

Subject: RE: TVC Resource Development

From: jleberg@fbm.com

Date: Tue, 08 May 2007 22:39:32 -0700

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

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

I agree with Joyce's suggestion of doing some spade work on cost effectiveness, but I think that the best way to start on that (particularly since most of the members of the task force are relatively new to TVC) is to include that issue in our discussions with John and Julia. I believe that John is away at the moment, but I would suggest trying to schedule either a meeting or a call shortly after his return. I don't view this as a one-off meeting--hopefully it will be the start of a dialogue that, particularly at the John/Julia level, the task force and the folks "on the ground" can engage in on an ongoing basis outside of the scheduled board meetings. Meetings with other staff members probably need more planning and a more formal agenda, but I hope that we can have frequent and less formal discussions with John and Julia (although not so frequent as to get in the way of their work!).

For an initial call/meeting with John and Julia, I would propose that we limit the discussion to a few topics. My choices would be:

1. Programming Goals--What are the two or three most important program areas that we would like to either expand or initiate if we could raise the funds?
2. Fundraising Process--What is our current process for ferreting out and applying for grants? What is our current process for identifying potential donors outside of the grant-writing process? (I would leave the topic of event fundraising to a later date, after we have a better feel for cost effectiveness.)
3. Some initial discussion of how to fill out our "cost effectiveness continuum," including how to get the historical data that we need.

Any other thoughts on where to start the conversation? In any event, the most important thing is to get started. Can we get a one-hour call onto the calendar either towards the end of the week of the 15th or else during the week of the 21st?

Jonathan

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

From: Marcy Beck [mailto:MWBeck@lbl.gov]

Sent: Tuesday, May 08, 2007 8:36 AM

To: Jen, Joyce

Cc: James Forcier; Kimberly Connor; Lemberg, Jonathan (28) x4452; John Power; Jillian Mistrack; Julia Love

Subject: TVC Resource Development

All,

Following up on Joyce's thoughts regarding first steps, I believe that Julia offered that she and John could give us a broad program by program status report w/ respect to funding at the next Board meeting, taking into account the nature of the funding for each, its certainty, and the extent to which, from a program standpoint, J and J see funding opportunities and challenges to keep programs going, to expand, to diversify and/or to break new ground.

Marcy

Jen, Joyce wrote:

Hi everyone,

Hope you're all enjoying this beautiful weekend. I regret that I had to miss the inaugural Resource Development Task Force meeting; sounds like it was a very productive session. I spent some time on the phone with James last week getting brought up to speed on what all was discussed and wanted to throw a few ideas out to the group for discussion as we think about next steps for the task force.

It sounds like one of the immediate action items is planning a potential staff meeting to discuss current and

new programs as relates to fundraising potential, cost measurement initiatives, etc. I don't have a firm point of view on whether this should be an all staff / Board / task force meeting, but I would like to propose that before we hold such a meeting (irrespective of ultimate attendees), we try to do some work around filling in the cost-effectiveness continuum as outlined in James' notes. I'm a huge proponent of this exercise and believe it is a critical step in beginning to assess where the efforts of TVC might be best spent. I also think that having some data to analyze would be helpful in providing a framework for said meeting. So, to get the ball rolling in terms of brainstorming how we might accomplish this, I thought I'd email an idea or two.

To start, perhaps it would be helpful if we could try to (i) parse out the average net revenue generated by each class of activity (consulting assignments vs. grants vs. events, etc.) -- and by "net revenue" I mean net of in-kind revenue, which is just the contra-balance of in-kind expenses -- and (ii) try to allocate costs to each (both direct costs and staff time), to get at the true amount each activity is bringing in. John -- is this something that TVC currently tracks? If not, I'd be happy to work with you and James to look into how we might try to gather this information. Obviously, it is not all about the bottom line, and there will be projects that TVC chooses to undertake that may not rank at the top of our continuum but are in keeping with the mission and objectives of TVC, or projects that have less quantifiable benefits. However, it might still be helpful to know what the cost of each is (monetary and opportunity), so the group can strategically select these projects and make sure we are balancing the number of higher and lower revenue-generating activities.

Thoughts, comments, suggestions? Just wanted to open it up for discussion as we think about planning another meeting in May and also since budget planning is around the corner.

Thanks,
JJ

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

Sent: Tuesday, May 01, 2007 4:38 PM

To: 'Marcy Beck'; 'Kimberly Connor'; jlemborg@fbm.com; Jen, Joyce

Cc: 'John Power'; 'Jillian Mistrack'

Subject:

Resource Development Task Force:

Many thanks for participating in our kick-off meeting Friday 4/27.

As we agreed, I raised with John the idea of a Task Force-plus-staff offsite meeting at our expense, and he is fine with it. However, John tactfully reminded me that all fundraising is being done by John and Julia (with some by Jill more recently), as shown on the document I distributed at the Task Force meeting (attached). This is the case for all revenue categories (consulting, grants, etc). (One of the key questions the Task Force might want to look into is whether staff should be more involved in fundraising, an approach that was used by TVC some time ago.)

Given the above information and the fact that staff has been attempting to explain their activities to us at recent Board meetings, I think it important to be sure when we wish to meet with staff - such as, before or after we develop preliminary ideas - and what our discussion should involve. Do we want to, say, have a briefer meeting with staff now, at which we would ask them to explain to us their few highest priority resource requirements? We could then use that information to develop some ideas and strategies as a task force, and then get back together with staff for a more lengthy session to discuss pros, cons, TVC's past fundraising challenges and successes, etc.

John also suggested, in the keeping with the Task Force's desire to keep things moving ahead, that he and Julia could make themselves available for a conference call, either before or after his time away 5/8 - 14, if we want information from them. He said he was ok with us meeting with staff during his absence, too - but I wish to solicit your ideas about exactly when/why we're meeting so that we can make the best use of everyone's time.

Please use the reply all function so we can deliberate this, ok?

Also attached are my notes from the meeting (I put in a placeholder for a chart to help up think about the cost-payoff of various revenue raising methods.) Feel free to add or edit all - I surely missed/misinterpreted a few things.

- JRF

