

**George Russill Fellowship
Portland State University
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The Greater Portland Vancouver Indicators is an initiative designed to improve community collaboration and community problem solving by convening the region's stakeholders and providing them with useful data about trends in the Portland-Vancouver Metropolitan region. The initiative, renamed as the Greater Portland Pulse (GPP) will convene stakeholders and share quantitative data about the region's livability factors so that the community can self-organize to create and implement solutions to the region's pressing needs.

I was hired in September 2010 as the George Russill Fellow to be a graduate research assistant for the initiative. My main role for the year was to serve as a support member of the GPP team, specifically for the Executive Committee team. This year-long experience was a significant learning experience for me as I was able to apply my coursework in nonprofit management and social entrepreneurship to provide research and recommendations to the Executive Committee and Advisory Committee of GPP. This classroom knowledge combined with my community service experience enabled me to provide a unique perspective to the GPP team as they developed the initiative.

In particular, my research and recommendations were focused in three major areas: the business plan for the organization, the board structure and the fundraising plan.

Core Activities

Organizational Structure/Business Plan

My first duty when hired was to set the framework for the business plan. While the purpose of GPP as a convener was defined there was relatively little consensus about what GPP the organization would look like. Would it be an initiative of another organization? Would it be a stand-alone nonprofit? What kind of staff would be needed? Who would make decisions?

To tackle these questions, I started with a review of 17 other indicators projects around the country. I collected information both through a survey sent to the indicators projects

themselves as well as a review of published information about the projects. The projects were researched to determine their organizational structures, the number of staff and board members and their annual budgets. They were also asked to provide success and challenges they've experienced working within their particular organizational structures.

This data was all compiled and compared against a study that was conducted by a paid consultant of how the indicators projects self-evaluated their effectiveness in the community. From there, options and recommendations were able to be defined. At the end of Fall Term, I presented to the Advisory Committee an overview of results of the data and presented several options of organizational structures that GPP could adopt. At the close of the presentation, the Advisory Committee decided that they would like GPP to be an initiative of an already existing organization, setting the stage for the creation of the business plan.

To develop the business plan, I utilized a model used in my social entrepreneurship class for social enterprise ventures. The model asks for not only a summary of the management needed, a description of products/services and an analysis of the need for this product/service in the market but also for a discussion of the theory of change and to consider intended and unintended impacts of the initiative.

The draft of the business plan was submitted to the executive committee who used it as a starting point for a draft document that was presented for approval to the Advisory Committee.

Board Structure

At this point in GPP's development the Executive Committee and I recognized a few upcoming issues:

- 1.) The business plan focused more on management and operational needs than the organization's board structure.
- 2.) The fundraising plan required support from a board as a component of fundraising strategy.

3.) The current advisory committee was scheduled to dissolve in the summer of 2011 and would need to be replaced by the new board.

Due to these upcoming obstacles, the executive committee and I decided to create several different models for board structures. My role was to draft the different models and visually display in a document that could then be presented to a small group of Advisory Committee members for discussion.

To inform the board structure development, I interviewed Russell Hancock, the Executive Director of Joint Venture Silicon Valley, a community problem-solving organization in San Jose, California. Joint Venture Silicon Valley has been highlighted as a case study for successful regional indicators projects and is unique in its history of being driven by the business sector as opposed to the nonprofit or government sector. Mr. Hancock was invited by the GPP to speak at a conference and it was during that time I was able to schedule an interview.

Mr. Hancock shared how critical it was to have an engaged board that encompassed all the region's stakeholders. He noted that engaged board means that the board not only volunteers time and energy, but also funds. The Joint Venture Silicon Valley board consists of 50 board members, one of the largest boards of similar type organizations and includes members of local government officials, business leaders and nonprofit leaders.

Mr. Hancock also shared several details with me regarding his fundraising strategy which informed my final product, the fundraising plan. He noted that the business sector is highly engaged in the project, with donations ranging from \$500 to \$150,000 a year. That plus the requirement of each board member to donate makes the bulk of the annual operating expenses for their organization.

After the interview with Mr. Hancock I took the data collected earlier on board structures and used it to create a board structure document. This board structure document consisted of several different board models that could meet two unique challenges: 1.) the board needs to be

representative of the population and 2.) the board needs to serve a key fundraising role. These two goals can often be contradictory. Generally a board member is solicited for their connections or personal wealth as well as for particular skills that he/she could contribute to a board. The desire for GPP to be a community resource requires that the board reflects that value, meaning that the board must be composed of stakeholders from many different demographics including a range of socioeconomic statuses.

To reconcile these two goals, several board structure models were developed with several different types of roles. One option had the board focus more on stakeholder representation than fundraising. Another focused more on fundraising than stakeholder representation. A third offered a board plus an advisory committee so that both the fundraising and stakeholder representation needs could be met. Each of the different structures had pros and cons, no one option offered a perfect solution.

The options were compiled in charts and graphs with various pros and cons listed. This document was then submitted to the executive committee for their feedback and then passed on to the small group of Advisory Committee members for review.

Fundraising Plan

My final deliverable was to produce a fundraising plan for GPP for June 2011-June 2012. This fundraising plan offered a four-prong approach to fundraising. It was further designed with the assumption that GPP would work to hire an executive director or development director to implement the work of the plan.

The plan consisted of strategies to fundraise from four separate groups: the board, the cities/counties, corporations and foundations. Using skills developed in my fundraising and nonprofit marketing courses; I outlined the fundraising message, a timeline for execution, and strategies for approaching the various groups. The fundraising plan was constructed with the start-up nature of GPP in mind. GPP, as a brand new organization not yet finalized, has received funds from Portland State University and Metro, but has not yet conducted a true

fundraising campaign. The release of the first annual indicators report is a perfect time to launch the fundraising campaign and the plan was created now so that it can go through a discussion and approval process before the release of the first indicators report.

This fundraising plan was submitted to the executive committee for their input and then forwarded to Portland State University's development department to coordinate fundraising efforts between PSU as a whole and this specific initiative.

Lessons Learned

I found this fellowship to be an incredible learning experience. It took all of the coursework I studied in public administration, nonprofit management and social enterprise and applied it to GPP. I was able to gain substantial insights in community collaboration, facilitation and the power of collective impact in creating social change for a community. Additionally, in observing the interactions of the executive committee with the advisory committee I gained significant perspectives regarding the relationship between a board and its executive staff members. These insights have already impacted the way that I interact with boards of nonprofits, including the board of a local nonprofit I worked with for my final master's project.

The practical experience I gained from working with this project was incredibly rich. I was exposed to the region's stakeholders, was able to observe how they work and interact together in the name of community problem-solving. This experience has not only provided me with improved leadership and communication skills to apply to my community service work, but also helped me land a professional position at a national nonprofit that I will begin after graduation.

I am very grateful to the George Russill Trustees for giving me this incredible opportunity to work with our region's stakeholders and to bring my knowledge and expertise in nonprofit management and social enterprise to create a community problem-solving system. The

experience influenced the contributions I had in each class this year and has made me a more experienced practitioner.

I will utilize all of these skills as the new Program Manager at the Alliance for a Healthier Generation. The Alliance's mission is to fight childhood obesity by activating regional stakeholders to encourage kids to be more active and to help schools offer healthier food and activity choices to their students. Without this GPVI experience I would not be nearly as prepared to step into this critical role in community relationship building.

Thank you to the George Russill Trustees for this unique and valuable experience.