

BUSINESS PLAN 2019-2020

Launched in 2007, Valley Nonprofit Resources (VNR) offers capacity-building services to the 5,300 nonprofit organizations in the San Fernando Valley region of Los Angeles. This Plan covers the period June 2019-May 2020.

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:

Founded in 2007 and based at California State University Northridge, Valley Nonprofit Resources emphasizes services to small and mid-sized nonprofits serving poor and vulnerable populations, as well as larger area nonprofits. It is responsible for raising its own budget (the University provides a 3-room office space, computers, and a telephone system). VNR has five main components:

- * a user-friendly **website** with a rich and varied set of information resources on it ; the website offers free downloadable copies of more than 600 publications from VNR and other sources, and it links to the **VNR Platform**, a separate free website with a searchable database and interactive geo-mapping capacity for the more than 5,300 Valley nonprofits.

- * a **learning community** for Valley nonprofits centered on peer networking and educational workshops focused on identified needs, and provided at community sites of VNR's partner organizations for ease of access

- * a **technical assistance** resource, with needs assessment and a range of consulting services (offered by VNR staff or through referrals to outside resources, both subsidized and market-rate)

- * an **information and referral** function to provide custom-tailored responses to Valley nonprofits' needs in real time, either online or by phone

- * a **community voice** to (a) help Valley nonprofits communicate about critical issues, e.g., through a bi-annual *State of the Nonprofit Sector in the San Fernando Valley* report; and (b) interact with policymakers through collaborative work with local and state legislators, such as workshops bringing together nonprofits with local elected officials (one with LA City Councilperson Paul Krekorian is scheduled for April 2019).

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 ; (2) *website use data* from Google Analytics (also used for the VNR Platform), along with Facebook usage data; (3) input from the *VNR advisory committee*; and (4) *evaluation studies*, such as telephone interview studies with nonprofits receiving technical assistance as part of cohort projects on individual giving and other topics.

Summary evaluation reports are prepared every two years (most recently for 2016-2018). 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).

VNR's services include community-based initiatives in the Northeast Valley, Burbank, Glendale, Canoga Park and Reseda, and participation in community groups such as the Valley Providers Collaborative and the Reseda Community Network. Now in its second year, VNR's Health & Human Service Executive Directors Roundtable meets quarterly to provide an education and networking resource for senior staff of health and human service nonprofits (in collaboration with Childrens Burn Foundation and Valley Care Community Consortium). VNR also produces information products, including a directory of nonprofit capacity building services now in its 15th annual edition. MEND (the largest poverty services agency in the Valley) provides input to CSUN's operation of Valley Nonprofit Resources, and for 11 years co-hosted with VNR the annual MENDING Poverty Conference (currently on hiatus).

Summary of Activities Over its 13 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 frequently 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., technical assistance for youth development nonprofits supported by grants from Dwight Stuart Youth Fund; and (b) *technical assistance focused on strategic planning, with longer-term organization development services* aimed at helping the nonprofit implement its strategic plan. Activities in 2009-2010 focused on helping Valley nonprofits cope with the recession - including a *Staying Alive* initiative funded by the California Community Foundation. VNR now regularly receives requests for second or even third rounds of strategic planning from its past clients. It also is experimenting with technology-based delivery systems for its educational activities - e.g., a webinar co-hosted with a nonprofit consulting firm, and two offerings of an online education course (with follow-through TA to participants) also conducted in partnership with a nonprofit consulting firm.

This summer VNR concludes the first phase of its year-long Uncertainty Initiative, which has conducted six educational workshops on topics related to the increased uncertainty nonprofits face in their environments - changes in employment law and accounting standards, dealing with the challenges of homelessness, etc. Technical assistance on these topics also has been offered to two cohorts of 10 nonprofits each (youth development and health & human services). This Initiative has been supported by grants from Dwight Stuart Youth Fund, Kaiser Permanente, UniHealth Foundation and Wells Fargo.

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 consultation 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 August 2018, VNR published the latest in its series *State of the Nonprofit Sector in the San Fernando Valley* reports.

Summary of Operations VNR operates from a three-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; Janet Levine, Janet Levine Consulting; Jan McElwee, McElwee Associates; and Matthew Zarcufsky, consultant. 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 one-year operating budget for VNR is attached. Confirmed and projected funding sources for VNR for 2019-2020 are:

<i>Funder</i>	<i>Amount</i>	<i>Status</i>
Kaiser Permanente	\$24,000	Ongoing
Southern California Edison	\$5,000	Ongoing
UniHealth Foundation	\$78,650	Ongoing
Wells Fargo	\$15,000	Ongoing
HIRI Funding	\$245,146	Ongoing
Fees for Service	\$15,000	Ongoing
Corporate Sponsorships	\$3,000	Pending

HIRI Funding is a gift made to CSUN by the Human Interaction Research Institute, which was the creator and original operator of VNR; approximately \$150,000 of this gift will remain as of June 1, 2019. Fees for service include fees charged for technical assistance consultations and revenues from past MENDING Poverty conferences.

Proposals have been submitted and are under review from Parsons Foundation and Wells Fargo. Small sponsorships from three local corporations have been requested and are under review (one has been approved already).

Business Plans have been created for VNR from its inception in 2007. The 2016-2018 Business Plan was extended to cover the period June 1, 2018-May 31, 2019.

**ANNUAL PROGRAM BUDGET
VALLEY NONPROFIT RESOURCES**

June 2019 - May 2020

Personnel

Thomas E. Backer, PhD, Project Director (Consulting Contract)	60,000
Ashley Wright, Project Coordinator (Consulting Contract)	29,000
Insurance for Project Director, Project Coordinator, Assistant Project Coordinator	4,000
Total Personnel	93,000

Other Expenses

Maintenance for VNR Platform	4,500
Training Workshop & Convening Miscellaneous Expenses	3,000
Resource Pool for Training and Technical Assistance Subcontracts	25,000
Postage/Overnight Mail	500
Reproduction & Printing	2,000
Supplies and Parking	2,000
Total Other Expenses	37,000

Total Project Costs **\$130,000**

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.