

## **Fiscal Sponsors: The COVID Conversations – Session 89 – March 15, 2022**

- Oliver: Hey, welcome back everyone and thanks for joining us. I said this already, but if you're new to our forum, welcome, we're glad you came. If you are returning to our forum, thanks for coming back. We're glad you're here. We have a really interesting topic today and today is the third in our series of three meetings that is being programmed by our friends from the National Network of Fiscal Sponsors Steering Committee. And I want to welcome Sarah McCann, who is on the steering committee who had the hard job of putting these sessions together. And I'm going to turn it over to Sarah to introduce our topic today and the discussion that's about to follow so welcome everybody. And here we go, Sarah, it's all yours.
- Sarah: Thanks Oliver and big thanks to Oliver and Andrew for making these happen, both the Tuesday calls ongoing and the NEFES partnership and big thanks to the rest of the steering committee for making this happen. And I'm excited today to introduce Community Initiatives' Audrey Roderick, who's the senior client services manager and Brandy Shah who's the legal director of client services and from the Colorado Non-profit Development Center, Angela Schreffler and Nicki Leszman should be here also. And today, some of you may have attended the sponsor spotlights in the past. Today, we're actually doing a sponsor kind of in conversation. So talking a little bit about similarities and differences in the two sponsorship practices, but we're going to get started by letting everybody introduce themselves and Audrey, you were first list so I'm going to pass it to you.
- Audrey: Great. Good morning. I'm Audrey Roderick. I'm the senior client services manager here at CI. I've been here since about June. Prior to coming to Community Initiatives, I was the executive director of a small fiscally sponsored organization here in San Francisco working on food and environmental justice issues. And yeah, I'll leave it at that. Nice to see everybody this morning. Brandy, you're up.
- Brandy: Sorry. I have a toddler I'm used to muting myself so if I start talking and you can't hear me, somebody give me the signal. I'm Brandy Shah, I'm a legal director at CI. I've been at CI for almost four years. I was a lawyer and I was an executive director of a nonprofit and I also worked in philanthropy before coming to CI four years ago. I'm happy to be here. Nice to meet everybody.
- Angela: Hi everyone. It's so great to be here. I'm Angela Schreffler. I'm the COO at Colorado Nonprofit Development Center. I have been here since 2013. Prior to that, I was the executive director of one of our fiscally sponsored projects. We worked on transportation issues for older adults and people with disabilities in the Denver Metro area. So I've been in the fiscal sponsorship realm for a long time, since 2009, and I've been in the nonprofit sector my entire career. So I'm really excited to be here and I will pass it over to Nicki.
- Nicki: Good morning, at least on this side of the coast to everyone. I'm Nicki Leszman. I am the senior programing manager at CNDC and I'm a little bit of a glue here because I was with community initiatives for two years, but I was at CNDC first and then moved to CI and then back at CNDC now and I've been in fiscal sponsorship for about eight years now,

kind of in all of those areas. So I am excited to share kind of a little bit about kind of my experience in both places and been able to kind of see how both organizations work and how fiscal sponsorship works at different organizations and things like that. So thanks for having us here today.

Sarah: Thank you all. So we've got some questions prepared, but if you've got questions, feel free to drop them in the chat and we'll get to them also. But to start, can you all tell us about your organizations and how the work has evolved? And whoever feels most strongly about this question, feel free to jump in.

Brandy: Community Initiatives start, I can start. Okay. Okay. So CI was formed in 1996. We grew out of the San Francisco Foundation. And so at the time, we had a very localized portfolio, very San Francisco and Bay Area based and primarily focused in direct services. We've grown to be a platform for leaders nationwide with international impact. So our team is Oakland based, but we have employees in close to 25 states and in four countries. We have a very diverse portfolio and part of that is because our ongoing mission and commitment is to community self-determination. And so we have community leaders who are addressing issues and problems in their communities across the country in a very diverse set of fields. Still the greatest number of our projects are focused around education. That might be from primary school kids all the way to training PhD candidates.

Brandy: And we have about 110 projects in our portfolio right now and I think the glue again, that holds those projects together is no matter how big or small the emphasis on a community determining its own needs. With the growth in our portfolio, what we're really looking to do is build capacities and efficiencies in our office to be able to support national and international work. And so as we talk about in this call, the changes to our staffing and our technology and the types of projects that are in our portfolio, it really has to do with that breadth and diversity. The growth of our projects has largely been in professional services and advocacy as opposed to direct services, which is now a minority of our portfolio. So I guess I'll leave it there and pass it over to Angela.

Angela: So CNDC started in 1999. We were started by a group of individuals from foundations. So from very early on, we had the backing and support of the foundation community in Colorado. So we are geographically based. So we're focused on the state of Colorado versus being focused on a particular mission or set of impact, I guess. So we are, I think early on in CNDC, we were really focused on the Denver Metro area. And especially over the last 10 years, we have definitely expanded across the state. We have projects from all across Colorado, particularly with the work that we've been doing with one of the foundations in Colorado focused on some health equity work, but that has really expanded and really increased our reach across the state. I would say... Yeah, I guess I'll leave it at that and then I'll turn it over to Nicki to add her thoughts as well.

Nicki: Yeah. I think our services have evolved a little bit in that I think we have our comfort level with risk is something that has evolved over the over time and as far as the risk we're willing to take. So a good example of that is grant making. So we used to not do a whole lot of grant making especially since COVID, I think grant making to individuals especially has become a large part of our work and I would imagine a lot of people on

this call have had to do a lot of grant making to individuals. And so that has really expanded our reach and impact as well.

Nicki: And I think one thing unique about CNDC is that the original CEO who was hired, Melinda Higgs, is still our CEO. So she has been able to lead our organization through the last 20 plus years since CNDC's founding and has really been able to establish us within the Colorado community as kind of the, I would say we were one of the original fiscal sponsors in the region though that is now expanding, but certainly has established kind of fiscal sponsorship as a alternative option to forming a C3 and so that was established pretty early in our community.

Sarah: Audrey, did you want to add anything?

Audrey: I think Brandy really covered it in terms of where we are and how we've evolved.

Sarah: Excellent.

Audrey: I think so.

Sarah: So next, tell us about how your administrative staff supports your projects.

Audrey: Sure. I can continue with that one. So in the last few years, as our portfolio's grown and not just as Bay Area based have moved from that one on one model to a more team approach. So we now, as folks are onboarding, definitely get a client services manager and an accountant that we've noticed with all of our projects and I'm sure cross with everyone most of the questions, most of the support is in the finance department. Folks really want to know where their money is and what's happening. So those project accountants will stay with a project throughout their tenure. And as folks continue through their onboarding get acclimated into the project here, we switched to a team model and so we're able to really focus it on professional development skills with our team in terms of areas.

Audrey: So contracts and granting and grants, our grants out against individuals and able to really hone in on those skills and so we can provide those services to our portfolio and making sure that folks are getting what they need. So again, some of our larger projects will stay with a client services manager the entire time they're here. We have our HR team that's available for all of the onboarding. We'll talk a little bit, but we've updated our technology platform so folks have access to Paylocity now for all of our projects. And then of course, we have Brandy who's around to be able to support with any of our legal issues and anything else that might be the start of that would eventually potentially lead to larger conversations with our council for anything like that. But yeah, it's kind of a general overview. Anything else to add Brandy or?

Brandy: I would just add that's a evolution that started about five years ago. So previously we had, as Audrey said a one on one model, but a team model in the finance side. So a much smaller finance team and a bigger client services team, finance being in the backend and not in direct communication should with projects. And we survey our

projects annually and every year the feedback is that the access to financial data and financial education is one of the most important things that we can provide at CI. And so five years ago, we began building a much bigger finance team with one-on-one access to our project accountants and evolved our client services team as Audrey said into a team that could work in a team and stay small and nimble, but still handle a diverse set of non-finance related issues. And that's an evolution that is still in progress and that really, really needs support through better technology. And that I know we will talk about later.

Audrey: Yeah.

Angela: I can start for CNDC. So we have anywhere between 65 to 80 projects at any given time, but we have had steady growth, especially over the last 10 years. So we have... Most of our staff are really tasks specific, so for example, we have someone just dedicated to accounts payable, somebody just dedicated to cash through receipts, someone very specifically working on contracts for example, but we also have individuals who are dedicated to a cohort of our projects. So a finance point of contact and then also a programmatic point of contact so that our projects, they could go to a specific individual if they know exactly who to go to, if they have a specific question, but if they aren't sure who to go to, then they can go to either their finance person or their programmatic person to kind of get more individualized attention if they're not entirely sure who to go to or they have a more general question.

Angela: I would say for the most part that has worked for us as we have grown over the last, especially five years, we've seen a lot of growth, but I would say the area that has created some confusion for our projects is when we have turnover and especially over the last couple of years with the pandemic, that has been really hard on our projects trying to figure out who to go to, especially in a remote environment. So we're constantly trying to figure out is that the right approach, is there a better approach, looking at CI's approach to see if that might be a better solution. But I would say too that when we've asked our fiscally sponsored projects, do you have other ideas of how this might work better, we haven't gotten a lot of suggestions around that. So for right now, we're really focused on providing support in the way that we have been with our administrative team. And we do have about 20 employees in our administrative office providing support to those. I think right now we have around 70 fiscally sponsored projects. Nicki, would you add to that?

Nicki: Yeah. I will add that. I think I had the benefit of being at CNDC first when we really launched our cohort type model of support. And then when I started at CI, we were still an individual project support model and we transitioned the whole time I was there into more of that team approach. And one of the things that I think was critical was in a one-on-one model, projects really feel that absence of staff turnover much, much, much greater because they've trained this person and how they like their things done, what their contracts typically are and when that person leaves, man their world leaves. And really the satisfaction is hard, is low, I should say. They still feel that in a team based approach, but the institutional knowledge of that project is shared amongst a team versus with one person in that one-on-one model, which I think really helps alleviate some of that burdens.

Nicki: So you're sharing kind of what's going on with that project or you're working on various pieces of that project. So in both approaches, there's really one person who's managing all of our contracts on... Someone else on our team is really managing all grants. So those in individual kind of... Each project has a individual like thumbprint of how they operate and what their typical business looks like is shared, which is nice because I think even though they still are unhappy when in this team model someone leaves because someone new all of the things about how their specific contracts work, it's less than having to retrain somebody about all of those individual pieces of their programmatic work. So I think that's definitely an approach that I think works well.

Nicki: One additional thing I'll say about this is definitely capacity related, but CNDC implemented kind of regular check-in calls. We need a better word for checking calls because they're not, they sound super, what there are, but to really learn more about what's going on. Coming up in the future, what's going on at project on the project level, what they need our support with to help mitigate some of those really always chasing after the fires. You're putting out this and you're running over here and putting out this to really help us get ahead of those and really support them before they become fires, acknowledging that that takes a lot of time and capacity from the team to be able to support projects in that way, but building that relationship is helpful and that rapport, obviously with projects and knowing kind of where their... How do I say this lightly? Where their areas of need are greatest in being able to prevent some of those things that are going to come up.

Nicki: Some of our projects are notorious for not telling us that they have events coming up and then we're scrambling to get permits in place and all those things. So knowing that ahead of time, being able to just map those out is really helpful in our service model. And then being able to rely on each other as a team to be a... One person really supporting our payment processing platforms is so much easier for that one person to really know how our the Stripe or whatever works so that they're able to answer those quick questions more nimbly than someone who gets that question once in a while and then has to do the research and then has to, just takes more time. So I think having that expertise on the team or at least the area of support is one way, I think that we're able to maximize our support projects.

Sarah: Thank you. And a couple of you mentioned this, but what role has technology played in your evolution and then where are you on your technology journey today, where you're going?

Audrey: I can talk about that one. I mean, I think with everyone, the pandemic has quickened folks' adoption of technology. I think we were starting on a journey to update and go from a lot of paper files and manual pieces of information with our projects and internally as well. We started with our finance team. So utilizing Intacct and allowing projects to have access to their dashboards to see what's going on, be able to look at balance sheets and create reports for themselves. You still need a level of understanding of financial information and knowledge to be able to take that in, but it really allowed folks to be able to get in there and see that. Updating our HR tech, so utilizing Paylocity. So folks are able to get in and request time off and see trainings that are required of them and see paychecks.

- Audrey: I think internally, we're going through a massive currently Salesforce project, so looking at how we can connect all of our kind of siloed tech right now. So we have Intacct, do we have Bill.com and we have Salesforce and we have our donation platforms and we have tech management and DocuSign, all of these different things that we're doing to be able to manage our portfolio projects and really trying to figure out how we can silo that so we can see a more 360 view of the interactions that we're having with our projects to be able to track the cycle of a contract with us, of a grant award that gets sent so we can see where bottlenecks are happening, where we can make sure that the right people are getting tapped in and tagged in appropriately and we can respond.
- Audrey: So part of this was because one of our projects got a very large grant to do grants to individuals. So we're doing over the course of this past year, they're coming in just over 500 individual grants. And so part of this is that we had to have a system to be able to support 500 grants of between five to 10,000 a piece. So a big piece of this was spurred by that and realizing that we needed to really update to be able to respond and now that's allowing us to look at how we can do this for the rest of our portfolio.
- Audrey: Some of the pieces down the line are how can we update what we use as our project portal so our folks can get information. Is there a way to make that more interactive and easier for folks to use? Is there a way even potentially that folks could be using direct access to limited pieces in Salesforce through their community licensing and that projects will be able to see kind of what's going on, but the goal really being how can we get information out to our projects quicker and making sure that they're getting the full scope.
- Audrey: Right now, even this, everything is still pretty manual. Hey, a check came in and things like that. So how can we speed that up for people to see what's coming in? They can get all that information and get back. So it's been a really big investment in a lot of time for our team right now as we try to figure out how to get tech to work for us and just more successfully, more efficiently. And so that's where, yeah, just starting off again, we've just kind of relaunched with new consultants on phase two.
- Brandy: And some of that demand comes from the project. So for example, our projects, we do 1,000 waivers.
- Audrey: Yeah.
- Brandy: We want to do this in paper so we've integrated a waiver, an online waiver platform that is more friendly to communities of color. And so that demand came from the projects, but a large drive is a drive for efficiency internally. And speaking to turnover and staff, in order for us to have a focus on professionally developing our staff and giving our staff maybe the capacity, we can't have them spending 90% of their time in administrative tasks that could be automated. And so we're really looking what is one of the major drivers of this is how can we let our staff focus on services to projects, but still maintain integrity in our back office and make sure that we have proper accounting and that we have good documentation and so we can't sacrifice that.

- Brandy: And so the work that Audrey is leading, it really combines our need for internal efficiency with the desire of projects to have access to better systems, to have access to mobile tools and actually to have an insight into those systems themselves. And so a future iteration will be a portion of our sales force that is available to projects, for example, but that's much further to down the line focus internally first and making sure that the system has a lot of integrity before we let in the projects into those systems.
- Audrey: Yeah.
- Angela: I think for CNDC, we've had two really big surges of technology. When I first started in 2013, we were still tracking everything in Excel spreadsheets and Word documents. And so we very, very quickly started implementing a Salesforce tool to really help us start tracking all of that so we could get away from that. We were losing a lot of data doing it that way. People couldn't work in the same document at the same time. This is even before we were using Office 365 and we could be in a document at the same time. So it was inefficient and also just not a great... It was just not a great way to store data from a security standpoint. So we implemented Salesforce, which has been a really great tool for us. We have built on our initial build out of that since we first implemented that.
- Angela: So we did a lot of technology, different technology. We implemented a lot of technology platforms in those first few years when I started. And then when the pandemic hit, it became very clear when we weren't going to return to the office right away that we had to do a lot of things to really get us completely into the cloud. So we integrated everything into Office 365. We had been using Abila so we switched to Intacct. We got everything into a cloud-based system so that we could get rid of our physical server at the office. We also focused a lot more on security around technology. As we went remote, there were... Just the threats, security threats just changed drastically as the pandemic hit. So we had to do a lot more training with our staff around what to look out for and what to be aware of as everybody was working remotely.
- Angela: So, yeah, so we've done a lot over the last two years to really build our infrastructure and made additional changes to Salesforce as well. We have a lot of the same goals that Community Initiatives does, including making our Salesforce system accessible to our projects. It would be great if they could just go into our system to be able to see what are your active contracts? What are your active grants? Here's your grant agreement for this specific grant. Those kinds of things so that we're not having to constantly send that information to them. So that is definitely a goal of ours over the next three years. So yeah, we've had a big shift in technology over the last two years and I see that shift continuing into the future as well.
- Nicki: I'll just add, as we all know, technology is an investment, is a financial investment that takes a lot of, not only from staff capacity standpoint, but dollars wise as well. Well, one of the things that we are still trying to figure out so if anyone has solutions here or recommendations is a payment processing platform that has great customer service, I know that doesn't exist. And also being able to track easily and set up easily. So I think that is one that we continue to think we have a solution and then for odds and ends reasons has not. We are still finding that unicorn, so if anyone knows of the unicorn, please send those far away.



- Sarah: Thank you all. And there was a question in the chat about technology systems so if there's anything else you want to recommend, please feel free panelists and otherwise. And thank you Carl for putting in the Community Initiatives info. And the next question, I think some of you may have touched on with the grants to individuals and all of our seller shout out next week's call is with Josh Sadly of social impact comments about grants to individuals. So don't miss that. As one change you've seen amongst your projects and your portfolio, but what other changes have you seen in your projects since your founding and your portfolios as a whole?
- Brandy: At CI, I already talked at a high level, we started as a place based sponsor and so we have a lot of direct service projects and over time we've evolved into a large portion of our project providing professional services. And the kind of support that we need for that is much different. We also have a growing body of projects whose professional services focus in and around technology. So as we are improving our own technology, we have projects who are really on the cutting edge of using technology for social good and we're learning along with them. We saw a jump and increase in model Cs during the pandemic. And so we have had an increase in model Cs in our portfolio. The vast majority are still model A projects.
- Brandy: And as the philanthropic sector continues to evolve, we are certainly continuing to see interest in fiscal sponsorship from philanthropists. We are in Silicon valley, and so looking at projects who might have otherwise gone to a community foundation or a scholarship donor advised fund or started an initiative, think about fiscal sponsorship as a way to meet their philanthropic goals. And that is something that CI is seeing more and more in business development and that our team is evolving our intake process in order to really assess whether the philanthropic project is really going to be well suited by a C3 structure. So we're definitely seeing that evolution.
- Brandy: The other thing I would say is that in the last few years, we have been called to increase our ability to operate internationally. And so we have now an international PEO that employs employees outside of the country. We have a system for contracting out of the country and we have a large body of international contracts that we are managing. And we now have new many, many more international funders. So funders based outside of the country who have very different requirements and their grant agreements about the types of policies that CI should maintain. And so we're definitely seeing changes in the projects that are coming to CI. And again, what we're still looking for is ongoing commitment to community self-determination wherever that is and on whatever issue it is.
- Angela: Yeah. I think our biggest changes have been the growth in the number of our fiscally sponsored projects that have been outside the Denver Metro area. I mentioned that already. We have also seen an increase in the number of arts groups that on the CNDC which is actually hard for us because one of our largest funders of... One of the largest funders of arts groups actually doesn't fund fiscally sponsored projects. So we acknowledge that, we're very transparent about that. Some groups decide to come with us anyway, some groups decide not to. And then we also have seen an increase in the number of groups who want... We primarily practice model A fiscal sponsorship. We've seen an increase in the number of groups who want to practice a different model, which



we've been able to do over the last couple of years as those needs have increased. I would say those are our biggest changes. Nicki, would you add anything to that?

Nicki: No. No. I think you covered the major changes.

Sarah: Now it is time for the rest of you to ask your questions and we do have one in the chat. Do sponsors have a service level agreement or similar expectation with each project?

Brandy: And that question comes from CI so I think we can guess that CI does not currently have that, but we do have a set of policies outlined in our fiscal sponsorship agreement that establishes some baseline supports that we will provide projects and some baseline expectations, but we don't have a service level agreement for each project. So we'll leave it to you, CNDC.

Angela: Yeah. We're the same. We have the expectations in our MOU and our project handbook, but not beyond that.

Sarah: Additional questions, feel free to put them in the chat or just shout them out. Otherwise, I may ask Nicki, coming, and those of you who came from project management also, were there any surprises moving from one fiscal sponsor to another or anything that felt very similar and moving from project level to fiscal sponsor? Kind of the same question.

Nicki: I would say it's all kind of the same animals, just kind of how each sponsor tackles the things that come up and you kind of, I think to that point, the service level expectations where those boundaries are between us and projects and kind of keeping that line. I think technology was slightly different both when I moved to Community Initiatives and when I came back to CNDC. Those things has changed and how we used it. I think it's an evolution, right, in that space of like as it's always evolving, but really trying to figure out that efficiency piece. And I think how each sponsor calculated risk and dealt with that, I think was also a major change.

Angela: I think coming from a project over to the fiscal sponsor side, I was surprised by the differences in the needs and the differences in the backgrounds of each of our project leaders. I'm obviously new my experience. I had led an organization prior to leading a fiscally sponsored organization. So I had a background of... I think I had a baseline of understanding around budgeting and financial management and those kinds of things. So was surprised to learn that not all of our project directors had that. So I think that was a big surprise to me and the level of support that was needed from the fiscal sponsor to each of those project directors and the level of support and how different it was for each of those project directors.

Audrey: I would just say coming from being the ED of a fiscally sponsored project, I feel like my mom used to joke that when I was a teenager that I would get what I deserved in terms of my terrible behavior. I feel like now being on the side, I was a terrible partner in terms of wanting the level of oversight and what I had because I also feel like that brings a really great experience to it of understanding why these things have to happen and

how you have those conversations. But I think for me, it is very interesting to be on the other side of it and just to have to go through that experience, but it is also, I feel like a great way to be able to enter with projects and talk about, be able to explain how this model, when it works well, what are those components that need to be there and how can you really make this work for you?

Audrey: And so I really enjoy that piece of it to be able to come from that perspective because to Angela, folks come from all different backgrounds and here we have a lot of folks that are coming from the corporate world. And so being able to just speak kind of that nonprofit language and what that means and what risk and compliance means under this umbrella is very different to what people are used to. And so how you can translate that and get folks to understand kind of how the flow of this works here.

Nicki: I also just add really quick, I was thinking about, I think a major difference also for me was the difference in regions. So being at a fiscal sponsor in Colorado has different in funders and different just regional capacities, which is different from being in the Bay. And just I think I was surprised to learn just there's a lot of money in the Bay, for example, and how that really shapes the projects that are coming to you and the funders that are funding those projects. And not that there's not money endeavor, there is for sure, but the community is much more, I would say, tight knit. So I would say that the community of where the sponsor is also had an impact, the experience of this fiscal sponsor.

Sarah: And Brandy, did you want to add anything?

Brandy: I guess, I would say on that, I think one of the greatest tensions between the leadership of the project and the leadership at CI is a risk tolerance. And also, I wasn't a director of the fiscally sponsored project, but I was a director of a nonprofit, but I only had to consider my nonprofit and my community. And I think we often see some tension with our projects because I'll have to say look, I'm stewarding funds from 110 projects and I can't let you do anything that's going to hurt the other 109. And so in that, this is a little bit like a co-op model. I need you to slow down and I need us to think about other ways to act a little bit more cautiously. And that I think is an ongoing tension between us and the projects and maybe particular to the fact that people get to me because they want to do something risky.

Brandy: And I guess the other tension that I see is the kind of the sense of urgency. We are trying to operate systemically so that we can do something for one project and replicate it for another. And of course, our products want to move really fast and they want to move on their urgent matter right away. And we both have to, I think to Audrey's point, we have to acknowledge that and name it and value it and then also say, but also, I can't let you use Facebook because if you do, nobody else can. So could we talk about another way for you to meet this goal? And I just, I think those are ongoing tensions. And I think there's a question here about customer service in the chat and I think our customer services start from the point of saying what you have just said is valid and your need is there and we want to help you meet it.

- Brandy: And also we also have our own needs as a fiscal sponsor to be able to serve all of you with quality. And these are in tension right now and I acknowledge it and let's try to work forward through that. I think our client services team comes to CI with a background in customer service. One of the things we're really trying to do is cross train with our finance team. We've had a growth in our finance team and the finance team primarily comes from the corporate sector, with less experience in the nonprofit community.
- Brandy: And so I think our effort on customer service is really building a bridge with our finance team and all of us having a shared understanding of what it means to be a customer service organization. And that's ongoing work for us because we all have our own specialties and we all come to the work from a different place. But our experience is that when we hire on the customer service side, those folks tend to come from the nonprofit sector and when we hire on the finance side, those folks tend not to come from the nonprofit sector. And so we have to do a bridge building internally in order to provide a cohesive set of customer service purchased through our projects.
- Angela: I'll build on the customer service piece of that. Thank you Brandy for starting that conversation. I think what is hard for, because we too, our program and administrative teams and I think even HR to an extent have much more of a customer service background than our finance team does. And I think what we have tried to build into our interviewing process is that you don't just get to come into the organization and just do accounting. So much of our accounting or our finance team, so much of what they do is interacting with our projects. And so the customer service piece of that is so important. That doesn't mean that we always get it right. And we're still trying to figure that piece out of how we hire for customer service in addition to accounting.
- Angela: But I think we're working on that. We have a, I guess rule for lack of a better word in our organization that we reply to emails within 24 hours even if it's to say I don't have an answer for you right now, but I'm working on it and I'm going to get back to you as soon as I can. And again, that it doesn't mean that we always meet that, but we try really hard to and I think what I've tried to build into my teams is because every time a project emails us, it sounds like oh, I need this back in like 30 minutes because everything is urgent.
- Angela: So what I've tried to build into my teams is asking like I can get this to you week. Is that okay? Or when do you need this back? Trying to meet our projects part way. Here's my expectation of when I can get this to you. Does that match your expectation? So that has been a key piece of how we try to deal with customer service, but it's hard and because it's all everything that we do is interacting with projects and the customer service piece, it's like all we do all day long.
- Sarah: So there are three questions in the chat I just want to make sure we acknowledge. One I think relates to this about whether you use ticketing systems, one about the increased cost of technology and how you're assuming that either as the sponsor or passing it onto projects. And one about any advice you have for staying sane and productive in the work. And we have seven minutes left, so we'll see how far we get.

Nicki: As far as the ticketing system, we don't use a ticketing system for project requests. I think that there is a fine balance between finding efficiencies and also making them feel like that they have someone that they're supporting them they can always go to and all of those things and so trying to marry the two. So we have not moved to a ticketing system at this time.

Audrey: And yeah, I think that question came from Community Initiatives. We have looked into ticketing systems here. I think that we've seen that the help desk function on them seems to be the most enticing, just the way that it's more interactive in terms of how folks can pose questions and get some automated responses in terms of like hey, I want to throw an event and like we can tailor what information is sent out. And I think looking at how we can utilize some functionality like that. And also, yeah, to that point, figure out since we are just dealing with folks all the time, what is that best way and is the ticketing system the right approach or making sure that we're just being as communicative as possible, getting back to focus as quickly as we can.

Audrey: I think to answer, even if we don't have an answer, just that we've seen it, we're working on it because I think what we've seen is just the complexity of the questions that we get lately are not easy answers and they usually do require multiple people involved and it's not just like hey, where's this form? It's like can I do this international contract with these folk? The level of it just takes, it's not just a quick answer. And I think because of that, we are seeing longer response time because it is easy to point someone in the direction of a piece of information, but that's just with the level of our project lately. Those aren't the questions that we get most commonly.

Brandy: And I think to your point, Nicki, I think Carl has used the ticketing system in quotes because we are not Amazon, we don't want people to... As very depersonalized and also we want to investigate all of the tools that corporate America uses and see if there's a fiscally sponsor friendly version that would work for us. Right? So again, trying to build efficiencies on our side so we don't lose people's questions and we know with confidence that we responded and how we responded. And so we're really using ticketing systems to achieve those goals and very early in the investigation.

Brandy: In terms of cost, I think Audrey alluded that we did get the benefit of some funds set aside for technology in a large state of California grant and that specifically goes to benefit the side of our Salesforce that does grants to individuals, but we're making internal investments on top of that to be able to build out the rest of the infrastructure around it. We are not passing on that cost of the projects. We have not increased our administrative fees. And I would just say also another cost that is skyrocketing for us is insurance and especially employment practices, we have a much bigger pool of employees than we did previously. And so one of the other costs we're trying to figure out how to address in a friendly way is the rise of insurance as well as the need for technology.

Angela: Yeah. We also have not passed the cost of technology onto projects and we have not increased our project fee. We did increase our project fee, I think it was in 2016, maybe 2017, but it was not in direct response to increased technology costs. I think the only thing we've passed on is maybe if a project wants additional licenses for Intacct, then

we've passed that cost on. I'm not even completely sure that we've done that, but so far we've not done that. We've just looked at it as kind of included in the cost of doing business. Cost of insurance has been huge for us as well. A few years ago, we did actually start passing on some of that cost around general liability. We started basing cost around square footage of a project's office space. So we started passing on cost in relation to a project's office space. And I'm happy to talk more about that offline if anybody's interested.

Sarah: Thank you. And for closing, any advice to say productive and saying as we do this work?

Brandy: I know when I interview, I used to be a legal aid attorney and you also can't be a legal aid attorney if you can't laugh at some of the worst things that are happening in the world to just get it through. So I think our client services team, we really say hey, you got to be able to take it with a little bit of laughter because the work that people are doing on the other side of you is mission critical. It's really important. It's really important to everybody. And sometimes that's going to rain down a lot of pressure on you to juggle a whole lot of things and we've got to take it with some humor or you won't or we won't see you stay. And we want, I think, we want to professionally develop our staff and that means they need to be here.

Audrey: I'll just reiterate just the piece that, I mean, the humor piece is huge of course and being that how we are able to get some joy. And I think just really remembering the work of the project as well and really focusing on that piece of it. And I think personally, I do this work now because I don't want to be that person anymore. And I love the backend piece of it and being able to support and being able to focus on what's happening at the ground level, what does that mission work and am I able to support that and focusing on that knowing that everything is so pressing, it does kind of allow to be able to see through that and just be able to focus on how can you support, how can you move this forward and continue to support the diversity of these missions and critical work that's happening, so. Trust for me.

Sarah: Angela, Nicki, we are in our last like 30 seconds.

Nicki: That is short. I think continued learning, fun and yeah, impact. I think those are the three things that keep me here.

Angela: Those are all great responses. I don't have anything to add.

Sarah: Awesome. Thank you all. Thank you Andrew and Oliver. Next week grants to individuals with Josh Natalie.

Oliver: Yeah. Huge appreciation to all of our guests today. Wagging our fingers at you. Thank you again Sarah for representing and programming these sessions. We're looking forward to building on the success of the last three sessions. Next week is grants individuals and then we have a bunch of other interesting sessions coming up. We're going to have a sponsor spotlight with, where's my note, with Institute for Education, Research and Scholarships. A regular attendee Newton Lee has lots to share with us.

Oliver:

So thank you for being here. As always, if you think there are ways we can be doing this better, please do reach out and let us know. We're always looking for good ideas. I also want to remind folks of our mentor mentee program. We're looking for mentors now. We have a bunch of mentees looking for mentors. If you have some extra time, you've been doing this a while and you'd like to share with someone, please sign up with us, just reach out to Andrew. Have a great rest of your week everyone. Stay safe, stay sane, stay positive. We can get through this together and we're really glad you spent the hour with us. Have a great weekend everybody.