

Overview

Upward Development, LLC was founded in 2014 in Oregon. We deliver professional services to support nonprofit leaders, programs, operations and boards of directors.

This is a benefit company, organized in part for the public good. We support community development and greater collaboration among the nonprofit, private and public sectors.

Our primary services are planning, assessment and grant fundraising. Andi enjoys training as well, and has shared knowledge with more than 1,500 professionals and community volunteers since 2008.

More than 1/3 of the 35+ organizations we've supported are education, arts and cultural nonprofits. We care deeply about helping people who are vulnerable in some way and/or experiencing poverty.

2017 Advisory Board

Penny Campbell

Hilary Stoebig

Tia Toumbs

Organizations Supported

U.S. Nonprofits	9
Lane County, Oregon Community Health Improvement Plan (CHIP)	5
Public Sector Entities	2
Businesses (private sector)	3
Total	19

Key Accomplishments

Assessments of Nonprofits Completed	2
Plans Developed (strategic, development)	4
Workshops Taught	5
Grant Pipelines Built	4
Grant Proposals Written	11
Funds Awarded to Nonprofits	\$3,459,700
People Directly Impacted[^]	157

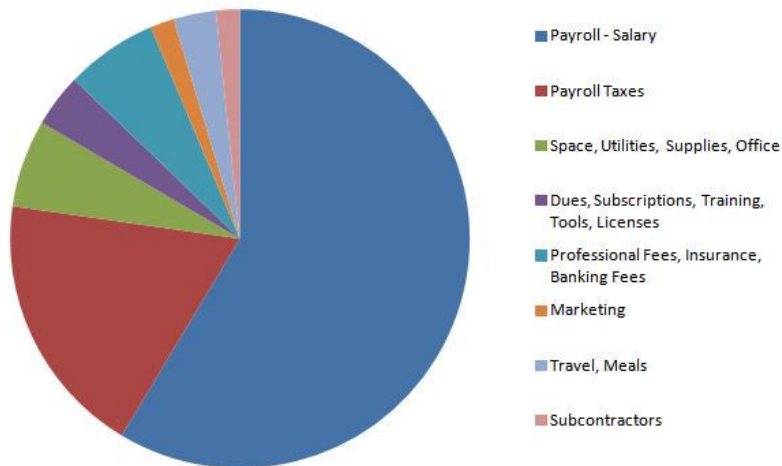
[^] Not including those impacted by grants as services are delivered, only those people directly working with Upward Development

In 2017 we had a 75% success rate on grant applications submitted. 88% of the funds we requested were awarded to nonprofits.

Technical Assistance Provided

Grants Researched	~250 leads	Benefiting 4 nonprofits
Professional Training	82	Consulting + five workshops
New Staff Training	5	Nonprofit leaders, grant specialists, development coordinators
Volunteerism	~50 hours	CHIP committee, various nonprofits and individuals
Fundraising Communication Pieces Written	2	Cases for support
Tracking & Evaluation Tools Created / Shared	75+	Some are the same tools to different clients, but all new to them
Budgets Completed	12	For grant projects + an organization
Policies Written & Updated	3	Gift, conflict of interest, fundraising
HR Documents Updated	5	Employee and board job descriptions

2017 Financial Snapshot



2017 Revenue & Expenses

Gross Sales/Revenue from contracts and workshops	\$52,481
Total Expenses	\$46,700
Net Income <i>(Distributions to Andi Kemp)</i>	\$5,781

Brief History

2014 - Andi Kemp established the LLC, took S-corporation election with the IRS, and established a benefit company in Oregon.
2015 - Created early stage administrative systems & accounts (banking and online). Built a pipeline of 8-12 clients annually.
2016 - Developed and upgraded a Wordpress website. Professional training for Andi. Advisory board development. Restarted training.
2017 – Transitioned to QuickBooks and hired a CPA. Shifted to more planning and assessment work than before. Began posting blogs. Growth in number of organizations served. Worked toward B-corp certification. Board development. Enhanced training materials. Provided more services to environmental and arts/culture nonprofits.

Oversight & Management

Advisory Board	Volunteer members nationwide; quarterly meetings via videoconference; typically an annual meeting in person.
Operations	Managing Member (Andi Kemp). Subcontractors and colleagues help with large projects like federal and state grants, 360° assessments.
Financial Management	A CPA files annual 1120S taxes (S-Corp election) and Oregon tax returns. Managing Member files quarterly payroll reports to Oregon and IRS. We use QuickBooks.
Client Selection	Free consults with 2-4 hours are typically invested in meeting and inquiry with prospective clients. 40-50% of business comes from referrals or word of mouth.
Evaluating Results	Training: We gather written (anonymous) feedback from workshop participants. Consulting: Email, face-to-face convos. Quality of assessments and plans. Anonymous surveys. Fundraising: Success rates with grants; feedback from program officers on the proposal and client organizations on the process. ROI and broad satisfaction with outreach and donor communication materials.

Funding Support

We'd like to thank and recognize the following organizations.

Their generous support made our work possible this year.

- *15 committed organizations who budgeted (and/or dedicated) funds to pay our hourly rate.*
- *Taxpayer dollars*
- *Donors who give unrestricted funds to nonprofits*



Andi Kemp, Principal Consultant