

**To:** The New World Foundation

**From:** Girls For A Change and three other participating organizations

**Subject:** Proposal in response to the recent RFP, “Increasing Organizational Sustainability through Expansion of Small Donor and/or Membership Base”

**Date:** October 29, 2009

**Project Title:** Building Shared Marketing Capacity



**Concept:** This project would create a partnership between three social justice organizations and a leading consulting firm which would 1) create more cost effective and compelling marketing systems for raising more money from individual donors; and 2) build long term organizational capacity via an apprentice based training process.

**Request:** We are requesting a grant of \$148,000 over one year with a second year amount TBD

**Participants:** The three organizations and the marketing team collaborating on this proposal are as follows:

|   | <b>Mission area</b>                                      | <b>Annual budget</b>    | <b>Website</b>                |
|---|--|-------------------------|-------------------------------|
| <i>Girls For A Change</i><br>(fiscal sponsor) | Girls in middle and high schools                         | \$1.5 M                 | www.girlsforachange.org       |
| <i>A Home Within</i>                          | Foster youth both in the system and recently emancipated | \$1 M                   | www.ahomewithin.org           |
| <i>Fresh Lifelines for Youth</i>              | Youth in the criminal system                             | \$1.9 M                 | www.flyprogram.org            |
| <i>Consulting Within Reach</i>                | Cause motivated marketing                                | N/A as a private entity | www.consultingwithinreach.com |

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## PROJECT NARRATIVE

### Introduction

The weakness of community based organizations in individual fundraising is systemic in nature, caused especially by the low marketing capacity almost inherent in an individual small/midsize nonprofit. This proposal seeks to address that systemic weakness by developing a **shared marketing capacity** for multiple nonprofits, which should produce dramatically improved staff expertise, cost effectiveness, and compelling fundraising results. We believe this innovative approach, if proven to be effective, can be easily replicated by other nonprofits and sponsoring foundations.

### Who We Are

The three nonprofits collaborating on this proposal all empower youth in disadvantaged communities in the San Francisco Bay Area and beyond. They pursue social change in complementary fields: *Girls For A Change* focuses on girls of color in middle and high schools in low income (mostly urban) areas; *Fresh Lifelines for Youth* (which was launched in 1998 through an Open Society Institute award of the Soros Justice Fellowship) serves youth in the criminal justice system; *A Home Within* operates in the foster care system. Taken together, the group has been recognized nationally as high performing nonprofits, winning national accolades such as two Draper Richards fellowships, a Purpose Prize from Civic Ventures, and recognition as an innovator and best practices organization by the National Law-Related Education Consortium.

The partnering capacity building firm is *Consulting Within Reach (CWR)*, a leading source of nonprofit expertise in the region. CWR is comprised of ten professionals with backgrounds in leading organizations such as Accenture, Apple, Harvard University, Hewlett-Packard, and more. The firm is known as a “one stop shop” for marketing related needs (see appendix for team bios). As part of its mission, CWR generally charges rates of 50% below market levels.

In late 2008, CWR recognized early how the recession would place a critical priority on individual fundraising vis a vis other funding sources. Soon thereafter, the firm catalyzed the formation of the *Capacity Collaborative* ([www.CapacityCollaborative](http://www.CapacityCollaborative)) which is a group of over 30 Bay Area leading foundations and nonprofits working together to develop new ways to build capacity for individual fundraising. As part of this initiative, CWR has completed or begun audits of 16 member nonprofits, analyzing their capacities that are critical for individual fundraising. CWR is already in the process of synthesizing the collective findings into a knowledge bank to benefit Collaborative members. This proposal is based on the data and insights emerging from that process, including the finding that the three nonprofits in this proposal have some of the highest growth potential in individual fundraising.

CWR has repeatedly demonstrated its expertise by successfully completing in the last two years over 40 marketing or fundraising projects for nonprofit clients, including all three of the participating nonprofits. An example of its impact can be found in an online case study for its capacity building work for a client that resulted in \$270,000 raised from individuals in four weeks.<sup>1</sup>

### Current Fundraising Strategy

All three nonprofits share a striking degree of similarity in their current state of fundraising. All grew to their current size by relying heavily on foundation (or government) grants. On average, *Girls For A Change*, *Fresh Lifelines for Youth*, and *A Home Within* only raise from individuals 25% of their budget. This foundation support has enabled rapid growth in recent years: *Girls For A Change* and *A Home Within* have recently opened new sites in other cities and *Fresh Lifelines for Youth* has expanded to a new county.

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<sup>1</sup> See [http://www.consultingwithinreach.com/case\\_studies/index.php?page\\_function=detail&case\\_study\\_id=1](http://www.consultingwithinreach.com/case_studies/index.php?page_function=detail&case_study_id=1)

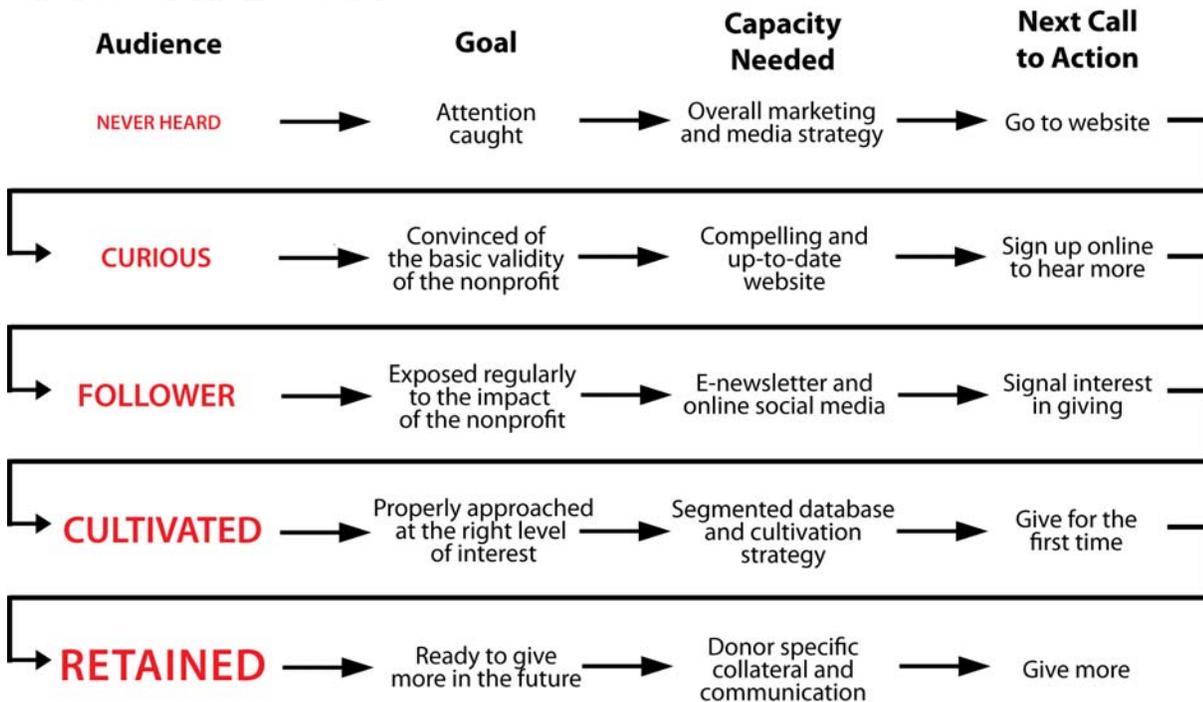
The three executive directors recognize that sustaining their rate of expansion requires building their capacity to reach individual donors. The new geographic areas of expansion all contain fewer foundations than the Bay Area. Moreover, the growing statures of these nonprofits mean that new strategic opportunities for influencing policy are opening up. This will require unrestricted funds, unlike much of foundation giving which is designated for program delivery. To address the strategic necessity of increasing their individual donor bases, all three executive leaders have hired new donor development directors in the last three months.

### The Critical Need: Integrated Marketing Capacity

Marketing capacity is critical to fundraising from smaller, individual donors. A critical mass of individuals will only feel moved to donate to organizations that have communicated their identity, work, and needs in an effective manner.

This capacity involves a broad range of functions. Whereas foundation grants can be acquired via one person skilled at grant writing, individual donations must be won by multiple skill sets engaging in several interrelated functions.

Consider a typical marketing process whereby an individual who has never heard of a nonprofit is converted over time into a donor.



Successful marketing requires an integrated system of strategies, processes and tools that can be described as a system of interconnected links in a chain. If one of the links is broken or weak, the entire system is undermined. For instance, *Fresh Lifelines for Youth* does a good job overall at individual donor cultivation. However, it has lacked a robust strategy for generating a wider base of initial attention with a widely understood message about its mission. *A Home Within* can generate initial attention each year via National Foster Care Month and an attractive art gallery event in San Francisco. However, its website is weak, with no ability for viewers to sign up for an e-newsletter. *Girls For A Change* also has strength on the front end with corporate co-branding in place, but lacks the resources to properly segment and cultivate individual donors.

## Definition of the Problem: Why Capacity is Missing

All three of the organizations in this proposal report chronic weaknesses at multiple points in the marketing system. This is not surprising given that consistent execution across this integrated system requires multiple and generally non-overlapping skill sets. Someone good at conceiving a media story and pitching it is rarely someone who can also do web development or maximize the effectiveness of a marketing/donor database.

Yet, like most community based nonprofits serving disadvantaged and marginalized populations, the three organizations can afford only one FTE dedicated to some amalgam of marketing/fundraising responsibilities. While those three individuals respectively hired in house are talented and motivated, they simply cannot do it all.

This narrowly constrained capacity further impairs the effectiveness of the three organizations given the highly volatile demand peaks for marketing. For example, *A Home Within's* need for more compelling web content is felt most keenly around National Foster Care Month when new initial interest can be generated. *Girls For A Change* faces stress on its staff during national campaigns with its corporate sponsors. *Fresh Lifelines For Youth* holds a critical annual gala and wishes it had better e-newsletter and online social networking capacity to follow up. At other times, the demand for marketing in these organizations is much more dormant. As a result, hiring more in house staff – even if they could be afforded – would be extremely inefficient.

The traditional sources of free talent are also insufficient. Pro bono and board efforts can be helpful when restricted to narrowly defined tasks. But they are generally undependable for the kind of ongoing and time intensive execution of excellence required by an integrated marketing system. The interdependencies of the chain also mean that if a volunteer (who for these three nonprofits is often a very busy Bay Area professional) fails to come through at one point, the entire process could be undermined. If a big media event has been staged but a volunteer charged with updating the website with key follow up material is too busy for several weeks, momentum can be lost. Most importantly, the effective deployment of volunteers requires some staff subject matter expertise to effectively manage the process. This kind of expertise is currently in short supply with all three organizations.

Gaining in house expertise in the current model of training is also ineffective. The sporadic and short workshops offered in various settings have very limited impact. The skills needed simply cannot be built in a few hours by talking about the issues in abstraction, and then releasing staff to do something they have never done or not done well before.

In summary, we believe the current model of building marketing capacity is broken. The central assumption in the current model is that each organization should by itself acquire in house all the marketing capacities required. We believe this assumption is unrealistic, and that a different model is needed.

## Proposal: Shared Marketing Capacity

*Girls For A Change, A Home Within, and Fresh Lifelines for Youth* propose sharing marketing capacity over a two year span. The collective would engage Consulting Within Reach (CWR) to execute on the areas of the integrated marketing system that are most critical for each organization. Simultaneously, this execution will serve as the context for apprentice based training of internal staff.

Some examples of the services and training to be provided include (see Appendix for the full list):

- Creation and/or refinement of a standard press kit
- Training of volunteer and staff on executing media pitches
- Producing and delivering monthly e-newsletters
- Developing and executing online social networking concepts
- Customized consultations on donor segmentation and cultivation strategy

- Creation of a learning community of the participating organizations meeting monthly to share ideas, measurements, and common opportunities
- And more...

Within these standard areas, emphases will vary according to the relative strengths and weaknesses of each organization. For instance, special emphasis will be placed on the e-newsletter deliverable because all three lack the capacity in this very critical link in the integrated marketing chain.

This approach of using shared expertise to execute, train, and share learning will **build organizational capacity**, is **cost-effective**, and will lead to **compelling marketing** to persuade individual donors to contribute more money.

A key goal of this proposal is to **build organizational capacity** for the long term. Marketing is an art that is more “caught than taught.” And one catches this art best in the apprentice model: first watching a skilled practitioner operate, then learning by doing increasingly challenging tasks under the mentor’s guidance, and then finally being launched after a lengthy period of absorption. The apprentice model also works best when there are multiple apprentices so that a learning community is formed.

We intend to structure the shared marketing capacity program around the apprentice model. Specifically, this will involve the following elements:

- Each nonprofit will designate its Director of Development as the primary “apprentice” (more than one can be selected from each organization) and the few mission critical subject matters that absolutely must be mastered.
- This “apprentice” will be the main liaison with CWR and work side by side on several projects.
- All three “apprentices” will be convened monthly to reflect and share their learning under CWR guidance.
- Templates and manuals will be created in most cases to reinforce the training and institutionalize expertise within the organization beyond the apprentice.

The first year of intensive apprentice based training will be followed up with a second year that will emphasize CWR coaching versus executing. It should be noted that the ultimate goal is not to get to the point where each nonprofit will be able to execute in house by itself all across the marketing chain. Most for profit companies cannot do so; the smart ones don’t even try. Rather, the goal is to have the nonprofit staff own the high level expertise (i.e. message creation), execute the low hanging fruit (i.e. updating its website), and have enough expertise and documentation to manage volunteers or consultants for those in between. As a side note, we believe that this heavy professional investment in the Directors of Development will aid our efforts to retain their talent for the long term.

In terms of the **cost-effectiveness** of this proposal, it is estimated that the for-profit, market rate cost for such a set of services could easily exceed \$150,000 for *just one company*. The ability of our proposal to deliver services to three organizations stems from several cost effectiveness factors:

- As mentioned, CWR rates are already set at 50% below market rates.
- One of the highest cost factors for CWR (and for any other firm) is the cost of client acquisition. This approach essentially removes that factor.
- Another CWR cost factor is the learning curve required as it moves to a new client and issue area. This cost is lowered by the collective’s broad convergence on youth and by the fact that CWR is already very familiar with all three of its former clients.
- CWR also can achieve some economies of scale. For instance, the team can mobilize to create monthly e-newsletters for three organizations in one meeting rather than three separate ones.

Another way to describe the cost effectiveness gained by this shared model is to say that the nonprofits are essentially pooling their buying power. This collaboration is made possible by the fact that while they all work on youth related causes, their specific issue areas (high school girls, foster care, and juvenile crime) are distinct enough to avoid competition at the level of individual donors. Indeed one of the advantages of shifting the focus to individual donors is that in this space, these organizations are no longer competing for similar foundation money (which they have in the past), and thus are more willing to share ideas and opportunities.

We also believe that this approach will enable **more compelling marketing** and much more effective individual fundraising. Obviously, having a professional firm execute across the integrated marketing system will create more consistency and quality. But there are other advantages that are made possible by collaboration.

- Best practices and creative ideas can be readily shared. Because their individual donor bases (especially the small scale ones) are relatively different, if CWR comes up with a concept for an e-newsletter for Girls For A Change, the same can be adapted for Fresh Lifelines for Youth.
- The shared capacity will serve as a framework to explore joint media events and campaigns. Three nonprofits doing something together are more likely to gain media attention than just one on its own.
- While CWR is already a leading firm serving youth related nonprofits, this project will concentrate its attention even further on this issue area and grow its ability to create compelling marketing materials.

## **Goals and Metrics**

We intend this project to serve as proof of concept for the shared marketing capacity model. As such, we are firmly committed to a rigorous measurement process to establish this model such that it becomes a best practice in our field. We will institute baseline measurements at the outset in key areas and then collect data either at our monthly apprentice meetings or in quarterly convening, depending on the metric in question. All the participating organizations are committed to working with The New World Foundation in disseminating the lessons gained.

For more specific details on our goals and metrics, please see the Appendix.

## **Sustainability and Replication**

Without knowing the results of Year 1, we believe it is impossible to accurately name the needs and costs for Year 2. As mentioned, the second year is focused more on having the nonprofit staff be coached as the latter execute functions themselves or manage volunteers to do so. We suspect that some highly strategic projects benefiting all three nonprofits may emerge, and that those projects may still involve CWR execution.

We do expect that the total cost of Year 2 should be less than half of Year 1. Moreover, all three nonprofits have committed to allocating a significant percentage of new individual donations specifically generated by this project in Year 1 and invest it in the plan for Year 2. To cover any remainder, we plan to seek limited renewal funding from The New World Foundation or other local foundations.

We believe the model undergirding this proposal can be replicated elsewhere. In the Bay Area, several organizations have expressed strong interest in adopting the shared marketing capacity model if proof of concept is established. The Franklin and Catherine Johnson Foundation has already, in partnership with CWR, conducted five focus group interviews with its grantees about this very model. The response has been overwhelmingly positive and the Foundation will be seeking other foundations to partner on replicating our project (assuming its success). Replication will also take place through the Capacity Collaborative.

## Appendix: Project Timeline and Budget

Please note that because of the depth of the CWR team, work on multiple phases will happen concurrently. We estimate that the total length of the project will be 9-12 months.

| Phase  | Purpose   | Key deliverables<br>(for each organization)   | Budget<br>(total) |
|--|---|---|-------------------|
| <b>Message creation</b><br>6 weeks           | Define why audiences should pay attention and potentially donate      | <ul style="list-style-type: none"> <li>• Message calendar</li> <li>• Message guideline</li> </ul>   | \$8,300           |
| <b>Media and public relations</b><br>6 weeks | Broaden the pool of initially interested individuals                  | <ul style="list-style-type: none"> <li>• Standard press kit</li> <li>• Specific press kit for an annual event</li> <li>• One press pitch done with apprentice</li> </ul>  | \$9,300           |
| <b>Story bank</b><br>12 weeks                | Appeal to the way most individuals are most moved                     | <ul style="list-style-type: none"> <li>• Three “poster child” stories</li> <li>• Templates for future stories</li> <li>• Training on story collection and writing (for both print and video)</li> </ul>   | \$13,800          |
| <b>Website improvement</b><br>8 weeks        | Impress initial visitors  | <ul style="list-style-type: none"> <li>• Content analysis and improvement</li> <li>• Added features to enable staff to update news items</li> </ul>   | \$16,800          |
| <b>Online social media</b><br>6 weeks        | Listen to what (younger) audiences are saying about the organization  | <ul style="list-style-type: none"> <li>• Implementation of one tool (i.e. Facebook, Twitter)</li> <li>• Ongoing monitoring of activity</li> <li>• Coaching staff</li> </ul>   | \$8,000           |
| <b>Monthly e-newsletter</b><br>18 weeks      | Communicate regularly with the newly interested and the existing base | <ul style="list-style-type: none"> <li>• Scrubbing of data in database and updating addresses of key donors</li> <li>• Graphic design of template</li> <li>• Creation of monthly content</li> <li>• Execution of the delivery</li> <li>• Monitoring results</li> <li>• Training and manuals on future content and delivery</li> </ul> | \$24,100          |
| <b>Database optimization</b><br>4 weeks      | Understand who is in the base   | <ul style="list-style-type: none"> <li>• Needed new reports and metrics</li> <li>• Training to maximize value from database</li> <li>• Coaching on segmenting donors</li> </ul>   | \$8,200           |
| <b>Cultivation strategy</b><br>8 weeks       | Convert new donors or upgrade existing ones                           | <ul style="list-style-type: none"> <li>• Analysis of optimized database</li> <li>• Segmented strategy for personal engagement of donors</li> </ul>  | \$15,200          |
| <b>Case</b><br>8 weeks                       | Make a convincing ask with supporting collateral                      | <ul style="list-style-type: none"> <li>• Content</li> <li>• Graphic design</li> </ul>   | \$11,500          |
| <b>Annual report</b><br>8 weeks              | Appreciate and communicate with existing donors                       | <ul style="list-style-type: none"> <li>• Content</li> <li>• Graphic design and template</li> </ul>  | \$7,900           |

|                              |  |  |                  |
|------------------------------|--|--|------------------|
| <b>General project costs</b> | Maximize efficiency and learning in this new model | <ul style="list-style-type: none"> <li>• Client management</li> <li>• Team management</li> <li>• Quarterly apprentice meetings</li> <li>• Measurement</li> <li>• Internal CWR documentation of lessons learned</li> <li>• Administrative overhead</li> </ul> | \$24,900         |
| <b>TOTAL</b>                 |  |  | <b>\$148,000</b> |

## Appendix: Goals and Measurement

The following chart refers to the first year of the project. In the second year of the project, we will continue these measurements while recalibrating targets. We also expect, given the innovative nature of this project, that additional goals, targets, and reporting may be added as we progress further into the expertise.

| Ultimate Goals               | Targets   | Reporting  | Frequency                                  |
|------------------------------|---|--|--|
| 1. Reach new individuals     | Increase the number of individuals in the database by 33%                             | Database counts of valid email or physical addresses   | Outset and then quarterly                  |
| 2. Grow individual donations | Increase the number of donors by 20% and total amount donated from individuals by 33% | Giving records   | Outset and then quarterly                  |
| 3. Increase staff capacity   | Apprentices report 50% increase in proficiency in targeted skill sets                 | Survey of apprentices in eight capacity areas along a spectrum of proficiency (i.e. from “don’t know” to “familiar” to “can execute by oneself”) | Outset, at 6 months, and then at 12 months |

| Process Goals                                 | Targets   | Reporting   | Frequency                    |
|---|---|---|------------------------------|
| 1. Increase potential points of interaction   | Double the number of ways an individual can interact with the organization            | Inventory of type and number of emails, newsletters, online social media, phone calls, etc. | Outset and then quarterly    |
| 2. Upgrade donors                             | Double the number of individuals who upgrade year over year                           | Giving records  | Outset and then at 12 months |
| 3. Grow culture of learning and collaboration | Each organization implements three new ideas learned from the other two organizations | Check in at monthly apprentice meeting  | Monthly                      |

| Cost Effective Goals                       | Targets   | Reporting  | Frequency                                  |
|--|---|--|--|
| 1. Remove cost barriers to regular contact | Reduce by two-thirds the cost required to execute monthly website updates and e-newsletters | Calculate time required by staff (at hourly rate). If the activity is not occurring currently, use cost of consultant. | Outset and then at 12 months               |
| 2. Better leverage scarce staff face time  | Increase by 20% the average amount raised per meeting with individuals                      | Giving records and activity logs of Executive Director and Director of Development                                     | Outset and then quarterly                  |
| 3. Self sustain marketing efforts          | 50% of marketing budget is covered by increased individual giving                           | Organizational budget and donor records  | Outset, at 6 months, and then at 12 months |

## Appendix: Key Staff Bios

### *Girls For A Change*

#### **Whitney Smith, Founder and Chief Executive Officer**

Whitney Smith founded *Girls For A Change* in 2000. Girls For A Change creates social action projects that empower girls and connect them to women mentors. The program was awarded a Draper Richards Fellowship and has expanded to four cities and several international sites. Prior to founding the organization, Whitney was the Director of the Santa Clara County Office of Women's Advocacy. Whitney has also served as the Program Director at Girl Scouts of Santa Clara County where she managed programs and services for 18,000 young women.

#### **Lori Fitzmaurice, Chief Development Officer**

Lori brings over 20 years of management and development experience to her role. Most recently the Director of Development at Keys School, a growing independent school in Palo Alto, Lori also served as Director of Fundraising Events for the San Francisco Zoological Society, and Director of Development for The Center for Grieving Children, the first children's grief support program on the East Coast. As a Senior Director at Charles Schwab & Co., Inc. Lori managed the Boston and Lexington, Massachusetts offices as Vice President and Branch Manager.

### *Fresh Lifelines for Youth*

#### **Christa Gannon, Founder and Executive Director**

Christa founded *Fresh Lifelines for Youth* as a Stanford Law School student working with disadvantaged youth caught in the juvenile criminal system. The organization educates the youth on the law as a way to mentor them towards the larger life changes needed to turn their lives around. It has recently expanded to a second site in the region. For her leadership of *Fresh Lifelines for Youth*, Christa was awarded one of 10 nationwide Open Society Institute awards of the Soros Justice Fellowship. Prior to her legal career, Christa was the female winner of the 1994 Walter Byers Award, the National Collegiate Athletic Association's highest academic honor, in recognition of being the nation's top female scholar-athlete.

#### **Skye DeLano, Director of Development**

Before joining *Fresh Lifelines for Youth*, Skye served as the Development Director at the Presidio Hill School and Mt Tamalpais School in the North Bay. She has and a Masters in Public Policy from Princeton University.

### *A Home Within*

#### **Toni Heineman, Founder and Executive Director**

Toni Heineman founded *A Home Within* out of her practice as a clinical psychologist who had been treating children, adults, and families for over 25 years. The organization recruits and manages mental health clinicians to volunteer their services to treat current and emancipated foster youth. *A Home Within* has expanded to small sites in over 30 cities. Toni also serves as a Clinical Professor of Psychiatry at the University of California, San Francisco, and has authored or co-edited a wide range of journal articles and books on the treatment of traumatized children.

#### **Kendall Laidlaw, Development Director**

Prior to joining *A Home Within*, Kendall enjoyed a 13 year career at Apple as a Product Marketing Manager and in Sales Development.

## **Consulting Within Reach (CWR)**

### **Curtis Chang, Founder and Chief Executive Officer**

Curtis founded CWR in order to leverage the abundance of Bay Area corporate professional talent – especially in marketing – to serve local nonprofits. As a “double bottom line” private firm, CWR team members have committed to providing their services to compelling causes at 50% below the market rate. Prior to starting CWR, Curtis served diverse roles in the social sector: the executive director of a family foundation; the pastor of a socially minded church in Silicon Valley; Head Teaching Fellow in the Harvard Government Department; and a Rockefeller Fellow doing development work in Soweto, South Africa.

### **Pete Snell, Marketing Strategy**

Pete has consulted for General Motors, Johnson and Johnson, Apple, Yahoo, Compaq, United Airlines, MCI, NBC, Mazda, State Street Global Advisers and other leading companies, empowering them to maximize the use of the Internet and digital media in their strategic planning and marketing. He currently is a coach to multiple executives, including some from the non-profit sector.

### **Brad Jung, Marketing Strategy**

Brad has more than 20 years of management and marketing experience in Silicon Valley. He is currently CEO of Enliven Systems and president of the School-Force Education Foundation.

### **Grace Lynch, Media Relations and Writer**

Grace has worked as a television news reporter at network affiliates in Northern California for both CBS and NBC. She has served as a marketing consultant for local government agencies such as the Santa Clara Valley Transportation Authority.

### **Jason Rieckewald-Schmidt, Online Social Media and Donor Database**

Jason is the Associate Director for Fundraising for InterVarsity Christian Fellowship in the Pacific Region. He also managed the donor data management department of a \$10M nonprofit in the county, and is an expert in a number of donor management systems and online communication tools.

### **Kelley Stupfel Conway, Fundraising**

Kelley has over 10 years of experience as a fundraising consultant and trainer for universities, local schools, churches, and nonprofits. She has an MBA from Seattle University and completed the advanced Fund Raising Management Certificate Program at the University of Washington.

### **Angela Aviles, Graphic Design**

Angela is the co-owner of LL Design, a private design company located in San Jose, CA. Angela has also worked as a full time consultant for Accenture, a leading international consulting firm.

### **Patrick MacPhail, Web Developer**

Patrick has developed dozens of high end sites as a team leader at iMarc (www.iMarc.net), an award winning web and media creation firm.

### **Mark Manley, Online Technology**

Mark has spent the past 20 years as an IT expert for Apple, designing and implementing custom online tools to enable teams to work together.

## Appendix: Girls For A Change Organizational Budget

|   | <u>Jul '09 - Jun 10</u> |
|---|-------------------------|
| Ordinary Income/Expense                 |                         |
| Income                                  |                         |
| Contributed Income                      |                         |
| 4000 - Contributions                    |                         |
| 4010 - Foundations                      |                         |
| 4010 - Foundations - Other              | 376,628.00              |
| Total 4010 - Foundations                | 376,628.00              |
| 4020 - Individual Contributions         |                         |
| 4020 - Individual Contributions - Other | 79,666.00               |
| Total 4020 - Individual Contributions   | 79,666.00               |
| 4030 - Corporate                        |                         |
| 4030 - Corporate - Other                | 475,655.00              |
| Total 4030 - Corporate                  | 475,655.00              |
| Total 4000 - Contributions              | 931,949.00              |
| 4050 - In-Kind                          |                         |
| 4050 - In-Kind - Other                  | 55,068.00               |
| Total 4050 - In-Kind                    | 55,068.00               |
| Total Contributed Income                | 987,017.00              |
| 5500 - Interest Income                  | 1,391.00                |
| 5800 - Miscellaneous Income             |                         |
| 5800 - Miscellaneous Income - Other     | 4,209.00                |
| Total 5800 - Miscellaneous Income       | 4,209.00                |
| Total Income                            | 992,617.00              |
| Expense                                 |                         |
| 6000 - Personnel                        |                         |
| 6010 - Staff Payroll                    | 565,287.45              |
| 6020 - Payroll Taxes                    | 71,170.65               |
| 6025 - Workers Comp                     | 5,652.91                |
| 6030 - Employee Benefits                | 40,472.98               |
| 6040 - PTO Expense                      | 40,309.49               |
| 6050 - Payroll Fees                     | 1,305.00                |
| 6080 - Recruiting Costs                 | 500.00                  |
| Total 6000 - Personnel                  | 724,698.48              |
| 6100 - Consultants                      |                         |
| 6186 - Coach Training                   | 12,500.00               |
| 6108 - Presentors                       | 3,500.00                |
| 6110 - IT                               |                         |
| 6111 - Computer Tech Support            | 15,900.02               |
| 6113 - IT Hosting                       | 12,636.00               |
| Total 6110 - IT                         | 28,536.02               |
| 6120 - Evaluation Consultants           | 15,008.00               |
| 6130 - Web and Graphics Design          | 5,000.00                |
| 6160 - Accounting & Audit Fees          | 7,200.00                |
| 6180 - Consultants - Other              | 10,500.00               |
| Total 6100 - Consultants                | 82,244.02               |
| 6200 - Facilities                       |                         |
| 6201 - Office Rent                      | 24,828.00               |
| 6210 - Utilities                        | 4,000.00                |
| Total 6200 - Facilities                 | 28,828.00               |
| 6400 - Communications                   |                         |
| 6410 - Mobile Telephones                | 16,260.00               |
| 6420 - DSL & Internet                   | 2,520.00                |
| 6450 - Postage and Delivery             | 4,900.00                |
| Total 6400 - Communications             | 23,680.00               |
| 6300 - Supplies & Equipment             |                         |
| 6310 - Office Supplies                  | 2,400.00                |
| 6315 - Program Supplies                 | 8,000.00                |
| 6320 - Computers, Furn, & Eq            | 3,850.00                |
| 6500 - Coach Fingerprinting             | 1,040.00                |
| Total 6300 - Supplies & Equipment       | 15,290.00               |
| 7100 - Events                           |                         |
| 6540 - Food for Events                  | 4,250.00                |
| 7150 - Equipment Rental                 | 375.00                  |

|                              |                   |
|------------------------------|-------------------|
| Total 7100 - Events          | 4,625.00          |
| 6460 - Printing and Copying  | 19,499.96         |
| 6470 - Photography & Film    | 500.00            |
| 6520 - Membership Dues       | 25.00             |
| 6530 - Subscriptions & Pubs. | 500.00            |
| 6550 - Tokens / Gifts        | 450.00            |
| 6565 - Advertising and PR    | 500.00            |
| 6510 - Conferences & Mtgs    | 5,200.00          |
| 6570 - Travel                |                   |
| 6571 - Air Travel            | 26,250.00         |
| 6572 - Ground Transport      | 8,450.00          |
| 6574 - Mileage               | 11,400.00         |
| 6575 - Parking               | 1,050.00          |
| 6576 - Lodging               | 16,000.00         |
| 6577 - Meals while traveling | 7,450.00          |
| 6570 - Travel - Other        | 0.00              |
| Total 6570 - Travel          | <u>70,600.00</u>  |
| 6589 - Project Plan Awards   | 2,250.00          |
| 6600 - Other Expenses        |                   |
| 6610 - Bank Service Charges  | 1,080.00          |
| 6630 - Licenses and Fees     | 8,025.00          |
| 6650 - Online donations fee  | 1,260.00          |
| Total 6600 - Other Expenses  | <u>10,365.00</u>  |
| 6800 - Insurance             |                   |
| 6810 - Liability Insurance   | 2,100.00          |
| 6811 - D&O Insurance         | 1,260.00          |
| Total 6800 - Insurance       | <u>3,360.00</u>   |
| Total Expense                | <u>992,615.46</u> |
| Net Ordinary Income          | <u>1.54</u>       |
|                              | <u>1.54</u>       |

Appendix: Girls For A Change 501c3 letter

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: FEB 11 2004

GIRLS FOR A CHANGE  
C/O WHITNEY SMITH  
70 W HEDDING ST 11TH FLR E WING  
SAN JOSE, CA 95110

Employer Identification Number:  
26-0035835  
DIN:  
17053328010003  
Contact Person:  
JERRY FINKLIN ID# 52674  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
DECEMBER 31  
Form 990 Required:  
YES  
Addendum Applies:  
YES

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

We have further determined that you are not a private foundation within the meaning of section 509(a) of the Code, because you are an organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

If your sources of support, or your purposes, character, or method of operation change, please let us know so we can consider the effect of the change on your exempt status and foundation status. In the case of an amendment to your organizational document or bylaws, please send us a copy of the amended document or bylaws. Also, you should inform us of all changes in your name or address.

As of January 1, 1984, you are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more you pay to each of your employees during a calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Since you are not a private foundation, you are not subject to the excise taxes under Chapter 42 of the Code. However, if you are involved in an excess benefit transaction, that transaction might be subject to the excise taxes of section 4958. Additionally, you are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please contact your key district office.

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the

Letter 947 (DO/CG)