

**Wade Edwards Foundation/Wade Edwards Learning Lab  
Assessment Proposal  
August 17, 2010**

**A. Organizational Information**

Dedicated to motivating, serving and rewarding our young people, the Wade Edwards Foundation (WEF) was established to memorialize the life and spirit of Wade Edwards by supporting activities that honor and encourage the qualities of determination, responsibility, and charity in young people. A 501(c)(3) charitable organization, WEF has been in business for 14 years and received its charitable status in July of 1996. The Foundation's primary project is the Wade Edwards Learning Lab (WELL), an after-school technology and education center located near Broughton High School in Raleigh. Memberships and services are offered at no charge. The WELL offers high school students a place to visit on a drop-in basis for both informal and structured activities after school, on weekends, and during the summer, and it provides space and programs for school classes, teachers, parents, and other community members, primarily in the mornings and evenings when its regular afterschool programs are not in session.

Due to the facility's proximity to Broughton High School and the fact that Wade Edwards was a student there, the organization primarily serves Broughton students, but the staff also welcomes students, teachers, parents, and educational nonprofit organizations with related missions from across Wake County and sometimes outside Wake County to participate in its programs and use the facility's computer lab and meeting space. Nevertheless, an estimated 95% of our services are provided to Wake County youth.

A second facility at Goldsboro High School is modeled after the WELL in Raleigh. The school's demographics differ significantly from those of Broughton High School. Goldsboro High School is a Title I school with 76.1% of enrolled students qualifying for free or reduced lunch. This facility is currently funded and operated by Wayne County Schools.

The organization plays a critical role for Wake County high school students by offering them technology and programs to encourage productive use of afterschool hours and by providing a safe and secure place for them to meet friends and wait for parents to pick them up after school. In its report "America After 3 PM," the Afterschool Alliance notes "Although there has been an increase in the number of North Carolina children attending afterschool programs over the last five years, today 31 percent of the state's schoolchildren are on their own in the afternoons, and another 13 percent are in the care of their brothers or sisters." The Afterschool Alliance and NC Center for Afterschool Programs cite studies demonstrating that teens who participate in afterschool programs are less likely to skip classes or to use drugs and engage in other unhealthy activities; that they show improved school attendance, test scores, grades, and engagement in learning; and that afterschool keeps students healthy and on track and also helps working families. WEF's trustees determined that such programs for high school students were virtually nonexistent when the WELL first opened its doors, and even now they are not as common as those for younger students.

Among the programs currently offered at the WELL are the following:

- During the school year, an afterschool homework lab offers tutoring by honor society and college students.
- The computer lab hosts NovaNet, a credit recovery software.
- *Link 2 Learn* is an intergenerational program that connects Broughton students and senior citizens who live at two nearby Raleigh Housing Authority facilities; the students teach the adults to use technology.
- At afterschool forums, students hear free speakers talk about career paths; participate in hands-on forums on subjects like forensics; and discuss topics of current interest like Internet safety, gang awareness, and bullying.
- A revamped summer program is currently offering students a menu of workshops including healthy cooking, music and arts, and technology.
- Free intergenerational technology classes are taught by volunteers on weeknights for teachers, students, parents, and nonprofit staff and board members to learn Word, Excel, Access, PowerPoint, Windows, and Internet skills. These classes are geared to the needs of adults seeking to enhance job skills, and teachers can obtain CEU credits in the classes.
- A Student Advisory Board hosts special programs and offers participants opportunities to practice community organizing, relationship building techniques, and public speaking and other communication skills; it also provides service learning experiences, often at nearby Raleigh Housing Authority facilities.

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### **B. Organizational Interest and Commitment**

As WEF and the WELL approach their 15<sup>th</sup> anniversary, staff and Trustees have determined that it is a good time in the life of the organization to assess activities and organizational efficiencies to ensure we are providing solid programs with the best outcomes possible. Proceeding with the understanding that keeping the organization current on trends and benchmarks is key to long-term success, we seek to evaluate overall effectiveness and determine not only how we can build on existing strengths but also where deficits might need correcting to help the Trustees and staff attain an optimal state of governance and management.

In a serendipitous meeting this spring, we learned that Haven House Services, an organization with which we are building a new partnership, had received a John Rex Endowment capacity building grant. \_\_\_\_\_, our proposed consultant, was at the meeting and subsequently met with the WEF Executive Director to offer her insights on WEF's proposed assessment. The WEF director also met with Kate Shirah to discuss WEF's desire to seek a grant.

On June 18, the WEF Executive Director and the Trustee taking the lead on this project notified our other Trustees that we hoped to pursue a JRE assessment grant as part of the Capacity Building Initiative, and Trustees have exchanged some email regarding the process. The Trustees will formally discuss this project when they meet in person on September 8. We recently had two long-time Board of Trustee members resign but are in the process of adding new Trustees to expand and revitalize the board.

We anticipate that a partnership with the John Rex Endowment will steer us in a direction to reenergize our existing organization and programs. We have many strengths including a centrally located facility, financial stability, trustees with institutional memory who have been on the Board of Trustees since the organization's inception, and dedicated staff members. Trustees and staff members are committed to devoting time to the assessment process and to ensuring follow-through once it is complete by applying for a capacity building grant if the assessment points to that as a logical next step. Whether or not a full capacity building grant is pursued, we are committed to making changes in identified areas of improvement.

### **C. Consultant Description**

We have selected \_\_\_\_\_ to be our consultant for this assessment. We became familiar with her through her work with Haven House Services, and in her capacity building work with them, she successfully launched a new partnership with our two organizations. We have also spoken with representatives at the Alliance of Disability Advocates to obtain their input on her effectiveness as the facilitator of their recent assessment process. She is licensed by the Secretary of State's Charitable Solicitation Licensing Division as a development consultant.

She was selected by the Executive Director and one of the Trustees because of her broad perspective on nonprofit organizations as well as her experience in assessing organizational capacities and translating that to actionable work plans. She is registered with Rex Endowment as an organizational capacity building consultant with expertise listed in Mission, Vision and Strategy; Governance and Leadership; Resource Development; Strategic Relationships; and Program Delivery and Impact. All of these are relevant to our desired assessment of programs, board and staff effectiveness. Her broad base of experience will give us the expertise to follow the "leads" of the assessment process. Please see \_\_\_\_\_'s attached resume and draft contract for this project.

While we did not interview other consultants for the project, the Executive Director and the key Trustee working on the project are familiar with organizational consultants in the Triangle, and both are comfortable in selecting \_\_\_\_\_ based on her stellar reputation in the Triangle nonprofit arena and glowing recommendations from \_\_\_\_\_'s staff and from the \_\_\_\_\_ Board Chair based on their own assessments.

### **D. Assessment Description**

Guided by a long-standing member of the Board of Trustees, the WEF Executive Director, and an Assessment Team, with input from the WELL Executive Director and facilitated by our consultant, we will undertake a four-month review of program effectiveness and client satisfaction, staff structure and effectiveness, and impact on the mission by the Board of Trustees, starting January 1, 2011. We plan to use client and staff surveys, focus groups, and one-on-one interviews with key stakeholders to collect data. The Assessment Team will be asked to identify organizational strengths, weaknesses, opportunities and challenges as the basis for surveys and interviews, and it will then layer information received through

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the process onto our initial understanding of the direction we need to take. Our consultant's independent perspective will provide a fresh perspective from outside the organization. The results will be prioritized for future capacity building and may include building and strengthening the Board of Trustees, staff development, reviewing programs and activities to determine how well they fit with organizational mission, and other strategies as identified by the assessment. The end result will be a stronger organization that meets the ever-changing needs of our area's youth and ensures client satisfaction and successful outcomes. The attached work plan contains a timeline and detailed activities and responsibilities.

The key activities of the project will be to identify and recruit the Assessment Team; define parameters and priorities of the assessment, conduct key interviews and focus groups with stakeholders; distribute and collect surveys; compile all data for initial review; review data; develop recommendations; and prepare a final report with recommendations. These activities will commence in November 2010, and a final report will be prepared by April 2011 and presented to the full Board of Trustees thereafter. Participants will include WEF and WELL staff members, several Trustees, our consultant, and clients/stakeholders including a sampling of students, parents, teachers, and community representatives. Assessment of program quality will be largely guided by the NC Center for Afterschool Programs' document entitled "Established Standards of Excellence Self-Assessment Tool: K-12" and by standards set forth by the Afterschool Alliance, a national organization committed to raising awareness and expanding resources for afterschool programs.

The timing of this proposed assessment initiative will assist Trustees and staff members as they develop new collaborations with the Shodor Foundation, Haven House, Raleigh Parks & Recreation, and other local organizations with missions that complement the work of WEF and WELL. The efficacy of existing activities and partnerships as well as how future partnerships can augment existing programs will be thoughtfully considered during the assessment.

We seek an assessment grant as a step toward eventual capacity building and as an opportunity for the board and staff to work together to address challenges and improve on existing strengths. Our assessment will review the strengths and weaknesses that exist in organizational structure and programs, with a focus on determining what deficits need correcting to help the board and staff attain an optimal state of governance and management. We will study how existing programs fit the mission and vision of the Foundation and of the WELL. We will also review where management systems and board and staff development needs lie. While we anticipate focusing on program and organizational structure, we are open to discussing peripheral or related topics as they arise in the course of our conversations, including, for example, diversification of revenue streams, possible afterschool accreditation, and questions about future facility or program expansion. Once the assessment is complete, should we determine that capacity building is a feasible step, we will pursue a capacity building grant to enhance existing strengths and correct identified weaknesses. We are open, however, to the possibility that there is more work to be done post-assessment to prepare for capacity building.

**E. Project Finances**

1) List your past three years' income total and expense total for each year.

Year	Income	Expense
2007	\$224,205	\$205,818
2008	\$215,952	\$215,786
2009	\$201,672	\$207,867

The 2009 990 is attached, and our auditors are preparing a reviewed financial statement for 2008 and 2009. We have not previously had audited statements due to prohibitive expense but will submit these to you later in August. Most expenses related to the activities of the Wade Edwards Foundation have been contributed as an inkind gift from the Lucius Wade Edwards Private Foundation. Those donations are reflected on the attached 2010 financial statements and in the income and expenses listed above; they will also be reflected on the 2008 and 2009 reviewed statements. The mission of the private foundation closely parallels that of WEF.

We request a grant in the amount of \$5,650, which will include \$4,750 for the consultant, \$400 for lunch meetings, \$200 for office supplies, \$50 for printing, and \$250 in indirect expenses which will be used primarily for bookkeeping. WEF will pay salaries and taxes of all participating personnel. The budget reflects a total donation from WEF of \$5,344, or 4% FTE for key staff members' salaries.