



# CNM 2017 ANNUAL REPORT





# CEO'S LETTER

**WHEN WE WERE FOUNDED OVER 35 YEARS AGO**, our mission was to provide basic management training services to small Dallas-based nonprofits. Over time, we have expanded to offer a wide range of management consulting and training services to nonprofits of all sizes, missions and locations throughout North Texas. In 2015, we broadened our mission to strengthen communities, not just nonprofits, by connecting and engaging foundations and corporations with nonprofits through a laser-like focus on outcomes to address growing issues in a more substantive way.

We launched our CNM-pact® Services in early 2017 following a successful pilot program in the previous year. With these services, we believe we will drive culture change as nonprofits become more capable of showing program outcomes through our evaluation expertise and robust technology for data analysis and reporting. At the same time, foundations and corporations will be able to know with greater confidence which nonprofits to invest in since they will have program results based on a valid methodology.

To further advance our mission and community impact in the future, we are strengthening our capabilities including:

- » Increasing the capacity of our CNM-pact technology to process significantly more data at a rapid speed so nonprofits can engage with stakeholders in real time.
- » Creating a “CNM Certified” designation for nonprofits using our CNM-pact Services who meet CNM standards for data collection, analysis and reporting to improve the funding decision-making process.
- » Expanding our education services to offer courses by webinar with captioning services and providing onsite training at the client's location for easy access to valuable content.
- » Enhancing our website to provide a more user-friendly experience and more online resources such as our recently released State of the Nonprofit Sector Report and Best Practices Guide to be issued this fall.

We recently updated our brand with a new color scheme, logo and shortened our name to reflect this new era of CNM. Also, we are completing the relocation of our Fort Worth campus to Westbend I, 1701 River Run, Suite 1002. The move provides CNM Fort Worth with increased office space including training facilities to better meet the needs of our Tarrant County clients.

We are proud to showcase the tremendous value we are bringing to the community through CNM's outcomes and feedback from those we serve. We deeply appreciate our Board, Advocacy Council, funders and partners for all of their time, financial support, and commitment to the mission of CNM.



**TINA K. WEINFURTHER**  
President and CEO  
CNM



## LEADERSHIP CONSULTING SERVICES

### Leadership Circles

Leadership Circles are open to CNM members who are full-time executive directors, development directors, program directors or marketing directors at a nonprofit organization. Participants are assigned to Leadership Circles based on their role and the size of the organization along with a professional facilitator to help guide the conversation. Some of the benefits of joining a Leadership Circle include peer-to-peer encouragement and coaching in a confidential setting and the ability to hear multiple viewpoints on issues impacting the nonprofit sector. More than 65 people participated in 11 Leadership Circles in 2017. One participant said, “The Leadership Circle provided me with a group of like-minded peers, who encouraged me through multiple issues over the last year. This type of group processing was extremely helpful in getting to the root of various work-related problems. I am grateful for the individuals in my Circle and their coaching over the last year.”

### Strategic Planning

CNM brings a full range of services to assist nonprofits in identifying opportunities and key strategies to meet their goals. Our process includes leveraging our proprietary organizational assessment tool based on Harvard Business School’s Balanced Scorecard which focuses on 14 key functional areas determined to be critical success factors for high performing nonprofit organizations. The assessment analyzes data from organization documents, an online survey that CNM administers to all staff and board executive committee members to obtain their ratings on the 14 key areas, and one-on-one phone interviews with the Board Chair and President.



“Pathfinders staff takes every opportunity possible to attend CNM workshops and seminars. The topics are always pertinent to our work, and the instructors have in-depth knowledge of the nonprofit field.”

— Kathryn Arnold  
*Executive Director  
Pathfinders*

### **Custom Training**

CNM can develop training customized to the needs of a wide range of community stakeholders including nonprofits, corporations, and foundations. Frequently, we are asked by nonprofits to create and deliver custom board governance training which is essential to advancing the organization's mission. We share best practices to elevate the board's knowledge of the social sector and then work with them to apply that learning to the nonprofit they serve to ensure strong performance. In 2017, CNM provided board governance training

to National Council of Jewish Women (NCJW). NCJW Board President Joyce Rosenfield said, “Thanks to CNM's ability to listen to what we felt we needed, as well as engaging our Board members, CNM put together a great presentation that both brand new Board members as well as those who have been committed to NCJW for more years than we can imagine could gain insight and knowledge. Thank you for making our investment in our Board so incredibly worthwhile.”

## Grant Services

In 2017, CNM added grant writing, research and review services to our portfolio of Leadership Consulting Services. CNM's expertise in grant writing and grant research helps nonprofits of all sizes and missions fulfill a critical funding need. CNM worked directly with United Way of Tarrant County (UWTC) to provide these services, leveraging our subscription only database and specialized foundation knowledge to identify potential funding sources. In addition, we helped manage the grant writing process for some of UWTC's existing grant proposals as well as the grant writing on the newly identified funders. CNM has currently written more than 25 Letters of Intent and grants for UWTC. "CNM has been instrumental in helping United Way of Tarrant County meet our development objectives this year. From the grant writing to research, it gave me great comfort to know the depths that CNM worked to ensure we received every possible penny there is to be raised," said Leah King, Executive Vice President and Chief Operating Officer, United Way of Tarrant County.

## Executive Recruiting

CNM's Executive Recruiting Services help support a nonprofit's hiring process from beginning to end for executive-level candidates. In 2017, Prevent Blindness Texas was in search of a new Executive Director to lead their organization and they enlisted CNM's help to find the best candidate. After an extensive search, Heather Patrick was selected to be the new Executive Director. Terri Nesrsta, Board Chair for Prevent Blindness Texas said, "We are thrilled with the progress Heather has made for our organization. Thank you again for helping lead us through this difficult transition."



## OUTCOMES AND EVALUATION CONSULTING SERVICES

### CNM-pact Services

CNM has continued to expand the adoption of our CNM-pact® outcomes and evaluation consulting and technology services that give nonprofits the ability to efficiently and effectively track, analyze, evaluate and report program performance. Nonprofits can now securely access their program results anywhere, anytime, on any platform. CNM's consultants work alongside the nonprofit staff to guide them in developing strong evaluation plans and protocols, while expanding their capacity to utilize data for planning and quality improvement. CNM brings outcomes expertise and technology to all nonprofits regardless of size, mission or location, at an affordable cost.

Lead by our Ph.D. trained program evaluation consultants, CNM consulting services align with the American Evaluation Association standards. Leveraging best practice measurement and evaluation standards, these services can help nonprofits achieve greater efficiencies and effectiveness. Below are some examples of how our CNM-pact Services are impacting the community.

### Boys & Girls Clubs of Greater Fort Worth

CNM worked with Boys & Girls Clubs of Greater Fort Worth to develop a program logic model that aligned with the Boys & Girls Clubs of America outcomes framework and organized their agency-level outcomes. CNM also worked with Boys & Girls Clubs of Greater Fort Worth, in partnership with Boys & Girls Clubs of America, to build their CNM-pact portal. "Our CNM-pact portal allowed us to link our outcomes to agency-level data such as average daily attendance or members' participation in special programming," said JD Newsom, Chief Operating Officer, Boys & Girls Clubs of Greater Fort Worth. "This functionality provides a level of analysis that allows us to ask new and more complex questions about our impact."

### Camp Fire First Texas

CNM provides CNM-pact technology services and third-party evaluation services to the Camp Fire School Readiness Program. In 2017, CNM worked with Camp Fire to improve their data monitoring and tracking system to enhance the quality of their outcome data. "Through this process of working with CNM, we have been able to streamline data collection and review information more quickly enabling us to address trends immediately instead of waiting until the end-of-year program analysis has been completed," said Lyn Lucas, Chief Program Officer, Camp Fire First Texas. "Overall, it's made us more efficient and effective in our data management and reporting processes."



"Through this process of CNM, we have been able to streamline data collection and review information more quickly enabling us to address trends immediately instead of waiting until the end-of-year program analysis has been completed."

## **The Aspen Institute and JPMorgan Chase Program on Philanthropy and Social Innovation Grant**

CNM received a \$50,000 grant from the Aspen Institute and JPMorgan Chase & Co., to support the continued development and evaluation of our CNM-pact technology and evaluation capacity building services to develop a shared measurement system across a group of nonprofits that are focused on the same social issue and strive for significant outcomes.

CNM brought together six nonprofit organizations whose missions are focused on reducing poverty through workforce readiness and affordable housing. With these six nonprofits, CNM worked collectively with the organizations to develop their individual evaluation frameworks and data collection plans with shared measures and outcomes across organizations.

One of the participating organizations was Austin Street Center. They worked with CNM to build their evaluation capacity for their Education and Employment Resource Center and their Work Program. As an Aspen program participant, Austin Street Center received individualized coaching from CNM's Ph.D. trained evaluators to create the tools necessary to implement a valid and reliable

methodology for evaluation. CNM data specialists, trained statisticians and SAS programmers, then built a CNM-pact portal to analyze and report their results. "It was an incredible experience working with CNM on our portal. To see data in so many ways and to use it to drive decisions that affect the lives of our homeless clients is truly a game changer. We went from wishing and dreaming to doing and knowing. The CNM-pact portal and the consulting have made data central to the work we do going forward. Nothing will ever be the same again and we are thankful for the opportunity to participate in such a phenomenal project," said Dulari Mehta, Assistant Director of Shelter Services.

With an increased focus on outcomes, Austin Street Center will be able to make data-driven decisions, leading to greater impact in their community.

## **Outcomes-Based Program Evaluation Institute**

The 2017 Moody Institute in Dallas and The Miles and Morris Foundations Institute in Fort Worth each included three sessions focused on outcomes-based program evaluation with eight hours of coaching sessions per organization. A total of 16 nonprofits participated, eight in each Institute. Participants completed the Institute with a complete evaluation plan and the tools necessary to successfully implement that plan. With generous support from the Moody Foundation, The Miles Foundation and The Morris Foundation, participants could register for the course at a fraction of the price normally associated with training of this caliber. "The Moody Outcomes Institute helped key players in our organization gain a deeper understanding of how to collect and measure important data on our programs. In addition, it helped us to get on the same page as a team about what we value in terms of data. CNM did a fantastic job of leading the workshops and we are so grateful for the opportunity to attend," said Jen Pierson, Director of Development, West Dallas Community School.

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— **Lyn Lucas**  
Chief Program Officer  
Camp Fire First Texas

## EDUCATION SERVICES

CNM's public seminars and in-depth certificate programs provide professional development training on a variety of nonprofit management topics including accounting, human resources, board development and volunteer management. In 2017, we held 64 public seminars, 34 in Dallas and 28 in Fort Worth. In addition, we conducted 14 certificate programs in Nonprofit Leadership, Nonprofit Management, Marketing, Outcomes and Fundraising.

CNM's Leadership Certificate Program is held in partnership with Southern Methodist University's Continuing and Professional Education department (SMU CAPE). This signature program celebrated its eleventh year in 2017 with 12 graduates. The Leadership Certificate Program provides multi-week, in-depth leadership training for nonprofit CEOs and senior leadership.

The Outcomes-Based Program Evaluation Certificate, sponsored by the Rees-Jones Foundation, is designed to help nonprofits serving children and families to create outcomes-based program evaluation plans that improve results. In 2017, 15 participants completed the program. The Outcomes Certificate consists of six classroom sessions designed to expand the capabilities of a nonprofit professional responsible for programs and reporting impact. Participants learn how to formalize program logic, develop indicators to measure success, determine appropriate data collection and analysis methods, communicate findings, and use the results for program improvement, innovation and growth. Over the course of the certificate, participants build and present a Program Evaluation Framework for a single program.





“Girl Scouts of Northeast Texas was honored to utilize our A Night of Light scholarship for primarily Fund Development courses and the Nonprofit Management Certification.”

— **Jennifer Bartkowski**  
*CEO*  
*Girl Scouts of Northeast Texas*

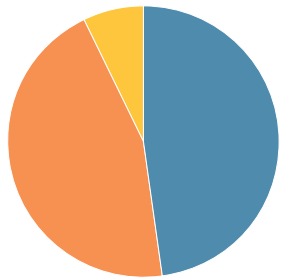
## A NIGHT OF LIGHT

A Night of Light showcases the individuals and organizations serving the North Texas nonprofit sector that are at the forefront of driving positive impact in our communities. In 2017, A Night of Light honored excellence in five categories, Nonprofit of the Year, Nonprofit CEO of the Year, Nonprofit Board Leader of the Year, Nonprofit Partner of the Year and Robert Miller Nonprofit Communicator of the Year. Since its creation in 2001, A Night of Light has awarded more than \$475,000 in cash awards to 95 organizations.

The event was held at the George W. Bush Presidential Center on November 16, 2017 and emceed by WFAA

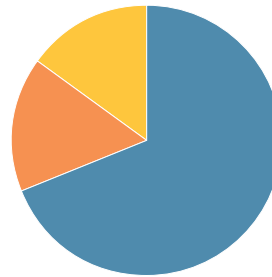
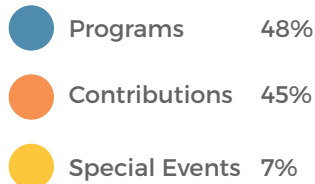
Anchor Ron Corning. Award recipients were presented with a \$5,000 unrestricted grant, a scholarship for \$2,500 in CNM services and a crystal Tiffany & Co. platter. The 2017 award recipients included ACH Child & Family Services, Nonprofit of the Year; Daniel Roby, CEO of Austin Street Center, Nonprofit CEO of the Year; Gerald Louviere, Board Member Boys & Girls Clubs of Greater Dallas, Nonprofit Board Leader of the Year; DRC in partnership with the Paulos Foundation, Nonprofit Partner of the Year; and Communities Foundation of Texas, Nonprofit Communicator of the Year.

## FINANCIALS



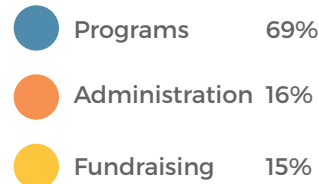
### Revenue 2017

Programs:	\$843,949
Contributions:	\$789,599
Special Events:	\$123,750
Total:	\$1,757,298



### Expenses 2017

Programs:	\$1,054,181
Administration:	\$248,985
Fundraising:	\$220,831
Total:	\$1,523,997



“As a small nonprofit, we are particularly grateful for affordably priced sessions offered in convenient locations, which provide opportunities for professional growth and development.”

— Judy Youngs  
Executive Director  
*A Wish with Wings*

## SUPPORTERS

### \$25,000 and Above

Alliance Data  
Amon G. Carter  
Foundation  
Atmos Energy  
Rees-Jones Foundation  
Sid W. Richardson Foundation  
The George & Fay  
Young Foundation  
The Meadows Foundation  
The Moody Foundation  
The Priddy Foundation  
Wells Fargo

### \$10,000 - \$24,999

Arlington Tomorrow  
Foundation  
Communities Foundation  
of Texas  
Fash Foundation  
John R. McCune  
Charitable Trust  
JPMorgan Chase & Co.  
Ken W. Davis Foundation  
The Miles Foundation  
The Morris Foundation

### \$5,000 - \$9,999

Bank of America  
Deloitte  
EY (Ernst & Young)  
Fidelity Investments  
Frost Bank  
Graham & Carolyn  
Holloway Family  
Foundation  
Origin Bank  
PwC  
(PricewaterhouseCoopers LLP)  
Texas A&M University  
Texas Instruments  
The Rosewood Foundation  
The Ryan Foundation

### \$1,000 - \$4,999

Alan K. Davis  
Amy Sutton  
Baylor, Scott & White  
Brandon D. Rowland  
Casey Oliver  
Collin Harrison  
Carolyn Montesana  
Dana Burghdoff  
George W. Baldwin  
Guido & Ruth Shumake  
Charitable Trust  
Gwen and Lel Echols  
Louise W. Kahn  
Endowment Fund  
Nancy Jones  
Roy Lopez  
Sarah Rodriguez  
Scott Orr  
Susan Rainey  
The Aspen Institute  
The Dallas Foundation

### Under \$1,000

Association of Fundraising  
Professionals Fort Worth Chapter  
AlphaGraphics-Park Cities/  
North Dallas  
Bill Lawrence  
Carlela Vogel  
Carole Rylander  
Fran Eichorst  
Isaav and Rachel Leventon  
Luis and Donna Gonzalez  
United Way of  
Metropolitan Dallas  
Vin Hoey

## OFFICERS

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*Alliance Data*

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### Susan Rainey

*Locke Lord LLP*

### Mike Walker

*Lennox International*

### Phil White

*Wells Fargo*

### Crystal Wright

*PwC*

### Ex-Officio

Casey Oliver  
*Texas A&M University*



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#### **MISSION**

To strengthen communities by connecting and engaging nonprofits and other stakeholders through thought leadership, management expertise and outcomes technology.

#### **VISION**

Communities thrive through committed stakeholders equipped to tackle issues in a meaningful way.

#### **CNM VALUES**

- Leadership: thinking and acting like an owner, anyone at any level and in any role helping to lift others up and working toward a common mission based on knowledge, confidence, courage, and compassion
- Integrity: being honest and doing the right thing consistently even in the face of adversity
- Teamwork: acting together in the interests of a common cause regardless of personal convenience or benefit
- Quality: having pride in one's work and striving to perform at the highest level in all that is done
- Stakeholder Focus: interacting with others, internally or externally, with consideration and care to their needs