

## BUSINESS PLAN 2010-2011

Launched in 2007, VNR offers capacity-building services to the more than 4,000 nonprofit organizations in the San Fernando Valley region of Los Angeles. It is operated through a partnership of Human Interaction Research Institute (lead agency and fiscal agent), California State University Northridge and MEND.

**Program Components** During its first three years of operation (2007-2009), VNR developed a multi-faceted information and service program for Valley nonprofits of all sizes, their staffs and boards:

- \* a **website** with more than 40 downloadable publications and many other information resources (downloadable assessment tools; rosters in categories such as nonprofit consultants and local foundations that fund capacity building; a calendar showing workshops and conferences in the region, etc.).

- \* a **learning community** offering educational workshops on numerous topics (40 to date), ranging from fundraising to financial forecasting to human resources challenges of nonprofits; “workshops-plus” that provide more than education - such as an October 2009 event for 50 animal welfare nonprofits, with \$30,000 in small grants offered exclusively to participants by co-sponsors ASPCA and PETCO Foundation (most of it approved through “on the spot” requests participants made during the workshop).

- \* a special initiative focused on the challenges of the recession called **Staying Alive**, which has disseminated hundreds of copies of a 25-page resource guide for nonprofits, and conducted workshops such as a November 2009 event for affordable housing nonprofits, featuring as faculty noted consultant Helen Dunlap, Bank of America’s Charmaine Atherton, and California Community Reinvestment Corporation’s George Vine.

- \* **technical assistance** focused on topics like strategic planning, with follow-up organization development consultation (offered to nonprofits like The Children’s Project, Havok Theatre and Comprehensive Community Health Clinics); and improving mental health agency capacity to provide services for families of adults and youth, including Spanish-speaking Latino families (to eight nonprofit mental health agencies in the Valley).

- \* the annual **MENDing Poverty** conference, sited at MEND in Pacoima, which focuses on policy and program issues vital to nonprofits serving poor and disadvantaged people, and features guest speakers like communications guru Andy Goodman and prominent activists Manuel Pastor and Torie Osborn (points from her talk are now a VNR publication). The June 2010 conference is co-chaired by former California Association of Nonprofits Executive Director Florence Green. Keynote speaker is *Forces for Good* author Heather Grant of The Monitor Institute. Other activities designed to give a **community voice** to Valley nonprofits include participation in the California Association of Nonprofits Regional Partners Network.

- \* **information and referral services** providing rapid solutions for Valley nonprofits on topics ranging from executive recruiters (a roster of them is a VNR publication) to use of fiscal agents to legal services.

A 19-person Advisory Committee provides guidance about the program to VNR, as well as local policy input. Grants from local and national foundations, local businesses, and a private donor support VNR’s activities, along with earned revenues from events and technical assistance services.

VNR program outcomes are evaluated using (1) evaluation surveys for VNR workshops (including pre-post tests and structured follow-up interviews for mental health family services activities); (2) website use data from Google Analytics, along with a pop-up point-of service survey; and (3) input from supervising bodies such as the VNR advisory committee. These data sources are currently being synthesized into overall evaluation reports for the startup 2007-2009 period, for review by VNR's advisory committee and by funders.

The VNR program model was shaped through broad community input over a five-year planning period (2001-2005, including a 2005 feasibility study funded by The California Endowment). It has evolved considerably based on the first three years of experience. Collaborating organizations that work with VNR on an ongoing basis include Valley Care Community Consortium, Glendale Healthier Community Coalition and Executive Service Corps of Southern California. Other organizations partner with VNR on a project basis. These include ASPCA, PETCO Foundation, Southern California Association of Nonprofit Housing, Los Angeles Community Redevelopment Agency, The Help Group, El Centro de Amistad, Los Angeles Family Housing, Los Angeles Stage Alliance, Phillips Graduate Institute and Network of Ensemble Theatres.

**Summary of Planned Activities** Over the last three years, VNR's program model has evolved, based on VNR's operating experience, national research conducted by HIRI (which has studied nonprofit capacity building for more than 20 years) and VNR's evaluation results. For example, all three data sources confirm that for many nonprofits, educational events alone may not lead to lasting impact (this also is true in many areas of individual professional development that have been studied, such as continuing medical education).

Thus, an increasing amount of VNR's activities are targeted to (a) "*workshop-plus*" activities, in which a learning event for nonprofits also has organized follow-through, e.g., capacity-building grants exclusively for participants of the workshop described above for animal welfare agencies, and underwriting by Executive Service Corps for services to nonprofits that participated in a February 2009 VNR-ESC workshop (three participants in the workshop are receiving such funds); and (b) *technical assistance focused on strategic planning, with longer-term organization development services* aimed at helping the nonprofit implement their strategic plan. These activities are all particularly geared to helping nonprofits respond to changing times, as is the *Staying Alive* initiative already described.

VNR also has been structured from the beginning with an emphasis on its own financial sustainability. Multiple funding sources have been secured, and operating expenses are kept modest (e.g., there is only one full-time staff person). Partnerships help increase quality, build nonprofit participation, and reduce expenses for every event VNR takes on. Income from fee-based service is limited but growing - workshops are priced modestly to encourage participation by smaller nonprofits (in 2009, for the first time, several participants asked for fees to be waived entirely because of their financial circumstances). Technical assistance consultations can move to paid status after initial services are completed, which are offered without fee.

In addition to ongoing activities already described, VNR plans for 2010-2011 include:

\* completion of a major upgrade of the VNR website, including installation of a document search function that will enable publications to be more efficiently retrieved.

\* workshop events planned with the Valley Rotary Club (“State of the Nonprofit Sector in the San Fernando Valley”), Los Angeles County Arts Commission (VNR will co-host one of LACAC’s successful *Arts TuneUp* events), Directors of Volunteers in Agencies (“Managing Volunteers in Interesting Times”), Breathe LA (a “Going Green for Nonprofits” workshop in which Valley activist Ed Begley, Jr. has expressed interest in speaking), and Southern California Association for Nonprofit Housing (a follow-on to the successful November 2009 event for affordable housing nonprofits). Workshops also are being planned on “Latino Leadership Development for Board Chairs and Board Members” (building on a successful workshop conducted in 2009 by trainer Marta Segura); “Integrated Social Media - How Facebook, Twitter and FaceBook Can Work Together” (building on a successful workshop conducted by PR and social media expert Ed Headington in 2009); and “Public Relations for Nonprofits” (co-sponsored by a local Latino-focused public relations firm).

\* collaborations with national intermediaries that provide capacity building services for local nonprofits, such as Taproot Foundation; and Nonprofit Finance Fund, whose Vice-President David Greco will be speaking to two upcoming VNR events.

\* increasing emphasis on strategic planning as a main VNR service, offered both through individual technical assistance consultations and through coordinated programs, e.g., one being explored for animal welfare nonprofits and to be co-sponsored by ASPCA and PETCO Foundation.

\* collaborative projects that may be funded by third parties, such as capacity-building work with the Network of Ensemble Theatres and Valley Care Community Consortium, both of which are being explored for 2010 launches.

\* participation in the Valley Care Community Consortium SB 697 SPA 2 Triennial Needs Assessment (VNR staff Julaine Konselman is serving on the project’s editorial committee).

\* publication in January 2010 of *State of the Nonprofit Sector in the San Fernando Valley 2009* report, written in collaboration with UCLA Center for Civil Society.

\* evaluation of capacity-building activities of funders, such as Annenberg Foundation and Flintridge Operating Foundation, using approaches first developed for VNR’s own activities (a collaborative relationship also is being explored with Flintridge, which shares with VNR the service area of Glendale; events for nonprofits serving the Armenian community are among those being developed).

**Summary of Funding Sources** A two-year operating budget for VNR is attached. Confirmed and projected funding sources for VNR for 2010-2011 are:

<i>Funder</i>	<i>Amount</i>	<i>Status</i>
Annie E. Casey Foundation	\$227,010	Approved 12/11/09
Annenberg Foundation	\$50,000	Work has begun; final details of contract being negotiated
Flintridge Operating Foundation	\$15,000	Approved 12/11/09

California Community Foundation	\$100,000	Proposal submitted 12/09 for \$75,000; \$25,000 in interim funding requested 9/09
Parsons Foundation	\$50,000	Proposal submitted 9/09; sit visit to be conducted in early 2010
Business Funders	\$1,000	Manufacturers Bank funding of \$1,000 approved; other corporate support being requested
Fees for Service	\$6,000	Small fees charged for workshops; fees for second-phase technical assistance consultations
Weingart Foundation	TBD	On hold pending completion of research study about Los Angeles area capacity building needs of nonprofits

Additional funding is being sought from other foundation, government and private sources (some of these potential funders are described above). Because VNR has only one full-time staff person at present, if funding for specific work is approved in excess of the operating budget presented here, staff commitments can be increased.

**ANNUAL PROGRAM BUDGET  
VALLEY NONPROFIT RESOURCES**

**2010**

<b><u>Personnel</u></b>	<b><u>Hours</u></b>	<b><u>Rate</u></b>	
Thomas E. Backer, PhD, Project Director	400	77.14	\$30,856
Fringe Benefits (22.45%)			6,927
Payroll Benefits (4.89%)			1,509
Leave Benefits (14.18%)			4,375
 Diana Medina Wiley, Project Coordinator	 1957.5	 19.16	 37,500
Fringe Benefits (32.77%)			12,289
Payroll Benefits (7.96%)			2,985
Leave Benefits (14.18%)			5,318
 Julaine Konselman, Project Assistant (Consulting Contract)	 100	 35.00	 3,500
 Total Personnel			 105,259
 <b><u>Other Expenses</u></b>			
Website Maintenance (Kate Groves, Webmaster; Mary Anne Shew, Technology Consultant)			4,000
Training Workshop & Convening Miscellaneous Expenses			8,000
Resource Pool for Training and Technical Assistance Subcontracts			70,000
Occupancy			4,196
Postage/Overnight Mail			400
Reproduction & Printing			2,000
Supplies			1,000
Telephone			400
 Total Other Expenses			 89,996
 <b><u>Total Direct Costs</u></b>			 <b>195,255</b>
 <b><u>Indirect Costs @ 15%</u></b>			 <b>29,288</b>
 <b><u>Total Project Costs</u></b>			 <b>\$224,543</b>

**ANNUAL PROGRAM BUDGET  
VALLEY NONPROFIT RESOURCES**

**2011**

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## **BUDGET DETAIL**

### **Personnel**

Employees of HIRI work 7.5 hours per day. HIRI fringe benefits include health insurance, dental insurance, long-term disability insurance, and leave benefits (sick leave, vacation and holidays). HIRI retirement is through TIAA/CREF. Only full-time employees receive benefits, and only employees who work more than half-time are vested in the retirement system. All figures given are experience-based estimates.

### **Other Expenses**

**Website Maintenance** is for regular updating of the VNR website by the Webmaster and Technology Consultant.

**Training Workshop & Convening Miscellaneous Expenses** is for materials, meals and preparation expenses associated with workshops and convenings in the San Fernando Valley organized by Valley Nonprofit Resources, including the annual conference for the Valley's nonprofit sector and peer networking meetings.

**Resource Pool for Training and Technical Assistance Subcontracts** is for conduct of training workshops and provision of technical assistance on priority topics and audiences identified through an interactive process with nonprofit leadership and funders of content-specific activities (the largest subcontractor to date has been Dr. Alex Kopelowicz, for activities related to VNR's special initiatives for improving capacity of mental health agencies to involve families in mental health services).

**Occupancy** is for rental of offices (@ \$2.12/square foot) in HIRI's offices for use by personnel on this project. HIRI charges office rent as a direct expense under its current overhead arrangement with DHHS. Calculation of occupancy charges is by percentage of staff time on the project.

**Postage and Overnight Mail** includes mailing of draft and final project documents, and routine correspondence, with limited use of overnight mail for time-sensitive materials.

**Reproduction and Printing** includes charges for routine correspondence and file materials, as well as for required program reports.

**Supplies** includes stationery, computer and fax paper, toner cartridges, pens, pencils, notetaking pads, and related items for project staff.

**Telephone** includes telephone conference calls for planning and datagathering, and miscellaneous voice/fax toll calls for project activities.

**Indirect costs** are computed at 15% of total direct costs. HIRI's Indirect Cost Agreement is with the U.S. Department of Health and Human Services Federal Region IX, San Francisco.