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Friends of Walnut Avenue

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Friends of Walnut Avenue

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Walnut Avenue Family & Women's Center - Tracy Wood & Dr. Christine Brooks

Collaborative Health & Human Services

Department of Health Human Services and Public Policy

December 10, 2018

Friends of Walnut Avenue

Walnut Avenue Family & Women's Center (Walnut Avenue) is a nonprofit agency that provides services to women, children, and families in Santa Cruz County. Programs include domestic violence services, early childhood education, and youth engagement. To provide these services, Walnut Avenue depends heavily on restricted funds, but this can be an unstable revenue stream. If an unexpected cost arises, restricted funds designated to a specific program cannot be reappropriated to alleviate the expense. Losing a critical grant may also force an organization to make cuts in programs or staff, impacting the quality of services. In order to expand revenue sources and raise unrestricted funds, a volunteer fundraising group was created. Friends of Walnut Avenue will support existing fundraisers and recruit donors to support the agency. Funds raised by the group will be used to maintain, improve, and expand Walnut Avenue's programs. Project success is assessed by having five individuals attending the first group meeting, and three commit to join. After the meeting, members were sent a survey to provide feedback about the knowledge and tools they need to be successful. It is recommended that the group's infrastructure is reviewed as membership grows, ensuring volunteers receive adequate support. It is also recommended that Walnut Avenue be in contact with the group at least once a month.

a donation room, food bank, and other seasonal campaigns. Participants of any program are able to access these additional services. Through its programs and services, Walnut Avenue serves women, children, and families who may be experiencing domestic violence, homelessness, early pregnancy, or poverty (Walnut Avenue, 2018). *Keywords: development, restricted funds, unrestricted funds, grants, fundraising, volunteer engagement*

Agency Description

Originally founded in 1933 as a YWCA, Walnut Avenue Family & Women's Center (Walnut Avenue) has served the Santa Cruz community for over eighty years. The agency's mission is to "provide support and services so that women, children, and families will have the opportunities and skills to thrive," (Walnut Avenue, 2018, para. 1). This mission drives Walnut Avenue's vision of providing "strengths-based, supportive programs in childcare, youth development, parenting, domestic violence awareness & prevention, and advocacy," (Walnut Avenue, 2018, para. 2).

Walnut Avenue provides a wide variety of services through three departments. The Advocacy and Prevention Department includes two programs: Services for Survivors of Domestic Violence and Services for Children and Youth. Survivors of domestic violence are offered services such as peer advocacy, legal advocacy, support groups, and a 24-hour domestic violence hotline. Department staff also offer trainings and workshops to schools, businesses, and organizations to educate about domestic violence. Services for children and youth include teen support groups, one-on-one mentoring, and life skills workshops. A kids group is also held during domestic violence services, providing participants a safe place for their children while receiving services. The Early Childhood Education department is one of the few subsidized child care programs in Santa Cruz. Located on the Santa Cruz High School campus, the child care center offers enriching education programs to families with children under five years old. Within the Resource Development Department, family support services include a donation room, food bank, and other seasonal campaigns. Participants of any program are able to access these additional services. Through its programs and services, Walnut Avenue serves women, children, and families who may be experiencing domestic violence, homelessness, early pregnancy, or poverty (Walnut Avenue, 2018).

Agency Problem

Walnut Avenue, like many nonprofit organizations, relies too heavily on restricted funds to provide services. Any donor has the right to set restrictions on a donation, often specifying that the funds be used to support a particular department or program (Propel Nonprofits, n.d.). Grants from public and private organizations are the most common, and largest, restricted funds organizations receive; often funding most of or an entire of a program. According to the Urban Institute (2013), about 30% of all nonprofit organizations depend on government funding for more than 60% of their revenue. At Walnut Avenue about 88% of revenue comes from local, state, or federal funding (Dr. Julie Macecevic, personal communication, October 16, 2017). Although restricted funds have good intentions - to ensure an organization uses funds appropriately- relying too heavily on this type of funding can inhibit an agency's financial flexibility. If an organization's relies on grants to fund most of their programs, they cannot use those funds cannot be reappropriated to cover an unexpected cost or loss of funds in another program. Unrestricted funds are the ideal funding source because they are not designated to a particular program or department and can be used where the agency needs it most. If left unaddressed, Walnut Avenue's reliance on restricted funds will inhibit its growth and ability to provide services.

Causes

Multiple factors have contributed to this issue. Prior to 2018, Walnut Avenue did not have a dedicated development staff member. This position is critical to the growth of an organization, as development staff are often responsible for executing fundraising plans, managing donation data, maintaining donor relations, and overseeing special events (Bridgespan Group, n.d.). According to McMillian (2014), "committed individual donors," (para. 1) are

critical to raise unrestricted funds and help an organization shift away from “grant-dependent income,” (para. 2). As donor relations are a primary responsibility in this role, a development staff member is an essential resource. The lack of this staff member resulted in the majority of fundraising and donor relations efforts falling to the Board of Directors, with agency staff providing the support they could. Walnut Avenue’s recent decision to hire a development staff member will help focus and strengthen fundraising efforts and donor relations.

Another factor is the lack of donation tracking at Walnut Avenue. DonorPro, a donor management database, was first introduced to the agency in 2017. Prior to this, Walnut Avenue had no central location to track and analyze incoming donations. A donor database is a critical tool in fundraising efforts, as data can be used to identify which funding strategies are most effective. Organizations can also use this information to identify potential large gift donors, based on giving history (Waters, 2011). With a donor database, Walnut Avenue is now able to hone its fundraising and donor relations efforts, assisting in the development of alternative revenue streams.

Lastly, there is an overall shrinking of nonprofit funding, especially public restricted funds. According to the Urban Institute (2013), 51% of human services nonprofits reported a decrease in federal funding in 2012, jumping from 32% in 2009. Although a majority of nonprofits reported receiving more funding from local and state agencies in 2012 than in 2009, 40% still experienced decreased funding (Urban Institute, 2013). According to The Berkeley Group (2017), public funding will most likely continue to plummet due to the current political climate, making it critical for nonprofits to “shift their financial dependency away from public financial backing (para. 1). As public funding becomes more unstable, organizations such as Walnut Avenue have more incentive to improve and expand their fundraising efforts.

Consequences

A heavy reliance on restricted funds can have disastrous consequences for service delivery. Many organizations with this issue often struggle to meet overhead costs such as building maintenance, technology updates, and staff training. Although many grants do budget for part of the funds to be used towards indirect costs, it is not enough. Goggins Gregory & Howard (2009) found that grants awarded to four surveyed nonprofits designated a maximum of fifteen percent of funds to be used for indirect costs. However, it's estimated that twenty-five percent of a nonprofits' expenses goes towards overhead costs (Goggins Gregory & Howard, 2009). Because restricted funds don't allow enough funds to be used for overhead costs, program and service delivery will suffer. An organization can't hold workshops if there isn't money to fix the roof leak. A new computer program isn't helpful if there aren't resources to train staff about its uses. Because funders have "unrealistic expectations about how much it costs to run a nonprofit," organizations will struggle to provide quality services. (Goggins Gregory & Howard, 2009, para. 5).

Depending mostly on restricted funds can also lead to cuts in programs or staff. As public funding decreases, competition for funds between nonprofits will increase. If an organization loses a grant, an entire program could be at jeopardy. For organizations that rely heavily on restricted funds, there is not much flexibility to use funds from another area of the agency to make up for that lost grant. An agency is also more likely to cut staff members before a program, leaving more work for a smaller staff.

Lastly, relying heavily on restricted funds to support programs and services creates a greater workload for an organization. Grant audits are used "to ensure that the awarded funds were spent as allowed and/or required in the grant agreement," (Leonard, 2013, para. 3).

However Knowlton, (2015) believes that many grants have “overly burdensome reporting requirements,” which “use up limited nonprofit financial capacity,” (p. 74). An organization that receives ten grants to support programs will spend much more time and resources reporting on it than an organization that only receives five grants

It is important for organizations to address this issue, as it results in poor service quality and delivery, program and staff cuts, and increased workload for an organization. Table 1 outlines the contributing factors and consequences of the problem.

Table 1

Contributing Factors	Problem	Consequences
<ul style="list-style-type: none"> → Lack of development staff. → Lack of donation tracking. → Shrinking nonprofit funding. 	<p>Walnut Avenue, like many nonprofit organizations, relies too heavily on restricted funds to provide services.</p>	<ul style="list-style-type: none"> → Agencies struggle to cover operating costs. → Cuts in programs, services and staff. → Creates a larger workload on the organization.

Project Description & Justification

Friends of Walnut Avenue (FoWA) is a development project to establish a volunteer fundraising group. Because Walnut Avenue depends so heavily on restricted funds to provide services, expanding fundraising efforts is an important goal. The purpose of this project is to diversify fundraising strategies by organizing and supporting volunteers who are passionate about fundraising. FoWA members will support existing fundraisers, host their own fundraising events, and recruit donors for Walnut Avenue.

There are many benefits to establishing Friends of Walnut Avenue. Securing funding is an extremely competitive task in the nonprofit sector. According to Grace (2016), successful nonprofits utilize multiple fundraising strategies, allowing donors “to give and connect with your organization in the way that suits them best,” (para. 2). In 2016, \$390 billion was donated to charities, but only 15% of this money went towards organizations addressing human services (Philanthropy Roundtable, 2016). The over 338,000 organizations in the nation that provide human services must compete for this 15% (Guidestar 2018). Establishing FoWA will diversify fundraising efforts and establish new revenue streams for the agency.

Eighty percent of nonprofit organizations in the U.S. “rely on volunteers to achieve almost one third of their work,” (Senses-Ozyurt & Villicana-Reyna, 2016, para. 3). Walnut Avenue depends on its volunteers more than other nonprofits, as they provide 60-70% of direct client services (Walnut Avenue, 2017). With such a strong volunteer network, Walnut Avenue has the ability to utilize volunteers in other departments, not just direct services. Establishing Friends of Walnut Avenue will engage volunteers in a new way and bring a variety of knowledge, skills, and resources to fundraising efforts. These volunteers will also be able to reach more community members and spread awareness about Walnut Avenue and its mission. As Friends of Walnut Avenue grows, fundraising and awareness efforts in the community will also grow.

The first step in beginning the project was researching volunteer fundraising and “Friends of” groups. The Center of Philanthropy at Indiana University (2000), defines a “Friends of” group as “a fund raising arm that is separate from the governing body,” (p. 101 Sec. V-17). Many of these groups are established as nonprofit organizations, separate from the agency they are supporting. There are many examples of these groups in the Santa Cruz community. The

Friends of the Santa Cruz Parks, also known as Friends, has funded millions for “educational programs, visitor services, and capital projects,” since 1976 (Friends, 2016, para. 1). This organization is a stand-alone nonprofit with a full Board and staff. This is much different than FoWA, which will start as a small volunteer group. However, Friends is a good model to look towards what FoWA can grow to. Another group in the community is Club Blue, a membership organization of young professionals that supports the Boys & Girls Clubs of Santa Cruz County (BGCSCC). Members assist in “volunteering, fundraising, socializing, and learning about being on a Board of Directors,” (BGCSCC, n.d., para. 2). At seven members, this group is much more realistic example of what FoWA may look like. Both Friends and Club Blue are two different, but strong examples of successful fundraising volunteer groups.

During this research, the Board of Director’s Development/Communication committee discussed their goals for FoWA in an April meeting. The feedback from this meeting was made into the FoWA Executive Summary (see Appendix A). With the structure of the group forming, the necessary resources need to be created. Not all group members will have fundraising experience and may need some training. Group members will be provided with documents on agency fundraisers and events (See Appendix B), fundraising tips and ideas (See Appendix C), guides for asking and thanking donors for contributions, and general rules and ethics of the group.

The research and preparation will lead up to meet and greet event for potential members. Held at the center, members will be given more information about the group such as the mission, vision, and member expectations (See Appendix D). There will also be a list of volunteer opportunities for those who want to get started as soon as possible. If there is time, members will also discuss their own goals for the group and identify a group leader.

Appendix E outlines the scope of work and estimated timeline to implement FoWA, spanning from February through December. Activities include initial research, agency meetings, and preparation leading up to the group's first meeting. Deliverables include the items or task completed during each activity. The timeline outlines how long each activity will take and includes an estimated completion date.

Project Results

Although Friends of Walnut Avenue is expected to start small, the group has potential to grow into a powerful fundraising tool, improving the quality and delivery of services. Group efforts will assist Walnut Avenue in the maintenance, improvement, and expansion of its programs. The research and work completed over the past seven months culminated in Friends of Walnut Avenue's first meeting. This casual meet and greet allowed interested individuals to meet other potential members and learn more about the group's purpose and member expectations. Initial outcomes for this meeting were to have five interested individuals attend, and three to commit to joining the group. Project success was assessed with a volunteer sign-in (See Appendix F) sheet to be filled out at the meeting. A brief survey was also distributed at the end of the meeting (See Appendix G), giving attendees the opportunity to give feedback about the first meeting, and request additional materials they will need to succeed. Based on survey responses, additional resources will be developed for the group.

Held in late October, Friends of Walnut Avenue's first meeting was a success. The seven attendants exceeded the goal of five, and prompted rich discussions of ideas for the group. The post surveys also had extremely positive feedback, with only one attendant giving scores lower than the highest possible five. One hundred percent of respondents also identified that they are interested in joining Friends of Walnut Avenue. After the meeting, potential members were

contacted to confirm their membership in FoWA, as well as other individuals who were not able to attend. Now, FoWA has twelve members to support Walnut Avenue's fundraising efforts, which is four times the initial goal of three joining members.

Communication with group members is facilitated via email. All members were sent a group roster and upcoming opportunities to volunteer. One Friend donated decorations to the "North Pole", where donors can drop off gifts for the Adopt-a-Family campaign. Information was also sent out about upcoming She.is.beautiful (SiB) race events, including community meet-ups and bib pick-up events. As one of the agency's largest fundraisers, SiB is a great start for FoWA members to get involved.

Although FoWA far exceeded its initial outcomes, there were challenges with establishing the group. Although there are volunteer fundraising groups, FoWA is especially unique. Members are expected to be independent and driven, and are encouraged to host their own small fundraisers and events if they wish. Ideally, FoWA is a group that will need minimal supervision, so it was important to be recruiting members that would feel comfortable with this group structure. With members' having control of the group's direction, it was also challenging to envision how this group will develop. Although group members are informed of volunteer opportunities, FoWA was created with the thought in mind that members are busy individuals; there is no formal participation commitment: members help out when their schedule allows. The flexibility of this group makes it convenient for members, but it makes it challenging to envision how FoWA will develop. The group's growth depends on the efforts of its members.

Personal Reflection

Friends of Walnut Avenue is a valuable resource for the organization's fundraising efforts that should be continued and maintained. This group has been a long-time goal of the

organization, even serving as an ideal next step for retiring board members. Results from the meeting indicate that this group is a resource worth investing the agency's time in. The independence given to the group means it will not impede staff work or drain agency resources. Twelve members is an excellent starting number that demonstrates the interest in and potential of this group. It is recommended that the group's infrastructure is reviewed and updated as membership grows. A designated staff member should also be in contact with the group at least once a month.

Establishing Friends of Walnut Avenue illuminated the importance of development, fundraising, and donor relations to an organization's growth and shift away from restricted funding. Funds raised by this group will be unrestricted, allowing it to be used in any department or program. It's important for an agency to have some financial flexibility, in case an unexpected cost arises or a grant is unexpectedly lost.

Fundraising and donor relations go hand in hand. It's important to keep donors involved and acknowledge their support. Donors who feel appreciated and engaged will be more likely to continue donating and supporting fundraisers. Without a strong donor base, it will be difficult to improve fundraising strategies. FoWA is a great asset to fundraising efforts, as group members will provide additional support to agency events. As fundraising efforts grow, awareness of and support for Walnut Avenue will continue to grow. Increased support will help the agency improve, expand, and maintain its services for the community.

FoWA also demonstrates the invaluable resource of volunteers. Any agency should utilize its volunteers to their full potential. These individuals are dedicated and passionate about Walnut Avenue's mission; they wouldn't donate their time if they didn't value Walnut Avenue's work. Volunteers already help provide a substantial amount of direct services at Walnut Avenue,

and now this group allows volunteers to help with behind-the-scenes efforts as well. Along with the additional support, FoWA is a cost-effective project. Members are donating their time, meaning there will be little, if any at all, expenditure of agency funds on group efforts.

Both donor relations and fundraising are just two components of development. Development is critical to an organization's success. Nonprofits must constantly adapt to new circumstances. As the nonprofit funding landscape changes, efforts and strategies must also change. Organizations should be constantly striving to expand their services and reach more community members. Dedicating time and resources to development is necessary if an organization wants to grow and thrive.

FoWA serves as another resource to expand and strengthen development and fundraising efforts. Securing funding in the nonprofit sector is a continual challenge. Restricted funding, such as grants, require detailed reporting and limit how funds can be utilized. Overall public funding continues to decrease, creating more competition between agencies. Now more than ever, it's important for nonprofits to create stronger fundraising strategies. Friends of Walnut Avenue is a cost-effective resource to support fundraising efforts at Walnut Avenue. This group will help raise funds, helping Walnut Avenue to continue serving the Santa Cruz community.

Future capstone students working in fundraising or development should keep in mind the importance of their work to an organization's success. Development does not always show an immediate pay-off; it can take weeks or months to see the impact of a mailing or outreach event. Fundraisers can sometimes take a few years to reach its goals. However, all of these efforts ensure that direct services can be provided every day, improving the lives of individuals and communities. Although it can be underappreciated at times, development and administrative work are critical to a nonprofits success.

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Appendix A

Friends of Walnut Avenue

Vision

The Friends of Walnut Avenue envision a world where families, women, and children live healthy, happy, lives and are supported in celebrating our community's cultural, economic, gender, and ethnic diversities.

Mission

It is the mission of the Friends of Walnut Avenue to provide financial support, public outreach, and advocacy for Walnut Avenue. The Friends strive to foster appreciation for the work of Walnut Avenue, and to promote Walnut Avenue as a critical and unique community resource for families, women and children.

- FoWA will begin as a more informal group. As the group expands, its organization may have to change.
- Communication/Supervision
 - FoWA will report to the Dev/Comm committee, as it consists of board members and staff. One committee member will serve as the liaison to FoWA. The group will report out once a month, or more if needed. Main communication will be through Slack in the Friends of Walnut Avenue thread.
- Resources
 - There will be no dues in Friends of Walnut Avenue. Members are responsible for fundraising and outreach with their own resources. If there is a formal organization event that the Friends are leading, then expenses may be part of the budget line.
- Leadership
 - Although this is a more informal group, there will not be a full Board of Directors. Suggested leadership is a rotating chair agreed upon by the group, but this may change once the Friends of Walnut Avenue is implemented.
- Time Commitment
 - Members will not be required to participate in Friends of Walnut Avenue for a specific amount of time.
- Launch Date
 - Ideally, Friends of Walnut Avenue will be launched/introduced at the upcoming brunch, around the first week of August. It will be similar to a soft opening at a restaurant to get an idea of who may be interested in joining. The goal is to have four members actively participating in Friends of Walnut Avenue.

Appendix B



Important Dates & Events

Fundraisers

- **Donor Brunch** - Held in the Fall, this fundraiser includes a silent auction and other giving opportunities. Attendees learn more about how their donations support Walnut Avenue's programs and their impact on the community.
- **Spring BBQ** - The first annual Spring BBQ will be held in 2019. Similar to the Donor Brunch, this fundraiser includes a silent auction and other giving opportunities. Attendees learn more about how their donations support Walnut Avenue's programs and their impact on the community.
- **She.is.beautiful** - Walnut Avenue has been the beneficiary of the She.is.beautiful Race for nine years, with the ultimate goal of raising \$100,000 for the organization by 2020. The next race will be Saturday March 23, 2019.

If you or anyone you know would like to volunteer at the race, please contact Walnut Avenue's Community Engagement Coordinator:
Genevieve Ortilla – gortilla@wafwc.org

Seasonal Campaigns

- **Turkey Drive** - Donor contributions provide Thanksgiving meals for families in the community.
- **Adopt-a-Family** - Donors "adopt" a family and purchase gifts for the holidays. A volunteer-run North Pole is set up for dropping off donations.

Important Dates

- **February** is Teen Dating Violence Awareness Month. The center provides orange ribbons to show support this cause.
- **October** is Domestic Violence (DV) Awareness Month. You can show your support by wearing a purple ribbon.

Appendix C



- **Hosted Party** - Host family, friends, or colleagues at your home for a fun event (brunch, dinner, holiday, themed etc.) to inform them of Walnut Avenue's work, share your passion for the agency's mission, and recruit donations to support invaluable community programs.
- **Restaurant Fundraiser** - Many local restaurants offer fundraising opportunities, donating a portion of sales to Walnut Avenue.
- **Social Media Fundraiser** - Utilizing your social media accounts can help reach a larger network of community members. You can create a birthday fundraiser on Facebook in support of Walnut Avenue, or encourage your friends to follow Walnut Avenue's social media accounts:
 - Facebook: Walnut Avenue Family & Women's Center
 - Instagram: @walnutavenue_sc
- **RoundUp App** - Donors can link their debit or credit card to the RoundUp app, which will then donate the "change" from purchases (the number of cents to the next whole dollar) to Walnut Avenue. It's a quick and easy way to support the agency. Learn more at <https://roundupapp.com/>
- **RoundUp App** - Donors can link their debit or credit card to the RoundUp app, which will then donate the "change" from purchases (the number of cents to the next whole dollar) to Walnut Avenue. It's a quick and easy way to support the agency. Learn more at <https://roundupapp.com/>
- **Support Agency Fundraisers** - You can host a table at Walnut Avenue's annual fundraisers.
- **Silent Auction** – Procure items for Walnut Avenue's silent auctions at the Spring BBQ and Fall Brunch.

Appendix D



Walnut Avenue

— FAMILY & WOMEN'S CENTER —

Friends of Walnut Avenue

Mission

The mission of Friends of Walnut Avenue is to provide fundraising support and public outreach for Walnut Avenue Family & Women's Center. Group efforts will assist in the maintenance, improvement, and expansion of Walnut Avenue's programs and services.

Vision

All women, children, and families of Santa Cruz County have the resources to lead healthy, productive, and fulfilling lives.

Member Expectations & Requirements

Friends of Walnut Avenue is a volunteer fundraising group. Members are expected to be passionate about Walnut Avenue's mission, familiar with their work in the community, and knowledgeable of how community members can support the organization. Members may be asked to:

- Recruit donors to support Walnut Avenue.
- Support existing agency fundraisers.
- Host small fundraising events.

Members will be given materials and resources to help them succeed. There is no formal time commitment, but a fundraising goal or other requirements may be implemented by group members in the future.

All members who have not worked with Walnut Avenue Family & Women's Center before should review the Volunteer Handbook. This can be found online at <http://www.wafwc.org>.

**Appendix E
Scope of Work**

Activities	Deliverables	Timeline	Estimated Completion Date
Community Research	Research Write-up	February-June	June 17th
Development/Communication Committee Meeting	Friends of Walnut Avenue Executive Summary	Early April	April 9th
Walnut Avenue Donor Brunch	“Launch” FoWA	August	August 12th
Develop Group Resources	Group Flyer; Group Rules & Ethics; Member Expectations; Fundraising Tips/Ideas; Fundraising Glossary; Thanking Donors; Agency & Services overview; Resource Packet	June-September	September 24th (Draft)
Email Board Members	FoWA Meet & Greet Invite & list of interested persons.	September	September 24th
Friends of Walnut Avenue Meet & Greet	Sign-in sheet	October	October 23rd
Create Additional Resources	Any other docs the group or agency may need.	October-December	December 17th
Help FoWA at the North Pole.	Collecting donations for Adopt-a-Family.	December	December 6th & 7th

Appendix F



**Friends of Walnut Avenue Meet & Greet
Sign-In Sheet**

Name	Phone Number	E-Mail	Join Walnut Avenue's mailing list? (Y/N)

Appendix F

Appendix G



Friends of Walnut Avenue- Meet & Greet Survey

This confidential survey will be used to assess the success of this event and receive feedback of how to improve future outreach for Friends of Walnut Avenue. Thank you for your support!

1. On a scale of 1 (poor) to 5 (excellent), how well did this event inform you about the purpose and role of Friends of Walnut Avenue?

1 2 3 4 5

2. On a scale of 1 (poor) to 5 (excellent), how well did the CSUMB intern facilitate this event?

1 2 3 4 5

3. At this time, are you interested in joining Friends of Walnut Avenue?

Yes No Not sure

Do you have any suggestions for how this event could be improved?
