

## Our Company

Upward Development is a small benefit company (B-corp). Our mission - Helping people and organizations build stronger, more vibrant communities. We provide organizational development consulting and professional fundraising for nonprofits and the public sector, in Oregon and the U.S.

## Our Services

Strategic planning, assessments of communities and organizations, grant fundraising, nonprofit consulting.

With a holistic approach and clear, direct guidance, we help talented people advance the organization’s leadership, finances, programs, human resources, fundraising, outreach, and governance to more effectively meet the mission.

We firmly believe that more intentionality, best practice, and investing additional resources in excellence leads to a more lasting, meaningful impact on communities and people.

## Our Values

Excellence and integrity combined with warm engagement.

We are committed to the principles of equity and inclusion in our business practices, and we value diversity in perspectives. Sharing power at the decision-making table is the most effective way to achieve social justice and racial equity, plus safety and equity for LGBTQIA2+ people. We invite organizations and people to grow with us in these realms.



*Aaron Burden (@aaronburden)*



*Agence Olloweb (@olloweb), Unsplash*



*Robert Collins (@robbie36), Unsplash*

## Highlights

### Organizations Served

U.S. Nonprofits	10
Public Sector Entities	4
Businesses (private sector)	0
<b>Total</b>	<b>14</b>

### Key Accomplishments

Assessments of Nonprofits or Communities	6
Strategic Plans	1
Workshops and Board Development	2
Grant Pipelines Built	3
Proposals for Funding Written	10

**Requested \$4.9 million in grant funds**

**Raised \$4.6 million for nonprofit programs and services!**

**Nearly 100 Professionals Supported**

*Helped guide 10 rural Oregon school districts and a Head Start program*

*Raised \$3 million for low-income families in the Texas Panhandle*

## Advisory Board

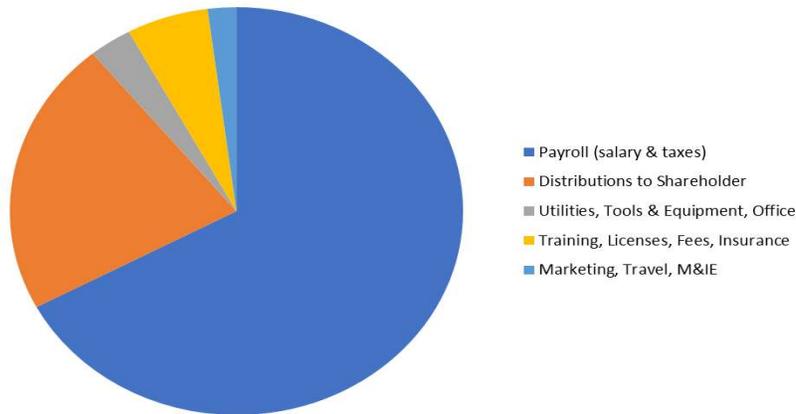
***Hilary Stoebig***  
***Harvard University***

*Human Resources, Management, Operations*

***Ti Toumbs***  
***Oxfam America***

*Accounting, Labor Relations, Planning*

## 2020 Financial Snapshot



<b>Gross Sales/Revenue</b> <i>(contracts and workshops)</i>	<b>\$52,557*</b>
<b>Total Expenses</b>	<b>\$38,589</b>
<b>Net Income</b> <i>(Distributions to Andi Kemp)</i>	<b>\$10,790</b>

*\*Upward Development secured a PPP loan in May 2020. Proceeds are not counted as income (cash-basis accounting) until the loan is forgiven, which took place in January 2021. The PPP revenue will be reflected in 2021. Revenue still declined by 8% from 2019, even with a PPP loan.*

## Testimonials

I was amazed by your ability — and willingness — to adapt to the drastically changed situation when the coronavirus lockdown began in the middle of the planning process. Despite this crisis, you were able to shepherd us through the process and produce a meaningful product even in the midst of the overwhelming uncertainty about the future that we are facing now. — *Barb Wheatley, Board President, Eugene Opera*

Andi listened well and was able to put our thoughts, ideas and priorities into a plan. They provided a clear structure for the process yet gave us time to mull things over. In the end, the plan is all ours. Excellent work. - *Ruth Obadal, Former Board President, Eugene Opera*

It has been a pleasure working with you, your professional ideas and guidance, your dedication and caring to make sure the Community Assessment was a true picture of our communities. — *Sylvia Cox, Executive Director, Klamath Family Head Start*

Andi's help was invaluable to our team. They were mindful not to feed us ideas or take away from our ownership of the assessments while also providing helpful advice in all regards. They supported us in completing a polished final product when we needed additional support. I very much appreciated Andi's calm demeanor and professionalism. — *University of Oregon student*

## Funding Support

The following sources of funds made our work possible.  
We are deeply grateful.

### *Nonprofits and Education Service Districts*

*Oregon Humanities*

*The University of Oregon Foundation*

*Grantmakers*

*Donors*

## Peers and Colleagues

*Thank you for your support and partnership!*

Anne Williams ( <i>in memory of</i> )	Shannon Criss
Karen Rainsong	Donna Schnitker
Dyana Mason	Matt Salazar
Mona & David Kemp	Penny Campbell
Melinda Norton	Erika Rauer
Brett Harris	Andrew Bisantz
Kemy Joseph	Ahava Oblak
Mycena Bell	Paula Free
Harney ESD Staff	KFHS Head Start staff
Magi York	Mary Twitty
Bob Carlton	Jo Bartlett

## Clients



Harney ESD



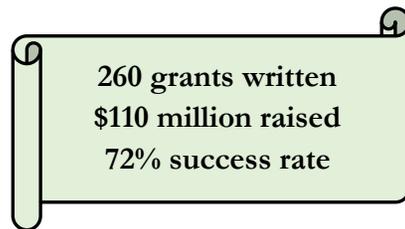
## History

**2008 to 2013** – Andi served in nonprofit leadership (development director, grant fundraiser). Early-stage consulting and grant writing.

**2014 to 2015** – Andi Kemp established the LLC – also a benefit company in Oregon – and elected S-corporation status. Managed an anchor client and a few other contracts annually. Early-stage administrative systems, business plan, and company practices developed. Built a pipeline of 8-12 clients annually. Secured more diverse projects in organizational development.

**2016 to 2017** – Created a website, branding, and digital products. Professional development for Andi. Advisory board creation and B-corp. certification prep. Transitioned to QuickBooks and hired a CPA. Restarted community training workshops. Provided more services to environmental, education and arts/culture nonprofits. Enhanced consulting skills and service offerings.

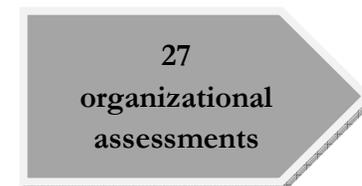
**2018 to 2020** – Student team advisor with the UO Law Nonprofit Clinic (graduate students.) Began working with Head Start agencies for grant writing and assessment; returned to writing grants in the community action network again. Delivered a handful of community workshops that were well-received. Helped nonprofits respond to COVID and secure resources. Ramped up consulting and public sector partnerships. Invested significantly in internal DEI (diversity, equity, and inclusion) training; adapted consulting to include more of this.



260 grants written  
\$110 million raised  
72% success rate



1,800  
professionals and  
community  
volunteers trained



27  
organizational  
assessments

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