

**BUSINESS PLAN 2014-2016**

Launched in 2007, Valley Nonprofit Resources offers capacity-building services to the more than 4,500 nonprofit organizations in the San Fernando Valley region of Los Angeles. This Business Plan covers the period June 2014-June 2016, the first two years that VNR will be operated by California State University Northridge, Center for Southern California Studies, in partnership with MEND. VNR moves to the CSUN campus June 1, 2014 from the Human Interaction Research Institute. It will continue to be co-sponsored by 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 460 downloadable publications (88 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 120 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 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 (a 2012 convening had more than 70 participants and there have been several follow-on events); and the Northeast Valley Nonprofit Network, a Weingart Foundation-funded initiative providing capacity building to 12 nonprofits in the Northeast Valley. Other cohort-focused efforts are supported by Kaiser Permanente (health nonprofits), Dwight Stuart Youth Fund (youth-serving agencies) and ASPCA (animal welfare nonprofits). Informal collaboratives bring together Valley children, youth and family nonprofits; and Northeast Valley health nonprofits, to consider joint referral systems and other approaches to integrated care. A Sustainability Initiative was conducted from 2013-2014, launched with a special learning event featuring California Association of Nonprofits CEO Jan Masaoka. Several workshops also were part of this initiative, covering topics like Letters of Inquiry and strategies for reviewing financial statements by non-accountants.

\* *technical assistance* focused on topics like strategic planning, with follow-up organization development consultation (offered to nonprofits like The Children’s Project, El Centro de Amistad 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, United Farmworkers co-founder Dolores Huerta and communications guru Andy Goodman. The 7<sup>th</sup> annual conference will take place June 18, 2014 and will focus on hunger and nutrition, with keynote speaker Joel Berg and others. Other activities designed to give a *community voice* to Valley nonprofits include a Latino Initiative focused on Latino-serving and Latino-led nonprofits (led by former VNR Project Coordinator Diana Medina Wiley).

\* *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 VNR learning events as seen by "frequent flyers" who have attended 5 or more events. Summary evaluation reports are prepared periodically. VNR also participated in the California Community Foundation's MSO grantee evaluation initiative, coordinated by Special Service 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 eight 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 eight years of operation, VNR's program model has evolved, based on VNR's operating experience, national research 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 received 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. 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 (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 five years).

In addition to ongoing activities already described, VNR plans for 2014-16 include:

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

\* co-sponsorship and coordination of a CSUN-UCLA joint conference on nonprofit sector research, to be held at UCLA campus in March 2015.

**Summary of Operations** VNR operates from a five-room suite of offices on the CSUN campus, on the 2<sup>nd</sup> floor of Sierra Hall. Staffing of the program is as follows:

**Executive Director**  
Thomas E. Backer, PhD

**Project Coordinator**  
Julaine Konselman

**Assistant Project Coordinator - Operations**  
Ashley Wright

**Assistant Project Coordinator - Learning Events**  
(Student Assistant - To be named)

Additional support is provided by College of Social and Behavioral Sciences personnel for website operations. VNR's fiscal agent is the CSUN Foundation.

**Summary of Funding Sources** A two-year operating budget for VNR is attached. Confirmed and projected funding sources for VNR for 2014-2016 are:

<i>Funder</i>	<i>Amount</i>	<i>Status</i>
HIRI Funding	\$240,000	Funded
Parsons Foundation	\$25,000	Funded/in process
Weingart Foundation	\$25,000	Funded (NEVNN II)
Business Funders	\$1,000	SingerLewak and other business sponsor funding
Fees for Service	\$9,000	Small fees charged for workshops; fees charged for second-phase technical assistance consultations

Total: \$300,000

Additional funding is being sought from other foundation, government and private sources. HIRI Funding for VNR is being provided through a transfer of assets in May 2014 from the Human Interaction Research Institute to California State University, as part of HIRI's wind-up-and-dissolve as a California nonprofit corporation. All funding is through CSUN Foundation.

**ANNUAL PROGRAM BUDGET  
VALLEY NONPROFIT RESOURCES**

**June 2014- June 2015**

**Personnel**

Thomas E. Backer, PhD, Project Director (Consulting Contract)	50,000
Julaine Konselman, Project Coordinator (Consulting Contract)	25,000
Assistant Project Coordinators (2) (Ashley Wright - Consulting Contract, and Student To Be Named)	22,000
Insurance for Project Director, Project Coordinator, Assistant Project Coordinator	3,000
Total Personnel	100,000

**Other Expenses**

Training Workshop & Convening Miscellaneous Expenses	5,500
Resource Pool for Training and Technical Assistance Subcontracts	36,000
Postage/Overnight Mail	500
Reproduction & Printing	5,000
Supplies and Parking	3,000
Total Other Expenses	50,000

**Total Project Costs** **\$150,000**

**ANNUAL PROGRAM BUDGET  
VALLEY NONPROFIT RESOURCES**

**June 2015- June 2016**

**Personnel**

Thomas E. Backer, PhD, Project Director (Consulting Contract)	50,000
Julaine Konselman, Project Coordinator (Consulting Contract)	25,000
Assistant Project Coordinators (2) (Ashley Wright - Consulting Contract, and Student To Be Named)	22,000
Insurance for Project Director, Project Coordinator, Assistant Project Coordinator	3,000
Total Personnel	100,000

**Other Expenses**

Training Workshop & Convening Miscellaneous Expenses	5,500
Resource Pool for Training and Technical Assistance Subcontracts	36,000
Postage/Overnight Mail	500
Reproduction & Printing	5,000
Supplies and Parking	3,000
Total Other Expenses	50,000

**Total Project Costs** **\$150,000**

## **BUDGET DETAIL**

### **Personnel**

All work on VNR is completed by independent contractors working on consulting contracts, except for students working for the University. Insurance required by the University for consultants is fully paid by VNR.

### **Other Expenses**

**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.

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

Fees for fiscal administration of VNR through the CSUN are built into each budget category.