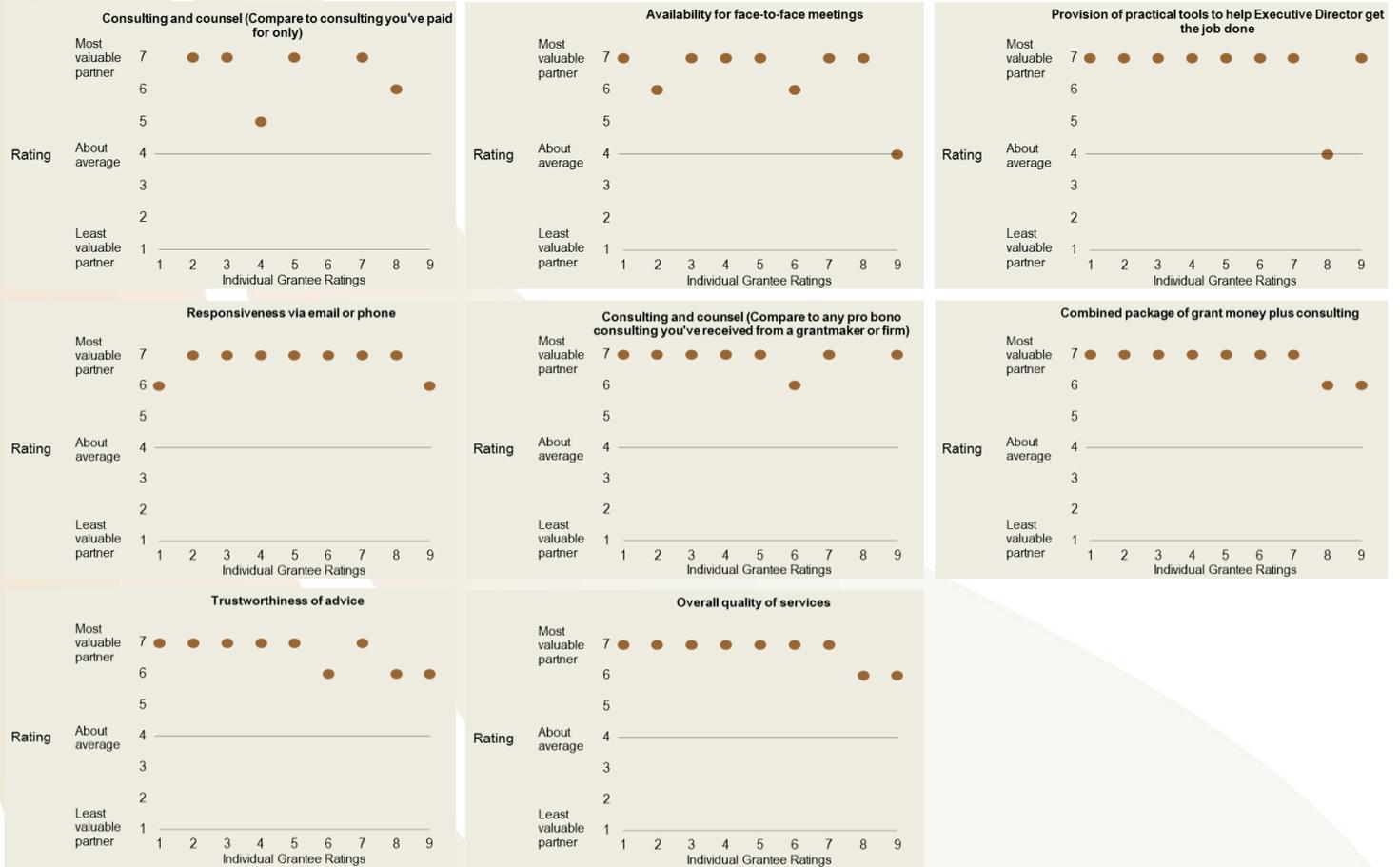
Disclaimer: This survey was administered by [GlassFrog](#), an evaluation-focused consultancy, to gather as much constructive feedback as possible from our grantees. Even in an anonymized, third-party administered format, we are cognizant of the dynamics and incentives at play between funders and those they support. While we believe this inquiry is an important element in our self-evaluation, we would emphasize that over time any impact we have will be best measured by our grantees' outcomes, not what they say about us. More information on how we attempt to triangulate the impact of our work is available [here](#).

Anonymous Survey Results from Nine Grantee Respondents

1. Experiences in and between meetings:



2. Comparing AB to other partnerships:



3. Feedback on services:

Grantee	Arbor Brothers' visions and goals for our organization align with our own.	When Arbor Brothers' visions and goals for our organization differ from our own, Arbor Brothers respects our viewpoint and ultimate ownership.	We improve our thought processes as a result of our conversations with Arbor Brothers.	Arbor Brothers gives conflicting or confusing advice.*	Arbor Brothers does its own homework in between meetings with us.	Arbor Brothers' homework contributes positively to achieving the goals of the project.	We ask Arbor Brothers for advice beyond the scope of the current project.	We come away from meetings with Arbor Brothers with a clear idea of how to move forward, and confidence that we are able to do so.
Modal response (2018)	Very often	Always	Always	Rarely	Always	Very often	Very often	Always
Modal response (2017)	Very often	Always	Very often	Rarely/Never	Always	Always	Very often	Very often
Modal response (2016)	Very often	Always	Very often	Rarely	Always	Always/Very often	Very often	Very often

Grantee	We can easily negotiate a compromise with Arbor Brothers when we disagree with them about our work.	Arbor Brothers pushes us out of our comfort zone in a way that improves the quality of our management and leadership.	The ultimate value of the homework we are assigned justifies its difficulty and unpleasantness.	We feel comfortable sharing confidential information with Arbor Brothers, knowing it will be handled sensitively and appropriately.	Arbor Brothers' advice leads us in productive directions.	Arbor Brothers provides clear instructions for doing our homework.	We are comfortable discussing project-relevant subjects with Arbor Brothers.
Modal response (2018)	Always/Very often	Sometimes	Always/Very often	Always	Very often	Very often	Always
Modal response (2017)	Always	Very often	Very often/Always	Always	Very often	Very often	Always
Modal response (2016)	Always	Always/Very often	Very often	Always	Very often	Always	Always

Grantee	Arbor Brothers helps us with issues not directly related to our core project.	We come away from meetings with Arbor Brothers feeling energized about our work.	We look forward to upcoming consulting meetings with Arbor Brothers.	We spend considerable effort to make sure we are as prepared as possible for meetings with Arbor Brothers.	Even when we are as well-prepared as we can be, Arbor Brothers is unsatisfied with our work.*	We improve our practices as a result of our conversations with Arbor Brothers.	We worry about upcoming consulting meetings with Arbor Brothers because we anticipate disagreements about project directions.*
Modal response (2018)	Always	Very often	Always	Very often	Rarely/Never	Very often	Rarely
Modal response (2017)	Very often	Very often	Very often	Very often	Never	Very often	Never
Modal response (2016)	Always	Very often	Always	Sometimes	Never	Very often	Never

Grantee	Arbor Brothers has helped us to understand what it means to have an outcomes-focused culture.	Arbor Brothers has helped us to develop our outcomes-focused culture.	Arbor Brothers has aided us in developing high-quality tools to support an outcomes-focused culture.	The tools that Arbor Brothers has helped us develop are user-friendly.	The tools we built with Arbor Brothers have helped improve the way our organization operates.	Our inherent differences with the members of Arbor Brothers (e.g. race, gender, religion) sometimes cause a disconnect in communication.*	Our reputation among nonprofit colleagues has improved due to our association with Arbor Brothers.	The benefits we receive from working with Arbor Brothers justify the resources (e.g. time, personnel) we devote to Arbor Brothers projects.	The gender, racial, and ethnic composition of their staff (Sammy, Scott, Erica, and Jess) positions Arbor Brothers to effectively partner across lines of difference.	Arbor Brothers is responsive to grantees' feedback, incorporating our suggestions in order to improve the quality of their services.
Modal response (2018)	Strongly agree	Strongly agree	Strongly agree	Agree	Strongly agree	Disagree	Strongly agree	Strongly agree	Agree	Agree
Modal response (2017)	Agree	Agree/Strongly agree	Agree	Agree	Agree	Disagree/Strongly disagree	Agree	Strongly agree	Neither agree nor disagree	Agree
Modal response (2016)	Agree	Agree	Strongly agree	Agree	Agree	Strongly disagree	Agree	Strongly agree	Not asked	Not asked

4. Balance of financial and consulting support:

	Exactly what we got.	Less consulting and more money overall.	Less money and more consulting overall.	Total
Arbor Brothers provides both grant money and consulting. If you could alter the balance of grant money vs. consulting, you would prefer (choose one):	7	0	2	9

5. Usage of “Theory of Change”:

Three grantees reported that they worked on a theory of change (TOC) model with Arbor Brothers last year. Two reported that they consult the TOC on a weekly basis; the third reported they use it monthly. Among the two grantees who reported building out a TOC model, this is how they reported using it:

	# reporting they used TOC for this purpose		
	2018 (total # = 3)	2017 (total # = 2)	2016 (total # = 3)
Program evaluation	3	2	1
Fundraising	2	2	2
Performance management	2	2	1
Starting new initiatives	2	1	1
Writing grant proposals	2	1	2
Beginning, continuing, or ending professional relationships with other organizations or partners	1	1	1
Strategic planning	1	0	0
Approving expenses	0	1	0
Budgeting	0	1	1
Downsizing	0	0	0
Hiring	0	1	0

6. Usage of other tools co-created with AB:

Over the past year, in which of the following contexts have you used well-developed systems, processes, or quantitative data, in conjunction with Arbor Brothers or otherwise? (Select all that apply.)

	# reporting they used tools for this purpose (total # = 9)		
	2018	2017	2016
Making hiring/firing decisions	6	6	5
Starting new initiatives	6	5	4
Performance management	5	6	4
Program evaluation	5	6	5
Setting budgets	5	6	7
Board development	4	5	5
Fundraising	4	7	5
Embarking upon/ending professional relationships with other organizations	2	2	2
Ending initiatives	1	2	0

(All grantees reported using the tools for at least one of the defined purposes.)

7. Usage of systems/processes co-created with AB (nine grantees):

Over the past year, for which purposes have you used tools and/or thought-partnership developed with Arbor Brothers? (Select all that apply.)

	# reporting they used tools for this purpose (total # = 9)		
	2018	2017	2016
Program evaluation	7	8	5
Making hiring/firing decisions	7	4	5
Setting budgets	6	7	6
Performance management	6	5	3
Fundraising	5	7	6
Starting new initiatives	5	5	5
Board development	1	2	4
Embarking upon/ending professional relationships with other organizations	1	1	3
Ending initiatives	0	2	0

(All grantees reported using the tools for at least one of the defined purposes.)

8. Markers of outcomes-focused culture:

Grantee	I have short-term (1 year or fewer) targets for outcomes.	I have short-term targets for how many participants I want to serve.	I have medium-term (2-5 years) targets for outcomes.	I know exactly how I will measure the extent to which I hit my outcomes targets.	I am regularly measuring the extent to which I am on track to hit my outcomes targets.	I periodically realign my spending to better hit my outcomes targets.	My staff can describe our medium-term outcomes targets.	My board members can describe our medium-term outcomes targets.
Modal response (2018)	Very true	Very true	Somewhat true	Somewhat true	Very true	Very true/ Somewhat true	Somewhat true	Somewhat true
Modal response (2017)	Very true	Very true	Somewhat true	Somewhat true	Very true	Somewhat true	Somewhat true	Somewhat true
Modal response (2016)	Very true	Very true	Very true	Somewhat true	Somewhat true	Neither true nor false/ Somewhat true	Somewhat true	Neither true nor false

9. Over the past year, has your organization passed up an opportunity for revenue growth because it did not align with your organization's long-term goals?

	2018 (total # = 9)	2017 (total # = 9)	2016 (total # = 9)
No: we were presented with an opportunity for growth and we decided to pursue it even though it did not directly align with our long-term plans.	0	0	0
Yes: we were presented with at least one opportunity for growth and we decided not to pursue it because it did not align with our long-term goals.	6	6	7
No: we were not presented with any opportunities like this.	3	3	2

10. Imagine engaging a stakeholder in an hour-long conversation about a large strategic issue of organizational importance. Please rate the relative value of speaking with each stakeholder below compared to speaking with Arbor Brothers.

"Arbor Brothers' input would be _____ valuable than that of this person (or these people)."

Grantee	Board chair	Average board member	Most engaged board member	Average funder	Most engaged funder	Front-line staff	Management team	Most trusted staff member
Modal response (2018)	About as	Much more	About as/ Somewhat more	Much more	Somewhat more	About as/ Somewhat more	About as	Somewhat less
Modal response (2017)	About as/ Somewhat less	Much more	Somewhat less	Much more	Somewhat more/ About as/ Somewhat less	Somewhat more	About as/ Somewhat less	Somewhat less
Modal response (2016)	About as	Much more	About as	Much more	About as	About as	Somewhat less	Somewhat less

11. For each of the following partners, please consider the benefits you receive from this foundation, relative to the time required to work with the foundation (i.e. time spent applying to, working with, and reporting to the foundation). When considering the benefits, please include financial benefits, prestige/halo effect, technical expertise, referrals, and any other benefits that you may receive. On a scale ranging from 1 to 7, how does Arbor Brothers compare to this foundation when considering the ratio of costs to benefits?

[REDACTED FOR CONFIDENTIALITY]

12. AB's role in funder introduction, pitch preparation, and hiring:

	# reporting yes (total # = 9)		
	2018	2017	2016
Has Arbor Brothers introduced you to a funder from whom you received funding?	6	5	6
Has Arbor Brothers helped you to prepare a pitch to a funder that led to funding?	5	4	6
Has Arbor Brothers helped locate new potential hires for your staff?	4	5	5

13. What, if anything, surprised you about working with Arbor Brothers? Before you started working with Arbor Brothers, what were your expectations of your work with them? Where did these expectations come from?

- I didn't have any sense of what the experience would be like -- I walked into it cold. The biggest thing is that there are a lot of funders who just sort of take you at your word and I don't think I've ever been in a process where they've pushed us on "Why do you say that?" and "Are you sure that's the best measure of that outcome?" It's really different from working with foundations that are more hands off and there's no feedback on whether you're using the right outcomes. There are definitely times that it caused some soul searching. I knew we'd work on a TOC, but I don't think I realized how hands-on that process would be.
- I have been impressed and surprised by how granular they get and that has been the best part about working with them. Just that they do get so granular. For example, we met with them recently to work on a project, and we in real time completed the project in a way that was very helpful.
- I didn't have any expectations but I realized how supportive they are. They actually care more than I thought they would care. I thought we'd go in and talk and that's it, but it surprised me how thoughtful and caring they are and how much they accommodate us. I think they wanted to help and support us.
- I think the additional resources were a surprise; usually they pick a project and you do that throughout the year. This year they added additional capacity that was unexpected and incredibly helpful. They filled a real need (that was unrelated to our project) for us in a way that saved us time, energy, and money. It made the process a lot easier.
- The thing that surprised me about this year was that, when many Arbor Brother staff members joined meetings, it was mostly terrific but sometimes felt like too many cooks in the kitchen. It felt like a lot of people weighing in, which was overwhelming, even if it did lead to richer work. For the most part, they handled it very well. I wondered how efficient it was for them because it seems like a ton of person power all working on similar things. But, on the whole, they handled it well and we got to know other staff members well. They did different pieces of the work with us so it helped clarify the division of labor.
- When we first engaged with them, we'd had a lot of experiences with pro bono consultants which were all radically different from what Arbor Brothers offers. We were nervous going in at the beginning. We vetted them very thoroughly on our end because we were worried about them imposing their ideas on us. We had a strong feeling that they'd be good listeners, but we were pleasantly surprised by how their work has been all about us doing what we think is important. They didn't try to shape our vision or our strategies. The level of respect that they bring and attention they pay to even the most granular aspects of our work; it makes them different from everyone else I've encountered.
- It feels like sometimes foundations describe what their expectation is of a partnership and then, once the partnership starts, the relationship is lacking. I was surprised -- in a good way -- that this was actually a partnership. I was also surprised by how involved they were in moving the projects forward. This was a lot different than other experiences we've had. They surprised us with their attention and availability.
- I think I had really high expectations just off of meeting them and the caliber of our conversations during the site visit process. It was clear to me how closely we were aligned -- same values, standards, and goals -- and they had valuable resources and insights to bring to the table. I hoped to be selected because of those conversations. If

- anything, the actual experiences exceeded my expectations. They were even more of a source of inspiration and guidance than I thought they would be.
- We've had other engagements where organizations came together with us to help with resources but not financial support (and vice versa), but not both. I wasn't sure what to expect. It was nice to be financially supported, but the consulting was even more valuable. I was surprised by how much our meetings with Arbor Brothers and our work became a part of our routine. We would have meetings and then do the homework. When I heard 200 hours a person plus homework, I wondered if it was even possible. I actually think it changed the way we work as an organization.
14. Could you tell us about any funding wins or program awards that your organization earned this year that you believe to be “very meaningful?”

[REDACTED FOR CONFIDENTIALITY]

15. What is your definition of an outcomes-focused culture?

One in which everybody who is a stakeholder in the organization -- whether it's the executive leadership team, staff -- has an understanding of why data is collected, how it's used to tell a story of where things are at, what changes are necessary and what's coming in the pipeline. One that talks actively about outcomes in a way that's connected both to evaluation and planning for the future. Sometimes we see outcomes as something you check off at the end of the year, but in an outcomes-focused culture, outcomes are connected to the mission of the organization or larger goals. An outcomes-focused organization fills in the gap beyond checking boxes, keeping them aligned, how well they're achieving goals, and the vision for the organization.

Success for the organization is clearly defined and every member of the organization understands their role and expectation in reaching those outcomes, reaching success. Metrics are defined and tracked and evaluated on a regular recurring basis to make program shifts and financial shifts and make sure we are consistently performing toward success.

An organization whose culture emphasizes looking at both measurable goals and anecdotes to achieve its mission; it's the practice of consistently looking at qualitative and quantitative data to ensure you're on track to achieve your vision.

Everyone has their job description and goals and all of that is tied to outcomes that are measurable. You can quantify the data.

We make decisions about what to do based on whether they'll lead to pre-determined outcomes we've decided are important.

One that focuses on outcomes; focuses on the results for the people we're serving.

One in which everyone on the team -- staff, board, and clients -- have a shared vision for what we want to achieve in the world and we see a clear path from the work we do individually to making that vision a reality.

Knowing where the resources in your organization are supposed to be going and why; what is the main goal we're driving toward; what are the interim indicators along the way. If we have to make resource allocation decisions, they are being made in a way that makes us most likely to achieve those outcomes.

I think it is that as an organization we have clarity on both the long-term goals we're trying to reach and the interim goals that will help us reach those goals. We've collected the data that will help us determine if we're making progress toward those goals.

16. What is one specific way in which Arbor Brothers has helped your organization develop an outcomes-focused culture?

[REDACTED FOR CONFIDENTIALITY]

17. What is one specific area in which your organization still has room to improve, w/r/t an outcomes focused culture?

We have not been able to get to the point of analyzing our data and figuring out how we use it to drive programs. I don't even think we'll do that this coming year, but maybe the following year after we have multiple years of data. That's a point at which there's more work to be done and it may fall off the radar because we're busy and we haven't done it before.

Performance evaluation and measurement. Refining those systems and ways in which we track success, establishing performance improvement plans, how we coach underperformers; whether our goals are attainable, etc.

We haven't quite gotten there with our marketing and development departments -- it's still a new, young group and we should do a better job of implementing a sales process for development and communications.

Our relationship with our board of directors makes some of this tricky because we're in a growth phase and the board has been simultaneously micromanaging but also under-involved. They don't pay attention, but when they do, it's too granular. As an example, we're trying to decide on a particular outcome and our team could work together and figure this out, but then the board will disagree and disrupt the process. So, board management with respect to outcomes is tough. How do we align them?

I think there are a couple of pieces. One, what makes us great is the how of what we do. There continues to be within our staff a little bit of tension between--yes we're all about process AND we have to ensure that that process is driving toward that goal. Sometimes it feels like either/or -- we're talking about process OR we're talking about outcomes. We still have work to do in terms of how these processes integrate. This happens a lot in the youth development/education space. We have to make sure that both feel integrated--that's one of our big challenges. Our biggest challenge is that we are really outcomes focused -- every dollar that comes through the door, I want to use it to make more change. However, we need to pause and think about the unsexy stuff -- finance, development, etc. We can't put all of our attention on programs -- we have to make sure operations support programs or we won't be sustainable.

The first thing that comes to mind is we need more time, if that makes sense. Our systems are new and we're growing and need to get new staff acclimated to the tools and systems, while also supporting existing staff. I feel like once we do that for another year, we'll have substantive data to look at and use to make decisions. It's too new to draw conclusions from the data we've collected; after this year, we'll have more to look at and figure out what we're being told from the data to inform how we move ahead.

We have to learn to have agendas, what are the end goals we want to achieve? We're such a start up; we just do it and see what the outcome is rather than starting with the desired outcome. Also, sharing it with the team and having them be brought into the culture; even our leadership needs better training on this. We're hiring new leaders so that will change. However, we need to start implementing the things we're taught. We're not sharing it with the rest of the team; we don't have buy-in yet. We've been so small for so long. It's been harder for us to communicate that to them.

How we communicate our outcomes. It's hard to translate our outcomes in a very quick way; it's sort of the nature of the work we do. To the average person, our outcomes don't translate easily. The actual concepts (not just the measures) are hard to explain.

In terms of staff improvement plans, staff meeting their targets, we're not there yet. We have organization-wide targets, but not targets for individual staff members. And we don't have ways of knowing whose batting above or below their weight.

18. Arbor Brothers always wants to improve the services it offers grantees by improving their approach, the types of services they offer, and the quality of their work. Could you provide two pieces of constructive feedback that would help Arbor Brothers make improvements in one or more of these areas?

Concerns about the Arbor Brothers grant cycle

- This year, we needed help with something in the early fall and they offered to assist. But we couldn't really take them up on their offer because we were waiting to hear if our grant was renewed. What types of support are available when you're in between grant cycles and haven't heard if you're renewed?
- Before starting, it would have been helpful to know that their work period is November to May. I felt surprised by that.

Ambivalence around the utility of a tool

- I know they were conscious of this at the time and I'm sure I helped make it more complicated, but I do wish one of our tools was easier to use. Some parts are easy and the answers are easy. But when I want an easy answer to some things, I can't find it. It's a little too built out, though at times I really appreciate that. We never had a chance to go back and revise it and make it simpler, though I admit I never suggested that either. The time frame we have to work with them is short and they're incredibly efficient with that time but I wish there had been room to revise. In retrospect, I would have chosen to redo this tool and make it something more useful and prioritize it over other projects. I didn't know right away that it wasn't working perfectly -- it took some time to figure it out. They definitely gave me a chance to use it but I felt in the development of this and another tool that it would have been good to spend extra time when it was being designed to kick the tires a little more and make sure it would work for our needs. It would have been good to think together down the road. It might have been frustrating - in retrospect, we may have been challenging to work with as well. But I think there may have been an opportunity to check before we dove into the full model. And I know that's hard to do because certainly we spent time. But I guess it's really stepping back and giving the birds-eye view and thinking through scenarios where you'll use this model.
- Maybe they could consider it a beta version and then have a re-design after the grantee gets a chance to work with it. We could ask, is this the right way? Are we approaching it correctly? Those types of questions. There's a tension there because one of the great things is that Arbor Brothers makes things happen, so this would slow things down. But that would hopefully make it a more sustainable tool in the long run.

Concerns with Arbor Brothers' project execution

- There were a few times where we asked them for advice that wasn't related to the main project and we felt they were going to provide more support than they did. If they had set our expectations and said they couldn't help, we would have understood.
- In one instance the detail orientation wasn't quite as strong as we've gotten used to with Arbor Brothers.
- We needed more time on one of the projects. They said I could reach out; but I didn't reach out because I didn't want to look incompetent. Using the meeting time to go over this would have helped a lot more. I was uncomfortable with it -- Arbor Brothers and

others on my team knew how to use it -- but I didn't. I felt behind. By the time it was time to go, I didn't feel like I knew it well enough. Even the language they would use to describe it was new to me. I would pretend I knew what they were talking about, but I didn't. I need to be more open and not so worried about what they think and actually believing it was a safe space to ask questions. I was a little intimidated of them.

Concerns around diversity

- We're struggling with diversity and promotion and we're cognizant of our own issues with promoting staff of color. Arbor Brothers wants to help, but their own diversity isn't the best in the field either, so I'm curious about how we'll be able to approach upcoming projects with an equity lens. I hope we'll be working with Erica. We feel like we can talk to them about this. It's not that this is an issue -- it's more of an apprehension, but it's hard to bring up an apprehension when you haven't yet seen something gone wrong. There are a lot of white men involved, so we need to talk about our suspicions with this before they're an issue.

Desire for more structured meeting times

- For my organization, I just wish the meetings were more concrete. We'd have an agenda and we'd go through it, but we wouldn't finish everything. I think it was because of us and not because of them. If they were sterner and could bring it back to what we're doing; but the fact that they don't push also makes them more special. On the other hand, the fact that they don't push means we lose time.

Desire for firm recommendations

- We're working on a project in our organization. When we first started talking about this with Arbor Brothers, they kept reminding us of all the pitfalls, which made us kind of get lost and unsure of how to proceed. It made us more indecisive. I wish they would have advised that we go in a certain direction. It felt like they'd pick a route and then give us the pitfalls; they never said what they would do if it were them. I'd prefer for them to make the recommendation and let me make the decision. When they gave the pitfalls, it almost felt like they were second guessing whether it was the right decision, which made me more indecisive.

More transparency upfront about the engagement and the commitment

- It would have been helpful at the beginning to have a sense of the menu of options of projects you could work on with Arbor Brothers before selecting projects that lock you in for the year. They don't want to push you to do things you don't want to do, but I felt like there were so many things they could do that I didn't even know were a thing. The project we did this year, I wouldn't have known to ask for it at the outset. I didn't even know it was a thing. I have a little regret about the order of projects we've worked on. There's a difference. When you're a prospective grantee, it's a sales pitch and you want them to pick you and you're going to tell them what they want to hear and what will make them pick you. Then, they pick you and eventually I understood who they are and what the relationship would be and I could be candid about the actual things I need help with. They could say at the beginning of the engagement that these are the things you said you wanted to do, this is what we offer, let's think about what would be most useful for you at this time. I didn't know I didn't have to do the project I pitched. When I realized I probably could change projects, I didn't want to push them. I was already pushing it and

being too candid. Now that I know they want to be authentically helpful, I would have picked different projects at different times.

- The one area that I might suggest -- and maybe they do this -- is being really explicit. It's a deep engagement, there's a lot of homework. Maybe being more explicit with folks about their expectations from the very beginning so people can make those investments of time and staff support. That's not a comment on their engagement with us. I try to flag this for people who ask me about Arbor Brothers.

Planning for life after Arbor Brothers

- I would love to have a little more training or reflection on how I can do what they're doing for me once they're gone. They've been the most meaningful coaches since I've been here and I don't know how to keep this going after we're done. How do I update the financial model? But even bigger than that, how do I maintain a high standard of excellence? How do I hold myself accountable and be the best leader I can be? How do I find other people I can trust and will be candid with me when I disagree? I wish there was more 'teaching me how to fish,' so I can do this by myself after my time with Arbor Brothers ends.

Desire for more meeting time

- I feel like it's one of their values to be really humble and they never want to fall into the trap of a funder being full of their own b.s., but sometimes I don't think they value their work enough. My time with them is so precious and I think sometimes they say you can wrap up early because they want to show that they respect my time. But my time with them is so much more precious than anything else. This is my most valuable time in terms of moving the organization forward. So, if the meeting runs over, that's fine with me.
- I don't even know if this is possible as they get bigger and have more grantees, but I think it would be helpful for them to flex their dosages a little bit. We get locked into a bit of a rhythm. Sometimes, depending on the project or topic or whatever's going on, it could be helpful to have more time together or a quicker check in. I feel like they're good about when things are urgent, but I wonder if it's possible they could be more flexible. Maybe I'm just thinking of a way to get more time with them (laughs).

Praise for the BBQ

- There should be two BBQs.