

PART I - FACE SHEET

APPLICATION FOR FEDERAL ASSISTANCE		1. TYPE OF SUBMISSION: Application <input checked="" type="checkbox"/> Non-Construction														
Modified Standard Form 424 (Rev.02/07 to conform to the Corporation's eGrants System)																
2a. DATE SUBMITTED TO CORPORATION FOR NATIONAL AND COMMUNITY SERVICE (CNCS): 08/09/11	3. DATE RECEIVED BY STATE:	STATE APPLICATION IDENTIFIER:														
2b. APPLICATION ID: 11CB131275	4. DATE RECEIVED BY FEDERAL AGENCY: 08/09/11	FEDERAL IDENTIFIER: 11CBHCA001														
5. APPLICATION INFORMATION																
LEGAL NAME: Community Initiatives DUNS NUMBER: 828767884	NAME AND CONTACT INFORMATION FOR PROJECT DIRECTOR OR OTHER PERSON TO BE CONTACTED ON MATTERS INVOLVING THIS APPLICATION (give area codes): NAME: Melanie Beene TELEPHONE NUMBER: (415) 230-7710 FAX NUMBER: (415) 230-7701 INTERNET E-MAIL ADDRESS: melani@communityin.org															
ADDRESS (give street address, city, state, zip code and county): 354 Pine St Ste 700 San Francisco CA 94104 - 3229 County: San Francisco																
6. EMPLOYER IDENTIFICATION NUMBER (EIN): 943255070	7. TYPE OF APPLICANT: 7a. Non-Profit 7b. Service/Civic Organization															
8. TYPE OF APPLICATION (Check appropriate box). <input checked="" type="checkbox"/> NEW <input type="checkbox"/> NEW/PREVIOUS GRANTEE <input type="checkbox"/> CONTINUATION <input type="checkbox"/> AMENDMENT If Amendment, enter appropriate letter(s) in box(es): <input type="text"/> <input type="text"/> A. AUGMENTATION B. BUDGET REVISION C. NO COST EXTENSION D. OTHER (specify below):	9. NAME OF FEDERAL AGENCY: Corporation for National and Community Service															
10a. CATALOG OF FEDERAL DOMESTIC ASSISTANCE NUMBER:94.022 10b. TITLE: Nonprofit Capacity Building	11.a. DESCRIPTIVE TITLE OF APPLICANT'S PROJECT: Homeless Youth Capacity Building Project															
12. AREAS AFFECTED BY PROJECT (List Cities, Counties, States, etc): Seven California Counties: Alameda, Fresno, Los Angeles, Riverside, San Bernardino, San Francisco, Santa Clara.	11.b. CNCS PROGRAM INITIATIVE (IF ANY):															
13. PROPOSED PROJECT: START DATE: 10/01/11 END DATE: 09/30/13	14. CONGRESSIONAL DISTRICT OF: a.Applicant <input type="text" value="CA 008"/> b.Program <input type="text" value="CA 008"/>															
15. ESTIMATED FUNDING: Year #: <input type="text" value="1"/>	16. IS APPLICATION SUBJECT TO REVIEW BY STATE EXECUTIVE ORDER 12372 PROCESS? <input type="checkbox"/> YES. THIS PREAPPLICATION/APPLICATION WAS MADE AVAILABLE TO THE STATE EXECUTIVE ORDER 12372 PROCESS FOR REVIEW ON: DATE: <input checked="" type="checkbox"/> NO. PROGRAM IS NOT COVERED BY E.O. 12372															
<table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <tr> <td style="width: 20%;">a. FEDERAL</td> <td style="text-align: right;">\$ 200,000.00</td> </tr> <tr> <td>b. APPLICANT</td> <td style="text-align: right;">\$ 200,000.00</td> </tr> <tr> <td>c. STATE</td> <td style="text-align: right;">\$ 0.00</td> </tr> <tr> <td>d. LOCAL</td> <td style="text-align: right;">\$ 0.00</td> </tr> <tr> <td>e. OTHER</td> <td style="text-align: right;">\$ 0.00</td> </tr> <tr> <td>f. PROGRAM INCOME</td> <td style="text-align: right;">\$ 0.00</td> </tr> <tr> <td>g. TOTAL</td> <td style="text-align: right;">\$ 400,000.00</td> </tr> </table>	a. FEDERAL	\$ 200,000.00	b. APPLICANT	\$ 200,000.00	c. STATE	\$ 0.00	d. LOCAL	\$ 0.00	e. OTHER	\$ 0.00	f. PROGRAM INCOME	\$ 0.00	g. TOTAL	\$ 400,000.00	17. IS THE APPLICANT DELINQUENT ON ANY FEDERAL DEBT? <input type="checkbox"/> YES if "Yes," attach an explanation. <input checked="" type="checkbox"/> NO	
a. FEDERAL	\$ 200,000.00															
b. APPLICANT	\$ 200,000.00															
c. STATE	\$ 0.00															
d. LOCAL	\$ 0.00															
e. OTHER	\$ 0.00															
f. PROGRAM INCOME	\$ 0.00															
g. TOTAL	\$ 400,000.00															
18. TO THE BEST OF MY KNOWLEDGE AND BELIEF, ALL DATA IN THIS APPLICATION/PREAPPLICATION ARE TRUE AND CORRECT, THE DOCUMENT HAS BEEN DULY AUTHORIZED BY THE GOVERNING BODY OF THE APPLICANT AND THE APPLICANT WILL COMPLY WITH THE ATTACHED ASSURANCES IF THE ASSISTANCE IS AWARDED.																
a. TYPED NAME OF AUTHORIZED REPRESENTATIVE: Melanie Beene	b. TITLE:	c. TELEPHONE NUMBER: (415) 230-7710														
d. SIGNATURE OF AUTHORIZED REPRESENTATIVE:		e. DATE SIGNED: 09/20/11														

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Executive Summary

TITLE: John Burton Foundation (JBF), a fiscally sponsored project of Community Initiatives (CI) JBF, through its Homeless Youth Capacity Building Project (HYCBP) will assist 20 nonprofits serving homeless youth to better use data to improve their organization. Participants will be selected from seven California counties. Each will complete a comprehensive organizational assessment, and use the results to identify one or more key areas to improve, using the Continuous Quality Improvement (CQI) process to track and monitor progress, develop and test strategies, evaluate effectiveness, and repeat the cycle of improvement.

NAME AND LOCATION: CI/JBF, San Francisco, CA

SUMMARY

Over the two year term of the project, we will select 20 small and medium nonprofits as ongoing program participants, (divided into two equal cohorts each year). In addition, the entire HYCBP network, which includes 250 nonprofit organizations statewide, will be eligible to participate in webinars, trainings, and other leadership development and networking opportunities.

Through flexible, responsive, and high quality trainings, webinars, and 1-to-1 coaching, our objectives are to enable participants to:

- Understand the value and importance of a performance management system such as CQI;
- Develop a realistic, achievable plan for implementing CQI in their organization;
- Implement the CQI process, using their organizational assessment to identify one or more areas of improvement, identify baseline performance measures, set benchmarks, and track progress;
- Show significant improvement in each of their selected areas of improvement, resulting in greater program quality and stability and improved long-term outcomes for homeless youth.

AREA SERVED: Seven California counties: Alameda, Fresno, Los Angeles, Riverside, San Bernardino, San Francisco, Santa Clara

NONPROFITS SERVED: 20 ongoing participant nonprofits, at least 250 additional nonprofits

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REQUEST AMOUNT: \$200,000

Program Design

GEOGRAPHIC SERVICE AREA

JBF, through its HYCBP will assist 20 nonprofits serving homeless youth to better use data to improve their organization. Selected nonprofits will complete a comprehensive assessment tool and use the results to identify one or more key areas for improvement. We will introduce them to the Continuous Quality Improvement (CQI) process, a performance management tool enabling organizations to develop and test strategies to improve key systems using benchmarks, and to use the knowledge gained through evaluation to develop and test new strategies in an ongoing cycle of improvement.

Participants will be selected from California counties with high concentrations of nonprofits facing resource challenges: three in Northern California (Alameda, San Francisco, and Santa Clara), three in Southern California (Los Angeles, Riverside and San Bernardino), and one in the Central Valley (Fresno). These seven counties have communities with high levels of poverty, high unemployment rates and stagnant rates of federal investment in youth homelessness. Six have also experienced growth in the number of youth who age out of the foster care system at 18, a primary risk factor for youth homelessness.

Recent studies reveal that nonprofits serving homeless youth desperately need capacity building support. In 2009 the California Wellness Foundation funded JBF to explore how to reduce the number of youth who experience homelessness. Extensive interviews with government and nonprofit leaders led to our report *Too Big to Ignore: Youth Homelessness in California*. A key finding was that many nonprofits serving homeless youth lack resources or knowledge to successfully apply for local, state and federal funding. Most do not collect consistent evaluation data, which has had two consequences: these nonprofits lack necessary data to continuously improve their programs; and they are not able to provide a strong evidence base to advocate for additional public or private investment. The need for capacity building for Southern California nonprofits was documented in the Weingart Foundation's 2010 report

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Fortifying LA's Nonprofit Organizations: Capacity Building Needs and Services in Los Angeles County, which found a need for capacity building in areas such as strategic learning, board development, financial management, and fundraising.

In 2009 JBF received two years of funding from the federal Strengthening Communities Fund for the HYCBP. This funding ends September 30, 2011. The HYCBP team has provided over 450 hours of technical assistance to nonprofits in the targeted counties, and is well versed in the needs of local nonprofits and has strong existing connections within each community. While general capacity building is needed, the desire for capacity building in the area of performance management is clear: in assessments completed by 60 HYCBP participants in 2009, 50% expressed interest in receiving support in the area of evaluation, and 52% in program development, both areas that benefit from implementation of a performance management system.

SELECTION

Over the two year term of the project, we'll select a total of 20 small and medium nonprofits as ongoing program participants, (divided into two roughly equal cohorts each year). In addition, the entire HYCBP network, which currently includes 250 non-profit organizations statewide, will be eligible to participate in webinars and in person trainings and other leadership development and networking opportunities. Small and mid-sized nonprofits will be defined as organizations with annual budgets under \$5 million. We have selected this figure as the cutoff because in our experience organizations with budgets over \$5 million are more likely to have evaluation and performance management systems in place, or have resources to contract consultants for their implementation.

To inform potential participants about this project, we will outreach to our extensive list of nonprofits in the seven counties, including our current network of 250 HYCBP member and affiliates. We will also post in newsletters and publications and conduct a web seminar for prospective applicants explaining the project's goals, benefits, and requirements.

Interested nonprofits will complete an application, as well as the Marguerite Casey Foundation's

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Capacity Assessment Tool (a modified version of the McKinsey Capacity Grid). This assessment tool will establish a baseline of data that will be tracked over the course of the project.

We will select participating nonprofits using the following criteria:

1. A annual budget under \$5 million (budget of the parent organization).
2. Alignment with the CNCS priority area of Economic Opportunity
3. Agreement to commit a staff person to attend four regional trainings and/or webinars, as well as quarterly peer teleconferences.
4. Organizational assessment must show a significant need for capacity-building in the area of performance management.
5. Organizational assessment must show at least the minimum infrastructure in place to implement the performance management process, with sufficient staff and board interest and availability.
6. Geographic location will also be considered to ensure participation from both northern and southern California.

PHILOSOPHY AND GOALS

JBF's mission is to improve the quality of life for California's homeless children and develop policy solutions to prevent homelessness. JBF believes that to accomplish this mission we must support organizations serving this vulnerable population to improve their outcomes, strengthen organizational effectiveness and expand services. A key ingredient for improving the quality and impact of nonprofits is to strengthen their ability to implement a high quality performance management system.

Our logic model proposes that by providing flexible, responsive, and high quality trainings and direct support we will enable the twenty ongoing participants to:

- Understand the value and importance of having a performance management system such as CQI;
- Develop a realistic, achievable plan for implementing CQI in their nonprofit;
- Implement the CQI process, using their organizational assessment to identify one or more core areas of improvement, identify baseline performance measures, set benchmarks, and track progress;

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- Use CQI to create strategies and activities on an ongoing basis and measure their effectiveness; These outcomes will result in significant gains in each selected area of improvement, resulting in greater program quality and stability and improved long-term outcomes for homeless youth.

APPROACH TO CAPACITY BUILDING

JBF will use a variety of methods including webinars, in-person trainings, one-on-one technical assistance, peer workgroups and roundtables, and access to web-based resources. We believe in a flexible, client-centered approach, knowing that each nonprofit has distinct needs, a unique culture, and varying levels of capacity. While we need to be efficient with time and resources by providing group trainings, we will tailor our support and advice to meet each nonprofit where it's at during the one-on-one TA.

We also recognize the importance of peer learning and networking. Our experience has shown that participants value the opportunity to learn from and partner with nonprofits going through similar efforts and facing comparable challenges. Thus, we will continue to offer regional trainings and implement peer teleconferences to allow participants to learn together, discuss challenges, share successes, and exchange best practices.

Finally, the HYCBP will continue to offer more limited training and technical assistance in areas outside of performance management, such as fundraising, program development, effective advocacy, and best practices for serving homeless and at-risk youth.

FRAMEWORK AND TIMELINE

Selection Process

Oct 2011: Outreach to potential organizations.

Oct-Nov 2011: Assist applicants in completion of application and organizational assessment.

Dec 2011: Review applications and organizational assessments and use selection criteria to select ongoing participants for year one cohort.

Jan 2012: Notify ongoing participants of their selection and sign MOUs.

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Feb-Mar 2012: Hold orientation and kick-off trainings, conduct site-visits to each ongoing recipient.

Oct 2012: Outreach to potential organizations for second year of project.

Oct-Nov 2012: Assist applicants in completion of application and organizational assessment.

Dec 2012: Review applications and organizational assessments and based on the selection criteria, select ongoing participants for year two cohort.

Jan 2013: Notify ongoing participants of their selection and sign MOUs.

Feb-Mar 2013: Hold orientation and kick-off trainings, conduct site-visits to each ongoing recipient.

Capacity-Building Activities

Feb-Mar 2012: Work with ongoing nonprofits to create Continuous Quality Improvement teams in their nonprofit.

Apr 2012: Conduct regional trainings in Northern and Southern California on the topic of identifying core areas of improvement and collecting baseline data and benchmarks. Introduce the concept of Dashboards to visually track performance. These trainings will be open to ongoing and additional recipients.

May-June 2012: One-on-one technical assistance and peer group teleconferences to assist in the development of baseline indicators, benchmarks, and how to develop test strategies. By the end of June, all participants should have their performance management system in place.

July 2012: Conduct regional trainings in Northern and Southern California on setting test strategies and activities to meet benchmarks, and how and when to collect and analyze data to further decision-making. Introduce the concept of Dashboards - visual tools to track progress in core areas of improvement. These trainings will be open to both ongoing and additional nonprofits.

Aug-Sept 2012: Continue to provide ongoing technical assistance to participants regarding effective use of performance management system and conduct final evaluation to determine impact of HYCBP.

YEAR TWO: February through September, 2013: In year two of the project we will repeat the above

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activities with a second cohort of ongoing nonprofits, following a similar timeline, as well as continue to track performance of the first cohort.

COLLECTING AND REPORTING DATA AND EVALUATING IMPACT

We will use a variety of tools throughout the life of the project to track progress, evaluate impact, and improve capacity building strategies:

1. Ongoing participants will complete the Casey Foundation organizational assessment at the start and completion of their participation in the project.
2. Ongoing participants will agree in the MOU to host a copy of their performance dashboard on a secure online file sharing system that is accessible to JBF staff. The dashboard is a key tracking tool of the performance management system we are using.
3. JBF will administer surveys following all regional trainings and webinars.
4. JBF will conduct an annual process and outcome assessment of both ongoing and additional participants, using an online survey tool.
5. JBF will conduct periodic progress meetings with each ongoing participant to assess progress.

COMMUNICATION PLAN

JBF has developed several successful communications strategies ranging from one-on-one individualized discussions, to large group and peer communications. These include regular group emails, an introductory webinar for prospective participants and ongoing webinars for all participants, ongoing one-on-one technical assistance meetings, quarterly peer teleconferences, accessing work plan forms and creating a dashboard through a web-based tool, and annual individual progress meetings.

TYPES OF ASSISTANCE

METHODS: We will organize regional trainings, webinars and peer teleconferences. To provide individualized, client-centered support, we will conduct site visits, provide one-on-one technical assistance and coaching, and hold annual progress meetings.

CONTENT: The focus of the performance management capacity building project will be to assist

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ongoing nonprofits in the design and implementation of a Continuous Quality Improvement performance management system. We will use an existing set of training tools and worksheets created by Goal QPC. This well-respected system is a data driven, long term approach to performance management that is rooted in an ongoing Plan-Do-Check-Act cycle:

- Plan: plan a process improvement
- Do: carry out the change or test on a small scale, searching for data that can be used in step 1
- Check: check the results to see what was accomplished or learned, observing and monitoring the effects of the change
- Act: adopt the change or abandon if not useful, trying the cycle again with the accumulated knowledge

Training content will include the concept of performance dashboards, visual tools to help team members quickly gauge levels of performance on an ongoing basis. Ongoing nonprofits will maintain a copy of their dashboard on an online file hosting tool accessible to JBF staff.

Additional participants will also be able to attend regional trainings and webinars, though will have limited access to one-on-one technical assistance, and the peer conference calls.

SOURCES OF EXPERTISE: JBF staff will be the primary implementers of the project and will utilize their own extensive expertise delivering this type of program as well as drawing on existing CQI publications and online resources. As needed, we will draw on the expertise of larger nonprofits already implementing CQI, and a network of local CQI consultants to provide additional technical support and deliver trainings.

USE OF EXISTING ORGANIZATIONAL CAPACITY, COMMUNITY RESOURCES AND PARTNERSHIPS

JBF will draw on its existing network of 250 organizations to implement a peer learning model allowing participants to benefit from each other's experience. We will also draw on the expertise of several large nonprofits serving homeless youth that already implement CQI to host site visits for ongoing participants. Two respected nonprofits, First Place for Youth in Northern California and the California

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Family Life Center in Southern California have indicated a willingness to assist in this project. The California Endowment, a statewide funder, provides meeting space in both Northern and Southern California.

Organizational Capability

EXPERIENCE AND TRACK RECORD

JBF was established in 2004 and has a proven track record of implementing federally funded capacity building projects. JBF has been a fiscally sponsored project of Community Initiatives (CI) since 2004, and as such CI is the grantee of record. CI was founded in 1996. Since its inception, CI has sponsored more than 160 projects in all areas of nonprofit endeavor, including arts and culture, education, environment, health, and public affairs. CI provides legal, financial, and programmatic oversight of the funds and activities of its fiscally sponsored projects.

In just 7 years, JBF has catapulted to the forefront of efforts to improve outcomes for youth who are homeless youth or exiting the foster care system. It serves as a source of information, a convener, and a resource for best practices and technical support. Our relationship with hundreds of organizations serving homeless and foster youth throughout California puts us in a unique position to implement this program.

JBF has successfully designed, implemented and provided oversight for a prior capacity-building project for a similar group of nonprofits. JBF understands that organizational growth does not occur as the result of a one-day workshop or other short term interventions. Through the HYCBP we have targeted a group of non-profits in the 7-county target area and developed a network of over 250 affiliate organizations throughout the state. Over the past two years, the HYCBP has provided over 450 hours of high quality one-on-one technical assistance to over 50 organizations, provided 20 web based trainings and 8 in-person trainings with a combined attendance of over a thousand participants, produced 4 resource publications, organized 3 full-day convenings and distributed \$600,000 in capacity building grants.

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The capacity building services offered by HYCBP cover a wide range of topics of importance to nonprofits, including performance management, improving fundraising skills, new program development, communication strategies, strategic planning, personnel management, organizational development, and effective collaboration.

In 2010 JBF conducted a survey of project members in order to determine the effectiveness of HYCBP. Over 80% of members responded to the survey which provided the following results:

- 83% of respondents reported that the HYCBP has improved their ability to sustain their organization; improved the quality of services their organization currently provides to youth; or allowed them to offer a new service to youth.
- 70% of respondents reported that the HYCBP has increased their organization's access to private or public funding sources.
- 86% of respondents reported that the HYCBP has increased their knowledge of different approaches to serving homeless youth.
- 87% reported it has increased their awareness of other organizations and people working to reduce youth homelessness in their region.

In addition to the HYCBP, JBF has experience providing the following programs:

1. The Transitional Housing Placement-Plus Statewide Implementation Project began in 2006 and promotes and protects the state's only housing program for homeless former foster youth, including implementing a statewide participant tracking system to evaluate the performance of providers and the provision of training and technical assistance.
2. CA Fostering Connections to Success works to ensure the successful implementation of a groundbreaking new policy which will extend foster care benefits to age 21.
3. CA College Pathways supports and encourages former foster youth to enroll in college and provides an online platform for students to access and share resources.
4. The SSI Transitions Project instituted a pilot program targeting two of the state's largest county

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agencies to ensure that all eligible youth transitioning out of the child-welfare system in California receive SSI benefits.

EXPERIENCE OF KEY STAFF

The Homeless Youth Capacity Building Project will be led by a team of professionals experienced in nonprofit administration, performance management, training and technical assistance, program evaluation, and collaboration with nonprofit organizations and public agencies. The specific roles and responsibilities of project staff are detailed below.

Senator John Burton (Ret.), Board Chair will donate his time to provide strategic advice and guidance to the HYCBP. Senator Burton has been in public service since 1964, including serving President Pro Tempore in the California State Senate, until his retirement in 2004. While in the State Legislature, Senator Burton focused on a range of issues including access to health care, mental health and the prevention of violence and substance abuse. Senator Burton has maintained his commitment to Californians as the founder and volunteer chair of JBF.

Diane Matsuda, JD, Executive Director served as the Executive Officer for the California Cultural and Historical Endowment prior to joining JBF. Ms. Matsuda has extensive experience providing technical assistance to organizations and providing overall management and oversight of programs.

Amy Lemley, MPP, Policy Director joined JBF as its Policy Director in 2005. Ms. Lemley will supervise project activities and will participate in the design and implementation of the individualized training agendas. Prior to her work with JBF, Ms. Lemley founded First Place for Youth, a nonprofit that has provided safe, affordable housing to transitional age youth.

Oscar Wolters-Duran, Project Coordinator brings twenty years of experience directing youth development programs, and ten years providing training, coaching and technical assistance in the areas of organizational and board development, performance management, strategic planning, evaluation, and fundraising. From 2000 to 2005 he served as the Executive Director of UC Berkeley's Young Entrepreneurs at Haas, and has since provided consulting services to many California nonprofits.

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Debbie Raucher, MSW, Program Specialist has worked in the non-profit sector for over thirteen years, including serving as the Deputy Director of the Tenderloin Housing Clinic and as the Director of East Bay Housing Organizations. Prior to joining JBF she worked as a consultant assisting non-profit and government agencies with program evaluation and design, needs assessment and analysis and fundraising.

Melanie Beene, President & CEO, leads CI with more than three decades of experience in the nonprofit sector. Ms. Beene has served as a management consultant, a development director, philanthropy program officer, and board member. For eight years she managed the Advancement Program of the NEA. She served as Program Director, Arts, for The James Irvine Foundation and for The William and Flora Hewlett Foundation.

NET ASSETS AND PERCENTAGE OF BUDGET: This grant would represent 50% of the Homeless Youth Capacity Building Project budget for 2011-2013, and 20% of the total annual JBF budget. JBF's net assets are \$3 million.

SYSTEMS, STRUCTURES AND STAFFING

The John Burton Foundation has a robust system of support to ensure the success of the performance management project including:

- Current network of members and affiliates and other partners throughout the State of California
- Technology to deliver webinars and host teleconferences (gotomeeting.com)
- Customized database to track project outputs and outcomes
- Web-based document sharing tools to share and track progress (such as Dashboards)
- Extensive administrative support staff to ensure that reporting and financials remain current and accurate

DEMONSTRATED EXPERIENCE AND INFRASTRUCTURE IN MANAGING GRANTS

We have successfully managed a two-year grant of \$1 million from the Strengthening Communities

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Fund's Nonprofit Capacity Building Program through the American Recovery and Reinvestment Act. In addition to these federal funds, JBF also manages over \$250,000 in foundation grants annually. JBF has consistently met all reporting deadlines and has comprehensive systems for tracking necessary programmatic and financial data. In addition we have extensive administrative and financial management support through our experienced fiscal sponsor, Community Initiatives, whose mission is to facilitate nonprofit activity that benefits the public good by providing fiscal sponsorship and back office services to organizations that do not yet have their own 501(c)(3) status. CI operations are carried out by its core staff of eight, under the direction of its Board of Directors (see organizational chart). CI's fiscally sponsored projects receive professional services in the following areas: financial services, grants management, human resources, payroll, and benefits management, and insurance coverage. Since its inception, CI has managed more than \$132 million in donations for the support of its fiscally sponsored projects.

Cost Effectiveness and Budget Adequacy

JBF is well poised to deliver a successful and cost effective project, and will be ready to start the project immediately, without need to hire new staff or develop relationships with potential project participants. Experienced project staff, a project website, a database to track project metrics and training tools are already in place. In addition, at least 120 organizations will already be introduced to the COI performance management tool through two regional trainings to be completed August 10 and August 17, 2011 with funding from an existing grant. Finally we have already selected and are familiar with the Organizational Assessment tool and training materials we will use.

ALIGNMENT WITH GOALS

The core expenses for this project are the program staff and qualified consultants who will design and implement the performance management activities, including trainings, webinars, organizational assessments, one-on-one technical assistance, and evaluation of the program. Other major expenses are related to the travel required to deliver trainings and technical assistance in both Northern and

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Southern California. Finally, the remainder of expenses is for materials and services essential to the success of the project: training manuals, internet and phone service, website management, printing and copying, meeting space, and supplies.

CASH MATCH

The cash match will be met by a combination of foundation grants already committed or received for this project (\$55,000), and available cash reserves (\$145,000).

Clarification Summary

BUDGET CLARIFICATION ITEMS

E. Supplies: \$150/month for black and color laser printer cartridges; \$50/month for laser quality paper; \$191.67/month for items such as labels, folders, binders, nametags, pens, paper pads for training participants. We shifted \$1800 from Supplies to Travel. Revised total in the Supplies category: \$9,400

C. Travel: We would like to add a new item to the travel budget, shifting funds from the Supplies category (this item falls under grantee share and the overall budget remains the same): in order to accommodate participants from the Central Valley who must travel long distances to attend in-person events, we will provide them with a travel reimbursement of \$150 for attendance at in-person trainings, for a total of \$1800 (2 participants x \$150 x 6 trainings). Revised total in Travel category is \$15,090

F. Contractual and Consultant Service: The HYCBP has a dedicated website where the project will continue to post announcements of upcoming learning opportunities, recordings of trainings, publications and other resources that are available to the larger homeless youth provider community. The project intends to create a mechanism whereby participant "dashboards" can be updated on-line and viewed by HYCBP staff and it is anticipated that this upgrade to the website will entail a significant up-front cost which is incorporated into the total for this line item. For initial design of new pages: \$600 (10 hours @ \$60/hour). For ongoing maintenance and updating of site: \$375/month (6.25

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hours/month @ \$60/hour)

I. Other Support Costs: Telephone/Internet: Cell phone service for two staff members @ \$85/month, internet service @ \$25/month, \$90/mo for program's share of office telephone and voice mail system

Participant technological support tools: webinar tool @ \$35/month; IT support @ \$169/month (1.25 hour/month @ \$135/hour); teleconferencing service @ \$37/month for participant check-ins and peer learning calls

PROGRAMMATIC CLARIFICATION ITEMS

1. Clarify how members of each cohort will be chosen, including the selection process for identifying and engaging a group of small and midsize nonprofits in providing ongoing assistance:

Because the project requires a significant year-long commitment, the process for selecting cohort participants is critical for its success. With this in mind, we have invested significant thought in developing tools and strategies to generate a large pool of applicants, build interest and excitement in the benefits of the performance management processes, and to identify and select the participants most likely to benefit from and be consistent participants in the project.

All interested organizations will be invited to attend a presentation where we explain the purpose of the performance management project, review the required commitments, and share the expected benefits. Applicants for the project must submit five items for review: 1) a completed application, 2) a completed organizational assessment (the Marguerite Casey Foundation Capacity Assessment Tool), 3) a letter of commitment signed by the executive director and board chair, 4) IRS Form 990, 5) a letter of recommendation for the staff participant from a supervisor or partner organization.

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The application will allow us to ascertain if the organization falls under the CNCS priority area of Economic Opportunity, and to assess its commitment to implementing a performance management process and its ability to participate in the project. Using the assessment, we will select organizations that exhibit need (have at least three capacity areas they are interested in strengthening), and appear likely to be able to participate successfully (have at least average capacity in more than half of assessed areas). The letter of commitment will ensure that the board and leadership approve the required staff involvement in the project. The IRS Form 990 ensures that the organization falls under our \$5 million threshold for small to medium sized organizations. Finally the letter of recommendation helps us determine if the staff person selected for participation is reliable, has a long-term commitment to work in the nonprofit sector, and exhibits leadership qualities.

Using a scoring rubric, we will identify top ranking finalists, who will be required to conduct a brief interview with the Project Coordinator to further assess their appropriateness for the project and their commitment to ongoing participation. We also intend to partner with several local foundations with whom we have relationships to help us identify organizations that they are funding who they believe would benefit from the service. This linkage will be likely to help keep staff, who in this field are unfortunately often sidetracked by urgent crisis issues, engaged in the process throughout the whole year.

2. Clarify any follow-on services to the year one cohort:

Year one cohort members will continue to receive access to technical assistance related to their area of focus on an as needed basis. They will also be able to attend trainings and webinars of the second cohort as a refresher. Finally, both cohorts will have access to the webinars, trainings, publications, announcements and other HYCBP activities which are open to all 250 affiliate orgs.

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3. Clarify any planned interactions between the year one and two cohorts:

One of the best ways to internalize information is by teaching. We are excited about the possibility of year one cohort participants taking a role in sharing information and serving as mentors for the second cohort. We will invite year one cohort participants to share both success stories and challenges at the orientation presentation and kickoff training, and to join our staff and expert trainers to co-train appropriate segments of the curriculum. We will also encourage year one cohort members to offer site visits showing the results of the performance management system in action.

Required Documents

<u>Document Name</u>	<u>Status</u>
COMMUNITY INITIATIVES ORGANIZATIONAL CHART	Sent
COMMUNITY INITIATIVES/JBF FISCAL SPONSORSHIP AGREEMENT	Sent