



# Case Study of Partnership between Voices for Children CASA and Social Venture Partners Boulder County





## Executive Summary

### VOICES FOR CHILDREN CASA OF BOULDER COUNTY (VFC)

**Focus Area:** Abused and Neglected Children

**Mission:** To provide trained, court-appointed volunteers to advocate for abused and neglected children in Boulder County.

**Major Programs:** Court-Appointed Special Advocates (CASA), Kids in Court, Educational CASA

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### SOCIAL VENTURE PARTNERS BOULDER COUNTY (SVP) INVESTMENT IN VFC

**Years of Investment:** June 2015 to November 2018

**Consulting Hours:** 1,008

**Number of Partner Volunteers:** 14

**Cash Grants:** \$46,000

#### ENGAGEMENT PRIORITIES

- Strategic planning
- Improved functioning of Board of Directors
- Improved community presence
- Improved functioning of staff team
- Relocation of office

## SUMMARY OF IMPACT

SVP's investment has helped VFC grow. It is now in a much stronger position to become a mature organization with increased ability to raise funds, significantly increase the number of VFC volunteers, effectively advocate on behalf of a much larger number of abused children, implement a new Strategic Plan and undertake effective governance by its Board. In the three years as an Investee VFC has:

- Increased income by 14% to \$432,820
- Tripled the number of highly-trained active CASA volunteers to 230
- Increased the number of children served annually by one-third to 215

## CAPACITY BUILDING

1. Strategic planning – facilitate process
2. Board development – facilitate, teach and support
3. Board-staff relations – train, facilitate and coach
4. Financial management – budgeting
5. Leadership development – executive coaching and mentoring
6. Office relocation – professional services
7. Executive Director search – training, process development and facilitation
8. Executive Director evaluation – develop process
9. Public relations – consulting
10. Marketing video – creation
11. Human resources – staff capability to cope with vicarious trauma
12. Human resources – audit, develop and implement new policies and procedures

VFC's resources, both capital and human, are being utilized more effectively and the strategic plan provides a clear roadmap to achieving their goal of serving 100% of the children in Boulder County who need them. The organization is enjoying a strong working relationship with Board and staff, and undertaking effective governance by its healthy and active Board.

"We got involved with SVP at a really critical time when VFC was on the brink of wanting to do this really big change," says Board member Jordan Bunch. "I don't think we could have made all of the changes that we needed to make without SVP's input and guidance because we needed to effectively work as a Board and as a staff. We couldn't have made the decisions that we needed to make if we hadn't had that [help from SVP]."

"I cannot say enough about the relationship with SVP," says Executive Director Jacob Harmon reflecting upon the Catapult Investee relationship. "It worked out great in almost every corner of our organization. SVP allowed us to build capacity in philanthropy strategies, volunteer recruitment and retention, and the board. The strength of our organization because of our relationship with SVP has been improved."

"One reason I came [to serve as a VFC Board member] was because the [Executive Director] search [project] was such a good process..." says Board member Tom Briggs. "I wouldn't be here if there wasn't an SVP." (Tom is an SVP Partner who volunteered to help VFC develop a timeline, hiring process and Executive Director onboarding for the VFC selection committee.)

## ORIGINAL RATIONALE FOR SVP INVESTMENT

At initial investment, SVP believed VFC presented medium risk and significant potential for positive impact. The risks were common in capacity building work – the organization was mature but needed a transformation to remain relevant, the board and staff team was small, the board of directors sought development, relationships between board and staff were somewhat tense, and the organization had experienced substantial change in the past year. Those were also opportunities for positive impact. SVP felt the programs and services provided by VFC were important to youth in need in our community, believed in the leadership and liked that services had benefited from significant improvements in the prior year. Although VFC had experienced positive changes, it needed help to complete its renewal transition. Finally, the organization's capacity building needs presented a strong fit with SVP's experience.



# Time for Transformation: A Case Study of the Partnership between Voices for Children CASA and Social Venture Partners Boulder County

By Judith Brush, for SVP

## INTRODUCTION

**V**oices for Children CASA of Boulder County (VFC), founded in 1985, is committed to the concept that all abused and/or neglected children in Boulder County are entitled to a powerful voice on their behalf, leading to a safe environment where they can thrive. Established by members of the Junior League of Denver and the Boulder County Bar Association, VFC is one of 950 CASA programs in 49 states.

Through its programs of Court-Appointed Special Advocates (CASA), Kids in Court and Educational CASA it has aided and advocated for more than 2,000 abused and neglected Boulder County children. However, as with many mature organizations, in 2015 Voices for Children CASA needed a turnaround to remain relevant, increase the number of children it can serve, resolve some internal issues, and increase capabilities.

VFC applied to and was selected by Social Venture Partners Boulder County (SVP) to become a Catapult Investee\* in its program which annually selects a nonprofit to receive pro bono capacity building consulting support valued between \$200,000 and \$400,000 over a 3.5 year period as well as monetary grants.

## BACKGROUND

### MISSION AND FOCUS

**V**FC's mission is to provide volunteers (Court Appointed Special Advocates) on a one-on-one basis to advocate for Boulder County child victims. The Magistrate of the 20th Judicial District Court assigns volunteers to new Dependency and Neglect cases.

CASAs are unpaid but receive 30-hours of mandated pre-service training. Each volunteer handles one case at a time for children from newborn to 18 years old. The volunteer conducts an independent investigation

**\* Catapult provides nonprofits with investments of 3.5 years of deep-dive consulting (typically 1,000 to 2,000 hours) and works side-by-side with nonprofit leadership to reach strategic goals for greater organizational impact. Supporting cash grants (typically \$35,000 to \$50,000) support the building of capacity and capability.**



including getting to know the child by interacting directly with them and talking to others in the child's life. CASAs use the information they gather to inform judges and other professionals of the child's needs in order to work towards providing a safe, permanent home for that child. They monitor the case and provide objective reports with their recommendations to the court. The goal is to get the child out of the system and into a safe and permanent home as quickly as possible.

Outcomes for children participating in CASA programs are compelling. Children with CASAs are more likely to graduate from high school and are less likely to be homeless as an adult. They spend less time in foster care, stay in fewer foster homes and are more likely to be adopted.

## OPERATIONS

A new Executive Director, Nia Wassink, came on board in 2013. A long-time Executive Director had been at VFC for more than 20 years. Another Executive Director came on board in the interim but did not stay long before Wassink's tenure began.

According to Board member Jordan Bunch, the long-time Executive Director (ED) kept organization records and other operational details in her head, like many directors who start early in an organization's history. It was a small organization and the ED ran everything. "So, when she left, the institutional knowledge left with her," said Bunch.

By the time Wassink arrived, VFC was losing volunteers and donors and had lost favor with the justice system, a key constituent. While every organization experiences stagnation, successful organizations recognize the need to make adjustments and secure help.

In 2014, Wassink started to put together the infrastructure that previously had lived in the ED's head, continued Bunch. "She started creating databases of our donors and tracking who gave what and when. She started to track the services we provided, how many kids we were serving, how many active CASAs we had."

At the same time, Wassink led an effort to modernize the CASA program and bring it into compliance with National CASA standards. The current National CASA Association program would provide more opportunities for collaboration with other CASAs in Colorado, but it would require changes in the structure, as well as increases in funding and personnel.

**Capacity:** ability (core skills, management practices, strategies and systems) of an organization to deliver and implement programs at the targeted or desired scale with effectiveness, sustainability and impact.

**Capability:** ability of an organization to deliver and implement programs according to the way they were designed (fidelity) and with quality, achieving the expected impact.

"In 2014 we were at a fever pitch," said Wassink, due to the breadth of change efforts in the organization, and tension developed between some Board members and Executive Director Wassink.

"(Wassink) was feeling stressed [without the] support from the Board that she needed," said Bunch. We needed to figure out how this Board was going to function."

In early 2015, VFC applied to SVP to become a Catapult Investee. The selection process began with an in-person information session for nonprofits, a letter of inquiry, and a conversation with the Board, then an organizational assessment, full proposal and leadership assessment – no small undertaking. SVP's Investee Selection Committee members worked to identify opportunities and obstacles for SVP impact culminating with in-person site visits. After four months, the committee identified VFC as the candidate with significant potential for community impact that was best suited to SVP's model, existing resources and balanced investment portfolio.

VFC was selected as a Catapult Investee, began its relationship with SVP in June 2015 and graduated in November 2018. It also received cash grants of \$15,000 in 2015, \$20,000 in 2016, and \$11,000 in 2017 for general operating costs.

SVP saw the challenges VFC was facing as opportunities for the nonprofit to continue and increase its positive impact. SVP felt programs and services provided by VFC were important to youth in need in our community, believed in the agency's leadership potential and liked that services were benefitting from new attention and updates.

SVP believed that VFC needed help to successfully complete its transition but had faith that it could happen.

“We were impressed with the transparency and commitment of VFC’s team,” says Jennie Arbogash, CEO of SVP. “During our due diligence process, Board and staff members acknowledged the organization’s challenges and were earnest in their desire for assistance to improve.”

## EXPLORATION OF IMPACT

Once VFC was selected, SVP Lead Partner Meredith Spear immediately teamed with the Board Chair and Executive Director to plan goals and projects.

The overall engagement goal was: ***“Through a Board improvement process, VFC will find a unified voice and plan for the future, with the assistance and guidance of SVP.”***

“Meredith was the person we needed to get the job done,” said Wassink. Spear had been in the corporate world for years and had served as a CASA in Arizona. She garnered respect by the CASA Board. “Talk about the matching that SVP does of Partners with organizations! She was the person we needed to get the buy in from the Board. They had to understand that CASA had to serve more kids. It took months to do.” According to SVP’s Arbogash, this initial resistance to change is common in capacity building work. “We humans have a tendency to fear the unknown and can convince ourselves the status quo is in the best interest of our clients and our organization. Successful transformations require courage.”

Individual engagement priorities were set for the investee relationship to attain:

- Strategic planning
- Board development
- Improved community presence
- Improved functioning of staff team
- Relocation of office

These priorities were based on recognition and acceptance of the need for VFC to grow. The organization was at a crossroads. Current Executive Director Jacob Harmon explains it this way, “The questions was, do we want to make a difference in the lives of children by providing services to every child who needs us and begin the process to become data driven?” he said. “It

was a difficult transition. SVP was critical in convincing the Board, staff and volunteers that this change was necessary.” (Harmon joined VFC with experience in data, a help to finish the work).

The support SVP gave to Executive Director Wassink was helpful since the relationship of the VFC Board with SVP was good. SVP Partners could give constructive criticism that may not be accepted if offered by the Executive Director, continued Bunch. Arbogash concurs and points out it is typical for Boards to receive feedback more readily from outsiders.

For the first year as an Investee, VFC had audacious goals that were not possible to accomplish in a short period, according to Wassink.

One issue VFC was facing was that its Finance Committee could not pass a budget. In order to grow they needed to spend some money and were sitting on \$1 million in investment assets. The committee members thought it too risky to take money from that fund. SVP Partner John McCorvie sat in on a Finance Committee meeting to discuss CASA’s ability to hit the bold goals they had set. McCorvie’s input convinced the Board that they needed to take the risk and pull some dollars from their investment account. The budget passed one week later.

As for the adoption of the updated CASA program, with SVP’s investment and help, VFC staff started the process. They adopted the new program that would change the organization’s structure. The Board accepted the change, but “as we began to roll out the new program the Board put up roadblocks,” said Wassink. “They just were not able to see the need for agility of the organization at that point.”

## BOARD DEVELOPMENT

“There was a leadership vacuum,” said Lead Partner Kay Paine about the Board as the relationship with SVP began. Harmon elaborated saying, “We had Board members who cared deeply about the organization but disagreement about how to move forward was paralyzing. The Board needed help to gain alignment.”

Eventually all but one of those Board members moved on to other opportunities, with Jordan Bunch remaining. “One of the smart things Nia did was to recruit strong Board members with the skills to right the ship,” said Harmon.

The biggest initial Board change was transitioning to the Board to be “invested and engaged appropriately



in things they should be involved in,” said Wassink. “This moved VFC into new exciting territories. I left when I felt that the Board could weather a change in Executive Directors.” The Board is now more diverse, including three young members and three men.

Board recruitment took place in several ways. One step was to put out a general call through SVP which is how Patricia Burgess and Steve Peterson joined the Board. Burgess and Peterson are SVP Partners and were already CASA volunteers. Burgess also had been on two CASA Boards before coming to Boulder.

Another new Board Member, Steve Welsh, is an early childhood specialist committed to CASA and he is well-connected in Longmont. Both Welsh and Burgess had great connections and experience on well-functioning Boards. “They could call out that something was not ideal,” Wassink said. Having their support helped Wassink turn the tide.

After setting their first year goals with SVP, Wassink said they knew that the Board needed governance training. SVP Partner Amy Maranowicz conducted a Board retreat covering vision, goals and Board communications. “This was really effective because the Board respected SVP,” said Wassink.

SVP provided valuable mentoring and coaching by bringing in SVP Partners to work one-on-one with Board officers and to consult with the full Board. Coaching provided additional tools and knowledge, including a better understanding of staff vs. Board member responsibilities and the appropriate role of a nonprofit Board. “These are all things that even if you’ve been on a Board you need a refresher on,” said Paine. Arbogash agrees and notes coaching or mentoring a nonprofit’s leaders is just as important as providing direct consulting services.

Today communications are effective and frequent. “The new Board is working well. Everything is very open ... a goal we are working on now is to increase the performance and diversity on the Board. We’re better now than it used to be,” said Bunch.

Board development is ongoing, and should and will continue year round. Harmon includes the *SVP Board with Brains* schedule in every board packet and mailing to encourage Board member participation in helpful trainings. “Some of those on the Board don’t have tremendous experience being on a Board. They’re still learning and are eager to learn,” elaborated Paine.

### RELOCATION OF OFFICE

VFC knew it needed to move its office from central Boulder, due to high rent, and made it a top priority in the beginning of the partnership. “Securing commercial space, especially affordable commercial space, is tough in Boulder,” says Arbogash, “Meredith Spear shared her expertise over many months to help VFC find office space in Gunbarrel and negotiate a lease which saves the organization 55% of its previous rent.” The new offices also are closer to Longmont. “More of the kids we serve are from Longmont and the new office location allows us to have a presence there,” said Harmon. Since the move, they are recruiting more volunteers from Longmont (since people do not have to drive as far).

### STRATEGIC PLANNING

With so much change, the organization was ready for an updated vision and action plan. Partner Jeremy Yazinski was engaged to lead VFC through a strategic planning process.

Volunteers, donors, systems partners and community members provided input on the strategic plan through interviews and three public meetings. Interviewees shared perspectives on the environment, strengths, weaknesses, and opportunities. Public meeting attendees commented on the plan and VFC’s three-year vision. Participants offered ideas on methods and resources that might help and be available to CASA to implement the plan, as well as ideas related to plan goals. It was a great way to get ownership from stakeholders, according to Paine.

Harmon started in the middle of the strategic plan process. A process that went well because of the concrete steps that were laid out, said Bunch. She continued, “One of our big strategic goals is to increase our

marketing because a problem we've historically had is getting VFC's name out there and competing with other bigger organizations vying for those fundraising dollars."

Another planning objective is to diversify and strengthen revenue streams, a goal critical to VFC's growth. Skilled volunteers are essential to maintain CASA's strength and this requires experienced managers and professional training. "We recognize that money is needed to continue to provide high quality services," said Harmon.

The organization is in a much better position to go out and raise funds because the Board has decided that part of their role is to fundraise, according to Paine. When SVP began, working with VFC there was not an expectation the Board would do that. Now it is much more a part of its culture to determine how to bring in more revenue. CASA also hired a Development Director to manage donor relations and fundraising which helps build more and stronger relationships in the community.

Finally, the Board is working to complete the tasks set in a two-pronged retreat held in May 2018 and facilitated by SVP Partner Barb Truan. The objective of the retreat was to help them put together an implementation plan for the strategic plan as well as to better understand their individual communication styles using a DISC assessment (a personal assessment tool used to improve work productivity, teamwork, leadership and communication).

As a result, the Board's work on the strategic plan has accelerated. In the past, it would have been difficult for them to know how to take on those responsibilities, according to Paine.

### COMMUNITY PRESENCE

People that know VFC love it. However, not enough locals know the nonprofit, meaning the organization needs to raise awareness of its work, explained Paine.

Before Wassink's tenure, communications were primarily focused on recruiting volunteers. "But when we started with audacious growth goals, we had to determine what this [the organization] was going to look like," Wassink said. "So we rebranded using the [national] CASA logo and branding. And, we began strategically looking at what markets and fairs we were going to and collecting data on that." At that point they began to analyze their social media use to make sure they had consistency in messages across all media. This happened

just as the partnership with SVP began.

VFC is doing more targeted awareness-raising and faces two challenges in getting the message out.

The first challenge is the doubt on the part of many that there are a large number of children needing help. Boulder County Housing and Human Services reported that in 2017 there were 2,500 substantiated reports of child abuse. Of that number, about 300 children are taken from their homes every year because it is too unsafe for them to continue to live there. These numbers do not jive with many people's perception of Boulder, making it more challenging to incite action via volunteerism or giving.

The second challenge is the need to raise awareness that VFC helps make a difference in the Boulder County community. That is why VFC has formed two important committees – a Policy Committee and a Marketing Committee. Harmon believes the one important way to raise awareness about the nonprofit and its work is to get legislators and elected officials to pay attention, and to get them and the media talking about the issue.

"We are making it a priority to raise awareness of CASAs in the field with legislators and elected officials which is driving awareness," said Harmon. In addition, VFC has increased efforts to let residents know VFC is a place where a person can volunteer to make a difference.

VFC is aware that raising awareness and increasing fundraising are connected. "One of the changes that we made in the last three years is adjusting to have one fundraiser focused on getting new people involved and aware and the other to keep past donors. It's been really helpful to get new donors involved," Harmon continued.

Fundraising this year is good and VFC expects to raise more in 2019. They have a diverse strategy with a highly dedicated and consistent donor base, good relationship with foundations and two incredibly successful fundraising events each year, reports Harmon.

Tracking engagement data is also imperative. Previously the nonprofit did not track organizational engagement with its social media and has no historical comparatives. Harmon is developing the metrics to see what the data on the website and social media looks like, and is seeing steady growth in the community with web site engagement.

Bunch believes communications are getting better and the organization will continue to improve over time.



## STAFF AND VOLUNTEER DEVELOPMENT

There were only three staffers at the outset of the SVP investment, no policies and little written down, according to Wassink. “We were putting volunteers in highly vulnerable situations...and we didn’t have policies that protected them or us,” she said. Now there are seven paid staff and triple the number of volunteer CASAs.

“In the past, volunteers did the administrative work but that wasn’t serving the kids and wasn’t serving the organization,” said Harmon. In the last year, VFC began implementing a strong human resources process (with SVP’s guidance) to attract, hire and retain the highest quality applicants. He said they have on-boarded very strong and talented people to support and manage the volunteers, and are dedicated to hiring nonprofit professional staff to address priorities of the strategic plan.

In the past, other than doing an occasional presentation, the staff did not have much interaction with the Board. The picture began to change when new Board Members joined. Harmon encourages more staff and Board interaction and communications. Staff members now regularly come to Board meetings to report on what they are doing. He also has created new marketing, fundraising and policy committees on which staff, Board Members and volunteers serve so that all levels of the organization are working together and “are all pulling in one direction.”

SVP Partner and psychologist Roland Evans is providing support and “group coaching” sessions for the staff regarding self-care and strategies to deal with the stress of their jobs. The sessions provide tools and resources that can help them deal with the trauma of being in stressful situations related to the abuse and neglect VFC clients have experienced. “The sessions help build coping skills and help each of us support our colleagues when they have a particularly bad day,” said Harmon.

One of the things Evans is doing in his biweekly sessions with them is working on an exit strategy to help them become a “self-coaching group.” This aligns with SVP’s philosophy of teaching rather than telling.

In addition, SVP Partners Jeremy Yazinski and Betsy Holmes have embarked on a human resources audit, looking at the policies and practices around HR. Yazinski interviewed each staff member to gauge their level of job satisfaction, how happy or unhappy they are working at VFC. He said everyone is very satisfied with their situation, their work and their colleagues, but there are some minor things to improve. He also planned and

facilitated a staff retreat and created a new Employee Handbook.

Holmes developed a Google Site that is transparent and includes all of the policies and procedures and forms for hiring and onboarding a new staff member. It also includes the new employee handbook.

## VOLUNTEER CASAS

When VFC became a SVP investee, the organization had 77 volunteer CASAs who worked with 166 children. Almost all were white women who were retired. Recruiting only took place at farmers’ markets, limiting the number of people reached. Since the goal is to provide every child in need with a CASA, outreach had to increase.

By mid-2018, VFC had 213 volunteer advocates and Harmon hopes to have about 250 active by the end of the calendar year. VFC had a training session with 20 people attending in July and plans another later in the year. By the end of their fiscal year in 2019, he wants to have 300 CASAs. Harmon realizes that while 300 will be a tremendous accomplishment, 400 are needed in order to serve every eligible child.

VFC is reaching out to the social work and law departments of University of Colorado and is beginning to form partnerships and engage interns. They also have reached out to a retired teacher’s group and the Boulder County Bar Association. “It’s slow moving in a lot of ways but the CASA program and its reputation in the community are so good so people are willing to listen,” he said.

“We also need more diverse volunteers,” said Harmon. VFC looked at where they were recruiting in order to expand. While farmers’ markets are still a successful place to recruit, they now reach out to their community partners and organizations, do more social media promotion (especially to reach younger volunteers) and ask volunteers to reach out to their circles.

One of the groups VFC reached out to is the LGBTQIA community because of cases involving abuse to children due to their gender or sexual identification. “We are letting the community know that if you want to work on LGBTQIA issues you can do so by being a CASA volunteer,” said Harmon.

VFC is also recruiting in Spanish-speaking communities.

## SUMMARY OF SVP INVESTMENTS

	TOTAL
Consulting Hours*	1008
Consulting Value	\$201,600
Cash Grants Awarded	\$46,000
Number of Projects	16+
Number of Partner Volunteers	14
*Rate = conservatively valued at \$200/hour	

## SUMMARY OF INVESTEE'S GROWTH

	2015	2016	2017	2018
Income	379,961	359,814	426,045	432,820
Expense	379,961	359,814	445,269	432,819
Reserves	922,036	955,415	984,934	1,082,527
Employees	3	4	5	7
Volunteers	77	82	130	230
Total Clients*	163	174	184	215
Volunteer Hours	4225	5797	5121	7177 (estimated)

## ANALYSIS & REFLECTION

### IT IS NOT ALL RAINBOWS AND KITTENS

As VFC works toward its ultimate goal to serve every abused and neglected child in Boulder County, there are additional steps it needs to take to get there. These include continuing to build infrastructure, hiring more staff, increasing presence in the community through effective marketing and continuing to recruit more volunteer advocates for the children.

A major challenge in reaching these goals is one that they may always face – the topic of child abuse and neglect is not an uplifting one. While the outcomes of the children helped by VFC, such as the number of children graduating from high school and going to college, are as good as those of participants in I Have A Dream Foundation and other programs, VFC has to deal



with the fact that these children are abused or neglected. Yet the perception is that abuse and neglect doesn't happen in Boulder County.

"It's really upsetting," Bunch said. "Those two things combined will make it always difficult for us to get the public awareness and the fundraising that follows it because to engage with VFC you have to recognize that children are abused and it happens here. People don't want to do that."

Another challenge Bunch feels VFC will always have is maintaining a diverse Board and volunteer base. "It's one of things we get feedback on. A lot of the kids we serve are Latino or are LGBTQ and it's so important that those kids have a CASA that they can share a life experience with. A kid who is transgender and sexually abused ... it is so important for them to have an advocate who will relate to that."

As a result of the program growth VFC has seen with an increasing number of volunteers and new fundraising, Harmon feels it is a moral imperative to say that they will serve 100% of the children in need. He will not be satisfied with 30% or even 50%. "We set an ambitious goal to serve 100% of the kids with CASAs so we increased our budget 50% to \$575,000 for 2019," said Harmon. "Those aren't small challenges. We've got to put our head down and do the work. We'll get there."

Lead Partner Paine believes staffing remains a challenge – while VFC currently has a good team, it is not

big enough to achieve their goals. In addition, she feels they don't have enough money to do everything they want to do. "They've got the capacity to raise money, but it may take longer than they want," she said.

Paine hopes the staff will have personal and professional development opportunities so that they feel they are supported and recognized for the work that they do and the Board will continue to evolve in terms of their level of professionalism and ability to partner with Executive Director Harmon to lead.

SVP CEO Arbogash says all organizations face on-going challenges and graduating Investees are no different. "SVP's capacity and capability-building is not a magic bullet. However, our achievements in developing skills and leadership, strengthening management practices, and implementing new strategies and systems means that Investees are much more likely to succeed. The people involved have more grit, more resources, more tools and more support at their disposal.

### INFLECTION POINTS

Participants in the VFC and SVP relationship outlined a number of key points during the investee process that were critical to its success.

- Two Board of Directors retreats, the first led by SVP Partner Amy Maranowicz and the second led by Partner Barb Truan. "The Board retreat with Amy was one of those night and day moments," said former Executive Director Wassink. "We made progress on how we were going to help each other. It was a positive experience."
- The retreat with Truan focused on the roles of the Board and their responsibility with the staff. It also covered communications and different communications styles. "This was a really good thing," said Paine. "I saw an immediate improvement in the way the Board functioned following it. The relationship between the Board and the Executive Director improved. That was really critical."
- The session with SVP Partner John McCorvie that led to the budget passing in one week, after faltering for months, was key. "It was so great, such a small thing that had a great impact," said Wassink.
- The Invested Leaders' peer group offered needed support. "Being an ED can be really

isolating," said Wassink. "How wonderful it was to have the structured environment, the support from peers going through the same things. You can't talk to your staff or Board about everything and so you end up feeling alone. The peer support is confidential. It is such a wonderful experience."

- When Wassink decided to leave VFC, SVP's help was essential to a smooth transition.

Wassink had not really thought through how she was going to tell people so SVP Partner Jeremy Yazinski went into coach mode and told her to tell a few people on the Board and to plan a transition strategy. She took the advice to heart, said Paine.

In order for the Board to effectively hire a new Executive Director they needed to have a better insight into what she did, so Paine interviewed Wassink about her job as ED during a Board meeting. It was an "ah ha" moment for the Board.

SVP Partner Tom Briggs worked with the Board's selection committee to come up with a search and hiring process, a structure and a time frame to on-board an Executive Director. By August 2017, Harmon was hired. Paine is continuing to work with the Board to develop the Executive Director's evaluation process since the Board is committed to an evaluation and to incentivize the position.

### LESSONS LEARNED

Lead Partner Kay Paine, who viewed her role in the process as project manager, explained what VFC learned through participation in the Catapult program. One thing was that there are a tremendous number of resources out there for the Investee to reach out to. Some were SVP-specific but there were others, as well. There are people in the community who also will work with them if they're asked, she said.

In addition, they learned that they don't need to operate in an insular way. "That's the kind of lesson all SVP Investees may learn through the process. You don't have to do this alone," she said. "Through the process you can step back and do a little reflection on what you need."

It's an SVP goal to get as many partners as possible involved in its nonprofit Investees. As VFC experienced, they received a great deal of consulting work – 1,008 hours from 14 Partners.

Paine occasionally gets together with Jacob Harmon as the investment winds down to talk about various issues saying, "I'm his sounding board." She has suggested he create a "kitchen cabinet" made up of a few thinking partners with whom he can discuss his struggle with an issue he is dealing with to benefit from their experience to find a solution.

## SUMMARY OF VOLUNTEER ENGAGEMENT

VOLUNTEER	CONSULTING AREA
Meredith Spear	Lead Partner – until January 2017, relocation, mentoring
Kay Paine	Lead Partner – after March 2017 Human resources, mentoring, team-building
Jeremy Yazinski	Strategic Plan, plan and facilitated Staff Retreat, HR Audit and new employee handbook
John McCorvie	Budgeting assistance to the Board
Amy Maranowicz	Board Retreat and Training (communication and decision making)
Amy Rosenblum	Executive Committee Training (Board roles and responsibilities)
Ellen Greenhouse	Coaching for ED (Nia)
Bruce Borowsky, Triple Threat Digital	Creation of a video to help recruit volunteers and educate community members about CASAs
Don Poe, People Productions	Creation of a video to help recruit volunteers and educate community members about CASAs
Tom Briggs	Developed timeline and hiring process and on-boarding for ED Search Committee
Kay Claggett	Board Training on accountability, roles and responsibilities
Roland Evans	Provided support and "group coaching" for staff (not ED) regarding self-care and strategies to deal with the stress of their job
Barbara Truan	Facilitated Board Retreat (DISC training and development of action plan for Strategic Plan)
Betsy Holmes	HR Audit, developed Google Site to use for hiring new staff and new "employee handbook"

*\* In addition to SVP's investment support, several SVP Partners have become involved with VFC as Board members, volunteers and donors.*



## THE FUTURE

The consensus of the SVP and VFC individuals interviewed about the Investee experience is that VFC will reach its goal that every neglected and abused child in Boulder County who needs a CASA will have one. Executive Director Harmon hopes they reach the goal in three years as stated in the strategic plan.

The organization recognizes that to reach it, everything must fall in line including increasing public awareness, increasing funding, and recruiting and training volunteers to be advocates. Lead Partner Paine added that when VFC meets its goal it must be able to maintain the quality and the personal touch that they currently have serving children with CASAs. A challenge is “how do you grow and not lose the one-on-one personal touch that you have with people,” she said.

Harmon said their goal also includes actively working to reduce and prevent child abuse. “It’s not enough to just provide CASA service,” he said. “It is incumbent for us to face the need and reduce it. We will be part of the solution to meet those challenges.”

To find those solutions to reduce the need for their services, Harmon believes the following issues need to be addressed:

- Affordable housing
- Access to substance abuse treatment
- Domestic violence
- Immigration
- Sex trafficking

Former Executive Director Wassink currently volunteers for VFC as a CASA. As someone actively serving as a child’s advocate, she believes VFC’s ability to serve every child in need will change the future of Boulder County. “When we look at so many problems facing our adult population they often start in foster care or after experiencing childhood trauma,” she said. The homeless population, the incarcerated population, and people with mental health issues, so many of these individuals’ problems begin with childhood trauma. “I feel that early intervention can lead to help with everything. If every child has an advocate, I can imagine what Boulder County would be in the next 20 years. It would be a kinder, gentler, safer place for everybody.”

## In memory of Meredith Spear.

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