



Consultancy Report: Organizational Sustainability Assessment

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BACKGROUND

We, Janet Addoh, Karla Gregorio, Abasin Ludin, and Luz Vazquez-Ramos, are an action research consulting team from the Middlebury Institute of International Studies at Monterey (MIIS), who are currently enrolled in the course “Organizational Sustainability of Social Change Organizations”. Our goal is to assist a local organization in addressing a sustainability challenge that is of interest to them, which can include any theme that an organization feels is affecting its sustainability, and would like to carry out deeper analysis and action to improve the problematic issues or opportunities within. The purpose of this report is to deliver our findings and recommendations from our consultation with the Salinas Valley Dream Academy (Dream Academy), in which we address the following questions:

How might the Dream Academy develop organizational structure and roles that effectively distribute leadership to serve their longer term needs? How might this be adequately resourced?

Our ultimate goal is to participate with the Salinas Valley Dream Academy in strategic reflection, co-guiding them towards identifying and incorporating relevant answers to their pressing and longer-term needs.

I. SUMMARY

The Salinas Valley Dream Academy is a non-profit organization formed in 2011 by Ruben Pizarro, an attorney and teacher at Alisal High School in Salinas, California. Mr. Pizarro is the executive director of the organization, working together with pro-bono staff. The Dream Academy consists of a cohort of approximately 100 students from four different high schools in Salinas Valley. The pro-bono staff work at these four high schools, which gives them the opportunity to see the youth everyday and build a relationship with them. The primary aim of the academy is *to expose youth to experiences outside of Salinas that will positively transform the way students think about themselves, and to prepare them to become future servant leaders who will give back to their community.* In order to achieve its aim, the Dream Academy organizes educational tours for the students to the east coast, such as New York and Washington D.C., as well as career building trips to Silicon Valley technology companies. These field trips expose students to new cultures, environments, and learning opportunities, and also motivate them to begin preparing for the next chapter of their lives.

Dream Academy Mission and Vision

Mission: “*The Dream Academy transforms youth into confident servant leaders by engaging them in life changing experiences that develop their skills and abilities so they can impact their community.*”

Vision: “*A community where all youth are inspired and empowered to live to their full potential.*”

In addition to the organization’s mainstay of educational trips, the Dream Academy also organizes a speaker series which is intended to empower the students by creating an enabling environment for sharing firsthand knowledge and experiences. The students also participate in fundraising activities to sponsor their trips by selling candy apples, organizing barbecues and raffles, selling discount cards, and many other activities. By doing the fundraising themselves, students develop a sense of responsibility, accountability, and independence, as well as enhance their communication and interpersonal skills.

Students also undertake community projects to build their character, gain new experiences, and give back to their community. Furthermore, the Dream Academy collaborates with the Salinas Ivy League Project to teach students how to write impressive essays and statements that will open opportunities for them in Ivy League schools.

II. AREA OF FOCUS FOR CONSULTANCY

Our consultancy team carried out an iterative process which allowed for adjustments based on reflection and emergence of new knowledge. Therefore, we continuously shared our findings with Dream Academy representatives as we uncovered them, and worked in close consultation with Prof. Ortiz-Aragon for feedback and guidance on how to adjust our methodologies based on new findings. We now explain our framework of understanding when we first began our consultancy with the Dream Academy.

Based on our initial meeting and analysis with Ruben Pizarro, we developed a “Rich Picture” drawing (see **figure 1**) that captured how we as a consulting team were “seeing” the Salinas Valley Dream Academy, its programs, challenges, opportunities, and related issues at that time. It was a very rough initial diagnostic that simply allowed us to frame a specific focus area for our consultancy.



Figure 1. Rich Picture of the Salinas Valley Dream Academy

The flow of the story in the Rich Picture goes from left to right, with the Dream Academy in the center. On the left, we have the current reality of the youth and families in Salinas. The rural landscape is the backdrop with the high school as a large fixture in the community and a place where youth can connect with teachers and friend, and where they feel safe. Outside of the school are some of the significant challenges that youth and their hardworking families are facing, such as gang activity, violence, and drugs. In the center, the Salinas Valley Dream Academy serves as a doorway into another world of

opportunities and a vehicle to physically seeing the world outside of Salinas via university trips and leadership activities. Some of the key pieces on the right are family engagement, youth leadership, and the notion of the youth as building a future for themselves through exposure to new people, places, and experiences through the Dream Academy. The current approach to fundraising (represented here in a cupcake) reflects a primary function of the Salinas Valley Dream Academy, which involves all stakeholders by having events and food and beverage sales.

The Dream Academy is reaching many youth and exposing them to experiences which they would otherwise not have the opportunity to do, leaving an impact in their lives and in the community. These activities are driven by the passion to increase possibilities for youth. Executive Director Ruben Pizarro is responsible for all administrative and program development systems of the organization, working with the support of a pro-bono leadership committee. At the same time, our early engagement with Mr. Pizarro revealed that he was the sole manager of all program, administrative, and fund development functions of the organization. Furthermore, he explained that they wanted to pursue other forms of funding beyond their current model of individual fundraising and short-term donations.

As a new 501(c)(3), we concluded, at the beginning of our consultancy, that the Dream Academy was facing challenges related to centralized leadership and limited funding sources, which could hinder them from achieving their goals related to growth. Hence, the core questions:

How might the Dream Academy develop organizational structure and roles that effectively distribute leadership to serve their longer term needs? How might this be adequately resourced?

III. METHODOLOGY

In figure 2, we have listed the five interventions we conducted with the Dream Academy: one Skype meeting with the Executive Director, Ruben Pizarro, one facilitated workshop with their direct beneficiaries (approximately 70 students), and three meetings with the Dream Academy leadership committee. Each intervention revealed key findings and informed us in the planning of the next intervention. (See annex 1 for more detailed notes on our findings and lessons learned from each intervention).

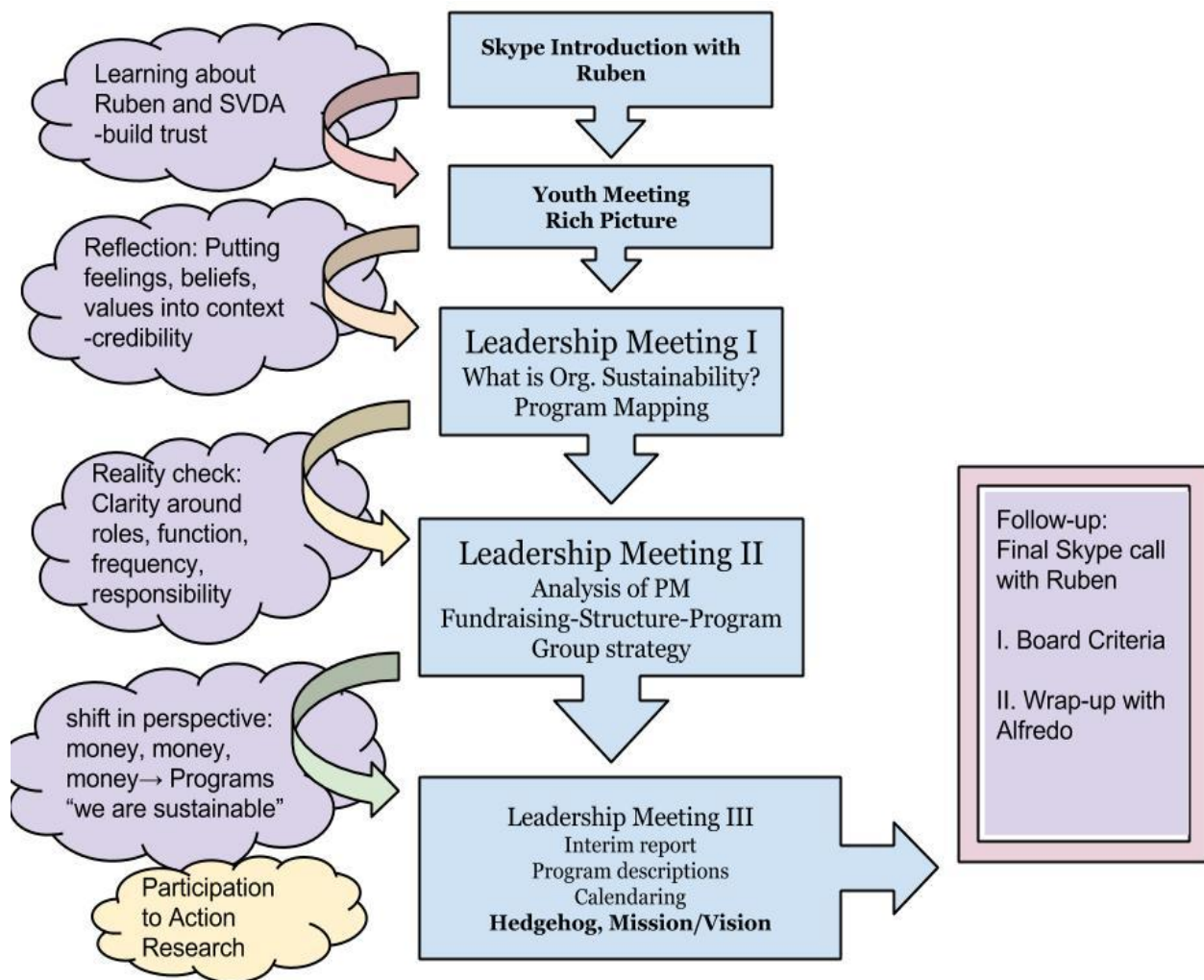


Figure 2. Methodology Diagram

We worked with the Dream Academy's beneficiaries, the students, in creating Rich Pictures which visually expressed the impact that the Dream Academy has had on their lives. This activity also involved having the students explain their drawings and perceptions of the Dream Academy. The executive director and the leadership team shared their thoughts on lessons learned which guided our next steps. We then carried out a Program Area Mapping activity with the leadership committee in order to develop a shared

understanding of how the Dream Academy's programs are organized and who was responsible for each program. We consolidated the programs that emerged (see **figure 6**), which we then presented to the Dream Academy leadership team to encourage analysis and dialogue on the structure of their programs. The third activity focused on connecting the concepts of fundraising, programs, and structures using specific examples. Afterwards, we collected feedback from the leadership committee regarding areas of improvement upon which they would like to focus. We then provided a fundraising assignment which invited each member of the leadership committee to reflect upon a fundraising event. The purpose of this assignment is to encourage continuous exploration and analysis of fundraising activities, which will lead to more efficiency. After Leadership Meeting II, we presented an interim report to the organization which encapsulated our findings at that point. We also conducted an activity wherein the leadership committee drafted descriptions of their programs, participated in a Niche exercise (see **figure 7**), as well as drafted their mission and vision statements. We also touched upon the concept of creating shared tools for organizing their activities.

IV. FINDINGS & RECOMMENDATIONS

Finding 1

Dream Academy leadership is not sufficiently distributed, leaving the executive director with little room for high-level long-term strategic thinking and program development

The Dream Academy board of directors was formed for legal and practical reasons, but without much definition of their roles and purpose. No board members were involved in any of the organization's recent events in which we participated, nor was there any mention of contributions they have made. Regardless of the lack of support from their current board of directors, the Dream Academy has a committed group of pro-bono staff that form a leadership committee who are implementing program activities. However, the roles and responsibilities are not adequately distributed since the executive director is the sole manager of program and administrative activities, leaving him with little room for high-level long-term planning and program development. Through the Program Area Mapping exercise, the Dream Academy leadership committee and executive director were able to come to the agreement that their leadership is too centralized. This realization, along with clearly defined program areas, brings to light the need to distribute many of the organization's operational tasks.

Given these challenges, and the fact that the Dream Academy wants to pursue grants and sponsorships, we find it problematic that they do not have a functioning board of directors, which could offer help in some of these areas. A board of director's structure varies from organization to organization; however, generally speaking, board members are tasked with bringing financial support, and are adept at certain high-level administrative functions (financial planning, legal counseling, etc.). A well-functioning board of directors could also assist the executive director in administrative and fund development functions. Furthermore, an organization is better able to take advantage of the various talents of its staff when each is given more opportunity to express their capabilities. We believe that the combination of cultivating a healthy board of directors and creating roles for volunteer staff will, overall, distribute leadership more effectively and create more opportunities for the executive director to focus on long-term strategic planning.

Recommendation 1

Delegate managers for each program or activity, and determine recruitment criteria and strategy for potential board members.

In relation to this finding, we have worked with the Dream Academy leadership committee in reflecting upon how they are distributing and managing program and fundraising activities (see **figure 3**).

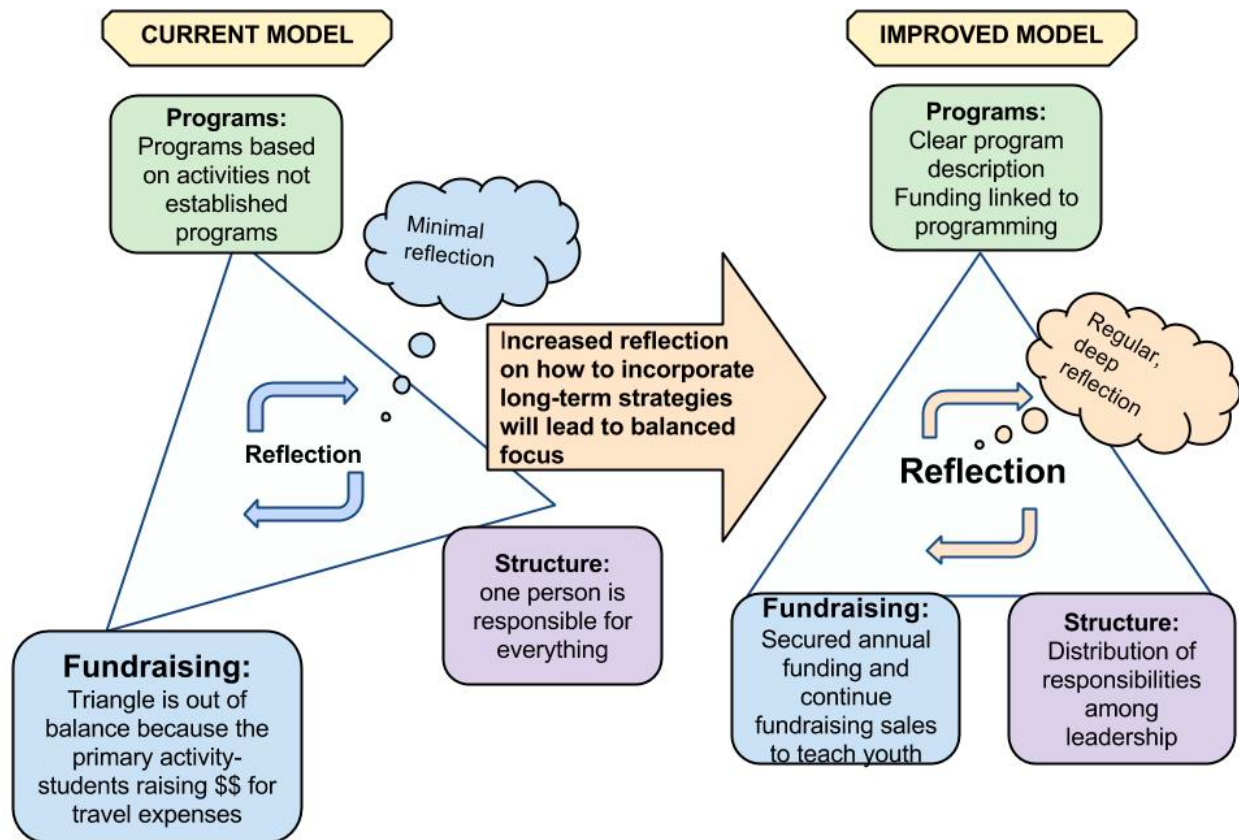


Figure 3. Conceptual shift to a new program management / fundraising model

The diagram to the left explains how the Dream Academy is currently functioning. The primary focus of the activities are short-term fundraising activities, which is why the triangle is tipped to the left. Aside from generating funds, these activities do have a positive impact on the development of youth servant leaders. However, we believe the ideal balance of an organization is to simultaneously support and cultivate fundraising, program activities, and structure. All three of these components need to exist for an organization to be sustainable, leading to the diagram to the right.

Having divided their activities into clusters of programs (see **figure 6**), the most direct step that the Dream Academy can take is to delegate a manager to each of these programs. At the very least, they can assign project managers to specific activities. These steps are quick and easy to undertake, and will have the immediate effect of creating more time for the executive director to focus on high-level planning, such

as determining the trajectory of program growth and board recruitment. In terms of revamping their board of directors, we recommend that the executive director invest time in researching methods to replace non-functioning board members, as well as strategies in cultivating effective new members.

There are many free online resources that can guide board development and recruitment (see **annex 2**). The Dream Academy leadership committee and executive director should decide on a selection criteria that works best for their needs, and reorganize their board based on these criteria. After deciding upon a criteria they can conduct a network analysis to determine if there are individuals within their sphere of influence who already fit their needs and requirements. To guide the Dream Academy in reflecting upon their recruitment strategy, we suggest that they consider one or more of the following types of board members:

- An accountant or finance professional for internal auditing and financial management
- An attorney to provide co-counseling with the executive director on legal matters
- Corporate sector board members who can connect the Dream Academy with resources and promote the organization to their sphere of influence for fund development
- A non-profit professional with significant experience and expertise in the field who can share knowledge on best practices
- Local government representatives or their staff who can increase promotion of events, as well as provide avenues for potential government funding as these individuals usually have access to a network of donors
- Members of the community or leadership committee who have the capacity to fundraise in a systematic fashion

Assessing Success in
the Adoption of
Recommendation
1

The Dream Academy team will know that they have been effective in working towards leadership cultivation and role delegation when responsibilities (such as program management, fund development, financial management) are distributed among various individuals. Another important indicator would be that the executive director has more time and greater capacity to focus on long-term planning, as opposed to being fully in charge of managing and implementing activities.

Finding 2

Minimal long-term strategic planning and unstructured programs are causing confusion regarding roles and required resources, and on what higher-level goals are meant to be accomplished by activities.

The Program Area Mapping activity revealed the activities that are currently operating have not been grouped as programs, making it difficult to understand who is doing what, what resources are required to accomplish goals, and how to tie these activities together towards reaching shared goals. Unstructured programs are making it difficult for the Dream Academy to articulate how each cluster of activities altogether contribute towards reaching a specific goal, which in turn affects their ability to decide which programs need to be the focus of growth. Given that the Dream Academy would like to reach more beneficiaries and have deeper impact, they would need to better articulate in what ways they would like to grow (for example, whether they want to increase the depth of current programs or create new ones). We also learned that there has not been sufficient reflection among staff nor feedback sessions with beneficiaries regarding program impact, which made it difficult to determine process improvement and growth trajectories.

Another issue relating to structure is that, prior to our consultancy, the organization had not yet created official mission and vision statements. However, the staff was able to decide as a group on how to articulate their mission and vision fairly quickly. This shows that the Dream Academy team has an unspoken understanding of what their goals are, but have not had sufficient opportunity to exchange ideas and make decisions on how to move forward. Besides growth, another issue the organization will face with not having official mission and vision statements and program structure would be presenting themselves to potential funders and supporters. The organization has strong community support and a healthy reputation within Salinas, but in order to amass strong support outside of their community, they would need to solidify their goals and programs.

Recommendation 2

Begin to build processes for improved organizational planning, including formalizing mission and vision statements, program descriptions, and some organizational processes

The Dream Academy leadership committee can move towards creating a long-term strategic plan for program development and organizational growth. However, before this can take place, they first need to formalize their vision and mission statements, cluster their activities into programs and create descriptions, as well as build tools to aid in planning (for example, a shared calendar of activities and/or a shared drive with program documents that can be accessed by all staff members) that will help them organize themselves. Concurrently, the leadership committee can begin reflecting on which ways they would like to grow, and specific goals for which to aim in order to achieve these long-term plans. Having clearly defined program areas provides more structure and leads to efficiency, and a planning system would aid in communicating and sharing resources during this process.

The majority of activities we have conducted with the Dream Academy have thus far been related to building structure and dedicating more time on strategic thinking. The leadership committee has been able to categorize their activities into different programs, and have also taken part in writing program descriptions. Additionally, they have also reflected upon their niche (see **figure 7**), and have drafted mission and vision statements. The leadership committee also took part in an activity where they

discussed how their fundraising, structures, and programs are interrelated, which is the first step towards deciding upon long term strategic planning for growth. Lastly, they discussed a potential tools for improved planning (a shared Google calendar).

The Dream Academy staff already have a shared understanding, albeit unspoken and unwritten, of the structure and purpose of their activities. However, it is important to have this understanding into written format that is understood and easily articulated by the entire leadership committee so that they can explain their mission, vision, and programs explicitly to the general public. We have synthesized these program descriptions (see **annex 3**) into a draft, and the leadership committee can now review and edit these as they deem appropriate. They can then work on developing consensus on how their programs are structured, how they describe them, and what the final versions of their mission and vision statements should be. In terms of planning systems, they should begin utilizing the tool that they agreed upon (the Google calendar), and also decide on a system for housing and sharing program information and documents (Google docs could be an option for this). Whatever format the organization chooses for calendaring activities and sharing resources, these should be accessible to all team members as a living document.

Once program structures are in place, they can begin to tackle long-term strategic planning. Given the programs that they have in place and the goals that these programs are trying to achieve, they can begin to ask themselves: In what ways would we want to grow in the long term? Do the programs we currently have reflect our shared mission and vision? Which of these programs should be scaled up? Do any of them need to be scaled down?

Assessing Success in
the Adoption of
Recommendation
2

There are various indicators to help the Dream Academy determine if they are beginning to make improvements in terms of structure and longer term strategic thinking and organizing. First, activities are adequately staffed, and there is little confusion on who is in charge of which task. Second, new activities that arise can be categorized into one of their programs, or if not, can be easily related back to how it affects their mission and vision. Third, members of the leadership committee agree on the purpose of each of their programs, and they can describe their programs to the general public in similar ways. Lastly, they have the ability to begin answering the questions posed in the previous paragraph regarding long-term planning.

Finding 3

Although Dream Academy has impressive fundraising capabilities, current revenue sources are not sufficient to support operating costs, and marketing activities are inadequate for supporting Dream Academy needs.

The Dream Academy's fundraising capabilities are impressive; however, they are heavily reliant on individual student and volunteer sales revenue, which covers only their immediate project costs (mostly travel expenses). This fundraising model does not generate sufficient operating funds for the Dream Academy, and the executive director has expressed the desire to diversify their funding sources in order to support growth. They have not yet been able to secure long-term funding, and the executive director specifically mentioned his desire to pursue grant funding as a potential source of revenue. In the duration of our consultancy with the Dream Academy, we also observed that they do not have digital or print media with which to advertise their programs and activities. There is consensus among the Dream Academy leadership on the need to develop marketing materials and a stronger online presence in order to attract supporters, whether volunteers or donors.

Without funding for operational costs (salaries for staff, office space, a marketing budget, and other administrative expenses), it will become increasingly difficult for the Dream Academy to sustain itself or grow. Currently, all staff are volunteers who have other full-time positions, which limits their time and ability for long-term planning and growth activities. If the Dream Academy intends to expand, either by serving more youth or by increasing their activities, their current fundraising model will not be able to support it. Expanding their current revenue sources will reduce the burden of fundraising on the current leadership committee and the executive director so that they can allot more time to strategic planning, as well as reduce the burden of fundraising by the beneficiaries, meaning that the youth will still fundraise, but there would be program funds to help offset travel and project costs and activities.

It is not uncommon for non-profit organizations to de-prioritize marketing and advertising because of the tendency to focus all available resources on program costs rather than administrative costs. However, the strongest case for dedicating more resources to marketing would be to attract potential supporters, whether in the form of volunteers or donors, which can then offset the cost of such marketing activities.

Recommendation 3

Expand current sources of support by utilizing online marketing methods, as well as research potential grant funding

To support marketing thus far, we have worked with the Dream Academy to formulate program descriptions and create initial versions of their mission and vision statements that can now be utilized to market themselves to the general public. These materials can be used as content for creating online accounts for volunteer and donor networking. They have also been working with a MIIS grant-writing consulting group on creating a template for future grant applications. The next step is for the Dream Academy to create online accounts to market itself to volunteers and donors, and following are live links to suggested websites. We encourage you to register with as many of these websites as possible, not only to seek out supporters, but also to increase your online presence while you are still in the process of building a website (see below).

Volunteer Cultivation

Idealist	Register for free and list your needs for volunteers.
VolunteerMatch	Register and list your needs, and they will match you with volunteers.
Linkedin for Nonprofits	Beyond free postings for volunteers, they have webinars and articles on how to write volunteer postings, what to include on your website, and even has templates.
Taproot Foundation	They will partner with you to build teams of volunteers for short-term high-impact pro-bono consulting projects tailored to your needs.
United Way Monterey County Volunteer Center	Find local volunteers online.

Donor Cultivation & Grant Funding Research

Razoo	This is a crowdfunding platform for social causes.
Guidestar	Potential donors and foundations use Guidestar to research a non-profit organization. Make sure that the information they have regarding your vision, mission, and programs are accurate.
Foundation Center	Research potential foundations based on their fields of interest to know which ones have funding priorities that match your mission.
Charity Navigator	Donors and foundations use Charity Navigator to see how non-profit organizations are rated. You cannot register as a non-profit, but you can do a search of your organization to see how they rate you.

These online marketing activities are low-cost and low-maintenance, and can potentially bring in significant support, both in terms of material and immaterial resources. Through online volunteer recruitment and donor engagement, the Dream Academy can find volunteer services for creating a website, designing print and online marketing materials, individuals who can serve as mentors, and many other roles. Additionally, the Dream Academy can also conduct a network analysis geared towards identifying potential donors and sponsors who can connect them with foundations for grant funding in order to generate sufficient funds for operational costs (Note: In “Recommendation 1”, we suggested a general list of potential board members who can fundraise. Here, we are suggesting that network analysis should also be done to seek sources of financial support who may not necessarily be board members). Beyond looking within their network, the Dream Academy can also begin to do research online on potential funders.

To help start the process in a more structured manner, we have outlined some additional marketing steps. These are based on the assumption that the Dream Academy relies on strong community support and reputation in their local area. In order to expand their funding base, they need to implement marketing activities that will increase recognition outside of their community. We have come up with the following steps which we believe will help towards strengthening their brand identity, as well as help them gain access to additional resources.

Suggested Marketing Steps:

- Solidify their mission/vision and program description (have a clear identity).
- Create online accounts with various nonprofit and donor websites to recruit supporters.
- Build a website that increases awareness about the positive transition occurring in the lives of the youth. The website should include feedback from youth on how the programs have affected them (their stories).
- Partner with other organizations who are also working towards youth empowerment to share resources and best practices.
- Conduct outreach at corporate volunteer events to recruit mentors who are passionate about helping underprivileged youth.
- Connect with contacts in print and TV media in order to explore the possibilities for free ads depicting youth in action in their community service programs.
- Have local business partners advertise about the Dream Academy in their stores.

Assessing Success in the Adoption of Recommendation 3

You will know when your online presence is growing when you begin receiving applications from volunteers, as well as donations from individuals who are outside of your network. The Dream Academy should continue their current fundraising model while seeking out new funding. Online marketing, network analysis, and grant-writing are new strategies that should not replace current fundraising activities. The idea is that eventually the Dream Academy will have program funds secured through grant funding and corporate sponsorship, along with student led fundraising activities.

V. CONCLUDING REMARKS

We have observed and been amazed by the Dream Academy's passion, commitment, and investment in their own community. The Dream Academy has built a reputation based on its work in the local community. Through our Rich Picture reflection exercises, the Dream Academy has proven their success in impacting the lives of the youth they serve. The organization has had success via its short-term model of fundraising activities that ultimately achieve the goal of sending youth from the Salinas area to Washington, D.C. and to New York.

However, should the Dream Academy want to adopt a long-term model, they would need to incorporate long-term strategies that have been suggested in the recommendations sections, without necessarily dropping their current model (see **figure 3**). It is important to keep in mind the normal level of tension that will exist when challenged to balance current activities with long-term ones. That being said, this process will take time and patience, but the incorporation of long-term strategies will establish the goals expressed by Director Ruben Pizarro.

Moreover, we believe the Dream Academy has a strong potential to develop lasting relationships in the corporate and public sectors. By expanding its partnerships in these sectors, the Dream Academy can leverage access to funds for their programs, which will create financial stability eventually lead to expanding its impact by serving more youth.

The recommendations made in this final report should be seen as a guiding list of next steps for the Dream Academy leadership team. These recommendations should be approached as supplemental to the already successful activities that the Dream Academy executes. Lastly, we feel confident that future MIIS students will be interested in consulting work with the Dream Academy, and have recommended this to our professor.

VI. ANNEXES

Annex 1: Detailed Notes on Methodology & Findings

1st intervention: Skype call with Ruben Pizarro

We began with an introductory Skype call with Executive Director Ruben Pizarro. We gained basic information about the Dream Academy, including Ruben's areas of concern, as well as learned about the his passion for starting the organization. We also established a communication plan between the him and the organizational sustainability consultation team.

Key takeaways

- Leadership is centralized, with the responsibilities falling mainly upon the executive director.
- Developed trust among both parties, resulting in a Terms of Reference document.

2nd intervention: General Youth Meeting & Rich Picture Activity

We attended a Dream Academy general meeting with approximately 70 of the Dream Academy's beneficiaries (students) and volunteer staff in creating Rich Pictures which visually expressed the impact that the Dream Academy has had on their lives. This activity also involved having the students explain their drawings and perceptions of the Dream Academy (see **figures 4 & 5**).



Figure 4: Students taking part in the Rich Picture activity



Figure 5: Students sharing their Rich Picture of how they perceive the Dream Academy

Key takeaways

- There are many activities occurring between the Dream Academy volunteer staff and the youth they serve, that are positively impacting their lives.
- No previous reflection or assessment have been done to evaluate their impact, and the Rich Pictures revealed powerful narratives which spoke to how the program influences the youth to develop confidence in their abilities to improve their environment. For example, one of the youth groups stated, “The Dream Academy motivates us to overcome our current obstacles and to grow so we may come back to Salinas and help change it.”
- Additionally, it appears that there have not been many exchanges of feedback, at least not at the group level, between the leaders and the students on the specifics of what aspects of the program worked best and why, etc.

3rd intervention: 1st Leadership Meeting

This was our first meeting with the Dream Academy leaders. We were not sure if board members or the volunteer staff were attending. No board members attended. We reflected on the Rich Picture activity, and the Dream Academy mentors and director shared their thoughts and lessons learned. We presented our guiding research question and conducted a Program Area Mapping activity (see **figure 6**).

What is the program?	Who benefits?	What does the program do? What is its purpose?	How is this funded?	Who is in charge?
Educational Field Trips/ College Awareness	-Students -University (Diversity) -Families -Community	-Exposes students to different environments & cultures -Learning about opportunities -Inspire, motivate, empower, inform students -Visualizing success, next chapter	-Community Members -Networking -Rotary Clubs	-Director (Ruben) -Dream Team
Guest Speakers/ Speakers Series	-Everyone -Students -Speakers -Community -Academy	-Inspires, motivates, and ignites action through sharing of experiences and knowledge -Inspires, motivates, and empowers students	-Free -Indiegogo(?)	-Speakers -Pizarro
Fundraisers	-Students -Community -Families	-Raises money and provides different experiences, responsibility, accountability, leadership, and teamwork -Bonding between everyone -Raises funds for trips -Become independent and responsible	-Student work -Candy apple, BBQ, discount cards, chocolates, raffle, sponsor letters, beer sales, ushering	-Students -Director -Families -Coordinators
Community Service	-Everyone -Community	-Provides empowerment, builds character, and gives new experiences -Instill importance of serving and giving back to the community	-Student work -Indiegogo(?)	-Dream Team -Students -Various Mentors
Familias	-Students -Community	-Skill-building -Give opportunity to lead	-Indiegogo(?)	-Film: Juan -Ethnic Studies: Maria, Ana Rosa -Health: Vela(?), Brenda -Global Citizens: Lily -Technology: Alberto, Ruben

Figure 6: Program Area Mapping Diagram (collated from 2 groups, entries are unedited)

Key takeaways

- The leaders were really appreciative of our research and they were open to collaboration.
- The leaders were extremely focused on fundraising, and did not prioritize the connection between fundraising, program descriptions, and organizational structure for long-term sustainability.
- Sustainability and strategic planning is not obvious in their activities, and we felt that they needed to see long-term strategies from a different lens.
- At that time, our ultimate goal for the day was to get to creating a mission and vision statement, and realized that there were several steps in between that we needed to cover.
- As a consultation team, we planned for too many activities and quickly learned that we had to adjust to accommodate for more reflection.

4th intervention: 2nd Leadership Meeting

We introduced concepts around long term strategies and process. This included analyzing divergent to convergent thinking, a triangle activity that linked fundraising to program areas and organizational structure as well as a review of program area mapping which was an impactful reflection. This session also was beneficial because the Dream Academy leaders were able to prioritize what their immediate needs are for the rest of our sessions together.

While observing the summary of the Program Area Mapping results, the staff noted that all of the activities involved showing students their capabilities. Several of the mentors also commented that the executive director was the sole person in charge of all the projects. The group began a dialogue on potentially dividing up the projects among different leaders. Ruben also stressed the need for them to have systems and structures in place for each activity. When discussing each of the projects, it was clear that many of their activities were done ad hoc without much long-term planning. The staff also mentioned the need to calendar activities since they have had issues in the past where there were not enough staff to manage certain activities.

Key takeaways

- The Dream Academy leaders were happy to see how far they have come, how active they are, and how sustainable they are within the short-term model they are currently utilizing.
- Prioritized needs of the Dream Academy are: synchronized calendaring, program descriptions and delegation of responsibilities and board selection criteria.
- Dream Academy leaders realized that their leadership is too centralized and they need to delegate more of the work.

5th interventions: 3rd Leadership Meeting

We led an activity in which we provided ideas for what information should be included in writing program descriptions. The leadership committee were eager to share more in-depth information on how they would describe the different programs that came about from our Program Area Mapping exercise. We then introduced a Gantt chart as a calendaring idea. The Dream Academy leadership team also expressed their desire to create mission and vision drafting statements, so we conducted a Niche activity (see **figure 7**) and led exercises on drafting a mission and vision.

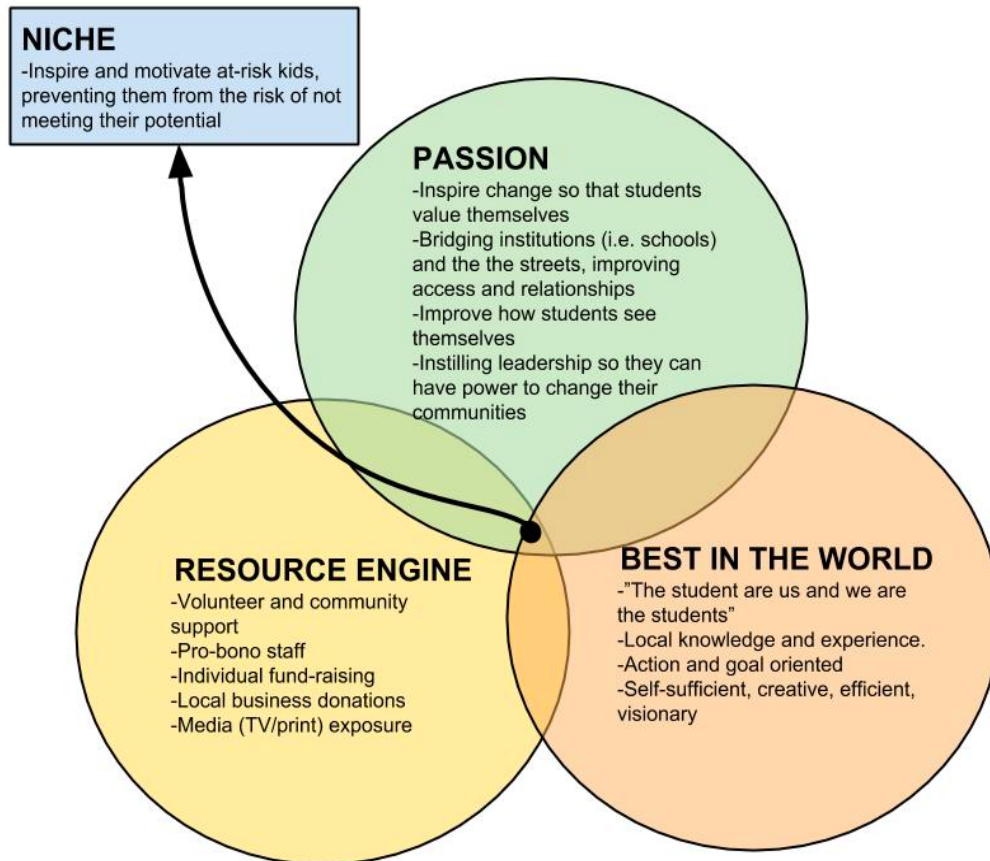


Figure 7: Niche diagram

Key takeaways

- Although the Gantt chart idea was not suited to the Dream Academy's needs, the calendaring activity pushed the leadership team to think about other calendaring ideas, and this is where we believe "action research" really began to take place.
- It was a great feeling to see real "action research", and the Dream Academy leaders requesting more activities.
- The Dream Academy team showed great passion and excitement while brainstorming on their mission and vision statements. The ideas they shared were very cohesive, showing the strength of their team.

Annex 2: Board of Directors Recruitment & Resources

I. What is a Board of Directors?

Generally speaking, a board of directors make high-level financial and legal decisions and oversee implementation of long-term strategic plans. Board members are leaders in the community and have networks of influence, or simply have expertise in their fields.

II. A diverse board is a strong board.

Make sure you have an attorney, accountant, members from the community, corporate sector, someone with expertise and in-depth experience in the nonprofit sector, and possibly local elected officials or their staff on board.

III. The board of directors + executive director = healthy leadership

The Executive Director is a bridge for the board and the staff and volunteers.

IV. Board members are responsible for fund-raising; should they pay dues?

- Each organization is different. A board member might be assigned to raise a certain amount of funds per year, or may be tasked with providing expertise in a certain field.

V. What other responsibilities should board members have?

- Provide strategic long-term planning.
- Promote and build a network of support for the organization.
- Work with the executive director to manage finances (track and manage cash flow).

Online Resources for Board Recruitment and Management

[Simone Joyaux](#) (Free documents on Learning Center page (see article, “Firing Lousy Board Members”))

[Nonprofit Hub](#)

[Starting a Nonprofit: Financial Landscape](#)

[Criteria for Board candidates](#)

[Different is Better: Why Diversity Matters in the Boardroom](#)

[Board Source](#)

[How Should Board of Directors be structured?](#)

[Should board members donate?](#)

[Board Liability Insurance](#) (What the experts say about liability insurance)

[Board of Director’s Guide to Liability Insurance](#)

Annex 3: Program Descriptions

Community Service Program

Servant leadership is a cornerstone value of the Salinas Valley Dream Academy. All students participate in community service activities, and are exposed to a variety of community projects and events where their services are needed and appreciated. It is through community service projects that students experience giving back and develop a deeper sense of self and community. Not only do students feel more comfortable helping others, but they also gain vital leadership and communication skills, allowing them to step into the role of a servant leader.

Some of the activities within the Community Service Program are:

- *Caminos Del Arte Community Festival (Closter Park) & El Grito Festival: Students assist with setup and breakdown of the event, maintain clean up, and assist with organizing games for children*
- *Toy drive: Students collect and distribute toys for young children during Christmas time*
- *Day in the Fields Project: Students are educated about the agricultural industry and volunteer to work in the local agricultural fields for a day*
- *Cleanup days with the City of Salinas (various locations)*
- *Food drive: Students collect and distribute food to low-income families during Thanksgiving*

Students are growing up in a world where there is high emphasis on “self” and individuality, with little emphasis on community and others. This program addresses this topic by showing students the importance of helping others and the value of “making a difference.” The program also aims to eliminate the negative view that community members may have about students. By teaching the community that students are capable of contributing, there is an increased chance that the community will support students. Students also become more confident in knowing that through their action they are making a positive impact.

Educational Field Trips & College Awareness Program

Through this program, the Dream Academy exposes youth to various universities to experience student life. It is widely documented that the enrollment of minority students at universities is consistently low. This program works towards removing barriers that prevents these students from getting into higher education. They attend leadership meetings and gatherings at these universities, which are mostly located in the Bay Area. The intention is to broaden their horizons and thinking, and to get them to see places that they can be part of in the future.

Some of the activities within the Educational Field Trip Programs are:

- *Educational field trips to Bay Area colleges and universities, such as UC Santa Cruz, CSU Monterey Bay, and Hartnell College*
- *Attending the Silicon Valley Latino Leadership Summit at Stanford University*
- *Taking part in the Latinas Think Big Innovation Summit at Google Headquarters*
- *Traveling to Washington DC and New York City to visit universities and other notable locations, such as: Columbia University, Georgetown University, John Hopkins University, the White House, Capitol Building, United States Supreme Court, Library of Congress, Statue of Liberty, Wall Street, and the United Nations*

Most of the Salinas Valley Dream Academy's participants will be the first-generation to attend college. Therefore, the program aims to change the students perspective and normalize the idea of going to college and travel. This has many positive long-term benefits, including building networks between universities and the Salinas Valley Dream Academy and connecting current college students and prospective students to support student access to college and future success.

Familias Program

The Familias Program is a component of the Salinas Valley Dream Academy that enhances students' experiences in service learning, which provides hands-on interactive approaches that allow students to make sense of the world while developing empathy. The program inspires students to widen their worldview about themselves and about their community. The groups are organized and divided by the following themes: Film, Global Citizens Project, Health, Ethnic Studies and Technology. Students are assigned in groups of 20 to each theme where they learn how to make lesson plans, work in groups, and learn from these challenging team-building roles. The Familias Program also gives students the opportunity to interact with adults and organizations within the community who can help them achieve their goals. This is a hands-on interaction that transforms students into skilled servant leaders.

The activities within the Families Programs are:

- *Technology: Bridging the digital divide by bringing computers and internet access to low income families*
- *Ethnic Studies: Implementing Ethnic Studies in high schools empowers students and builds tolerance by teaching them about their history and culture*
- *Health: Promoting community health by leading diabetes and childhood obesity awareness activities among elementary school children*
- *Film: East Side Stories -Si Se Puede- is a film that highlights the success stories of four families in our community. One of our staff members is the director of the Monterey Film Festival and lends experience*
- *Global Citizenship: The Citizens of the World Project adopts villages and families in developing countries, combining service learning with real understanding of how local decisions and actions can have a global impact*

Through the Familias Program, students build leadership skills, such as learning to work in as well as lead groups, delegate responsibilities, develop passion for causes, and develop the ability to vision-cast or ideate. These experiences transforms students and improves their self confidence by getting them to realize that they can accomplish things they may have previously thought they were not capable of doing. This positive change in self-confidence is powerful as students ultimately link the ideas that they can make their dreams a reality and make a difference in the world.

Fundraising Program

The Fundraising Program is a vital component of the Salinas Valley Dream Academy. The experience of travelling opens the students' eyes and mind to a world of possibilities beyond Salinas. Additionally, the program helps the students develop a sense of responsibility, accountability, and independence, as well as enhance their communications and interpersonal skills. The Dream Academy provides training and access to fundraising materials to its participants so that they can raise funds to support their participation in educational trips to New York and Washington, D.C. Armed with support from their peers and mentors, students are able to successfully raise funds towards these life changing activities. Through the self-directed fundraising process, the students achieve their financial goals.

Some of the activities within the Fundraising Program are:

- *Candy Apple Sales*
- *Chocolate Sales*
- *Car Washes*
- *Chicken Barbecue Dinner*
- *Distribution of Donation Request Letters*

Many students come from low-income families and lack the financial and cultural capital to experience travel, making a trip to New York or Washington, D.C. unimaginable. Fundraising not only allows students to have access to these opportunities, it teaches them how to network and market themselves. Furthermore, parents and community members fundraising alongside the students build lifelong memories in addition to bonds between students themselves while in the process of fundraising.

Speaker Series Program

Mentoring and role modeling are a vital component of the Salinas Valley Dream Academy. Through the Speakers Series Program, community leaders and elected officials are invited to share their personal stories with students. The personal stories that are shared allow guests speakers to connect with students and teach them about overcoming various challenges that they've faced in their life journey. Students also learn about job roles, responsibilities, and benefits. These community leaders tie in an advocacy component by discussing a current community issue or campaign, and give students opportunities to participate in influencing policy and bringing about positive changes in their community.

Some of our guests for the Speaker Series Program have been:

- *United States Congressman Sam Farr*
- *Mayor Joe Gunther*
- *Salinas Union High School District Board Members Eva Marie Martinez, Kathryn Ramirez and Phil Tabera*
- *Monterey Herald Reporter, Claudia Melendez*
- *District Attorney James Panetta*
- *State Assemblymember Luis Alejo*

The Speaker Series Program targets the issue of bridging the disconnect that exists between young people and adults (specifically adults in positions of authority). This component also provides students with answers to key questions that they have with regards to achieving their goals. For example, if a speaker is a principal, the students may benefit by seeing what steps one must take to reach that position. This experience is particularly empowering and students often share their concerns with these community leaders. This encourages students' civic engagement, and gives students the confidence to approach elected officials and community leaders when the need arises in the future.