

2009-2011 SILICON VALLEY NONPROFIT EFFECTIVENESS FUND
Introductory Meeting Notes
August 13, 2009

The 2009-2011 Silicon Valley Nonprofit Effectiveness Fund is designed to provide support for educational sessions and grants to nonprofit organizations that are considering transition activities such as mergers, acquisitions. On August 13, United Way Silicon Valley held a meeting open to all Santa Clara County 501(c)3 organizations to introduce the Nonprofit Effectiveness Fund and secure recommendations on possible education sessions that would help agencies learn more about gaining organizational efficiencies and strategic re-structuring or mergers; a summary of the discussion is outlined below.

Question to Audience: What types of workshops would you like to see the Nonprofit Effectiveness Fund hold to help you through this process?

Answers:

- How to blend two or more organizational cultures
- Strategies of external merger/ acquisition
 - Potential liabilities/revenue loss during merger
 - Marketing of Merger/Restructuring Announcement
 - Case Studies – Successful Merger Examples
 - Agencies could share their success stories
 - Due Diligence Process – Step by Step
 - MOU
 - Crisis Situations
 - Real Estate Financing
- Change Management
- Rebuilding from within – focus on internal enhancements
 - Re-structuring
- How to be effective on joint ventures
- “Speed-dating” with other Non-Profits – How do you meet other organizations with like-minded missions?
- Budgeting – First Steps and throughout the entire process
 - Projected Savings/ Long Term Forecasting
- Back Office Collaboration – Best Practice Models
- Internal Communications/Transparency of Process
 - Staff and Stakeholders
- External Marketing of Current/Future Programs

Answer: Types of Workshops (cont'd)

- Fundraising – Ideas for contacts and prospects
- Basic concepts – How to begin the Nonprofit Effectiveness Fund process
- How to work with External Consultants

Other Notes:

- Create a resource directory for written materials that would best assist the agencies
- Workshop series need to be held more than once over the lifecycle of the fund
- Consider providing the attendance roster from this meeting, so people can connect with each other.
- Request for a list of external consultants willing and able to work with the Nonprofit Effectiveness Fund.
- Request for another introduction session after Labor Day. (Now set for September 10th at 11 a.m.)
- First workshop to be held in the fall of 2009 – maybe as soon as late September or early October
- Sessions should be no longer than four hours

AUDIENCE QUESTIONS:

Q: Strategic planning – Does the organization have to have a plan in place?

- Yes.
- In order to apply for a grant, an agency must be able to demonstrate that the organization has completed its due diligence (i.e., board analysis completed; agency culture and a joint request from staff and volunteer leadership).
- Funds can be used for both planning and/or implementation of a restructure or other effectiveness strategies.

Q: Does grant only cover external consultants?

- No.
- The process, however, is managed by the organization and it must be able to demonstrate deliverable results.
- The grants are not expected to fully fund all associated (e.g., legal fees and other aspects of merging) expenses incurred by potential mergers, partnerships or innovative strategic plans.
- Agencies must think about long-term benefit from this work.

Q: Can one agency be on multiple applications?

- Yes, but it must make sense (i.e., an organization might not appear to be strategic in pursuing too many multiple partnerships).

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