

BUSINESS PLAN 2016-2018

Launched in 2007, Valley Nonprofit Resources (VNR) offers capacity-building services to the 4,600 nonprofit organizations in the San Fernando Valley region of Los Angeles. This Plan covers the period June 2016-May 2018, the next two years of VNR's operation at California State University Northridge, in partnership with MEND.

Program Components VNR plans and operates a multi-faceted information and service program for Valley nonprofits of all sizes, their staffs and boards, with a focus on smaller nonprofits:

* a **website** with more than 500 downloadable publications (nearly 100 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.). In September 2015 VNR launched the VNR Platform, a geo-map with fully searchable information portfolios on all 4,600 nonprofits, as well as links to other searchable resources.

* a **learning community** offering educational workshops on numerous topics (more than 165 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 several there have been several follow-on events). A Canoga Park initiative is under consideration and several learning events already have been given there. A Children Youth and Family Nonprofit initiative has been in operation for several years and has put on a half-dozen learning events (co-sponsored by CSUN's Institute for Community Health and Well-Being and Child Development Institute). VNR also operated for three years the Northeast Valley Nonprofit Network, a Weingart Foundation-funded initiative providing capacity building to 12 nonprofits in that area. A Sustainability Initiative was conducted from 2013-2014, launched with a special learning event featuring California Association of Nonprofits CEO Jan Masaoka; a 2015-2016 Individual Giving initiative has included a number of educational workshops on this topic.

* **technical assistance** focused on topics like strategic planning, with follow-up organization development consultation (offered to nonprofits like Strength United and Wildlife Learning Center); 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 W.T. Grant Foundation President Adam Gamoran. The 9th annual conference will take place in June 2016 and will focus on affordable housing.. Other activities designed to give a **community voice** to Valley nonprofits include a Latino Initiative focused on Latino-serving and Latino-led nonprofits, with a number of educational events.

* **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 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 (also used for the VNR Platform), 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 every two years (most recently for 2014-2015). 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 ten 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 ten years of operation, VNR’s theory of change 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).

Valley Nonprofit Resources operates as a capacity-building organization under a three-component theory of change: (1) significant impact is most likely by concentrating limited resources on small and medium-sized nonprofits in the San Fernando Valley, which in turn affects both VNR’s business model (mostly no-cost or very low-cost services) and the types of services offered; (2) significant impact is most likely when education is supplemented by follow-up technical assistance (the VNR “workshop plus” model), whenever there are resources to do so, with this TA offered by the same experts who conduct the workshop; and (3) significant impact is most likely when services are offered in the larger context of an effort to bring together the Valley nonprofit community, through VNR’s special initiatives and other activities (this requires its own independent resource allocation - it cannot be done under a pure fee-for-service model focused only on individual nonprofits).

Thus, as already mentioned, 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 its 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 now regularly receives requests for second or even third rounds of strategic planning from its past clients.

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 free or 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 is initially free for smaller clients, but can move to paid status after initial pro bono services are completed (one VNR client received paid services for five years).

In addition to ongoing activities already described, VNR plans for 2016-2018 include publication in 2016 of the latest in its series *State of the Nonprofit Sector in the San Fernando Valley* reports, written in collaboration with UCLA. This latest edition will present findings from UCLA's second-round study of individual giving in Los Angeles.

Summary of Operations VNR operates from a five-room suite of offices on the CSUN campus, on the 2nd floor of Sierra Hall (provided at no charge by CSUN). The program is staffed by Thomas E. Backer, PhD (Executive Director) and Ashley Wright (Project Coordinator). A number of nonprofit and philanthropic experts provide pro bono services as faculty for VNR workshops, and a few of these also have been paid by VNR to offer follow-on technical assistance consultation under the workshop plus model. Recent paid consultants include Jan Kern, Los Angeles Trust for Children's Health; Jan McElwee, McElwee Associates; John McLaughlin, McLaughlin Associates; and David Berkus, David Berkus Consulting. Additional support is donated by College of Social and Behavioral Sciences personnel for website operations. VNR is a program of the CSUN Foundation, and is physically based in the College.

Summary of Funding Sources A two-year operating budget for VNR is attached. Confirmed and projected funding sources for VNR for 2016-2018 are:

| <i>Funder</i> | <i>Amount</i> | <i>Status</i> |
|----------------------------|---------------|---|
| HIRI Funding | \$245,146 | Funded (partially expended) |
| Parsons Foundation | \$50,000 | Funded (partially expended) |
| Southern California Edison | \$5,000 | Funded (a \$5,000 renewal is likely) |
| Weingart Foundation | \$15,000 | Funded (a \$15,000 renewal is likely) |
| Fees for Service | \$15,000 | Funded - fees charged for workshops, some TA consultations; MENDING poverty conference revenues |
| Total: \$330,146 | | |

Additional funding is being sought from other foundation, government and private sources. A proposal for \$25,000 is under review at Dwight Stuart Youth Fund and proposals have been invited from Kaiser Permanente (\$15,000) and The California Wellness Foundation (\$90,000). Other funding is being explored, including renewals from existing funders.

ANNUAL PROGRAM BUDGET
VALLEY NONPROFIT RESOURCES

June 2016 - May 2017

Personnel

| | |
|--|--------|
| Thomas E. Backer, PhD, Project Director (Consulting Contract) | 50,000 |
| Ashley Wright, Project Coordinator (Consulting Contract) | 25,000 |
| Insurance for Project Director, Project Coordinator, Assistant Project Coordinator | 3,000 |
| Total Personnel | 78,000 |

Other Expenses

| | |
|--|--------|
| Maintenance for VNR Platform | 4,500 |
| Training Workshop & Convening Miscellaneous Expenses | 3,000 |
| Resource Pool for Training and Technical Assistance Subcontracts | 10,000 |
| Postage/Oversight Mail | 500 |
| Reproduction & Printing | 2,000 |
| Supplies and Parking | 2,000 |
| Total Other Expenses | 22,000 |

Total Project Costs **\$100,000**

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BUDGET DETAIL

Personnel

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

Other Expenses

Maintenance for VNR Platform is for contract with Urban Institute, to update the Platform with current NCCS data and perform other maintenance tasks.

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 financial administration of VNR through the CSUN Foundation are built into each budget category.