

Subject: RE: Follow up to Task Force Conference Call

From: jleberg@fbm.com

Date: Mon, 11 Jun 2007 11:54:36 -0700

To: jforcier@bayanalytics.com, MWBeck@lbl.gov, jjen@hf.com, connork@usfca.edu

CC: jpower@thevolunteercenter.net, jmistrack@gmail.com, jlove@thevolunteercenter.net

James,

I was speaking with Marcy at the house party last week about next steps. It seems to me that we have already learned quite a bit (although we have a lot to go, as well). I think that one way to move things forward would be to sit down again as a group and come up with a fairly specific list of possible fundraising actions (e.g., approach these specific companies (or companies in these specific industries or geographic areas, etc.) about these specific topics, use these specific techniques to find grant money for these areas, etc.) The goal would be to pull together during the meeting a document with all of the ideas that we have come up with. I have attached a very simple template for what I envision, but the other task force members may have better ideas on how to organize the list.

We probably don't have all the information that we need for this exercise, but we can take our imperfect product back to John and Julia for input. Hopefully the list could also help us identify areas where we need to do more research, and help us think about how to do that efficiently. By the way, I agree with everything that you have set out below, including the need to refine our mission a bit. I hope that by first coming up with a very concrete list of possible actions we can zero in on areas where the Task Force can be most effective.

Please let me know if this sounds like a reasonable way forward. Whether we use this approach or another, if the Financial District is the most convenient place for everyone I am happy to find us a conference room at my firm's office at Montgomery and Bush for the next Task Force meeting.

By the way, here's a link to an article in today's Marin IJ about a grant that was given to a Marin-based volunteer organization for the purpose of developing volunteerism among people 55 and older:

http://www.marinij.com/marin/ci_6111254 (I'm not sure whether this works as a hyperlink--if not, just cut and paste into your browser.) John/Julia, as a general matter how do we get word of opportunities like these when they arise?

All the best.

Jonathan

-----Original Message-----

From: James Forcier [mailto:jforcier@bayanalytics.com]

Sent: Friday, May 25, 2007 7:44 PM

To: Lemberg, Jonathan (28) x4452; 'Marcy Beck'; 'Joyce Jen'; 'Kim Connor'

Cc: 'John Power'; 'Jillian Mistrack'; jlove@thevolunteercenter.net

Subject: Follow up to Task Force Conference Call

My apologies for the delay in following up with you about the Task Force's next steps. I found our May 18 conference call with John and Julia to be informative, and did my best to take a few notes which I've summarized below. Please feel free to add to or edit them for the group.

I think it important for us to agree on a mission and goals for the Task Force so that we can accomplish something useful on behalf of the Volunteer Center. I've posed some ideas following the conference call notes - please message back to all as soon as you can with your thoughts.

Resource Development Task Force Conference Call
May 18, 2007

Current funding priorities include:

- The Youth Program: this is an important source of funding for TVC's youth outreach; the available pool of available funds has diminished; and a TVC budget needs to be developed by June
- The Consulting and Training Practice: funds needed to expand current offerings, create new offerings, and to launch in San Mateo
- Volunteer Services with the City of San Francisco

Fundraising is predominantly done by John and Julia, although there is a desire to get program staff more involved in securing funding. While TVC once had a development department, it was reduced to a ½ time position and subsequently discontinued

The Bay Area Corporate Volunteer Council is key for establishing and maintaining the corporate contacts needed for TVC's fundraising. Using the CVC and other means, TVC has focused on corporate relationship building.

Various ideas as to how to bolster fundraising:

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Broaden the appeals made on behalf of TVC's Special Ed kids' programs by targeting funders interested in supporting youth development

- Identify corporations' specific philanthropic goals and make appeals to the firms that are most aligned with TVC
- Identify foundations' specific goals and pursue grants from those that are aligned with TVC
- Get involved in/aligned with the corporate social responsibility movement
- Meet with other "volunteer matching" organizations to learn how they raise money and see if there are collaboration possibilities
- Use testimonials as fundraising tools
- Better identify and understand what TVC is doing that is particularly successful, and determine how to market it to others. One example is PG&E executive placement on non-profit boards - perhaps "package" and promote to other corporations?

What is the Task Force's mission?

The Task Force has energy, intelligence, and a lot of great tactical ideas, and we need to figure out how best to harness and direct it. One way to help us decide would be to examine the cost-effectiveness of various TVC approaches to see what has worked well and what hasn't and zero in on areas that we wish to pursue with our limited time and resources. However, this idea didn't seem to resonate with everyone in the group. Have you another approach to help us decide on our area of focus?

Also, while the value of learning about TVC programs through staff presentations at board meetings is unquestioned, we may wish to accelerate it by gathering more information specific to the Task Force's needs. Perhaps we could ask each program to tell us (by the June board meeting?):

- Most important current objective
- Funding needed to accomplish
- Persuasive argument for why funder should support it

- Any thoughts as to specific or groups of funders who might be worth going after
- ????

What else might we need to know about the programs so that we can support them? Other ideas or suggestions on any of the above?

- JRF

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