

VRI Impact Report July 2020 - December 2021

Overview The VNR Recovery Initiative (VRI) was launched in July 2020 by Valley Nonprofit Resources, which provides information, training and technical assistance to strengthen the 4,300 nonprofits in the San Fernando Valley region of Los Angeles. VRI's specific objective is to help Valley nonprofits respond to the many challenges of pandemic recovery (such as responding to pandemic-induced trauma, economic stabilization, and long-term sustainability) as Southern California moves towards what comes next for nonprofits and the people and communities they serve.

In particular, nonprofit leaders can create well-organized recovery plans to coordinate these efforts. They also can explore ways nonprofits can collaborate to increase the success of their recovery, despite the continuing challenges of the evolving pandemic.

This report summarizes data gathered on VRI's process and outcomes from July 2020 through December 2021. It includes results from workshop participant surveys, TA consultant input on their technical assistance and its outcomes, and TA recipient telephone interviews. VRI will continue in 2022, with new priorities driving educational workshops, technical assistance, and information services. Additional evaluative data will be gathered on these activities.

Main VRI Activities A total of 20 VRI educational workshops offered information and skill-building on topics ranging from handling trauma to developing a more entrepreneurial mindset, to using technology to enhance donor communications. They included a set of Recovery Roundtables, bringing together nonprofits in specific communities (Burbank/Glendale, Canoga Park, Reseda, North Hollywood, City of San Fernando, Pacoima) both to learn about how to handle the trauma resulting from the pandemic, and to explore ways they might work together in their own communities.

Technical assistance was offered to 28 Valley nonprofits. TA included work with three cohorts of nonprofit organizations: (1) health and human services nonprofits, supported by a grant from UniHealth Foundation; (2) 10 youth development nonprofits, supported by Dwight Stuart Youth Fund; and (3) eight nonprofits wishing to address their anti-racism policy and programming, supported by grants from The California Wellness Foundation and the California Community Foundation.

Information services were offered through the workshops and TA, and also through Recovery Resources, a special section of the VNR website. This section included links to regularly updated community resources.

A survey of how nonprofit leaders regard recovery challenges and opportunities for Valley nonprofits also was conducted, supported in part by a grant from Community Foundation of the Valleys. Results from the survey have been reported separately.

Anti-Racism Activities Starting from the principle that full pandemic recovery can only happen if communities address racial injustice at the same time, VRI includes a major component focused on anti-racism training and policy development (building on earlier VNR work focused on DEI - diversity,

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equity, and inclusion). This work was funded by grants from The California Wellness Foundation and California Community Foundation, and was led by CSUN Professor Allen Lipscomb, a DEI and anti-racism expert. It included educational workshops and individualized technical assistance, and was aligned with a recent research study of anti-racism policy and practices of Valley nonprofits, funded by a HIRI Nonprofit Research Fellowship grant to Prof. Lipscomb (from a permanent endowment at CSUN established in 2014 by VNR Executive Director Dr. Thomas Backer).

A March 2021 report on a pilot project for the anti-racism work is available. That report summarizes positive outcomes for three educational workshops and four technical assistance consultations conducted in 2020 by Professor Lipscomb and helped structure the work reported here.

Funding Support for VRI comes from California Community Foundation, Community Foundation of the Valleys, Dwight Stuart Youth Fund, Joseph Drown Foundation, Ralph M. Parsons Foundation, UniHealth Foundation, Weingart Foundation and Wells Fargo. The structure and activities of VRI build on several previous VNR initiatives (and their empirically evaluated outcomes), such as its Uncertainty and Leadership Development Initiatives.

Data Gathering

Evaluation data were gathered as follows:

- SurveyMonkey data were collected for all 20 workshops conducted as part of VRI from July 2020 December 2021. The roster of workshops is below. Data analysis included (a) computation of average responses for items 1-3 of the survey, and (b) content analysis of all meaningful write in responses.
- In addition to conducting an educational workshop as part of the current phase of this work, Prof. Allen Lipscomb also appeared in a podcast about anti-racism program and policy which is now available on the VNR website.
- A total of 28 TA consultations were conducted as part of VRI. The roster of TAs is below, including who did the TA and the key contact person interviewed as part of this evaluation. An email was sent to the contact person for each TA, requesting a brief telephone interview (in the email, contact persons were advised that responses also were possible by email to increase participation in the evaluation). The interviews asked for 2-3 positive impacts of the TA, challenges encountered in the process, assessment of the workshops if they attended them, and suggestions for improvement of the TA process. TA consultants also provided input both on the activities they conducted, and the results achieved.
- Four nonprofits in this group also received TA on how to integrate their development and communication activities. TA was provided by consultants Jan McElwee and Susan Dunn as a follow up to McElwee's consultation to these four agencies, offered as part of VRI. A separate report has been prepared by the consultants on the outcomes from this work.
- In July 2021, a section of the VNR website was created, AVNR Recovery Resources. It includes a summary of the VNR Recovery Initiative; access to seven resources on the pandemic and on COVID-19, which are updated weekly or monthly (one resource is specific to the San Fernando Valley, and another is specific to youth development nonprofits); and a list of publications

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providing further information, including one on race equity which supports VRI=s anti-racism work. VNR TA clients and workshop participants are directed to this section for information on the pandemic and on recovery.

Results

Workshops The average number of workshop participants was 22, with a range of 11-38. These were intended to be small audience events so that there could be interaction among participants and with the speakers.

Across the 20 workshops, 75% of participants reported they definitely or for the most part got what they wanted from the workshop. Workshop speakers were rated as excellent or good by 90% of participants. Workshop content and materials were rated as excellent or good by 80% of participants.

Content analysis of the write-in responses showed that overall, many of the more than 400 participants in these workshops were pleased with the use of their time to attend - particularly because all sessions were on Zoom so no transportation time was involved. A number of participants took away specific information or principles they felt would be useful back home in their own nonprofit.

A few of the workshops had significant challenges as seen by participants. One on increasing the digital footprint of nonprofits to increase post-pandemic fundraising from businesses was seen as too much focused on podcasts, the business activity of the speaker. A workshop on how nonprofits can have a more entrepreneurial mindset was felt by many participants to be too academic and not useful for their nonprofit=s planning and activities. Participants in some of the Recovery Roundtables wanted more structure, reporting that allowing other participants too much time for talk about their own activities and challenges was not productive. The workshop on resources for Health and Human Services providers resulted in split opinions - some found the interaction with a prominent funder and hearing stories of how other providers have addressed recovery challenges both were very valuable; others felt the session was not well-structured and should have been guided by a PowerPoint.

Many but not all of the participants provided responses to the final write in question. A fair number were variations on want more of these - people are hungry for learning and for dialogue about the issues covered. Some were specific in their praise: It was a great workshop with tangible suggestions for improvement in outreach. I would not change a thing. Great info and interaction - one of the best! It was a great opportunity to connect with local nonprofit leaders.

Others were favorable about content and speakers, but wanted changes in timing (morning rather than afternoon sessions to accommodate their schedules), and in format: The most useful part to our organization is learning from other nonprofits what they are doing, what software they are using, etc. I think having a speaker is good but having them as a round table facilitator is more effective for us. One respondent wanted a larger-scale change: A series over a 6–9-month period to permit longer-term learning, impact, and feedback. Another said they wanted follow-up with other participants to take action on recommendations made especially for group work.

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And a few responses were specific in their criticism: AI don't feel that I gained new information on how to increase my digital footprint to raise funds from businesses. The majority of the workshop centered purely on the idea of having a podcast and interviewing people you would want to partner with, with little to no information about how to make contact with these people or tips and tricks for how to discuss raising funds. It needs to be a lot more structured, many of us were confused by what the purpose of this was, guest speaker was short and didn't really get into depth. Also, there were a lot of audio concerns. As already mentioned, two TA recipients also asked if workshops could be scheduled in the morning instead of the afternoon.

Technical Assistance Content analysis of both consultee and consultant input on the TA showed that 100% of consultees valued the assistance they received and praised the consultants who provided it. The topics covered included:

- several TA recipients asked for the consultant=s help in creating a one-year strategic plan for 2021, need because the previous plan (usually one which VNR had helped create) had been overwhelmed by events of the pandemic.
- leadership and staff training on how to address pandemic recovery was provided to a number of recipients, sometimes including helping managers develop communication skills.
- a number of the TA focused on fundraising, and particularly on how to interact with donors, foundations, and other funders virtually when face-to-face approaches were not possible. Sometimes this included input on virtual fundraising events.
- other fundraising consultations focused on using software systems to keep track of donations and grants, resulting in better informed staff and Boards.
- three TA recipients are in the midst of major transformations - one with a retiring founder, one with plans for buying a building and expansion of services (as well as community activities), and one with a sudden and large increase in revenues (enabling hiring of staff in what had been mostly a small volunteer enterprise).
- several recipients wanted specific TA on accounting and financial management, down to basics such as a better chart of accounts and more efficient use of QuickBooks.
- one recipient was assisted in fulfilling a long-delayed objective of creating a Friends of ... group to help with community level awareness-building and fundraising.
- another recipient was assisted in creating a system for raising funds from patients, after it was determined that many patients could use credit cards to make donations.
- one recipient asked for assistance in planning for the celebration of their 50th anniversary.
- one recipient asked for help in creating an app to automate key parts of their service process.

TA focused on anti-racism policies and programs included staff and board training, assistance to board on developing a policy, and creation of a JEDI Committee (Justice, Equity, Diversity & Inclusion) to support the organization in its DEI and anti-racism goals. One recipient also asked for help in creating a tool for evaluating the impact of these activities, and another for a tool that could be used with clients to heighten their awareness and responsiveness about these activities.

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All TA recipient interviews included several positive impacts of the TA, which were re-confirmed by the self-reports of the consultants. Positive impacts included:

- one of the consultants is an expert in nonprofit financial management and worked with several of her consultees on reviewing and upgrading their financial operations (both Quickbooks and more sophisticated systems), and in providing training for staff and Board in how to understand and use financial records. In two cases, the TA recipient has retained the consultant's firm to provide additional consultation paid for by the consultee.
- While the need for improved financial management existed before the pandemic, the constrained financial resources of the last two years made competence in this area even more important. And there have been complexities associated with special government loans and grants such as Payroll Protection Program.
- another of the consultants has special expertise in fundraising strategy and provided help ranging from enhancing approaches to individual donors, to using a donor management tracking system the consultant created to help boards and staff keep better track of their fundraising efforts. The TA provided included some fairly basic education such as how to overcome Anxiety about asking people for money. One TA recipient described herself as a Jack of all trades with limited experience in fundraising. She needed help in this area, such as how to approach donors, but there were time constraints on this activity because of other high priority needs such as infrastructure development for this very small nonprofit.
- in many cases, the TA also included addressing basics like communicating with potential donors by email using systems such as MailChimp, identifying potential donors through attendance at community meetings such as those of the local Chamber of Commerce, and framing fundraising letters effectively - including goals aimed at pandemic recovery (special services for clients in the time of COVID, safety equipment) as well as traditional needs of the nonprofit.
- TA recipients were helped to put fundraising into a larger context, including an annual development plan instead of one just covering a few weeks. One recipient reported the consultant had helped them design their first-ever end of year fundraising campaign. And consultants working directly with Boards and Board fundraising committees helped to prioritize the fundraising plans that were being advanced by staff.
- one TA recipient was pleased with the consultant's assistance in thinking about, then writing a letter of interest for funding a small project. Another asked for assistance both with proposal development and with managing a complex relationship with a funder - which eventually resulted in a significant grant to the nonprofit.
- several TA recipients were assisted with strategic planning, often a revision of an existing plan to accommodate changes required by the pandemic, or done to create a new planning period. One recipient reported that a major insight of the consultation was that strategic plans are living documents, and should be reviewed and possibly revised periodically.
- the TA consultant provided leadership and staff training to several of the recipient organizations, focused on supervision and on burnout prevention. In at least one case, the latter was also addressed by helping the consultee arrange monthly team-building meetings outside of work. In another instance, the consultant's input helped the consultee arrange their first-ever board retreat, which was judged a success.

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- consultation for several recipients was focused on major transformation taking place for the nonprofit. In one instance, the organization was the subject of a brainstorming session with eight participants from widely varying backgrounds offering advice about how to move towards acquiring a new, larger building in which to offer service, as well as provide space for community meetings. In another instance, strategic planning included a focus on the founder/ED retiring. And in a third, VNR provided two consultants, one to offer staff training on how to respond to a major growth spurt in funding and staffing (including creating longer-range strategies to maintain higher funding, such as implementing donor management software, fee-for-service programs, and increased Board giving), and one to advise the board about how to negotiate these large-scale changes.
- several of the organizations receiving TA from Dr. Lipscomb reported that his interactions with the Board and senior staff had a lasting positive impact - focusing attention on Board diversity, equity issues and implicit bias. One organization that already had considerable diversity on both staff and Board reported that these conversations made them aware that there were still places of needed improvement, such as increasing input from the African American community. This organization also reported that they were provided with an Anti-Racist Decision-Making Tool that helps guide their conversations on these subjects.
- one of the recipients reported that Dr. Lipscomb was especially helpful in creating a safe space for some difficult conversations to take place. The consultation for several of the recipients also included creating a committee, which Dr. Lipscomb calls a JEDI Committee (Justice, Equity, Diversity and Inclusion), to lead the organization's efforts in the anti-racist and DEI space. In addition to an overall policy, organizations were helped through his consultation and their ongoing activities to review and improve language in agency forms, create and implement a formal policy, and learn to use respectful terminology when communicating with clients and their families.
- sometimes Board members made commitments to personal education on anti-racism and DEI after working with Dr. Lipscomb. For instance, one sat in on a White People for Black Lives Matter session, and another connected with an academic who shared guidelines on inclusiveness and how to include accurate history in presentations made as part of the organization's community work.
- another organization received technical assistance from Dr. Lipscomb in creating a guidebook on how to address, filter and monitor implicit bias in their service work with clients.

Most of the challenges TA recipients cited were about scheduling - the busy lives of nonprofit leaders can make it difficult to keep TA appointments and do homework suggested by the consultant. The consultants frequently were praised for being flexible in scheduling, and in using Zoom or telephone meetings to reduce time burden (and also these were required during most of the TA consultations due to COVID safety precautions).

Several recipients noted that with the relatively short time frame of the consultation it was difficult to give the consultant a full picture of the organization, its history, successes, and current challenges. But they also were happy with the results of TA despite this difficulty.

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Several other recipients asked directly for more time with the consultant. The most frequent response, however, was no challenges! That was a further reflection of the overall high level of satisfaction with the technical assistance provided.

Ways to improve TA in the future included returning to in-person meetings as soon as that is possible. Face-to-face consultation has advantages though several recipients also noted the convenience of Zoom meetings.

Development/communications consultation done with four of the participating nonprofits also was uniformly well-received. Some of the activities of this supplementary consultation already have been mentioned, such as helping the TA recipient frame communications to potential donors that were more likely to produce results.

Posted Materials Informal feedback about these was positive, but it was noted that there already are a large number of pandemic and recovery related resources on the internet. Having a curated collection of regularly updated resources as well as publications was of some value.

Future

Overall, VNR=s educational workshops were rated favorably, but there is room for improvement in future offerings, as indicated here. VNR has been offering workshops for its entire 16 years of work in the San Fernando Valley, and a number of changes have been implemented in the past. Findings from this evaluation will help guide future improvements in the workshop structure and process. The uniformly positive rating of the technical assistance provided as part of the Recovery Initiative encourages VNR to continue such activities using the model for service now in place.

VNR=s Recovery Initiative has set three new priorities for Valley nonprofits in 2022. These were shaped by workshop evaluation data, input from TA recipients, and findings from the VNR Recovery Survey:

1. Using social media platforms and monetized information products, both for increasing resources and for outreach to clients

Education and technical assistance will be provided to help Valley nonprofits (a) learn about and use TikTok, Instagram and other social media video platforms to facilitate donations and outreach - especially to people under 30, highlighting skill development for creating inexpensive but creative short videos to go on them; and (b) monetizing information products (e.g., online fee-based professional education courses built on agency expertise), building earned revenue. Educational workshops will be offered, and TA will be provided to a pilot group of smaller

2. Integrating development and communications activities

Fundraising always has depended on effective communications, but during recovery having a well-defined communications plan underlying all development efforts is even more important, highlighting virtual as well as in-person approaches for message consistency, prioritizing audiences, creative dissemination strategies, etc. Education and TA activities will be created based on the results of a Fall

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2021 pilot project, conducted for VNR by development consultant Jan McElwee and communications consultant Susan Dunn.

3. Increasing sustainability and promoting accountability measures for antiracist activities

Education and TA on antiracist programming has been provided to Valley nonprofits, and a number of them have begun to implement programs and policies. To keep these alive and growing, strategic attention through education and TA needs to be focused on sustainability, and on developing cost-effective evaluation measures to prove that these activities have impact. CSUN=s Professor Allen Lipscomb will continue as a key partner in this aspect of VRI.

These priorities will be addressed under current funding support, but fully implementing all three will require additional resources. Several grants already have been received, and others are pending.

VRI will continue through December 2022. Two more workshops have been conducted so far in this final year, and more technical assistance and workshops are planned as indicated. The challenges of the pandemic and the nonprofit sector=s recovery from it continue to evolve.

VRI Technical Assistance

Consultants were Janet Levine, Lydia Floyd, Jan McElwee, Allen Lipscomb and Tom Backer

UniHealth

U1 - Child Development Institute - Joan Maltese - Levine

U2 - Center for Living and Learning - Alex Alexander - Floyd

U3 - Kids Community Dental Clinic - Dale Gorman - McElwee

U4 - Childrens Burn Foundation - Sharon Townsend - Levine

U5 - Cri-Help - Brandon Fernandez-Comer - Levine

U6 - Strength United - Kim Roth - Backer

U7 - Northeast Valley Health Corporation - Rosa Guerrero - McElwee

U8 - Clear Skies Ranch - Gabrielle Melville - McElwee

U9 - Hillview Mental Health Center - Eva McCraven - McElwee

U10 - Refugee Children Center - Mayra Medina-Nunez - Floyd

Dwight Stuart

D1 - Wildlife Learning Center - David Riherd - Backer

D2 - Enrichment Works - Donna Wood-Babcock - Levine

D3 - AWOKE B Pierre Arreola B Levine

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D4 - Musicians at Play Foundation - Cindy Pease - Backer

D5 - Mentor Matchmaker Foundation B Brian Frankel - Backer

D6 B Boys & Girls Club of the West Valley - Geovanny Ragsdale - Floyd

D7 - Kids Community Dental Clinic B Dale Gorman - Backer

D8 - Burbank YMCA - Bryan Snodgrass - Backer

D9 - DIY Girls - Leticia Rodriguez - McElwee

D10 - Tia Chucha=s - Michael Centeno - Floyd

Anti-Racism - all Allen Lipscomb

A1 B Child Development Institute - Tessa Graham

A2 - Burbank YMCA - Bryan Snodgrass

A3 - AWOKE- Pierre Arreola

A4 B Strength United - Kim Roth

Anti-Racism B all Allen Lipscomb

B1 - Enrichment Works - Donna Wood-Babcock

B2 - Center for Living and Learning - Alex Alexander

B3 - Ascencia B Ketaki Deo

B4 - Mentor Matchmaker Foundation - Brian Frankel

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VRI Educational Workshops

Speakers and Co-Sponsors if any are listed

- #1 7/29/20 Increasing Access to Capital - Sonya Blake, OC Issac
- #2 9/10/20 Recovery - and Revisiting Your Mission - Janet Levine
- #3 9/16/20 Technology for Donor Communications - Brian Frankel
- #4 9/30/20 4-5:30 pm Reviewing Your Financial Management Operations - Lydia Floyd
- #5 1/26/21 4-5:30 pm Increasing Your Digital Footprint to Raise Funds From Businesses - Tony DeMaio
- #6 2/24/21 4-5:30 pm- What Shape Should You Be? Strategic Re-Structuring for Valley Nonprofits - Carrie Harlow, Jennifer Vanore, PhD, Brittney Weissman, Joan Maltese, PhD; Community Foundation of the Valleys, Nonprofit Sustainability Initiative, co-sponsors
- #7 4/1/21 4-5:30 pm Now More Than Ever - Nonprofits Need an Entrepreneurial Mindset - Alexander Glosenber, PhD - Valley Economic Alliance, United Chambers of Commerce of the San Fernando Valley, co-sponsors
- #8 4/7/21 4-5:30 pm Canoga Park Recovery Roundtable - Alejandra Sandoval - Neighborhood Partners in Action, Institute for Community Health & Well-Being, Strength United, co-sponsors
- #9 4/14/21 4-5:30 pm Burbank/Glendale Recovery Roundtable - Alejandra Sandoval - Burbank Nonprofit Executive Directors Coalition, Glendale Nonprofit Executive Directors Coalition, Institute for Community Health & Well-Being, Strength United, co-sponsors
- #10 4/15/21 4-5:30 pm - Reseda Recovery Roundtable - Alejandra Sandoval - Reseda Community Network, Institute for Community Health & Well-Being, Strength United, co-sponsors
- #11 5/11/21 4-5:30 pm Succession Planning and Pandemic Recovery - Janet Levine & Lydia Floyd
- #12 5/18/21 4-5:30 pm The Road Back to Live Fundraising Events - A.J. Steinberg
- #13 6/8/21 4-5:30 pm Building Nonprofit Boards in a Diverse World - Janet Levine, Joan Maltese
- #14 7/21/21 4-5:30 pm City of San Fernando Recovery Roundtable - City of San Fernando, San Fernando Community Health Center, co-sponsors
- #15 7/28/21 4-5:30 pm Pacoima Recovery Roundtable - AWOKE, Pacoima Beautiful, Tia Chuchas, co-sponsors, facilitator, Pierre Arreola
- #16 7/29/21 4-5:30 pm North Hollywood Recovery Roundtable - AWOKE, Pacoima Beautiful, Tia Chuchas, co-sponsors, facilitator, Lydia Floyd
- #17 10/14/21 4-5:30 pm Post-Pandemic Workplaces: Legal Trends Impacting Nonprofits - Kristina Kourasis
- #18 10/19/21 4-5:30 pm Pandemic Recovery Resources - for Health & Human Services Nonprofits - Jennifer Vanore & panel of 7 speakers
- #19 10/26/21 4-5:30 pm Pandemic Recovery Resources - for Youth Development Nonprofits - Sara Montrose & panel of 4 speakers
- #20 11/18/21 4-5:30 pm How Nonprofits Bring Anti-Racism On Board - Allen Lipscomb, Ketaki Deo, Tessa Graham, Donna Wood-Babcock