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Looking for the Upside in the Downturn: Time-Tested Models of Nonprofit Innovation

Caster Family Center for Nonprofit and Philanthropic Research, The Nonprofit Institute, University of San Diego

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LOOKING FOR THE UPSIDE IN THE DOWNTURN

TIME-TESTED MODELS OF
NONPROFIT INNOVATION

presenting sponsor



Looking for the Upside in the Downturn: Time-Tested Models of Nonprofit Innovation

Warren Auditorium, Mother Rosalie Hill Hall

Friday, June 5, 2009 | 8:00 AM – 12:45 PM

AGENDA

- 8:00-8:30 Registration and Networking - Coffee and Pastries
- 8:30-8:45 **Welcome** - Michael P. Yeatts, President
Commercial Deposit and Payment Solutions, U.S. Bank
Introduction of Topics and Presenters - Pat Libby
Caster Family Center for Nonprofit Research
- 8:45-9:15 **A) The Children's Support Foundation**
Kathleen Cooney Clarke
Shared Planned Giving
- 9:15-9:45 **B) Pittsburgh Human Resources Collaborative**
Rosa Davis and Lois Mufuka Martin
Shared HR Functions
- 9:45-10:00 Break
- 10:00-10:30 **C) Council Connections**
Richard Swafford, Ph.D, and Carrie Vogelsang
Shared Purchasing/IT
- 10:30-11:00 **D) University of San Diego**
Mary McDonald, Ph.D.
Mechanics of Collaboration
- 11:00-11:30 **E) Shakespeare Santa Cruz**
Dana Werdmuller
Fundraising Through Innovative Technology
- 11:30-11:45 **F) Caster Family Center for Nonprofit Research**
Heather Carpenter and Tom Cesarini
Additional Technology Tools for Increased Efficiency
- 11:45-12:00 Pick up boxed lunches from the loggia and proceed to breakout sessions
- 12:00-12:45 Breakout-session locations:
- A) Room 107**
 - B) Room 127**
 - C) Room 137**
 - D) Room 139**
 - E) No Session**
 - F) Room 141**

Dear Nonprofit Community Friends,

There is an old adage that says, “When it rains, it pours,” which we think accurately captures the tone of these difficult economic times. Nonprofits are being deluged with requests to do more with less and, like many of the people we serve, our organizations are feeling increasingly desperate. Beyond social services and health care organizations, arts, education, and cultural organizations are struggling to survive while donors are pinching their pocketbooks. With rare exceptions, nearly every nonprofit is feeling the effects of the economy and the need to do something different.

To that end, in response to your requests, the Caster Family Center for Nonprofit Research searched the country (including our own backyard) to select a handful of time-tested strategies that nonprofits have been using to improve their operations. Many, but not all of these models, are collaborations that have yielded significant efficiencies and cost savings. Our objective in bringing these people and resources to you is to provide San Diego’s nonprofit community with workable models that can prevent you from having to reinvent the wheel. We also hope these examples will inspire you to pursue other ideas that can benefit your organization and others.

At the risk of stating the obvious, there are many wonderful models of nonprofit innovation and collaboration already at work in our community. Our hope is that those who are engaged in these efforts will share their stories on our blog (www.sandiego.edu/nonprofit). For this event, we prevailed upon the generosity of U.S. Bank to bring practitioners who are largely operating outside of our community to talk about how they are doing things differently and successfully. We are grateful for U.S. Bank’s support. It is our hope that the workshop portion of the day will provide an opportunity for participants to delve into their experiences in much greater detail.

Although these are difficult times, we know that by working together we will continue to provide critically important services that enrich our community.

Sincerely,

Pat Libby

On behalf of the team,
Caster Family Center for Nonprofit Research



organization profile

THE CHILDREN'S SUPPORT FOUNDATION

The Children's Support Foundation is a planned giving collaborative among three leading youth service agencies - Children's Village, Inwood House, and Safe Space - to create lasting support for New York's most vulnerable youth and young families. Together, the collaborative serves more than 30,000 young people and provides donors the opportunity to make a significant impact on child and family poverty in the New York metropolitan area. The agencies' spectrum of evidence-based services include child welfare, community-based health services, school-based teen pregnancy and AIDS prevention,



THE CHILDREN'S
SUPPORT FOUNDATION

youth leadership, young adult support services, and specialized maternal health and family support services for pregnant and parenting teens. A seed grant from the Booth Ferris Foundation will support The Children's Support Foundation's first years of operation. The effort is supported by a Professional Advisory Committee, whose members represent the nation's leading investment, wealth management, and philanthropy advisors.

organization profile



PITTSBURGH HUMAN RESOURCES COLLABORATIVE

As mid-sized nonprofit organizations, Bethlehem Haven, the Center for Victims of Violence & Crime (CVVC), and POWER were faced with the growing challenges of effectively managing the complexities of their respective human resources without the expertise of a human resources department. Concerns included compliance issues, recruitment and retention of quality employees, compensation,

training and performance – all of which are normally handled by a Human Resources Director. In the spring of 2001, Marilyn Sullivan, Executive Director of Bethlehem Haven, approached the executive directors of CVVC and POWER to

determine if there was interest in partnering to solve these dilemmas. There was immediate agreement and much enthusiasm at the prospect of developing an innovative project designed to meet the growing human resources needs through “back office” sharing. It was the shared vision of creating an HR department that could serve three partner agencies that led to the Human Resources Collaborative, known today as the HR-C. This creative project has received national attention. The collaborative has been asked to present at various conferences, been called upon to meet with other organizations hoping to share resources through partnerships, and the HR-C has been highlighted in publications including the Chronicle of Philanthropy and the Pittsburgh Business Times. The HR-C offers a model of sharing services that can be replicated by other organizations seeking to provide quality services on a restricted budget.

organization profile

COUNCIL CONNECTIONS

Council Connections was founded by community health centers in 1979 to provide significant pricing discounts through the power of volume purchasing. The organization is committed to helping members leverage their buying power and enhance their financial strength. Council Connections supports community health organizations, both nonprofit and for profit, as well as nonprofit

educational organizations. Council Connections reaches out to support these types of organizations in thirty-eight states. More importantly, the member organizations pay no fee for either membership or services other than the cost of the items purchased at significant savings. Council Connections is partnered with Premier, Inc., offering members low prices on the items used most for office

supplies, technology products and services, medical/surgical supplies, capital and biomedical equipment, printing and forms, laboratory services and supplies, pharmacy products and services, dental supplies, and so much more. Today, Council Connections services more than 500 community health centers and other nonprofit member organizations with more than 2,400 locations throughout the United States. While offering a variety of administrative and medical products in a group purchase delivery system for members, Council Connections is also helping members with technology - helping members save money by sharing technology. These services offer enormous saving to members for no membership fee.



organization profile

USD - CASTER FAMILY CENTER FOR NONPROFIT RESEARCH

The Caster Family Center for Nonprofit Research provides resources and products that are both scientifically valid and have direct applicability to the field. It also serves as an important training facility that enables doctoral students to directly engage in a variety of third sector-research projects. The Center offers access to and analysis of various types of nonprofit data; conducts research on the sector; analyzes funding, public policy, and environmental trends affecting nonprofit corporations; and provides program evaluation and research services to individual nonprofit organizations on a fee-for-service basis. Additionally, as part of its ongoing public education work, the Center convenes regular symposia with practitioners in order to discuss its findings within the context of the local, regional, and national sectors. The Caster Family Center is based within the School of Leadership and Education Sciences at the University of San Diego.



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organization profile

SHAKESPEARE SANTA CRUZ

Shakespeare Santa Cruz is a professional repertory company in residence at the University of California, Santa Cruz. Its Festival was founded in 1981 and continues to be held annually each summer at UC Santa Cruz. Plays are held indoors on the UCSC Theatre Arts Mainstage and outdoors among the redwoods in the Festival Glen.

Bringing in professional actors, directors, and designers from

throughout the country, the Company's season runs from mid-July through August and features three to four plays presented in repertory.

Hailed by USA Today as "one of the nation's top ten most influential" Shakespeare companies, Shakespeare Santa Cruz interprets the works of William Shakespeare through a contemporary lens and introduces its audiences to the newer work of American playwrights.



presenters' biographies



KATHLEEN COONEY CLARKE is Assistant Executive Director for Development & External Affairs for Inwood House, a leading nonprofit teen pregnancy prevention and family support agency dedicated to helping adolescents become healthy, self-reliant adults, serving 4,000 New York City and New Jersey youth. Ms. Clarke is a member of the Advisory Board of the Junior League of the City of New York and provides pro bono services in development and communications strategy to other nonprofit organizations in the service of youth and the environment. Prior to joining Inwood House, Ms. Clarke was for 15 years president of Severin/ Aviles Associates, a political media consulting firm she founded to serve candidates and causes throughout the United States. Ms. Clarke earned her Bachelor of Arts degree from Merrimack College.

presenters' biographies



ROSA DAVIS earned her bachelor's and master's degrees from the University of Pittsburgh's School of Social Work and has nearly 30 years of diverse experience in human services. Ms. Davis is the Executive Director of POWER – Pennsylvania Organization for Women in Early Recovery – a nonprofit organization whose mission is to help women reclaim their lives from the disease of addiction to alcohol and other drugs. Under her leadership, POWER has grown from a single-program agency in 1992 to an organization that today provides the most comprehensive gender-responsive treatment and support services in Western Pennsylvania. Ms. Davis is a graduate of Leadership Pittsburgh and a member of NASW, the PA Halfway House Association and Soroptimist International of Pittsburgh. In 2006, Ms. Davis received the Girl Scouts-Trillium Council's Woman of Distinction award, which recognizes women and girls who have demonstrated extraordinary achievement or leadership in their fields.



LOIS MUFUKA MARTIN came to Bethlehem Haven in March 2008 with a background in social work, nonprofit management and nonprofit consulting. She received her bachelor's degree in History from Lander University in Greenwood, South Carolina, and her Master of Education in Counseling from Clemson University in Clemson, South Carolina. Ms. Martin often describes Bethlehem Haven as an organization that understands the need for collaborative and systemic community change to address the root problems of homelessness. Founded in 1981, Bethlehem Haven has recognized that efforts towards collaborative and systemic change should always include dignified continuum of care services for those in need. It is the continuation of that mission that brought Ms. Martin to Pittsburgh.

presenters' biographies

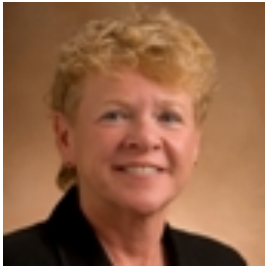


RICHARD SWAFFORD has over 22 years of diversified experience in the Information Technology (IT) field. He has held various positions in the private sector and Department of Defense from Project Manager to Director of IT. As Director of Information Systems/CIO for the Council of Community Clinics in San Diego, CA, Dr. Swafford oversees budget and staff management, product evaluation/selection/vendor negotiation, clinic interaction related to support and consultation, IT strategic planning, project management, consultation services, and product development. He is also a member of Premier's IT Selection Committee and participates with Council Connections in product and project placement. He belongs to a number of statewide organizations and speaks regularly at agency-sponsored events. Dr. Swafford's education includes Doctor of Philosophy in Business Administration and Applied Computer Science as well as advanced degrees in multiple disciplines. He has served as faculty at several universities.



CARRIE VOGELSANG is the LINQ Program Manager for Council Connections, a group purchasing organization (GPO) that negotiates deeply discounted prices for supplies and services for nonprofit community health centers and other organizations nationwide. Ms. Vogelsang currently manages the new markets division - LINQ - which focuses on healthcare organizations outside the community health center arena as well as education facilities that include colleges, universities, and K-12 schools. Prior to joining Council Connections in June 2007, Ms. Vogelsang previously worked for AMN Healthcare, the U.S.-Mexico Border Health Commission, 211 San Diego, and she spent two years serving as a Peace Corps Volunteer in the Dominican Republic. Ms. Vogelsang graduated from the University of Southern California with a Bachelor of Arts degree in International Relations and a minor in Business.

presenters' biographies



MARY McDONALD joined the University of San Diego faculty in September 2008. Dr. McDonald is teaching graduate-level courses in Leadership Studies, primarily in the Nonprofit Leadership and Management Program. She is also collaborating with faculty and students on nonprofit sector-focused research and evaluation projects. Dr. McDonald was previously the director of the Community Research Institute (CRI) at the Dorothy A. Johnson Center for Philanthropy and Nonprofit Leadership at Grand Valley State University in Grand Rapids, Michigan. In that capacity she was regularly involved with both community-based and university-based research in philanthropy and the nonprofit sector. Her most recent research, "International Philanthropic and Nonprofit Studies Education -- Creating Sustainable Social Change," was presented at the International Society for Third-Sector Research Conference in Barcelona, Spain. Dr. McDonald grew up in western Michigan and earned her doctoral degree at Michigan State University in Family and Child Ecology in 2002. Prior to her graduation, she worked with nonprofit organizations in a number of capacities, including serving as the director of the Muskegon Family Coordinating Council, the executive director of Every Woman's Place in Muskegon, and development manager at Hackley Hospital, also in Muskegon.

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presenters' biographies



DANA WERDMULLER joined the Shakespeare Santa Cruz (SSC) staff in January 2007 and has worked as a marketing and advertising professional for over 15 years. Prior to joining SSC, she was owner and Creative Director of Dana Werdmuller Advertising + Design, a full-service agency specializing in tourism, hospitality and nonprofit industries. Ms. Werdmuller served as a Marketing Consultant for the Central Coast Small Business Development Center at Cabrillo College for several years, offering individual business consulting plus developing and presenting a range of marketing workshops to the small business and nonprofit communities. Ms. Werdmuller currently serves as a Commissioner for the Santa Cruz County Arts Commission and holds a Bachelor of Arts degree from San José State University in Pictorial Art.

presenters' biographies



HEATHER CARPENTER has served as a nonprofit manager, consultant, speaker, and trainer to nonprofit organizations for over seven years. She currently pursues her Ph.D. in Leadership at the University of San Diego where she serves as Viterbi Family Doctoral Fellow and Research Assistant at the Caster Family Center for Nonprofit Research. Ms. Carpenter is an adjunct faculty member at John F. Kennedy University in the Bay Area and she teaches and presents on a variety of topics in the nonprofit sector. Ms. Carpenter is an active Facebook and Twitter user, but she is best known for her commentary on her Nonprofit Leadership 601 blog. Ms. Carpenter also serves on the National Campaign to Promote Nonprofit Sector Careers committee through the Nonprofit Sector Workforce Coalition.



TOM CESARINI is a Research Assistant at the Caster Family Center for Nonprofit Research, currently pursuing his doctoral degree in Leadership Studies. Mr. Cesarini holds a Master of Arts degree in Nonprofit Leadership and Management and a Bachelor of Arts degree in Communications. Mr. Cesarini has served as a longtime proponent of the culture and history of San Diego's Italian community; in this role, he continues to preserve and promote Italian culture and heritage through research and education. In 2004, noting an absence of a singular point of reference for the local Italian community, he founded Convivio Society for Italian Humanities as well as its auxiliary, the Italian Historical Society of San Diego, with the express goal of establishing a local Italian cultural and historical institute to serve the community. He currently serves as the Convivio executive director. Mr. Cesarini is also the co-author of two pictorial-history books, *San Diego's Little Italy* and *San Diego's Fishing Industry*.

Collaborating for the Common Good:

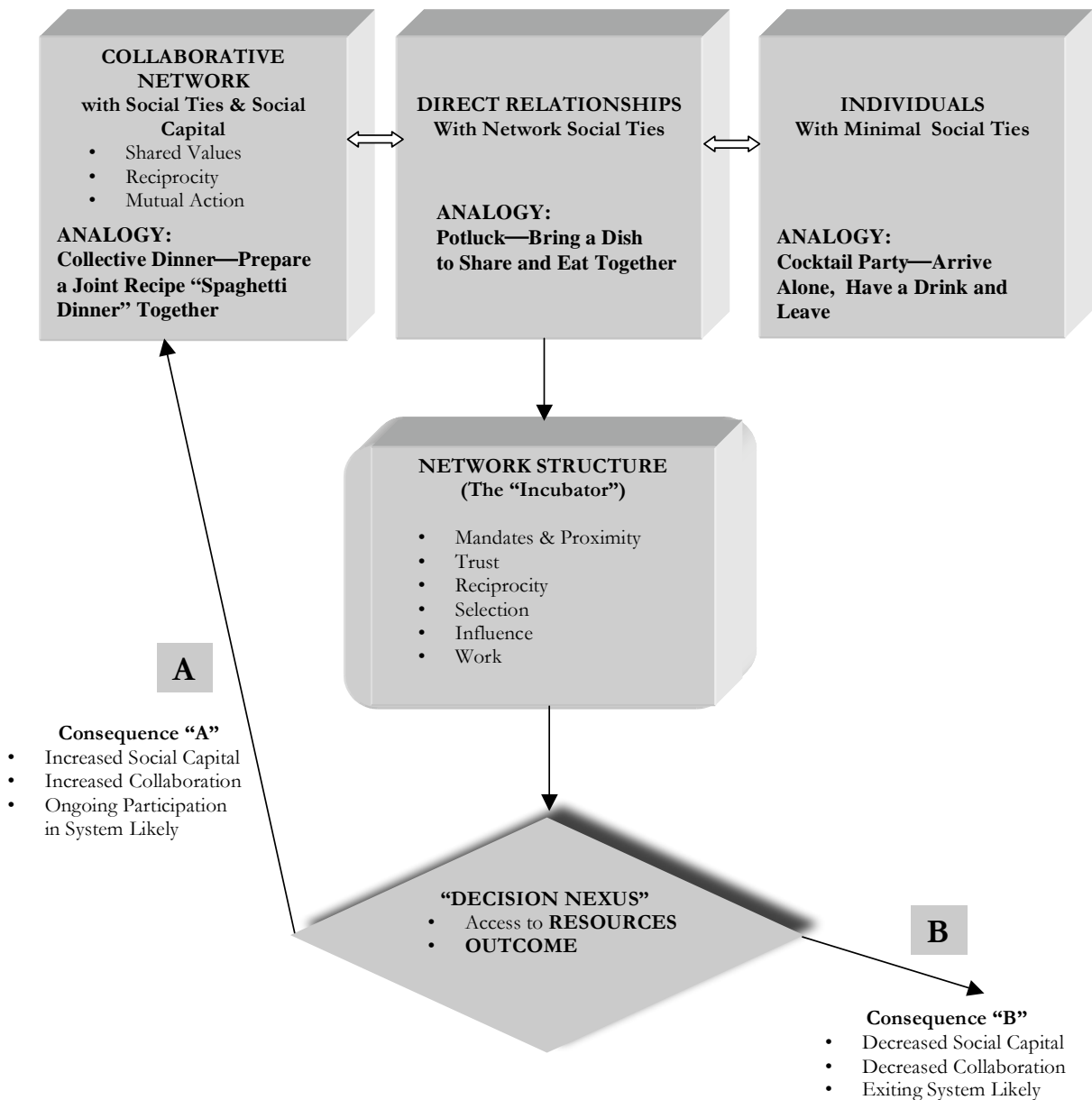
The Possibilities and Pitfalls of Community Collaborative Networks



SOCIAL CAPITAL in a Community Collaborative Network

The collaborative process does not naturally develop levels of social capital, but the process provides an infrastructure for *potential* development. A “decision nexus,” where the work and the relationships come together with resources and outcomes, results in one of two paths: one that builds and regenerates the system (Consequence “A”), or one that exits the system (Consequence “B”). A person either engages in an increasingly collective effort or goes elsewhere.

Figure 1: Social Capital in a Community Collaborative Network



The “Progression” of Collaborative Relationships

There are distinguishable differences in each dimension of the collaborative network at the “individual,” “direct relationships,” and “network” levels. All levels operate at any point in time in a community collaborative network (see below).

The three levels can be interpreted as “levels of the progression of collaborative engagement” as well as increasing levels of social capital. It is at the network level that the expressions of trust, reciprocity, and work (mutual action) reach the level conceptualized by social capital theorists.

Figure 2 summarizes the themes.

Figure 2: Collaborative Relationships As a Progression

	INDIVIDUAL “I am in it for me <i>(and my own group).”</i>	DIRECT RELATIONSHIPS “I am in it for you and me <i>(and both of our groups).”</i>	NETWORK RELATIONSHIPS “I am in for all of us <i>(the collective ‘me’).”</i>
Mandate	Involved <i>to meet organizational mandates</i> /access resources.	Involved to meet mandates/access <i>for certain others.</i>	Involved to meet <i>collective mandates</i> and access to resources.
Proximity	Access to “Tell My Story.”	Access to hear/see others to position my story.	Access to create a new story.
Trust	Consider “myself.” Confidence in “myself.”	Consider certain others. Confidence in certain others.	Consider others as I would consider myself.
Reciprocity	I will do for you if you do for me.	I will do for you if you do for me or our mutual goals.	I will do for us.
Selection	I select to inoculate myself.	I select to expand myself.	I select because you are like me/not like me.
Influence	I am not influenced.	Certain others influence my work.	Others’ thoughts change my behavior.
Work	I do my work. I will do my part.	I do my work through you. I will do my part to help you.	We do our work. I will redefine my part.

TECHNOLOGY RESOURCES

- * Low cost software for nonprofit organizations; answers to many technology questions:
<http://www.techsoup.org>
- * Tech Soup Healthy and Secure Computing; handouts and technology-planning templates:
<http://www.techsoup.org/hsc>
- * A free guide to Application Service Providers, Internet services, and online software (including donation software):
<http://www.compasspoint.org/enonprofit>
- * Free expert advice about technology products:
<http://www.pcmagazine.com>
- * Free software:
<http://www.downloads.com>
- * Lists of nonprofit software:
<http://www.socialsourcecommons.org>
- * Nonprofit software reviews:
<http://www.idealware.org>
- * Nonprofit technology support listservs:
<http://www.groups.nten.org>; nten-discuss@groups.nten.org;
npo-techies@lists.compasspoint.org

