

Overview

Upward Development, LLC was founded in 2014. Our mission - helping people and organizations build stronger, more vibrant communities.

We deliver professional services like development consulting, planning and fundraising to benefit nonprofit programs & operations.

This is a benefit company, organized under Oregon law in part for the public good. Though we support primarily nonprofits, we welcome private and public sector partners who are doing philanthropic work, community development, and/or supporting the nonprofit sector.

2016-2017 Advisory Board

Penny Campbell
Hilary Stoebig

KC Huang
Tia Toumbs

Organizations Supported

U.S. Nonprofits	5
International Nonprofits	1
Public Sector Entities	2
Businesses (private sector)	3

Key Accomplishments

Organizational Assessments of Nonprofits Completed	1
Plans Developed (strategic, capital campaign, corporate philanthropy)	4
Grant & Contract Pipelines Built	3
Grants Written	6
Funds Raised*	\$383,000
Workshops Taught	4
Students Tutored (ACT & SAT)	8

*57% success rate on applications submitted, 76% on funds requested

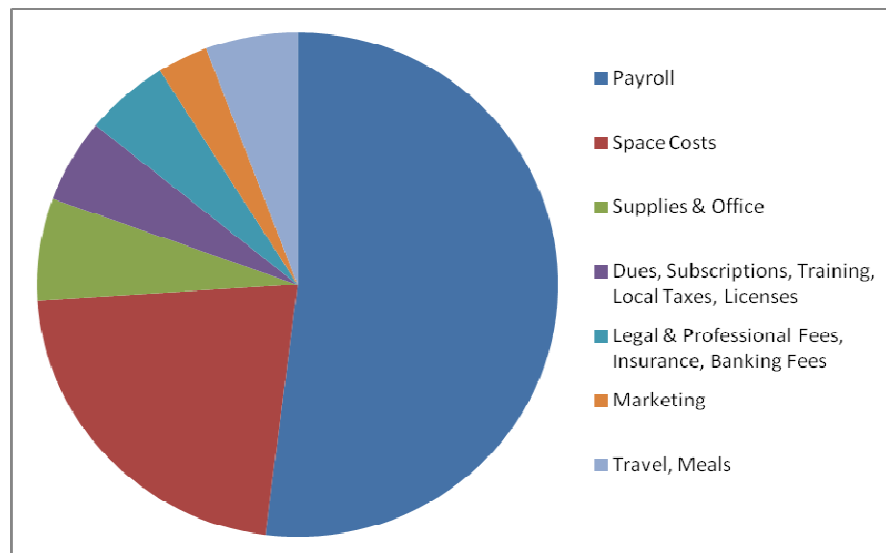
Since 2015, the makeup of partners and clients has changed to include fewer grant writing contracts, with more planning and assessment work.

We also began cultivating relationships with the public and private sectors – this year they represented half of our clients.

Additional Accomplishments

Grants Researched	~200 leads	For three client organizations
Professionals Trained	95	Partnership with Eugene Public Library Adult Education Programs
New Staff Trained	3	Nonprofit leaders, grant specialists, program administration
Networking Events	9	EVDP Monthly meetings, workshops
Volunteerism	~38 hours	Including guidance and free consults
Fundraising Communication Pieces Written	3	Two cases for support, appeal letter
Tracking & Evaluation Tools Created / Shared	60+	Some are the same tools to different clients, but all new to them
Budgets Completed	7	For grant projects and new programs
Policies Written & Updated	8	Gift, conflict of interest, fundraising, etc.
HR Documents Updated	11	4 job descriptions; 7 work plans

2016 Financial Snapshot



2016 Revenue & Expenses

Gross Sales/Revenue	\$42,273
Total Expenses	\$32,801
Net Income (Distributions to Andi Kemp)	\$9,472

Brief History

2014-2016: Andi Kemp established the LLC, took S-corporation election with the IRS, and established a benefit company in Oregon. Created early stage administrative systems & accounts (banking and online). Built a pipeline of 8-12 clients annually. Developed and upgraded a Wordpress website. Professional training for Andi. Advisory board development. Planning for growth.

Oversight & Management

Advisory Board	Four members nationwide; quarterly meetings via videoconference.
Operations	Managing Member (Andi Kemp). Subcontractors and colleagues help with large projects like federal and state grants, 360° assessments.
Financial Management	Professional accounting firm files annual 1120S taxes (S-Corp election) and quarterly payroll reports to Oregon and IRS. Business checking and savings accounts. Excel for financial statements.
Client Selection	Free consults with 2-4 hours typically invested in meeting and inquiry with prospective clients. Roughly 40% comes from referrals or word of mouth.
Business Practices	Upward Development uses written contracts and stays in regular communication with clients. We do not work on commission, but rather charge an hourly rate for services and develop custom contracts based on the needs of each organization. We seek to work with partners that: <ul style="list-style-type: none"> • Support community development • Want to improve diversity, equity and inclusion among staff and board (internal) as well as programming, planning and outreach (external) • Desire to improve their operations, fundraising and community impact
Evaluating Results	Training: Gather written feedback in quarterly workshops Consulting: Email, face-to-face conversations. Quality of assessments. Fundraising: Success rates with grants; feedback from program officers on the proposal and client organizations on the process. Success and satisfaction with outreach and donor materials.