

BUSINESS PLAN 2012-2013

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 VNR plans and operates a multi-faceted information and service program for Valley nonprofits of all sizes, their staffs and boards:

* a *website* with more than 200 downloadable publications (70 of them created by VNR) and many other information resources (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 (more than 80 to date), ranging from fundraising to financial forecasting to human resources challenges of nonprofits; includes “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).

* *special initiatives* focused on the nonprofit sector in Glendale (a 2010 convening had more than 60 participants and was followed by VNR workshops funded by City of Glendale) and Burbank (two events completed and a convening planned for early 2012); and the Northeast Valley Nonprofit Network, a Weingart Foundation-funded initiative providing capacity building to 12 nonprofits in the Northeast Valley.

* *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 ten 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 Father Greg Boyle of Homeboy Industries, communications guru Andy Goodman and prominent activists Manuel Pastor and Torie Osborn. The fifth anniversary conference is being planned for June 2012 and co-chairs are Jocelyn Guihama of UCLA Center for Civil Society and Jim Garrison of Pacific Federal Insurance Corporation. Other activities designed to give a *community voice* to Valley nonprofits include a Latino Initiative focused on Latino-serving and Latino-led nonprofits (an upcoming event scheduled for this Initiative is a leadership development seminar for young Latinas).

* *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 *VNR 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; (3) input from the *VNR advisory committee*; and (4) *evaluation studies*, such as an interview study recently completed, assessing impact of the first five years of strategic planning consultations. Summary evaluation reports are prepared periodically. VNR also is participating in the California Community Foundation's MSO grantee evaluation initiative, coordinated by Special Services for Groups.

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 five years of operation, as discussed further below. Collaborating organizations that work with VNR on an ongoing basis include Valley Care Community Consortium, Glendale Healthier Community Coalition and Network of Ensemble Theatres. 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, and Phillips Graduate Institute.

Summary of Planned Activities Over its five years of operation, 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. Many activities since 2008 have focused on helping Valley nonprofits cope with the recession - including a *Staying Alive* initiative funded 2009-2010 by the California Community Foundation.

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 (beginning in 2009, participants occasionally have asked for fees to be waived entirely because of their organization's financial circumstances). Technical assistance consultations can move to paid status after initial grant-underwritten services are completed (one VNR client has been receiving paid services for three years).

In addition to ongoing activities already described, VNR plans for 2012-13 include:

* creating collaborative projects, such as a strategic planning initiative for arts organizations with the Network of Ensemble Theatres, proposed for California Community Foundation funding.

* publication in 2012 and 2013 of *State of the Nonprofit Sector in the San Fernando Valley* report, written in collaboration with UCLA Center for Civil Society.

* evaluation of capacity-building activities of funders, such as Flintridge Operating Foundation, using approaches first developed for VNR's own activities (VNR also has a collaborative relationship with Flintridge, which shares with VNR the service area of Glendale; Glendale Initiative events are an element of this partnership).

* planning for a 2012 conference in collaboration with San Fernando Valley Community Foundation, San Fernando Valley Council of Governments and Valley Economic Alliance, designed to enhance philanthropic funders' awareness of Valley nonprofits (funding from Weingart Foundation and California Community Foundation is being sought for this event).

Summary of Funding Sources A two-year operating budget for VNR is attached. Confirmed and projected funding sources for VNR for 2012-2013 are:

<i>Funder</i>	<i>Amount</i>	<i>Status</i>
Annie E. Casey Foundation	\$227,010	Funded/in process
California Community Foundation	\$75,000	Proposed
Flintridge Operating Foundation	\$15,000	Proposed
Parsons Foundation	\$50,000	Funded/in process
Southern California Edison	\$19,000	Proposed
UniHealth Foundation	\$30,000	Proposed
Weingart Foundation	\$150,000	Funded/in process
Wells Fargo Foundation	\$15,000	Proposed
Business Funders	\$1,000	SingerLewak and other business sponsor funding
Fees for Service	\$6,000	Small fees charged for workshops; fees charged for second-phase technical assistance consultations

Additional funding is being sought from other foundation, government and private sources. Annie E. Casey Foundation has invited a proposal for \$75,000 in supplementary support, for replication of the Latino MFG model for foster youth aging out of the system with two Valley mental health agencies. American Express and S. Mark Taper Foundation have invited proposals for funding of a nonprofit leadership initiative, tentatively planned to focus on young Latinas. 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, part-time staff commitments can be increased.

**ANNUAL PROGRAM BUDGET
VALLEY NONPROFIT RESOURCES**

2012

<u>Personnel</u>	<u>Hours</u>	<u>Rate</u>	
Thomas E. Backer, PhD, Project Director	800	77.14	\$61,712
Fringe Benefits (22.45%)			13,854
Payroll Benefits (4.89%)			3,018
Leave Benefits (14.18%)			8,750
 Victoria Cepeida-Mojarro, 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	 4,500
 Total Personnel			 149,926
 <u>Other Expenses</u>			
Website Maintenance (Kate Groves, Webmaster)			2,000
Training Workshop & Convening Miscellaneous Expenses			8,000
Resource Pool for Training and Technical Assistance Subcontracts			30,000
Occupancy			6,204
Postage/Overnight Mail			400
Reproduction & Printing			1,000
Supplies			1,000
Telephone			400
 Total Other Expenses			 49,004
 <u>Total Direct Costs</u>			 198,930
 <u>Indirect Costs @ 15%</u>			 29,840
 <u>Total Project Costs</u>			 \$228,770

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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 the *Raising the Bar* and *Latino MFG Program* initiatives).

Occupancy is for rental of offices (@ \$2.25/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.