



Community
Science
Workshop
Network

CSW Network Annual Grant Report 2015-16

Aug. 22, 2016

Annual Narrative Report of Progress made through July 31, 2016

Executive Summary: The organization continues to mature from a start-up nonprofit, into a sustainable organization with systems in place for administration, financial management, and fund development. These systems provide “back office” support to our five member workshops across the state. Site directors report greater sustainability as a result of a centralized fundraising database, project/curriculum database, collaborative grant writing, and shared program practices. Site directors report increased local fundraising efforts as a result of recent trainings. This translates into a reduced reliance on network level grants. A revisit of the strategic plan in April and July, revealed expansion efforts take place in neighboring schools and communities surrounding each workshop. Site directors use their workshop as a “hub” to replicate workshop success in satellite classroom spaces or mobile workshops in their regions. Expansion, in the traditional sense, is also taking place as the CSW Network take steps to open a new site in Salinas, CA. Overall, 2015-16 has been a successful year for the network and its members.

Objectives for this grant, and detail your progress against each:

In the last twelve months the CSW Network’s objectives were to: 1) Support local site program service plans; 2) Provide technical assistance in areas of nonprofit management and fundraising; 3) Bring together site directors and educators to share best practices and execute our mission, goals, and projects effectively. The following report describes our progress in these areas as well as new information about our leadership structure.

Objective 1: Support Site Programs

CSW Network’s grant program allocated \$50,000 to its member sites this year. First, each site received \$2000 to support participation in professional development provided by experts in the field of tinkering, STEM education, Making, and mathematics. Partners in the field, scientists, and local experts provided technical assistance and high quality workshops to each local workshop. Total granted \$10,000.

Second, CSW Network allocated \$7,000 per CSW Network site to help support the free, “open tinker time,” offered during out-of-school time. These grants are made possible by the MaCready Family gift. CSW members are working to identify other donors to leverage this gift. “Open tinker time” for underserved youth after school and on Saturdays has been the most effective program offered by CSWs but also the most challenging program to sustain and expand. Our inspiration comes from watching kids discover their talents in a specially designed environment with engaging

materials, highly effective facilitators, time to go deep with curiosity, and innovative learning opportunities. Students get inspired as engineers, inventors, and scientists. CSW Network acknowledges this program as a core activity and core value of current and future sites and will make it a top priority in 2017 to fully fund statewide.

Objective 2: Provide Technical Assistance (Fundraising and Financial Management)

CSWN drafted its first organizational fund development plan in June 2015 with support from its new board members and expertise from fundraising consultant Tobi Marcus in Santa Cruz, CA. Site directors reviewed the plan in September 2015 at a statewide meeting in Gilroy, CA. The updated version was reviewed and adopted by the entire board of trustees in October 2015 at a statewide meeting in Morgan Hill, CA. The plan featured a new individual donor strategy and one-on-one fundraising trainings for site directors and a development related position on their staff. CSW Network staff visited each site director more frequently this programmatic year than in prior years to implement this plan.

On June 28th, 2015, the Network held a full day fund development training workshop in Watsonville, facilitated by Tobi Marcus. A special presentation was provided by Nina Simon, Executive Director of the Museum of Art in Santa Cruz, discussing individual donor solicitation. This was the most fruitful workshop of the day based on feedback from the site directors and development assistants from each member site. Each director practiced “an elevator pitch” for their site and drafted a revenue goal with specific categories for solicitation in FY2016. This was a landmark process for the organization as a whole. In the fall, site Directors identified one person on their team who could help them track donations and begin to compile names for a holiday fundraising mailing in coordination with the Network staff.

The Network staff executed an intensive individual donor solicitation strategy in November and December 2015 by establishing Fund EZ as the statewide donor database. Over 500 names from the San Francisco, Sanger, and Watsonville sites were inputted. The Network staff partnered with Mission Science staff to launch the inaugural holiday mailing campaign, which included a holiday mailer with a letter from our founder, Dan Sudran. The campaign raised over \$13K in donations. The Network trained associate director Ziggy Khan, of Mission Science Workshop to track these new donors and follow up with them quarterly.

Objective 3: Bring Together Site Directors To Share Expertise / Receive Trainings

With the support of the Goldman Foundation, the site directors met four times in statewide meetings covering the following topics. They were compensated for their time in the form of “release payments” so that others could teach their workshops while at the meetings with CSW Network. Themes of the meetings included:

- September: EVALUATION SYSTEM
- October: FUNDRAISING PLAN (discussed above)
- June: FUNDRAISING SUCCESS STORIES
- July: ACCOUNTING INFRASTRUCTURE

During the past year, Dr. Peter Ellis of Community Crime Prevention Associates, based in Alameda, developed a comprehensive evaluation system based on youth development outcomes. Dr. Ellis collaborated with site directors and Board to develop several instruments aligned to programmatic outcomes common across all sites. Sanger, Greenfield, Excelsior/SF, and Watsonville signed on to implement the youth/parent/staff surveys in Spanish and English to measure indicators of asset change/improvement in school programs, workshop open tinker hours,

classroom field trips to the workshops, and Summer STEM and Robotics Camps. CSW's interventions will result in significant gains in communicating our outcomes to funders and stakeholders. Surveys were administered and collected in January to assess first semester progress, and will be again in June (second semester) and August/September (after summer camps). Preliminary results of these 2015-16 academic year surveys will be made available in late Fall 2016.

This summer, site directors reported the following successes as best practices:

- Sanger SAM Academy (Sanger CSW) adopted a strategy of providing fee-for-service professional development for California Mini-Corps students statewide, therefore creating a new dissemination model and new revenue stream to support drop-in program. Nearly 400 undergraduate Mini-Corps students have participated to date and will be delivering Sanger CSW program to Migrant students all over California. Sanger also secured a \$54,000 gang prevention/intervention grant to expand services to at-risk Sanger youth, and is working on another grant to expand outreach to surrounding rural communities by deploying a mobile science workshop (Del Rey and Parlier).
- Fresno adopted a model of contracting through a fiscal agent (SAM Academy) in order to fund additional staff time to serve more students. This allowed Fresno to re-open its second workshop site that had closed the year prior to due city restrictions on staff hours. The site director, Manuel Hernandez, is developing a 'cross-city' collaboration to start a CSW in Madera under the auspices of the City of Madera Parks and Recreation Department.
- Greenfield solicited \$20,000 from the city and was awarded the funds for general operating costs. This was a major boon for the organization and a first "ask" for the site director. He has worked to leverage this gift to raise additional funds in Spring 2016. Adding a fundraising component to his job description is new in this site but he finally realized it was necessary to get involved in order to diversify support.
- Watsonville has identified all of its funding streams and negotiated an execution and renewal plan with the city in order to expand its services and avoid over extension of the staff. Prior to the new director hired in March 2015, Jose Sandoval, the site was serving more schools than funds committed, therefore, always being understaffed. Prior site directors at this site were not involved in crafting the annual program budget or managing the revenue streams. Through a revenue analysis, Mr. Sandoval quickly adjusted the staff allocation per school contract and tied it to funding committed.
- San Francisco has promoted its Director of Administration to Associate Executive Director. Ziggy Kahn started as a grant writer for Mission Science Workshop three years ago. In her second year, she assumed all fiscal oversight of the organization's budget and program budgets. In her third year, she assumed human resources management. An effective leader, she manages the overall operations of the organization at both Excelsior and Mission Science. Through her collaboration with the Network staff, the San Francisco sites raised over \$13,000 in holiday campaign donations *for the first time*. They will make this an annual solicitation.

Highlights from the recent July 17 meeting: Site directors and board members expressed interest in reforming the accounting system of the organization. To phase out the internal bookkeeping system managed by the Executive Director and her office assistant in prior years, the CSW Network identified a full service accountant with nonprofit expertise. "At Your Nonprofit's Service," led by CPA Martha Jimenez has provided accounting services to non-profit agencies for over 25

years and serves over a dozen nonprofit agencies across the Bay Area. They provide off-site bookkeeping, accounting, and consultation to agencies with operating budgets ranging from \$200,000 through \$5,000,000. Site directors spent three hours learning about the accounting system and adopting new budgeting and monthly statement practices for their own sites.

Challenges & Updates

An interim Executive Director assigned by the board, Paloma Garcia-Lopez, ran the organization part-time from July-December 2015. In December 2015, the Network identified three strong candidates for the position of Executive Director. The finalist for the position was Sol McKinney, who was the former site director of the Excelsior CSW in San Francisco. Sol was also an alumnus of the program, and a mentee of Dan Sudran since 1997. He came on board to lead the CSW Network four days a week (32 hours) and began his tenure on January 4, 2016. Together, the Development Director and new Executive Director executed technical assistance, fundraising, and site director meeting/programs without interruption as Sol McKinney had been involved in the holiday solicitation process in San Francisco, attended the fund development workshop in June, and participated in the September and October site director meetings/orientations covering evaluation and fundraising efforts statewide. Further, he was involved in crafting updated project budgets for all programs and staff allocation of time in Mission and Excelsior workshops.

The newly appointed Executive Director was supported by a transition plan including mentoring by Treasurer Paloma Garcia-Lopez and President Jerry Valadez, and was also supported to attend several training programs with CompassPoint in Oakland, CA, and the Center for Excellence of NonProfits in Redwood City, CA. He worked with CSW Network for 6 months until he abruptly resigned effective June 30, 2016. This presented a significant challenge for the organization. Board President Dr. Jerry Valadez, Treasurer Paloma Garcia-Lopez, and Secretary Chris McCarthy immediately stepped in and coordinated a transition of all leadership functions, financials, and organizational operations to affect a seamless and uninterrupted continuance of CSW Network business. Facilitated by Board President Valadez, the Board of Directors met for its annual retreat on July 17, 2016 in Watsonville and together established a new leadership structure made up of the Board President as CEO, supported by the Board Treasurer and Board Secretary/VP as the Executive Committee. Dr. Jerry Valadez is a retired superintendent, science educator and school administrator, and has served as Board President since March 2015. His bio is attached along with a new organizational structure

Organization Structure:

CSW Network's board of trustees has expanded its responsibilities of policy and oversight, to include administration of the organization. Per the bylaws, the Board officers administer the organization in absence of an executive director. For that reason, Dr. Jerry Valadez will work 20+ hours per week to run the organization as Board President and CEO. The treasurer, Paloma Garcia-Lopez will work 5 hours per week to manage the finances and grant projects of the organization. Dr. Chris McCarthy, VP/Secretary, will work 5 hours per week to oversee the programs and collaborative meetings between the sites.

The central office of the organization moved to Sanger, CA, alongside the SAM Academy (Science, Art, Music CSW). SAM Academy is providing private office space and general office equipment/supplies at a low cost during the tenure of Dr. Valadez as leader of the organization, for several years. The CSW Network board is excited about this opportunity to continue its work uninterrupted, under the leadership of its board president. Dr. Valadez will hire an office assistant in September and a program officer in January. A grant writing consultant will be hired to execute statewide and local grants in the winter and spring to fully fund the organization's goals.

MISSION/VISION/GOALS:

Despite the challenges described above, the mission of the Community Science Workshop Network remains the same. CSW Network's mission is to serve as a powerful advocate and resource for Community Science Workshops, providing opportunities for youth to tinker, make, and explore their world through science in underserved communities across California. The three objective we accomplished this year, with the support of the Goldman Foundation grant, demonstrate our allegiance to our mission.

As stated in our January 2014 strategic planning retreat with the board and staff:

The Role of CSW Network is to function as a reservoir of resources for member CSWs, including:

- providing professional development for staff;
- conducting original research and tracking evaluation of youth outcomes;
- pursuing, coordinating and building capacity for fundraising from local sources;
- increasing access to curricula;
- raising public profile and visibility as well as advocacy for the unique CSW model nationwide.

Over the past three years, the CSW Network has worked to meet these priorities:

- ✓ Craft Vision and Strategy for the CSW sites and statewide organization
- ✓ Provide Staff Development to CSW Sites
- ✓ Document Learning and Evaluate Success
- ✓ Facilitate Fundraising and Marketing

As we enter 2017, CSW Network acknowledges it is time to revisit the strategic plan and set its top priorities. It began this process at our July 2017 retreat by establishing a new leadership structure, committing to replicate its programs (not just by starting new sites, but by using existing sites as hubs for mobile workshops and classroom "pop up" stations), and using a common method to document learning and evaluate success (Youth Development Assessment System). The board plans to meet with experts to continue to update its strategic plan and develop a concrete work plan.

FINANCIAL REPORT

CSWN's board approved annual operating budget for fiscal year 2015-2016 was \$330,000, of which \$225,000 was raised and \$105,000 was rolled over from the prior fiscal year project funds. For 2016-2017, our board-approved a conservative, operating budget of \$220,000. All 2016 projects were completed on time and no funds had to be rolled over into the new year. Over \$171,000 has already been raised towards this goal. Additionally, the organization has five months of operating reserves in the general fund.

Moving our central office location and reducing Executive and Development staff positions, has led to significantly lower operating costs. The board preferred a streamlined, conservative budget to kick off FY2017. However, the organization has two pending proposals to the Moore Foundation and SRI/National Science Foundation which may bring in \$180,000 this year. The board will reevaluate the budget in January to adopt these new funding sources and expand its services to an increased operating budget of \$320,000+.

New funding opportunities for FY2017:

- a. A 3-year pledge of \$50,000 a year was secured from the McCready Family Foundation in Seattle, WA. The first payment was received in June 2016. This is a general donation geared to support the free, “open tinker time,” offered by each of the CSW Network sites. CSW Network is working to identify other donors who may be inspired by this gift to also make similar commitments.
- b. The Driscoll Fund at the Community Foundation of Santa Cruz County awarded \$10,000 to support programs in Greenfield in FY2016. A successful completion of the Community Garden Project gained recognition from the foundation and the Driscoll Corporation committee further garnishing support for local programs in FY2017.
- c. CSW Network is submitting a proposal for \$300,000 (\$100,000 a year) to the Moore Foundation to replicate its programs and services to educators and youth program directors across the state.
- d. CSW Network has submitted a \$160,000 (\$80/yr) proposal to NSF through a partnership with SRI to document learning outcomes in underserved, bilingual communities across the state. CSW is a model for the nation.
- e. To fund the expansion into Salinas, Dan Sudran has made a \$50,000 commitment directly to the Cesar Chavez Library in Salinas. CSW Network will not act as a “pass through” grant maker in this case. The expansion committee believes more dollars can be raised locally if funds come from an individual stakeholder rather than a statewide entity. We will observe this strategy and work to identify matching donors.

All of these efforts have helped the Network be on better footing to manage its finances and steward fundraising efforts effectively. Thank you for your continued support.