



THE
PHOENIX
PROJECT

**2008 NONPROFIT LEADERSHIP
AND
SOCIAL ENTREPRENEURSHIP PROGRAM
REPORT**

September 11, 2008

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INTRODUCTION

In July 2008, the Phoenix Project graduated its second statewide class of Virginia's future nonprofit leaders and social entrepreneurs. Over six weeks, the twenty-nine top undergraduate and graduate students hailing from fifteen universities spent over sixty hours during thirty-seven educational sessions studying with forty-two guest instructors before completing twenty-four capacity building projects and four direct service projects for nonprofit organizations and municipal agencies for a total commitment of over 8,000 hours. The program again took place in Petersburg, Virginia, with students residing at Virginia State University.

We have aggregated the responses to more than 1,000 evaluations completed by students, faculty, and community partners. The responses give hard evidence of the value and success of our model. Students reported average increases of between 147% and 252% in their knowledge and efficacy in each of twenty-five key measures of nonprofit leadership and social entrepreneurship. Faculty and guest speakers scored their experiences with the program an average of 9.4 on a 10 point scale. Community partners ranked their overall satisfaction with the program at a 9.1 on a 10 point scale.

This program continues to offer the nation's only statewide model for identifying, educating and networking our next generation of social entrepreneurs.

THE PHOENIX PROJECT'S MISSION IS ADVANCED THROUGH THE PROGRAM

The Phoenix Project is an effort to develop in Virginia a national model for engaging a state's collection of colleges and universities and its next generation of social entrepreneurs and nonprofit leaders in a powerful network with a state's most severely economically distressed communities and to employ that network to ameliorate through social enterprise the effects of severe poverty. We employ three strategies to advance our mission. First, we help build powerful university-community partnerships that infuse our communities with valuable capacity building resources in the form of leveraged faculty, administrative, alumni and student expertise and provide a powerful context in which to test entrepreneurial solutions to seemingly intractable social challenges while furthering the institutions' missions of instruction, research and service. Second, we convene leaders from public, private, and nonprofit sectors and from higher education to determine a collaborative statewide strategy for advancing social entrepreneurship. Finally, we design innovative statewide nonprofit leadership and social entrepreneurship development programs for top undergraduate and graduate students to prepare them for their roles as future social innovators. This report evaluates this third strategy, manifest in our flagship Nonprofit Leadership and Social Entrepreneurship Program ("NLP"), in which students simultaneously learn the challenges facing economically-distressed communities, provide capacity building services to organizations serving those communities, and develop the relationships, knowledge, and courage to become Virginia's next generation of social entrepreneurs.

AN INNOVATIVE PROGRAM APPROACH TO SOCIAL ENTREPRENEURSHIP EDUCATION

Led by a highly regarded faculty including over forty of Virginia's most accomplished scholars, nonprofit executives and practicing entrepreneurs, students engage in lectures, simulations and workshops during the academic session, which is the first two weeks of the six-week program. The intense and innovative curriculum develops the skills, understanding and relationships required to build sustainable organizations and to devise entrepreneurial solutions to our most intractable social challenges. Students explore with guest speakers who are leaders in their fields dozens of critical issues faced by nonprofits and their leaders. During the four-week field experience, students work with nonprofits and municipal agencies, engaging in consulting teams in community and economic development projects critical to the revitalization of the severely distressed community in which the program is held.

The Phoenix Project's social entrepreneurship educational model is innovative in several ways. First, it is both academic and experiential, combining classroom learning with on-the-ground practice with community clients. Second, the academic content couples three components that are generally not offered together: best practices in nonprofit management; theories of leadership and entrepreneurship practice drawn heavily from the private and public sectors; and the causes and challenges of severe poverty—a context that reveals both the greatest need and opportunity for entrepreneurial problem-solving. Third, the curriculum is taught not by a single faculty member, but by a collection of the foremost experts in the particular subfields of the curriculum, exposing students to an unparalleled depth and breadth of knowledge as well as a network of talented professionals upon whom they can call in the future. Fourth, the curricular content itself takes a determinedly statewide (as opposed to local, national, or international) focus, to ensure that students can connect complex business and leadership concepts to communities, leaders and institutions with which they can actually build meaningful relationships in the short-term. Fifth, while curricular concepts are frequently taught from a statewide perspective (i.e., how to form a social enterprise *in Virginia*, or how to engage *Virginia's* unique political institutions in support of one's mission), the experiential component takes place in the context of single severely distressed community to reveal the interconnectedness and complexity of social challenges in a context students can get their hands and minds around. Sixth, the experiential component forgoes the internship model where a student is assigned to a single organization in favor of a consulting model where students work in teams on a portfolio of diverse projects for multiple clients, more closely mimicking the multi-dimensional nature of entrepreneurial leadership. Seventh, the entire program is intense, compressing into six weeks study and practice that might take two semesters to complete in a traditional academic environment, to mimic for students the intensity of the life of effective entrepreneurs. Eighth, the class of approximately thirty-students is recruited from a competitive pool of applicants from more than 40 universities statewide, with few common areas of study, so that the admitted class is diverse and highly qualified and so that graduates can return to multiple institutions to leverage additional interest in social enterprise. Ninth, the program is residential to provide opportunities for students to form the intense interpersonal relationships that will sustain long-term a broad statewide network of future social entrepreneurs through collaboration instead of competition. Finally, in contrast to the model where students are viewed as the mere recipients of leadership programming, students are empowered to take ownership of the program itself, suggesting and testing improvements to the pedagogy in ways that model the inventive leadership we seek to inculcate in our students. The

powerful combination of these characteristics creates a learning environment makes it the first program of its kind in Virginia and the nation.

The Phoenix Project's Nonprofit Leadership Program meets both short and long term needs.

In the short-term severely distressed communities require additional capacity in their nonprofit and municipal sectors to respond to opportunities for revitalization. In the longer term, we need a new generation of highly skilled nonprofit leaders and social entrepreneurs (defined as leaders who can apply entrepreneurial principles to civic challenges through the nonprofit, public and private sectors) to ensure that citizens can more fully realize the promise of the Commonwealth and the nation.

A. Providing Short-Term Capacity to Distressed Community

The Phoenix Project is developing new models for infusing distressed communities with additional capacity for change. Our first efforts, now being replicated statewide, have been developed in Petersburg, the most distressed community in Virginia. This city of 33,000 has the eighth lowest life expectancy of all municipalities in the U.S., the highest illiteracy rate in the Commonwealth (43%), and only one fully accredited public school (out of nine). With Virginia's highest HIV/AIDS rate, 24% of the population experiencing chronic liver disease, and a high teenage pregnancy rate, Petersburg faces myriad social ills resulting from generational poverty.

There is no shortage of understanding in Petersburg of the challenges it faces or of commitment and courage by its citizens to change their circumstances. The community has identified, however, a severe shortage of the additional hands and minds required to build entrepreneurial organizations capable of implementing transformative and sustainable solutions. **In the short term, the Phoenix Project seeks to meet the need for civic capacity in Petersburg by bringing hundreds of highly skilled faculty, administrators, alumni and students from a new consortium of colleges and universities to lend their hands and minds to critical economic and community development projects defined and prioritized by the community.** The colleges' and universities' missions to teach, research and serve are equally furthered by the partnership, which is sustained year-round, but is focused during the summer through the Nonprofit Leadership and Social Entrepreneurship Program. The Phoenix Project is now replicating a year-round partnership model (without the formal summer program) in two additional communities—southeast Newport News in the Tidewater region and along the Route 1 corridor in Northern Virginia, with additional consortia of university partners.

B. Bridging the Nonprofit Leadership Gap

In the long term, the Phoenix Project seeks to close the leadership gap threatening distressed communities by developing the next generation of nonprofit leaders and social entrepreneurs to pursue economic revitalization and social progress throughout the Commonwealth. **It is through the NLP that these future leaders are identified, educated and connected to one another and current leaders in a statewide network.**

The national nonprofit sector is comprised of more than 1.1 million registered organizations, employs more than 11 million people and the equivalent of 5.7 million full-time volunteers and generates annual revenues exceeding \$1 trillion. The national rate of growth in the number of nonprofit organizations is an astounding 40% over the past fifteen years. Even more astounding is the growth rate of nonprofits in Virginia during the past fifteen years—71%, to 35,000 organizations.

Nearly 80% of the nation's nonprofit organizations are led by Baby Boomers of which the majority will retire by 2009. This exodus from the sector will be massive. In the next ten years, 640,000 new executives (*not* entry-level staff) will be needed in the nonprofit sector—the equivalent of 50% of every MBA class from every university for the next ten years. This growing deficit between supply and demand is referred to as “The Leadership Gap.” Institutions of higher education have neither anticipated nor kept pace with the growing demand for nonprofit leaders and social entrepreneurs. Even the most progressive MBA programs are graduating no more than a handful of individuals to fill executive level positions. The picture is bleaker at the undergraduate level. **While 68% of undergraduates nationally say they would consider employment in the sector, only 6% say they know how to secure or succeed in those jobs.** Little infrastructure exists for recruiting, developing and retaining the skilled, committed and diverse workforce Virginia's nonprofit sector requires to thrive in the decades ahead. The Phoenix Project seeks to devise strategies to meet this need.

The imminent need for qualified nonprofit executives is compounded by the fact that most nonprofit training and certificate programs aimed at traditional students are cursory and rarely reach beyond the teaching of basic management topics to the larger questions of sustainability, scalability, entrepreneurial business practice and leadership for systemic change. Most nonprofit management degree programs attract individuals already established in the field. **The Phoenix Project arrives at precisely the moment when nonprofit leadership development is needed most, and proves an appropriate match for the desires, skills and characteristics of tomorrow's nonprofit executives and social entrepreneurs—the Millennial Generation.**

The Millennial Generation, sometimes termed Generation Next, came of age following the terrorist attacks of September 11, 2001. Now between the ages of 17 and 26, Millennials are more socially conscious, civic minded, and service oriented than any recent generation. Millennials identify themselves as ambitious, open-minded and optimistic. They are confident, self-assured and think outside the box. **More so than the previous generation, Millennials believe they are capable of bringing about positive change in the world, making them a natural match for the nonprofit leadership deficit.** What's more, the Millennials' natural propensity for entrepreneurial action and creative thought will ultimately serve the nonprofit sector well. Where past methods have failed, tomorrow's nonprofit executives will dream of ways to succeed, conquering challenges and adversity.

Additionally, Millennials utilize cell phones, the Internet, email and instant messaging programs multiple times a day, and because of this, possess a natural proclivity for multitasking. Millennials are more team-oriented than generations past, but because of this sociability—and combined with their preference for multitasking—become bored with traditional classroom activities. The Phoenix Project's dual approach, combining interactive lecture and hands-on, experiential learning, proves a strong match for the Millennials' learning preferences and needs. The Millennials' comfort with utilizing new technologies also extends to their comfort with attempting new practices and collaborating with partners from a variety of sectors. They can understand and engage members of multiple sectors, easily moving among them to bring about efficient, effective and innovative results. These qualities will serve them well as social entrepreneurs, leaders who combine passion for a social mission with business-like discipline, innovation and determination. While often found in the nonprofit sector, social entrepreneurs are drawing on skills and relationships from the private and public sectors to bring brilliant new solutions to our toughest social challenges in the Commonwealth and around the globe.

The Phoenix Project trains tomorrow's nonprofit leaders and social entrepreneurs in the context of a distressed community. Distressed communities rely disproportionately on the nonprofit sector in the absence of a healthy private sector offering both employment and a tax base to fund government services. When the leadership gap's full effect is felt, distressed communities in Virginia and throughout the nation will be devastated as the last connection to viable recovery is severed. Equipping future leaders with an understanding and sensitivity to the needs of distressed communities is key to ameliorating this impact.

The annual Nonprofit Leadership Program meets the need for informed, thoughtful and active leadership to guide Virginia's nonprofit organizations as the Baby Boom generation retires and ever increasing demands are made on the sector. Likewise, the Phoenix Project meets the need for an expanded and skilled civic workforce to build capacity within the nonprofit sector in Virginia's most distressed communities.

SUMMARY OF KEY CHANGES TO THE 2008 PROGRAM

As a result of the nearly 2,000 evaluations conducted during the 2007 program, a number of changes were made during the second year of the statewide initiative to ensure continued satisfaction among participants, faculty members, and community partners, while maintaining the core components of the model that had proven successful in substantially increasing students' knowledge across the 25 measured areas. These key changes can be summarized as follows:

- *Duration* – The program was shortened by two weeks. This summer's program ran a total of six weeks (June 15 - July 26). Whereas in the 2007 program weekends were loosely programmed, making greater use of weekends in 2008 allowed us to cover roughly the same ground on a shorter schedule.
- *Academic Classes* – Eliminating duplication of curricular topics as identified in the 2007 program evaluations allowed us to reduce the total number of academic sessions by nearly 30% to 37 sessions (of approximately 1.5 hours in length each), thereby preserving innovative content but delivering it more efficiently.
- *Clinical Faculty Members* – Rather than utilizing graduate students, seasoned professionals with substantial experience as entrepreneurs in private business and in the nonprofit sector were recruited to supervise and guide community projects as clinical faculty members.
- *Elimination of Superteam Projects* – During the 2007 program, in addition to the portfolio of 4-5 projects for community partners assigned to each student team, student teams were assigned to work together on one of three group projects. Such projects were eliminated to ensure the quality and timeliness of portfolio projects.
- *City Soul Event* – In previous years, students were asked to plan and host an event, known as *City Soul*, which allowed area nonprofits to showcase their services to the community and attracted citizens with live music. This year, rather than organizing and hosting a stand alone event, the Phoenix Project partnered with the Commonwealth's Attorney, the Richmond Time's Dispatch, and inRich.com to host the *Petersburg Intercultural Festival* held at Poplar Lawn Park on July 25-26, 2008, which achieved the same aims as *City Soul*.

STUDENT PARTICIPANTS

Twenty-nine graduate and undergraduate students participated in the program following admissions from a competitive statewide pool of applicants. Admissions decisions were based on a record of academic excellence, leadership, and demonstrated interest in the subject matter. Online applications were followed by interviews with candidates. The following is a profile of the 2008 class:

- *Universities* – Students hailed from fifteen Virginia universities (bold type face denotes universities not previously represented in the program): Christopher Newport University, George Mason University, James Madison University, **John Tyler Community College**, Longwood University, Lynchburg College, **Norfolk State University**, **Radford University**, University of Richmond, Virginia Commonwealth University, Virginia State University, Virginia Tech, **Virginia Wesleyan College**, Washington & Lee University, and the College of William & Mary.
- *Majors* – Students had twenty-two different majors: business entrepreneurship, business finance, communications, English, geology, government, health and human services, history, homeland security, integrated studies, international relations, law, marketing, mass communications, political and persuasive communications, political science, psychology, public policy, religion, rhetoric, social work, and sociology. The average GPA was 3.5.
- *Classes* - 24% were rising juniors; 41% were rising seniors; 21% had just graduated; and 14% were enrolled in graduate programs.
- *Diversity* – The female/male ratio was 77%/23% and 50% were racial/ethnic minorities.
- *Prior Academic Classes* – 6 (21%) students indicated having participated in prior classes focused on the nonprofit sector or entrepreneurship.
- *Financial Need* – The program tuition for the six weeks was set at \$1,750, reflecting approximately 40% of the actual cost per student to administer the program. Despite a commitment by the Phoenix Project to cover 60% of the total program cost for each student, the admitted class demonstrated significant financial need. In total, 27 of the 29 students received financial assistance from their home university or financial aid from the Phoenix Project to support their attendance at the program. In total, universities contributed \$36,500 in support for their students' attendance and the Phoenix Project's corporate partners provided scholarships totaling \$11,750.

Goals for 2009:

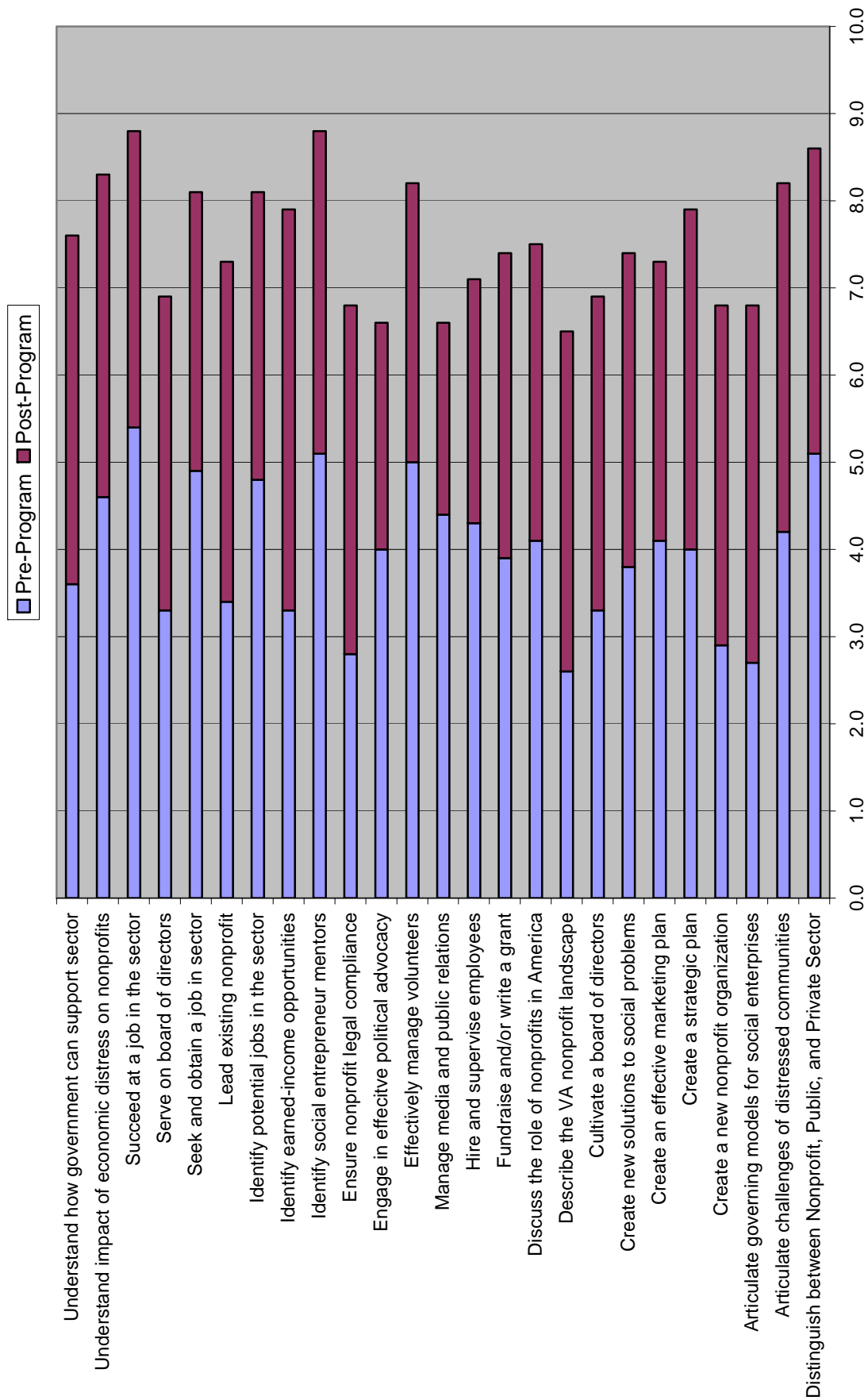
- *Increase the gender balance of the class while maintaining commitment to high academic performance.*
- *Secure continuing commitments from partner universities to assist in covering the costs of participation by their students, if admitted.*

PROGRAM IMPACT

The Phoenix Project tracked twenty-five aspects of the program's impact on student participants. We administered pre- and post-surveys to students asking them to quantify on a scale of 1-10 their preparedness to enter the nonprofit sector, to lead and manage an organization, to define major trends in Virginia's nonprofit sector, and to succeed as social entrepreneurs, among many other measures. To ensure the objectivity of responses, students were not given access to their pre-program survey responses when completing their post-program survey six weeks later. Results revealed that the program had a significant positive impact on every substantive area tested. In each category, average response reflected an increase of between 147% and 252% (reflecting a minimum increase of 2.1 and a maximum of 3.9 points on a 10 point scale) in students' knowledge, preparedness and sense of efficacy as a result of the program. These results are especially satisfying in light of the fact that these students self-selected in competing for admission to the program and thus brought a higher base level of commitment to concepts of leadership and entrepreneurship than the general student population.

The following chart reflects these results in detail. Students rated their preparedness for each of the areas with 1 being the lowest and 10 being the highest. The language on the far left describing each topic measured is abbreviated for space.

Impact of the 2008 NLP on Student Participants



PROGRAM IMPACT (CONT'D)

On a scale of 1 to 10, students also rated their satisfaction with a variety of additional outcomes of the program, including opportunities to develop and test leadership and entrepreneurship skills (8.2), providing assistance to a distressed community (8.7), opportunity to develop a network of like-minded peers (8.9) and the opportunity to engage with current nonprofit and civic leaders (8.6). As in previous years, some students were less satisfied with the rigor of the program schedule, which some thought too demanding.

In the post-program evaluations, students were asked to comment about the most helpful aspects of the program. Student responses included: the opportunity to engage with nonprofits as a professional and in a professional setting, developing friendships with their fellow students, the opportunity to build their professional skills, exposure to a wide variety of leaders in the sector, working in a team setting, gaining some real world experience, and understanding the qualities required to be a successful social entrepreneur. When asked whether they would recommend participation in the program to their friends, every student indicated that they would make such a recommendation.

The results demonstrate that the program succeeded in equipping participants with additional knowledge and skills necessary to become effective nonprofit leaders and social entrepreneurs eager to tackle the complex challenges facing economically distressed communities in the Commonwealth and beyond. Despite these positive results, however, the Phoenix Project remains committed to continuing to innovate and improve the program. A number of recommendations from students, guest faculty, and clinical faculty members will be considered in preparing for the 2009 summer.

ACADEMIC SESSION

During the two week academic session students attended three to four classes per day, each class lasting approximately 1.5 hours. In total, students participated in thirty-seven academic classes led by forty-two faculty members recognized for their leadership and knowledge in relevant topics. Some classes were co-taught by more than one faculty member. All students who sought academic credit from their home institutions for participation in the program were successful. Students generally received a total of six academic credits.

The 2008 curriculum was reviewed by academic and sector leaders from throughout the Commonwealth. In total, over seventy-five members of the Phoenix Project's Higher Education Advisory Team¹ were invited to provide comments and suggestions regarding the proposed curriculum. The final 2008 program curriculum reflects a shared belief that the recipe for a successful social entrepreneur includes four primary ingredients:

- (1) An understanding of the theories, policies, practices, and challenges that have historically characterized and shaped **nonprofit leadership** in Virginia and America;

¹ For a complete list of the members of the Higher Education Advisory Team, please refer to Appendix A.

(2) An understanding of the tenets of **social entrepreneurship** and the emerging models for building transformative and sustainable solutions to our most pressing economic and societal challenges that rely on successful strategies drawn from the public and private as well as nonprofit sectors, and recognition of the opportunities for innovation in this field;

(3) Possession of the **toolbox** of skills and professional relationships employed by successful social entrepreneurs; and

(4) **Context** in which to see and apply these lessons and develop the personal courage required to forge new paths to sustainable, systematic societal change; the academic context provided by the NLP is a focus on Virginia's challenges, opportunities, institutions, and assets and the experiential context is the battle alongside community leaders to revitalize a Virginia community facing severe economic distress.

Significant revisions to the curriculum were made between the 2007 and 2008 program. The 2007 program consisted of sixty-one learning modules led by a total of thirty-seven faculty members. Many subjects during the 2007 program stretched across two or more 1.5 hour sessions. For the 2008 program, thirty-seven academic classes were offered, each topic was confined to a single 1.5 hour session. Each class was an element of one of the four ingredients outlined above and intended to provide students with an introduction to that specific topic area. Every class was designed to provide unique information so as to prevent duplication of content. The ingredients were offered chronologically, with limited exceptions to accommodate the availability of the desired faculty member for a given topic.

Students generally found the academic session to be of high value, rating it at 7.6 on a 10 point scale. They were most satisfied with the faculty members' knowledge overall (7.6) and enthusiasm (7.5). Assessments done by each student following each academic class yielded the following average results: enjoyment of the presentation (7.8), enjoyment of presenter (8.0), amount of new information garnered during the class (7.7), and value of the class to career objectives (7.8). Despite a significant reduction in the number of classes between the 2007 and 2008 programs, students continued to express less satisfaction with the number of curriculum readings and the rigor and pace of the academic session. Many students felt the pace of the academic program was extremely demanding.

Guest faculty members were also surveyed regarding their experience with the program. Of the forty-two instructors participating in the 2008 program, fourteen had participated in the 2007 program and twenty-eight additional faculty members were identified and recruited. The identification and cultivation of a significant quantity of new faculty members was necessitated by the curriculum revisions discussed above, a desire to utilize the talents of an ever increasing sphere of interested individuals, and, in very limited circumstances, based upon unfavorable rankings from the students in the prior year's program. Faculty members rated their overall experience with the program highly (9.4 out of 10). Faculty members also scored each aspect of the program with high ratings: pre-arrival communication (9.1), helpfulness of staff upon arrival (9.5), student interest and engagement (9.0), and facilities and equipment (9.3). Nearly all faculty members completed surveys and all respondents indicated that they would be interested in returning as a guest faculty member for future programs.

Goals for 2009:

- *Eliminate any remaining duplicative content so that the curriculum can be conveyed in 30 classes.*
- *Encourage students to collaborate further with and utilize guest faculty members as a resource during the completion of the community projects during the subsequent experiential session.*

Following is a list of the thirty-seven academic classes offered during the 2008 program, the name and title of the faculty member(s) leading each class, and the key questions that each class was designed to address:

A. Ingredient One: The Nonprofit Leader

1. Examining the National and International Social Sector

Anne Edgerton, Director of Child Protection and Emergency Response, Christian Children's Fund

Greg Werkheiser, Executive Director, The Phoenix Project

a. International:

- i. How many NGOs are there in the world and what percentage of the global economy do they represent?
- ii. Are nonprofit organizations structured or supported differently in Asia, Europe, Africa, Latin America, the Middle East than here in the United States?
- iii. What are some of the largest and/or most influential international NGOs and where are they headquartered?
- iv. What is the rate of growth of the global nonprofit sector? What factors are impacting this growth?

b. National:

- i. How many nonprofits are there registered in the United States and what percentage of the U.S. economy do they represent?
- ii. What are the demographics for the U.S. nonprofit sector (break down the sector by budget, employees, service areas, issue areas, etc.)?
- iii. What has been the rate of growth of the national sector? What factors are impacting this growth? What region of the United States has seen the greatest growth in the number of nonprofits?
- iv. What are some of the largest and most influential national NGOs and where are they headquartered?
- v. What are the demographics of the leadership staff of U.S. nonprofits (gender, racial, age, time in position, backgrounds and experience, etc.)? Is this changing and, if so, how? What is the average annual compensation?
- vi. How many nonprofits survive their first two years and what is the most common cause of failure?
- vii. What are the primary trends experts are observing within the national nonprofit sector?

2. Examining the Virginia and Petersburg Social Sector

Deborah Williamson, Executive Director, Virginia Network of Nonprofit Organizations

a. Virginia

- i. How many nonprofits are there registered in Virginia and what percentage of the Virginia economy do they represent?
- ii. What are the demographics for the Virginia nonprofit sector (break down the sector by budget, employees, service areas, issue areas, etc.)?
- iii. What has been the rate of growth in Virginia? What factors are impacting this growth? What region of Virginia has seen the greatest growth in the number of nonprofits?
- iv. What are some of the largest and most influential Virginia nonprofits?
- v. What are the demographics of the leadership staff of Virginia nonprofits (gender, racial, age, time in position, backgrounds and experience, etc.)? Is this changing and, if so, how? What is the average annual compensation?
- vi. What are the primary trends experts are observing within the Virginia nonprofit sector?

b. Petersburg

- i. How many nonprofits are there in Petersburg and what percentage of the Petersburg economy do they represent?
- ii. What are the demographics for the Petersburg nonprofit sector (break down the sector by budget, employees, service areas, issue areas, etc.)?
- iii. What are some of the largest and most influential Petersburg nonprofits?
- iv. What are the demographics of the leadership staff of Petersburg nonprofits (gender, racial, age, time in position, backgrounds and experience, etc.)? Is this changing and, if so, how? What is the average annual compensation?
- v. What relationship do Petersburg nonprofits have to the city government? Major foundations? The business community?

3. The Traditional Role of Nonprofits in the American Society

David Carter, Director of Programs and General Counsel, The Phoenix Project

Brandon Kliever, Program Assistant, The Phoenix Project

- a. Why was the nonprofit corporation created, when, by whom and how?
- b. Who benefits from nonprofit organizations? Who are the “customers,” “clients,” “consumers,” and “shareholders” of a nonprofit corporation?
- c. How is a nonprofit different from a for-profit corporation? From a government organization? What are nonprofits allowed to do that for-profits are not and why? What are for-profits allowed to do that nonprofits are not and why?
- d. What other advantages and disadvantages are there to being a nonprofit corporation?
- e. What role “should” nonprofits play in society?

4. Nonprofit Formation

Marion Werkheiser, Associate Director, The Phoenix Project

David Carter, Director of Programs and General Counsel, The Phoenix Project

- a. What is a 501(c) corporation? What are the various forms of 501(c) corporations? What percentage of nonprofit corporations are public charities?
- b. How does one form a nonstock corporation in Virginia? What is the purpose of Articles of Incorporation? Bylaws? Mission Statement? What is the role of the State Corporation Commission?
- c. How does a nonstock corporation obtain tax exempt status? What forms have to be completed? What are the materials that must be submitted? How long, on average, does the formation process take to complete? What are the costs?
- d. What other registrations must a public charity complete in Virginia to be operated lawfully? What if it is soliciting contributions?
- e. What policies should a nonprofit organization consider adopting when it is being created if it anticipates seeking tax exempt status?
- f. How are nonprofits dissolved?

5. The Board and The Executive

Wally Stettinius, Chairman and CEO (former), Cadmus Communications Corp.

Michael Caplin, Chairman, Turtle Island Consulting Group

- a. What is the purpose of a nonprofit Board of Directors? What are their legal responsibilities? What other responsibilities do Board's frequently assume? How is a nonprofit board the same/different than a for-profit board? How can you find opportunities to serve on a nonprofit board?
- b. What are the qualifications of a good board member? Who chooses board members and how? How are they replaced over time?
- c. What is an example of a great board of directors? What is an example of a dysfunctional board of directors? What makes them great or dysfunctional?
- d. What is the role of the Executive? What are his/her legal responsibilities? What are his/her other common responsibilities? Is there a difference between a President and Executive Director?
- e. What duties can the board delegate to the Executive Director and which cannot be delegated? What happens when the board and the Executive Director disagree? How should the Executive Director's compensation be determined?

6. Donors and Grant-makers

Najmah Thomas, Program Officer, The Cameron Foundation

- a. How much support is provided to the global, national and state nonprofit sectors, respectively, by individuals, private companies, foundations, government and others? What motivates each of these groups to give and what are the advantages and potential disadvantages for organizations receiving contributions from these funders?
- b. How big is the average gift to a Virginia nonprofit organization? Who are the top individual, corporate, and foundation donors in Virginia? In Petersburg? Who are the beneficiaries?

- c. What forms can contributions take? Are there restrictions on the amounts or types of contributions nonprofits can accept or how they can use them?
- d. How much does Virginia state government provide to nonprofits? Which nonprofits are state-supported?
- e. What are foundations? Donor-advised funds? What are the legal requirements regarding expenditures by foundations? What is considered an expenditure for purposes of the 5% requirement?

7. The Intersection of Nonprofits and The Public Sector

Joe Szakos, Executive Director, Virginia Organizing Project

- a. Why would nonprofits want to work with local, state and federal governments?
- b. Are there any restrictions keeping nonprofits from working with governments? Can nonprofits lobby elected officials? What activities are considered “lobbying” and which are not?
- c. Can nonprofits endorse candidates for public office? Which activities would be considered intervening in a political campaign?
- d. If an organization is concerned about the requirement that influencing public policy not be a “substantial” part of its activities, what options are available to the organization? How does the 501(h) election work? Once you’ve made the election, is it permanent? What are the expenditure limits under this test? What is the distinction between direct and grassroots lobbying?
- e. How can public officials support nonprofits? How can nonprofits support public officials?
- f. What are some examples of national, Virginia, and Petersburg nonprofit organizations partnering with local, state or federal government?

8. The Leadership Gap and The Millennial Generation

Julie Owen, Assistant Professor of Leadership and Integrative Studies, George Mason University

- a. What is the Leadership Gap? How did it form, when and why? Is it a problem? If so, for whom? Are there any positive effects of the Leadership Gap? If so, for whom?
- b. What are the strategies being advanced for closing it? Which do you think will be most effective?
- c. What are the demographic characteristics of the Millennial Generation? What are their character/personality attributes? What are they looking for in their professional careers? How does the Millennial Generation differ from Baby Boomers? Gen. X’ers?
- d. What opportunities are available to Millennials within the nonprofit sector nationally? In Virginia?
- e. How will successful nonprofits change or adapt to attract and retain the Millennial Generation?

9. Governance and Compliance

Marion Werkheiser, Associate Director, The Phoenix Project

David Carter, Director of Programs and General Counsel, The Phoenix Project

- a. What are the requirements that must be met before the board of directors can take action on pending business? What notice must be given? What is a quorum?
- b. What are excess benefit transactions and what steps should be taken to avoid them within nonprofit organizations? What are the repercussions for engaging in an excess benefit transaction?
- c. What are conflicts of interest? What should a board member do if he/she has a conflict of interest?
- d. Do nonprofit organizations have annual reporting requirements? What are the requirements? What trends are there in the changes to the reporting requirements?
- e. What is the Unrelated Business Income Tax? When would an organization be required to pay the U.B.I.T.?

B. Ingredient Two: The Social Entrepreneur

10. Social Entrepreneurship in the Nonprofit Sector

Venkatesh Raghavendra, Chief Philanthropy Officer, American India Foundation

- a. What is social entrepreneurship? Where did the term originate, from whom and why? Why are there many competing definitions and which seems clearest and why? Are all nonprofits social enterprises? Why or why not?
- b. What are the characteristics of a “typical” social entrepreneur? How are the leadership styles and skills of social entrepreneurs comparable to those of other sectors?
- c. Who are some leading social entrepreneurs in the world? In the United States? In Virginia? In Petersburg?
- d. In what issue areas are social entrepreneurs working?

11. Social Entrepreneurship in Corporate America

Erika Herz, Manager of Sustainability Programs, Batten Institute of Entrepreneurship and Innovation, Darden School of Business, University of Virginia

- a. Can a for-profit business person be a social entrepreneur? What values and practices do social entrepreneurs adopt from the private sector?
- b. What are examples of social entrepreneurship within corporate America? How does a for-profit company balance their responsibilities to shareholders while addressing societal issues? Is there a hidden agenda? How do shareholders of private companies view the social missions of their businesses?
- c. What is triple bottom line accounting? How does triple bottom line accounting differ from traditional accounting principles? How might triple bottom line accounting promote social entrepreneurship within corporate America?
- d. What is an intrapreneur? How can intrapreneurs have an impact on corporate behavior?

- e. What is the Low-Profit Limited Liability company? What is the status of the initiative to create this form of entity? What would the impact be on social entrepreneurship?

12. Sustainability Solutions I: Financial

Lisa Whitaker, Associate Director, Center for Community Development and Social Justice, Lynchburg College

- a. How can nonprofits earn money instead of getting it through solicitation of grants and contributions?
- b. What are examples of nonprofits that are earning money through fees for service? How much money do they make and how do they apply it?
- c. What are examples of nonprofits that are earning money through sales of products? How much money do they make and how do they apply it?
- d. How much money can nonprofits earn before they jeopardize their nonprofit status? What can a nonprofit do if it is earning “too much” money?
- e. How much of the total budget of a nonprofit organization should come from earned income before it is considered a social enterprise? Is there a dividing line?

13. Sustainability Solutions II: Leadership, Mission and Programs

Amanda Antico-Majkowski, Interim Director, Northern Virginia Center, Old Dominion University

- a. How do leaders of social enterprise ensure that the organization continues to have good leadership over time? What is succession planning and when should you do it?
- b. What are examples of social enterprises that have sustained leadership through changing boards and staff? What are examples of social enterprises that have not sustained leadership through changing boards and staff and what can be learned from their mistakes?
- c. How can social enterprises sustain their mission and programs through merger? What are examples of nonprofit organizations that have successfully merged?
- d. How can social enterprises sustain their mission and programs through partnerships? What are examples of Virginia organizations that have effectively partnered?
- e. Is sustainability always desirable—should social enterprises live forever?

14. Scaling Social Impact

Christopher Gergen, Founding Partner, New Mountain Ventures, LLC

- a. What does it mean to scale a social enterprise?
- b. What are the advantages, challenges, risks and disadvantages of scaling an organization?
- c. What is the impact on mission, programs, budget, leadership, impact?
- d. What are examples of national, Virginia, Petersburg organizations that have successfully scaled up their operations? Are there resources or tools available to assist in this process?
- e. What are examples of social enterprises that have not succeeded in scaling their organizations and what can be learned from their experiences?

15. Examining the Lives of Successful Social Entrepreneurs

Christopher Gergen, Founding Partner, New Mountain Ventures, LLC

- a. What motivates them? What do they want to achieve in the world?
- b. What influenced them and their thinking? Who were their role models? Are they “born” or “made?”
- c. Do they have personal traits in common? Do they have prior professional experiences in common?
- d. Who are leading social entrepreneurs under 30? How can other young people make a significant contribution to social change?

16. Introduction to the Social Enterprise Case Studies Assignment

David Carter, Director of Programs and General Counsel, The Phoenix Project

- a. Working in groups of 3-4, students were asked to identify and research a social enterprise having a significant impact on an important social issue. The organization could be located anywhere in the world, but the organization’s impact must be felt locally. As part of the preparation of this assignment, the students were expected to meet in person, by phone, or through email with the individual or organization that was the focus of their study.
- b. Students were asked to prepare a written case study outlining their findings.

17. Student Funding Pitches

Michael Caplin, Chairman, Turtle Island Consulting Group

Ken Dye, Director of Government and Community Affairs, Comcast Metro Richmond

Suzann Wilson Matthews, Chair, The Phoenix Project

Barbara Ukrop, Member, Board of Visitors, The College of William and Mary

Ray Warner, Partner, Smith, Dawson & Andrews, Inc.

Judy Wason, Vice President for University Advancement (retired), Christopher Newport University

- a. Student teams were required to deliver a 5-7 minute oral presentation to a panel of potential funders as if they were requesting funding for the organization that they review for their written case studies. The presentations were intended to be persuasive, shifting from an objective analysis in order to practice the skills required for successful fundraising.
- b. The panel was comprised of friends and directors of the Phoenix Project who have experience reviewing funding requests.

C. Ingredient Three: The Toolbox of Change

18. Inspiring and Managing People

Terry Thompson, Partner (retired), Hewitt Associates

- a. How do social entrepreneurs inspire others? What leadership abilities do you have / lack and how can you strengthen them?
- b. What is the difference between leadership and management?

- c. What are the skills required to effectively manage paid staff? Volunteers? What legal requirements should an Executive Director/CEO/President be aware of regarding the treatment of employees?
- d. What evaluation tools are available to executives to help assess employees' strengths, weaknesses and performance?

19. Running an Effective Meeting

Katie Campbell, Consultant in Nonprofit and Volunteer Management

- a. When are meetings necessary? How long should they last? How should they be organized? Who should attend? When is it appropriate to meet by phone rather than in-person?
- b. How do you make a meeting highly effective for all involved? What tools are available to help you facilitate better meetings?
- c. Why is it important to keep minutes or recordings of meetings where decisions are made? How much information should be contained in the official minutes of the meeting? How much is too much and why?
- d. How should meetings be ended? What are the best strategies for follow up and follow through?

20. Public Relations and Marketing

Bruce Dorries, Chair, Communications Department, Mary Baldwin College

Michael Caplin, Chairman, Turtle Island Consulting Group

- a. What is the value of public relations to your social enterprise?
- b. How can you secure effective print coverage? Television coverage? Radio coverage? How do you write an effective press release?
- c. What are the most frequent and serious errors made in PR or media relations?
- d. What is effective marketing? How much does it cost? How do you know it is effective? What are examples of Virginia-based social enterprises that use marketing effectively?
- e. Where can you get further training in marketing and public relations?

21. Budgeting and Accounting

Celia Broadus, Principal, Accounting Strategies to Solutions, LLC

- a. What is effective budgeting? How can it be used to build and sustain your organization? What categories are typical in a budget? How frequently should you revise your budgets?
- b. How do you estimate costs for programs and events that you have not previously conducted? What are the best practices in budgeting for potential, but unsecured, contributions?
- c. What is the difference between budgeting and accounting? What standards are used for the purposes of accounting? What is the distinction between accrual and cash accounting methodologies?
- d. To whom must you report your finances? What do donors look for when examining your budget and accounting? Who has the right to examine your financial records and for what reasons?

- e. What is an audit and why is it important? Who should conduct the audit and to whom should the findings be reported?

22. Fundraising and Grant Writing

Laurie Rogers, Independent Grant Writer

- a. What are effective strategies for soliciting individuals and corporations as contributors or event sponsors?
- b. How do you identify potential grant opportunities for your organization?
- c. How does one write an effective grant application? What are examples of successful grant applications and why were they effective? What are examples of unsuccessful grant applications and what can be learned from their example? When should you partner for grant requests?
- d. How much time / effort / money should an organization spend on fundraising and how much should the organization have to show for that investment?
- e. Where can you get further training in fundraising?

23. Program Evaluation

Elaine Summerfield, Program Officer, The Community Foundation serving Richmond and Central Virginia

Susan Hallett, Program Officer, The Community Foundation serving Richmond and Central Virginia

- a. What is program evaluation? Why is it important?
- b. How do you ensure program evaluations provide useful measures of the program's efficacy? What tools are available to make evaluation easier?
- c. Who within the organization should be responsible for creating and monitoring program evaluation? To whom should results be reported?
- d. How can you use evaluation results to fundraise? How should foundations use program evaluations to make funding decisions?
- e. Where can you get further training in program evaluation?

24. Strategic Planning

Michael Caplin, Chairman, Turtle Island Consulting Group

- a. What is strategic planning? Why is it important?
- b. How is it done? What tools are available to make planning easier?
- c. Why is it important to have a written plan? In preparing a written plan, what elements should be included? How often should strategic plans be updated?
- d. What are examples of Virginia social enterprises that conduct effective strategic planning?
- e. Where can you get further training in strategic planning and writing work plans?

25. Harnessing the Power of Technology

Denise Dahl, Dahl Consulting

- a. How are social entrepreneurs using technology to: communicate with stakeholders; build relationships and manage contacts; deliver services to clients; fundraise; budget and perform accounting; attract volunteers; and evaluate programs?

- b. What are the most essential technologies relied on by social entrepreneurs? Where can you get further training on using these tools?
- c. What are examples of Virginia-based social enterprises that use technology in innovative ways to further their mission and sustain their programs?
- d. What impact has technology had on the ability of social enterprises to be scaled up?
- e. How can social media technologies engage more people in service within their community and what is on the horizon?

26. Personal Marketing I: The Resume and Networking

Mary Schilling, Director of Career Services, The College of William and Mary

- a. What are the components of effective resumes? What is the distinction between a resume and a biography and why should you have both?
- b. What are the most frequent and serious mistakes made on resumes and in personal biographies?
- c. What is networking? What are its benefits, how and where and by whom is it done? How do you start networking?
- d. What is an elevator speech? What makes for effective and ineffective elevator speeches?
- e. What are the tips to effective personal marketing and networking?

27. Personal Marketing II: Public Speaking

Greg Werkheiser, Executive Director, The Phoenix Project

- a. In what circumstances are social entrepreneurs called upon to speak in public?
- b. How has oratory been used to galvanize social change movements?
- c. What are the strategies employed by the most effective communicators?
- d. How can you improve your public speaking?
- e. What are the most common weaknesses of public speakers and how can they be addressed?

28. Ethics for Social Entrepreneurs

John Charles Thomas, Justice (retired), Virginia Supreme Court; Partner, Hunton & Williams

J. William Gray, Partner, Hunton & Williams

- a. Are there commonly accepted ethical principles and practices followed by nonprofit leaders and social entrepreneurs?
- b. What are ethical situations that nonprofit leaders and social entrepreneurs might confront in managing the finances of the organization? Are there ethical considerations in how an organization expends its resources?
- c. What ethical challenges might arise when dealing with potential donors?
- d. What standards should nonprofits meet in dealing with their employees and volunteers?
- e. How can social entrepreneurs create an environment in which they are consistently making ethical choices in the operation of their organization? What resources are available to assist leaders in making tough choices?

29. Operations Management

Deborah Coleman, Principal, The Coleman Group

- a. What is the process for effective operation management?
- b. What role does planning play in effective operational management?
- c. How do you effectively implement your operation plan?
- d. What should be done after implementing your plan?

D. Ingredient Four: Context, Revitalizing Distressed Communities

30. Global and National Poverty

Amelia Ross-Hammond, Coordinator, Service Learning and Civic Engagement, Norfolk State University

- a. How many people in the world / the United States / Virginia / Petersburg live in poverty?
- b. What are the historical causes of poverty around the world and in America?
- c. What are the psychological impacts of living in poverty?
- d. What are the physical impacts of living in poverty?
- e. How does poverty in America differ from poverty around the world?

31. Profiles of Virginia's Most Economically Distressed Communities

Thad Williamson, Assistant Professor, Jepson School of Leadership Studies, University of Richmond

- a. What are Virginia's most economically distressed communities?
- b. What are the historic causes of economic distress in Virginia?
- c. How do we measure economic distress in the Commonwealth?
- d. What characteristics do these communities have in common? What characteristics do they not share?
- e. How should distressed communities prioritize resources to meet competing demands and produce sustainable change? What role can higher education institutions play in this process?

32. Economic and Social Conditions in Petersburg Since the American Revolution

Renee Wyatt-Chapline, Executive Director, Virginia's Gateway Region

Christian Booty, Research/IT Manager, Virginia's Gateway Region

- a. What did Petersburg look like when it was economically healthy?
- b. What historic events impacted the City most significantly and how?
- c. What are the current manifestations of poverty in Petersburg?
- d. What opportunities exist that may improve the economic health of Petersburg in the future? What stumbling blocks currently exist?
- e. How can Petersburg benefit from its relationships with Virginia State University, Richard Bland College, William and Mary and other institutions of higher education?

33. Effects and Solutions I: Employment and Housing (Virginia and Petersburg)

Earlene Jones, Workforce Development Manager, Crater Regional Workforce Investment Group

Deborah Hanson, Program Manager of Asset Development, Virginia Supportive Housing

- a. How does poverty impact one's ability to obtain and retain quality employment?
- b. How does substandard housing negatively impact individuals? How does it effect health? Employment opportunities?
- c. What solutions have social entrepreneurs advanced that have proven effective in breaking the cycle of unemployment or underemployment within economically distressed communities?
- d. What solutions have social entrepreneurs advanced that have proven effective in breaking the cycle of substandard housing within economically distressed communities?
- e. What role can higher education institutions play in addressing the issues of housing and employment?

34. Effects and Solutions II: Health and Public Safety (Virginia and Petersburg)

Mark Cruise, Principal, FC/A Solutions, LLC

John Dixon, Chief of Police, City of Petersburg

- a. What are the various factors that contribute to the reduced life expectancy for those that live in poverty?
- b. What are the unique health challenges faced by those living in poverty?
- c. What solutions have social entrepreneurs advanced that have proven effective in increasing the quality of health care for impoverished communities?
- d. What are the public safety challenges in economically distressed communities?
- e. What strategies are available to ameliorate these conditions? What role can higher education institutions play in addressing the issues of health and public safety in communities?

35. Effects and Solutions III: Youth Needs and Education (Virginia and Petersburg)

Amelia Ross-Hammond, Coordinator, Service Learning and Civic Engagement, Norfolk State University

- a. How does poverty impact the development of youth?
- b. What is the status of public education in distressed communities?
- c. What are the causes of the condition of the schools?
- d. How can school systems attract and retain qualified teachers?
- e. What strategies are available to help improve these conditions? What role can higher education institutions play in addressing youth needs and education in these communities?

36. Effective Engagement in Economically Distressed Communities

Veronica Jemmott, Community Partnerships Manager, Virginia LISC

Greta Harris, Program Vice President, Virginia LISC

- a. Who sets the agenda for effective community engagement? How?
- b. Does race impact one's work in economically distressed communities? Gender?
- c. What might cause distrust or hostility among citizens within the community?

- d. How do you ensure that the community continues to be engaged in the process of improving their community?
- e. How do you respond to concerns or problems with professionalism?

37. Using G.I.S. Data and Community Mapping in Distressed Communities

Saphira Baker, Principal Consultant, Communitas Consulting

- a. How do you gather and obtain relevant and current statistical data about economically distressed communities?
- b. How can this data be useful to nonprofit practitioners and social entrepreneurs?
- c. How do you analyze the data to obtain the information that will be useful as a nonprofit leader?
- d. What systems are available to assist in managing, analyzing, and displaying the data to improve its usefulness?

EXPERIENTIAL SESSION

The experiential session comprised the final four weeks of the program. Students were assigned to six teams of approximately five students each to complete a total of twenty-four capacity building projects for nonprofit and municipal organizations. The graduate students enrolled in the 2008 program were assigned to a single team and specific projects with additional sophistication were assigned to that team. All remaining students were assigned to teams based upon a variety of factors including diversity of colleges, class years and experience, and majors. Once assigned to teams, the teams provided feedback on the projects that they wanted to address. This feedback was taken into consideration along with the complexity of the project portfolio for each team and a desire to expose students to as many different types of projects as possible. For example, no team was asked to complete more than one marketing plan. As distinguished from a traditional internship, students working in teams on projects have an opportunity to learn a wider variety of skills from one another and benefit from a wider exposure to a variety of organizations and leaders.

The community submitted project requests through a web-based form and through a community information session held by Phoenix Project staff in advance of the program. The Phoenix Project selected projects based on their capacity building nature for the client organizations, relevance to the economic revitalization priorities identified by the community and educational value for the students. In total, forty-seven project requests were received and twenty-four projects were accepted (51%).

During the experiential session, students utilized workspace in hi-technology classrooms located at the Appomattox Regional Governor's School in Petersburg. The school is located on West Washington Street, a primary artery adjacent to the City's Old Towne area and within close proximity to many of the client organizations. The session was primarily conducted in a large classroom that provided both tables and chairs in approximately ½ of the room and approximately 20 computer workstations in the remaining space. The room was outfitted with printers, a copier, scanner, wireless internet, and two Vonage voice-over-IP phones.

Students were pleased with the experiential session, expressing the most satisfaction with the value of their work to the Petersburg community (9.1), access to necessary information and technology (8.5), and the opportunity to develop and refine skills (8.2). Despite significant improvements to the students' access to technology and other equipment as compared to the prior year, students expressed less enthusiasm about the overall quality of the workspace provided for the experiential session. The students ranked the Governor's school workspace at 6.4 and comments reflected a desire to have separate work space for each team rather than shared workspace. The Phoenix project will continue to consider whether such workspace can be identified and obtained at a reasonable cost for future programs.

Community partners were exceptionally pleased with the work completed by the students, with an average response of 8.8 out of 10 on a total of twelve measures. The community partners' overall satisfaction ranking (9.1), professionalism of the Phoenix Project staff (9.7), students' work ethic (9.4), and students' ability to meet established deadlines (9.6) all received extremely high scores. 100% of the participating organizations expressed a desire to work with the Phoenix Project again.

Goals in 2009:

- *Identify physical space that will permit teams and individuals to have more individualized workspace and better facilitate client meetings.*
- *Negotiate carefully the scope of each project to ensure that it can be professionally completed during the time frame permitted by the program model.*
- *Ensure that each community partner has a single point of contact for the students during the course of the project.*

Students completed twenty-four capacity building projects for twenty-four nonprofit organizations and municipal agencies. Listed below are the completed projects and partner organizations:

- Conduct a housing survey of seniors and their families to gauge the amount they could pay for a new affordably priced rental senior facility and what amenities would be desirable. (Better Housing Coalition)
- Identify grant opportunities and draft a case statement. (Saint Joseph School)
- Research other historic homes managed by nonprofit organizations regionally and nationally to inform suggestions for income-generating activities and programs with an eye towards sustainability. (Battersea, Inc.)
- Assist in planning a reorganization/integration of the Southside VA Nonprofit Resource Center, Focus INC, and ConnectSouthside to streamline and improve delivery of services and support development of a strategic business plan. (Southside Virginia Resource Center / Connect Southside / Focus INC)

- Identify gaps in current policies and draft new ones where needed to assist agency in obtaining status as an accredited law enforcement agency. (Petersburg Sheriff's Office)
- Design a brochure and marketing plan to make community aware of CCH services related to community education (unrelated to their direct client services). (Crater Community Hospice)
- Develop a marketing plan for recruitment of foster parents in the Petersburg area. (Petersburg Department of Social Services)
- Conduct a needs assessment of the Petersburg area to measure the extent and nature of the needs of seniors regarding transportation, home repair and low-cost learning programs to determine whether the organization should expand its services to Petersburg. (Shepherd's Center of Chesterfield)
- Develop a marketing and business plan for opening a "Re-Store" as an income-generating strategy to support core home-building efforts. (Tri-Cities Habitat for Humanity)
- Research and prepare an assessment and potential plan for opening an HIV+ group home in the Petersburg or surrounding areas. (Serenity)
- Develop a financial plan. Review current operations and donors, devise a plan for improved donor outreach and growth, and prepare a growth strategy for an anchor arts organization. (Sycamore Rouge)
- Analyze data from the Health Department and map data to show where teens who are getting pregnant live within the City to inform prevention efforts. (United Way of Greater Richmond & Petersburg and Petersburg Teen Pregnancy Prevention Coalition)
- Analyze whether formation of a School of Historic Preservation could be a successful employment and economic development initiative in Petersburg and prepare a plan outlining the steps necessary for its development. (Virginia School of Historic Restoration)
- Research and draft an advocacy paper that can be used to advocate for an adjustment to the income requirements of a federal program for prospective foster grandparents which currently prohibits many retirees with moderate incomes from becoming foster grandparents. (Foster Grandparent Program, Inc.)
- Research and prepare a report describing the steps necessary required to become an accredited technical school. (Pathways)
- Create a data/map book of targeted neighborhoods that has overlays of data related to economic distress, including homeownership rates, teen pregnancy, crime stats, etc. (Virginia LISC)

- Revise the City’s emergency operations plan for compliance with the National Incident Management System. (Petersburg Fire Department)
- Draft a Freedom of Information Act policy for the City and propose an ordinance for adoption by City Council. (Petersburg City Attorney)
- Examine the requirements to become a licensed day provider of social services to mentally and physically handicapped individuals. (Southside Sheltered Workshop)
- Place art displays in the storefronts of vacant buildings on Sycamore Street to demonstrate a strategy for making the area more attractive and vibrant that has proven effective in Richmond. Prepare a public unveiling. (Stories ‘n Storefronts)
- Research best options for an electronic newsletter, based on cost and services provided and create a template for newsletter. (Rebuilding Together)
- Create a new website design and provide guidance on implementation. (Historic Petersburg Foundation)
- Create a comprehensive directory of services offered by nonprofit organizations in the Tri-Cities. (The James House)
- Create a marketing and public relations DVD describing the work of the organization to potential volunteers and funders. (ElderHomes)

In addition to high numerical rankings from community partners, written feedback from community leaders was also extremely positive:

“I LOVED the final product produced by our team. I would welcome their involvement with us at any time!”

-- *Tricia Wolfe, Shepherd’s Center of Chesterfield*

“I am ever so grateful for the opportunity to work this year with such energetic, brilliant, and analytical students. They possess the ability of being able to manage multiple projects, deal with multiple project leaders, and ultimately complete the projects. Thank you for this opportunity.”

-- *Gwen Cooper, Stories ‘n Storefronts*

“The work provided by the students will enable me to much more effectively communicate with our board, and has already provided a strong resource for our future planning.”

-- *K.B. Saine, Sycamore Rouge*

“I think you have done an excellent job in first choosing the students you work with and second in choosing their sponsors. It

takes a team to do the job you all do each year and I think you have the right formula.”

-- *Betty Hobbs, United Way of Greater Richmond & Petersburg*

“Thanks for the contribution to our organization, to me personally, and for the opportunity to share in this project. It was the best summer yet.”

-- *Dwala Ferrell, Pathways*

“As a one employee organization, we really value the assistance we receive from the Phoenix Project. Your help on specific projects has allowed us to achieve goals that would not have otherwise been possible.”

-- *Elizabeth Kirby, Rebuilding Together Petersburg*

“We were very pleased to have the students working on this project. They did a great job in a very short period of time.”

-- *Pam Covil, Historic Petersburg Foundation, Inc.*

EXPERIENCING PETERSBURG

Students lived in Nicholas Hall on the campus of Virginia State University. Students were generally pleased about spending their summer in Petersburg, their orientation to Petersburg, and their level of engagement with the community.

While the majority of the work students do for the community is capacity-building in nature, students also enjoyed participating in direct service projects in Petersburg; they assisted in the repair of a home for an elderly widower with ElderHomes, helped clean and ready a home site for Habitat for Humanity, and organized a full day service project for the House of Restoration Community Development Program working with children. Students expressed a desire to continue the level of direct service conducted during the course of the program.

Students also participated in a variety of social activities during the program. These activities included a narrated bus tour followed by a welcome dinner with community partners, a guided tour of the Petersburg National Battlefield, bowling, and attending a play at Sycamore Rouge, a local community theater.

Goals for 2009:

- *Explore cost-effective options that would permit the students to eat more of their meals in the community, rather than at the on campus dining hall.*

VIRGINIA STATE UNIVERSITY

Virginia State University, historically the first fully state supported four year institution of higher learning for African Americans in the United States, again served as host for the program. The University made exceptional efforts to provide access to the campus' best facilities, to be responsive to requests from students and staff, and to reduce the conference services costs of the program to the Phoenix Project. Students and staff were extremely pleased with the academic space in the University's new Engineering and Technology building where the academic session of the program was held this year. They were also pleased with the friendliness and professionalism of the VSU staff. We extend our thanks to President Moore, Provost Thomas, Director of Conference Services Yourdonus James and their respective staffs for their continued partnership in this important venture.

STAFFING LEVELS

The 2008 program was staffed by the Director of Programs, a live-in Assistant Program Director, and one fulltime and two part-time clinical faculty members. A second live-in Program Assistant was present for the academic portion of the program. Other permanent members of the Phoenix Project statewide staff, including the Executive Director, Associate Director, and Operations Manager were present for portions of the program.

Based upon feedback received during the 2007 program, staffing responsibilities were adjusted for this program. Most notably, seasoned professionals in the nonprofit and higher education arena were identified and recruited to serve as team supervisors during the experiential portion of the program. These clinical faculty members generally worked normal business hours during the experiential session and did not reside on campus with the students.

Our clinical faculty members for 2008 were:

- Ms. Celia Broadus, President, Accounting Strategies to Solutions, LLC;
- Dr. Nicole Footen Bromfield, Director of Student Services, Virginia Commonwealth University, School of Social Work; and
- Ms. Deborah Coleman, Principal, The Coleman Group, LLC.

The Phoenix Project intends to have two residential Assistant Program Directors remain throughout the duration of future programs. Professional clinical faculty members will continue to be a key to ensuring a high quality professional outcome for our community partners.

Goals for 2009:

- *Recruit additional clinical faculty members so that each team will have an individual supervisor.*
- *Strive to have each clinical faculty member available each day of the experiential session in order to provide maximum guidance and allow for more great learning opportunities during the experiential session.*

CONCLUSION

The 2008 program again proved both highly innovative and effective as indicated by the data gathered through extensive evaluation. The Phoenix Project remains committed to continued innovation and will again make modifications and adjustments to the program in 2009. The Phoenix Project remains committed to its vision of creating a model statewide network of social entrepreneurs engaged in developing transformative organizations and solutions to the Commonwealth's most pressing challenges and committed to making real the full promise of our Commonwealth for the 750,000 Virginians who live in poverty.

OUR THANKS

Our sincere appreciation to the hundreds of individuals made this program possible and whose continued interest and involvement will ensure its continued vitality, including the many alumni, staff, students, guest faculty members, and community partners that continue to be our partners in innovation. We are also pleased to recognize the generous support of our financial contributors. The 2008 class was named in honor of our board chair and generous supporter, Suzann Wilson Matthews, without whom none of our work would be possible. The Mason Hirst Foundation was again a leading sponsor of the program, and was joined by The Collis Warner Foundation, Ron and Paula Seward, Mark B. and Susan B. Sisisky Fund of the Community Foundation Serving Richmond and Central Virginia and Boehringer Ingelheim. We thank the universities from which our 2008 class hail for contributing to the costs of this program.

CONTACT US

If you are a student who wants to apply for the 2009 program, a faculty member interested in contributing to the curriculum or nominating students for admission, a leader from another state who wants to explore adapting the Phoenix Project's model for your use, or if this work inspires you to make a financial contribution in support of our programs, please contact:

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APPENDIX A: HIGHER EDUCATION ADVISORY TEAM

We are very grateful to our Higher Education Advisory Team for their service to the Phoenix Project and to the Commonwealth:

Ms. Shalise Bates-Pratt
Director of Student Leadership
Student Leadership & Women's Resource Center
Randolph-Macon College

Mr. Evan Baum, M.S. Org. Dev, M.A. Ed. Leadership
Director, Undergraduate Academic Programs
George Mason University

Dr. Paul Bierly, III
Director of the Center for Entrepreneurship
College of Business
James Madison University

Ms. Celia Broadus
Comptroller
ChildSavers

Mr. Michael Caplin, J.D.
Chairman
Turtle Island Group

Dr. Russ Cargo
Director, Nonprofit and Civil Society Program
Institute for Policy and Governance
Virginia Tech

Pastor Dwayne Carson
Director of Leadership and Campus Pastor for Discipleship
Liberty University

Ms. Anne M. Casey
Assistant Director of Corporate & Foundation Relations
University of Virginia

Dr. Bernard Chirico
Vice President for Student Affairs and Dean of Students
University of Mary Washington

Dr. Robert Colvin
Chair, Department of Leadership and American Studies and
Associate Professor of Leadership Studies
Christopher Newport University

Dr. Nancy Cooley
Vice Provost for Distance Learning
Old Dominion University

Mr. Mark R. Cruise
Chair
Virginia Network of Nonprofit Organizations

Dr. Freddye Davy
Director, Honors College
Hampton University

Ms. Vanessa Diamond
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