



Valley Nonprofit Resources

BUSINESS PLAN 2007-2009 (7/07 Edition)

*Human Interaction Research Institute
California State University Northridge
MEND
Volunteer Center of Los Angeles*

Valley Nonprofit Resources will provide a range of capacity-building services to nonprofit organizations in the San Fernando Valley, as defined in a 2005 Feasibility Study conducted by the four partner organizations named above, and supported by The California Endowment. It will have five main activity components, summarized later in the Business Plan and presented in more detail in the Feasibility Study report. After four years of planning, as the Feasibility Study report sets forth, this program will be operated jointly by the Human Interaction Research Institute, California State University Northridge, Volunteer Center of Los Angeles, and MEND.

Start-up funding for this program is estimated at slightly less than \$200,000 per year, as set forth in the attached draft three-year budget, which may be reshaped to reflect specific funder and nonprofit community interests. These funds will be used both to create the overall infrastructure for the program (staffed information and referral center, website, and structure for convenings, peer networking and “community voice” advocacy activities), as well as to conduct training and technical assistance targeted to specific content areas and audiences - based upon both input from the nonprofit community and from interested funders.

Named project staff would provide overall planning and administration of the program (including creation and operation of the five major components of the program), plus support for content-specific training workshops and TA consultations (done jointly by the partners). The Project Director also would be involved in offering training workshops and TA consultations in his areas of expertise, such as transition management, organization development or systems change.

Several funders approached to support this program have indicated interest in funding projects (which would be part of VNR) that would address specific content areas and audiences (e.g., leadership transition management for health and human service agencies, use of evidence-based programs by mental health agencies). While funding support is needed for creating and sustaining the VNR program’s basic infrastructure (plans for sustainability also have been made, and are presented in the Feasibility Study report), these content-specific projects also are an important part of VNR’s becoming a viable force for nonprofit capacity building in the Valley.

Contacts have been made with a number of foundations about funding, as indicated in the summary chart following. On November 15, 2006, the Provost of California State University Northridge brought together business leaders from the Valley to discuss potential business support for nonprofit capacity building, including this project. Los Angeles County Supervisor Zev Yaroslavsky co-hosted this event, and gave an inspiring speech about the importance of nonprofit capacity building. Finally, training and technical assistance services offered through this project will recruit revenues through fees for service, which will be held to a modest level in order to encourage broad participation by the nonprofit community in the Valley.

Summary of Planned VNR Activities

The VNR program will have five major activity components:

* user-friendly *website* with a rich and varied set of information resources and linkages on it, formatted for “24/7” easy access and offered free of charge to all users.

* *learning community* for Valley nonprofits with several components - peer networking (including a possible successor to the Valley Nonprofit Alliance, so that nonprofit leaders would have support for maintaining a regular chance to convene and talk about common concerns), and a variety of training programs offered at multiple community sites for ease of access.

* *technical assistance resource* to offer both initial assessment of needs for capacity building, and a range of consulting services (either offered by staff or consultants of the project, or connected through referrals, some with and some without financial support to pay for the technical assistance).

* *information and referral center* to offer custom-tailored responses to Valley nonprofits’ needs in real time, either by phone or online, and staffed by the Project Manager, who has many years’ experience with such activities (in some cases, a referral might be to another component of this program; in others it might be to an existing Los Angeles area resource such as the Center for Nonprofit Management, or to a national resource, such as the Nonprofit Facilities Fund).

* *community voice* to help Valley nonprofits communicate with each other about critical issues, e.g., through an annual “state of the nonprofit sector” report and convening (modeled after the UCLA Center for Civil Society’s report and conference); and through a “Valley nonprofit policy council” (modeled after the California Association of Nonprofits’ similar council, of which HIRI is already a member) which can release statements to help Valley nonprofits “speak with one voice” on issues of importance to local policymakers, funders, and the community at large.

VNR will be a *virtual organization with a dispersed physical presence*. The program headquarters will be housed in HIRI’s Encino offices, with training programs offered at the CSUN Center for Management and Organization Development, VCLA in Panorama City, and MEND in Pacoima (thus providing good geographical coverage of major areas of the Valley). Other sites for training programs may also be identified, depending upon both geographical considerations and the resources that might be available through a site partner.

The Human Interaction Research Institute will be the fiscal agent for grants, sponsorships and other revenues received by VNR, and will provide the primary staffing for the program. Staffing and budgetary resources will be adjusted to reflect specific activities required for invited proposals from several foundation funders. Management of the program will be provided jointly by Dr. Thomas Backer, President of HIRI; Professor Alan Glassman, Director of MOD at CSUN; Marianne Haver Hill, Executive Director of MEND; and James Leahy, Executive Director of Volunteer Center of Los Angeles. Additional guidance will be provided by an Advisory Committee chaired by Paul Vandeventer, Executive Director of Community Partners (Mr. Vandeventer reaffirmed his commitment to the Committee in October 2006).

In April 2006, VNR conducted its first event, a technical assistance workshop in Glendale on board development, co-sponsored with the Healthier Community Coalition. The successful workshop had approximately 15 participants, both board members and executive directors from Glendale-area nonprofits wishing to improve their board development and governance skills.

Summary of Funding Sources

Following are the current funding sources for the VNR program. Original plans for the total funding mix are presented in the Feasibility Study report. As mentioned earlier, the three-year startup budget may evolve somewhat depending upon funder requirements (e.g., the mix between development of basic infrastructure and program-specific services funded by a particular grant).

<i>Funder*</i>	<i>Amount</i>	<i>Status</i>
Donor - Dr. Ursula Springer (retired HIRI board member)	\$1,000	Made to support small foundation seminar
Unihealth Foundation	\$122,239	Approved 11/13/06; work has begun
Weingart Foundation	\$100,000	Approved 2/22/07; funds dispersed upon meeting matching requirement of additional \$50,000 for first year
Parsons Foundation	\$50,000	Proposal submitted
Compassionate Capital Fund (Government grant)	\$75,000	Proposal submitted (consortium)
The California Endowment	\$10,000	Proposal submitted
California Community Foundation	\$50,000	Proposal submitted
Verizon Foundation	\$7,500	Proposal submitted
Bank of America Foundation	\$10,000	Proposal submitted
S. Mark Taper Foundation	\$25,000	LOI submitted
The California Wellness Foundation	\$25,000	LOI submitted
Washington Mutual	TBA	LOI submitted
Business Funders	\$2,000	NBC Universal funding of \$1,000 received; Manufacturers Bank funding of \$1,000 committed; other corporations being approached, e.g., proposal submitted to Rocketdyne
Fees for Service	TBA	To be sought when program is in place and fee-based services offered
Keck Foundation	TBA	Preliminary qualifying review done; Foundation suggested proposal for larger project should be made after VNR is established

**PROVISIONAL BUDGET - THREE-YEAR STARTUP PHASE
VALLEY NONPROFIT RESOURCES**

Year One

<u>Personnel</u>	<u>Hours</u>	<u>Rate</u>	
Thomas E. Backer, PhD, Project Director	600	63.86	\$38,316
Fringe Benefits (21.29%)			8,157
Payroll Benefits (5.90%)			2,261
Leave Benefits (14.18%)			5,433
 Elizabeth A. Howard, Project Manager	 800	 27.59	 22,072
Fringe Benefits (32.77%)			7,233
Payroll Benefits (7.96%)			1,757
Leave Benefits (14.18%)			3,130
 Terri Ruddiman, Project Coordinator	 800	 17.85	 14,280
Fringe Benefits (1.94%)			277
Payroll Benefits (9.43%)			1,347
 Total Personnel			 104,263
 <u>Other Expenses</u>			
Website Development			6,000
Website Maintenance			1,000
Training Workshop & Convening			10,000
Miscellaneous Expenses			40,000
Resource Pool for Training and Technical Assistance Subcontracts			3,256
Occupancy			400
Postage/Overnight Mail			2,000
Reproduction & Printing			1,000
Supplies			400
Telephone			
 Total Other Expenses			 63,056
 <u>Total Direct Costs</u>			 167,319
 <u>Indirect Costs @ 15%</u>			 27,098
 <u>Total Project Costs</u>			 \$194,417

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. A five percent salary increase per year is included.

Other Expenses

Website Development/Website Maintenance is for creation and effective operation of website to support nonprofit capacity building in the Valley.

Training Workshop & Convening Miscellaneous Expenses is for materials and preparation expenses associated with workshops and convenings in the San Fernando Valley organized by Valley Nonprofit Resources, including an 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. Subcontractors would include VNR partners CSUN, VCLA and MEND.

Occupancy is for rental of offices (@ \$1.68/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, copying of multiple drafts and final project report.

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.

**PROVISIONAL BUDGET - THREE-YEAR STARTUP PHASE
VALLEY NONPROFIT RESOURCES**

Year Two

<u>Personnel</u>	<u>Hours</u>	<u>Rate</u>	
Thomas E. Backer, PhD, Project Director	600	67.05	\$40,230
Fringe Benefits (21.29%)			8,565
Payroll Benefits (5.90%)			2,374
Leave Benefits (14.18%)			5,705
 Elizabeth A. Howard, Project Manager	 800	 28.97	 23,176
Fringe Benefits (32.77%)			7,595
Payroll Benefits (7.96%)			1,845
Leave Benefits (14.18%)			3,286
 Terri Ruddiman, Project Coordinator	 800	 18.74	 14,992
Fringe Benefits (1.94%)			291
Payroll Benefits (9.43%)			1,414
 Total Personnel			 109,473
 <u>Other Expenses</u>			
Website Maintenance			2,000
Training Workshop & Convening			10,000
Miscellaneous Expenses			40,000
Resource Pool for Training and Technical Assistance Subcontracts			3,256
Occupancy			400
Postage/Overnight Mail			2,000
Reproduction & Printing			1,000
Supplies			400
Telephone			
 Total Other Expenses			 59,056
 <u>Total Direct Costs</u>			 168,529
 <u>Indirect Costs @ 15%</u>			 25,279
 <u>Total Project Costs</u>			 \$193,808

**PROVISIONAL BUDGET - THREE-YEAR STARTUP PHASE
VALLEY NONPROFIT RESOURCES**

Year Three

<u>Personnel</u>	<u>Hours</u>	<u>Rate</u>	
Thomas E. Backer, PhD, Project Director	600	70.40	\$42,240
Fringe Benefits (21.29%)			8,993
Payroll Benefits (5.90%)			2,482
Leave Benefits (14.18%)			5,990
 Elizabeth A. Howard, Project Manager	 800	 30.42	 24,336
Fringe Benefits (32.77%)			7,975
Payroll Benefits (7.96%)			1,937
Leave Benefits (14.18%)			3,451
 Terri Ruddiman, Project Coordinator	 800	 19.68	 15,744
Fringe Benefits (1.94%)			305
Payroll Benefits (9.43%)			1,485
 Total Personnel			 114,938
 <u>Other Expenses</u>			
Website Maintenance			2,000
Training Workshop & Convening			10,000
Miscellaneous Expenses			40,000
Resource Pool for Training and Technical Assistance Subcontracts			3,256
Occupancy			400
Postage/Overnight Mail			2,000
Reproduction & Printing			1,000
Supplies			400
Telephone			
 Total Other Expenses			 59,056
 <u>Total Direct Costs</u>			 173,994
 <u>Indirect Costs @ 15%</u>			 26,099
 <u>Total Project Costs</u>			 \$200,093