



Scope of Support



Scope of Support defines the collaborative working partnership between Social Venture Partners and our nonprofit partners. The goal of our partnership is to ensure that you excel as an organization and can deliver programs and services sustainably and in greater quality, quantity and scope. While not a contract, this document supports alignment and describes the projects we intend to undertake together, the measurable changes you wish to achieve, and how you expect them to affect your overall programs or services. This is a working document that we will adjust together as needed as our work together evolves.

Organization	[REDACTED]
Date	22 July 2022
Engagement Period	Year One: 1 July 2022 – 30 June 2023 Year Two: 1 July 2023 – 30 June 2024
Nonprofit's Mission	The overarching goal of [REDACTED] is to ensure their underserved neighborhood; a federally-designated Promise Zone, has the means to thrive. They have a holistic approach to caring for families - from child care/education, nourishment, financial literacy, and help for troubled youth. Established in 1995, there has been considerable growth in recent years. [REDACTED] is the only direct service, place-based organization in the area and has worked tirelessly and creatively to secure grants and foundation support to make a difference in the lives of this underserved community. [REDACTED] has a working early education center, a financial literacy program, a Small Business Development Program (awarding over \$1 million in grants and loans), and monthly food distribution of 50,000 lbs. They have plans to provide STEAM summer camp this summer. [REDACTED] is exploring the possibility of establishing a much-needed charter school. They were awarded a \$5.3M grant to support



Scope	
Overall Project Outcome	<p>██████████ will be positioned with a stronger, deeper team of leaders, operating under a compelling 3-5 year strategic vision and plan, with a clear set of program priorities and a credible plan for their school expansion into higher grades (with timeline and revenue stream.)</p>
Overall Project Description	<p><i>Primary:</i></p> <ul style="list-style-type: none"> • <i>Strategic Planning</i> • <i>Program Development & Evaluation (including Charter School proposal)</i> • <i>Staff Leadership Development</i> • <i>Finance & Budget Planning</i> <p><i>As needed:</i></p> <ul style="list-style-type: none"> • <i>Facilities, Real Estate & Infrastructure</i> • <i>Revenue Stream Development</i>
Sub Project #1	<p>3-5 Years Strategic Plan Leads: ██████████ (SVP) & ██████████ (nonprofit)</p>
Goal	<p>Work with ██████████ leadership team to create a compelling vision and implementable strategic plan for the next 3-5 years that will inform their annual planning and is aligned and understood across their key stakeholders (board, staff, partners, vendors.) Develop KPIs to guide tracking and adjustments to plan over 3-5 year horizons.</p>
Support Area	<p>Primary: Strategic Planning</p> <p>Supporting: Finance & Budget Planning Program Development & Evaluation</p>
Description	<p>██████████ has just completed the implementation of its previous Strategic Plan (drafted in January 2019) and needs to develop and document its next 3-5 year strategic path to growth and impact. Annual planning will follow (potentially with a USD</p>



	<p>consultant) to develop their 2023 plan based on the outcome of this sub-project.</p> <p><u>July:</u></p> <ul style="list-style-type: none"> • Review previous strategic plan • Start financial review <p><u>August:</u></p> <ul style="list-style-type: none"> • Agree on tools (SWOT, Why, 10 Step, etc.) and start pre-work • Start STEAM (K-5) Charter School investigation (see sub-project #3) <p><u>September:</u></p> <ul style="list-style-type: none"> • Facilitate 1st Strategy Session with [REDACTED] leadership team <p><u>October:</u></p> <ul style="list-style-type: none"> • Continue pre-work/research on gaps <p><u>November:</u></p> <ul style="list-style-type: none"> • Facilitate 2nd Strategy session with [REDACTED] Leadership team • Document draft plan and KPIs <p><u>December:</u></p> <ul style="list-style-type: none"> • Plan review & feedback incorporation • Finalize KPIs • Final plan presentations (to board, staff, etc.)
Timing	July - December 2022
<u>Sub Project #2</u>	<p>Staff Leadership Development</p> <p>Leads: [REDACTED] (SVP) & [REDACTED] (nonprofit)</p>
Goal	<p>Instill basic leadership and management skills and principles under which [REDACTED] staff can operate more independently while aligning to the [REDACTED] strategic plan and management direction.</p>
Support Area	Leadership Development



<p>Description</p>	<p>The [REDACTED] intermediate management staff is young and relatively inexperienced in managing others. Many young leaders (in their twenties) have struggled with delegation and coaching. The team is very hungry and passionate, though they often get caught up in the weeds and see one another as peers. They struggle to define their roles and supervisory duties. [REDACTED] is planning a 3-day all-staff training offsite over the Thanksgiving Holiday week and would like to use this training event to advance their staff leadership training goals.</p> <p><u>August/September:</u> Deploy a leadership assessment tool to understand gaps and current attributes of the staff at [REDACTED]</p> <p><u>September/October:</u> Design recommendations for upcoming staff training offsite in November</p> <p><u>November:</u> SVP to observe staff interactions (and facilitate sessions if appropriate) at all-staff training offsite</p> <p><u>December/January:</u> Develop a longer-term leadership curriculum focused on the gaps and second-tier management staff (include customized elements and recommendations for 3rd party tools and courses as appropriate, across individual, and group activities – virtual and face-to-face.) Develop a measurement plan to identify progress and hot spots</p> <p><u>February 2023- July 2024:</u> Deploy tools/course Track progress and adjust</p>
<p>Timing</p>	<p>August 2022 – July 2024</p>
<p>Sub Project #3</p>	<p>STEAM Charter School (K-5) Investigation Leads: [REDACTED] (SVP) & [REDACTED] (nonprofit)</p>
<p>Goal</p>	<p>Deliver credible feasibility and (if appropriate) implementation plans for the Logan Heights STEAM Charter School. Understand</p>



	<p>how staffing, funding, curriculum and facilities will affect [REDACTED] and their community.</p>
Support Area	<p>Primary: Program Development & Evaluation</p> <p>Supporting: Finance & Budget Planning Revenue Stream Development Facilities, Real Estate & Infrastructure Strategic Planning</p>
Description	<p>As the [REDACTED] preschool has grown, [REDACTED] has been approached by parents with worries about the quality of education their children will get as they “age out” of the [REDACTED] preschool and into the public school system. There is an opportunity for [REDACTED] to bring its STEAM-based approach to the Kindergarten through 5th-grade years by establishing a Charter School.</p> <p>Linked to the Strategic Planning activity in sub-project #1, research needs (funding, staffing, real estate, etc.), licensing requirements, and community appetite through a viability study.</p> <p>If the concept is feasible, lay out a plan including investments, capital campaign, execution needs, build-out, and launch. Establish oversight through an advisory committee in addition to the [REDACTED] management team and board. Create a timeline and budget for the project. Strategize on how to bring in the revenue needed. Understanding the financial system that can sustain the school for the long haul (including meeting with investment firms for endowment management.)</p> <p>July – December 2022: Initial feasibility study January – June 2023: Execution plan</p>
Timing	<p>July – December 2022: Initial feasibility study January – June 2023: Execution plan</p>



Sub Project #4	Program Development & Evaluation Leads: ██████████ (SVP) & ██████████ (nonprofit)
Goal	Stronger alignment and understanding of the purpose and deliverables of each ██████████ program (including how they work in conjunction with each other) will ensure that better, more empowered decision-making can be executed across the organization leading to fuller delivery of the organization's mission and goals.
Support Area	Program Development & Evaluation
Description	<p>Review all ██████████ programs to align with Community needs and ██████████ strategic priorities. Understand why ██████████ offers this program (community needs/desires, revenue generation, etc.) and establish KPIs to measure and track program goals at the program level. Prune non-aligned programs and set process/guidelines to evaluate additions.</p> <p>Initial evaluation: July – Dec 2022 as part of Strategic Planning activity (see sub-project #1) Program deep dives: January 2023 – June 2024</p>
Timing	<p>Initial evaluation: July – Dec 2022 as part of Strategic Planning activity (sub-project #1) Program deep dives: January 2023 – June 2024</p>
Sub Project #5	Finance & Budget Planning Leads: ██████████ (SVP) & ██████████ (nonprofit)
Goal	Evaluate current practices and help move ██████████ to industry/business best practices in financial and managerial budget management and reporting to ensure sufficient funding is available for ██████████ growth needs (staffing, programs, etc.) and appropriate approaches are used to ensure a solid basis for financial reporting to ██████████ board, IRS, agencies and donors.
Support Area	Finance & Budget Planning



Description	<p>██████ has asked for help in long-term budgeting, aligning financials to achieve strategic goals, and understanding how to be strategic, not reactionary in regard to managing their finances and funding within and across programs and the entire organization.</p> <ul style="list-style-type: none">• Initial overview of ██████ financial approaches: July – August 2022• Evaluation of cash reserve management including potential investment management firm interviews (given current cash reserve of \$1.8M): July – August 2022• Deeper dive into key financial areas/practices (as needed): TBD• Evaluation of programs for budgeting and funding efficiencies (in alignment with all other sub-projects)
Timing	July – August 2022: Initial financial review Ongoing through July 2024: Program drill-downs as needed



Tracking Indicators

Summary of Growth and Progress

	Description	At Application	End of Year 1	End of Year 2
Total Budget (\$)	For FY 2022	\$1,364,863		
Revenue (\$) Fiscal Year End	For FY2022	\$1,517,400		
Cash Reserves (\$ total & months on hand)	Per SDSVP application	\$1,800,000		
Staff Size	As of July 2022	27		
# of Clients Served (if applicable)	Per SDSVP application	800		
# of Volunteers (if applicable)	Per SDSVP application	40		
<u>Success Measurements</u>				
Measure #1	<i>Measurements the nonprofit uses to define success</i>	TBD		
Measure #2	<i>Measurements the nonprofit uses to define success</i>	TBD		
Measure #3	<i>Measurements the nonprofit uses to define success</i>	TBD		