

# URBAN AFFAIRS COALITION



# THE VALUE OF UAC

- ✓ UAC is “A Home for Non-Profits”
- ✓ UAC saves organizations time, money and resources
- ✓ UAC positions organizations for growth through efficiencies and economies of scale

# UAC MANAGEMENT

## **Sharmain Matlock-Turner , President and CEO**

Sharmain began her tenure at the Coalition in March of 1999, with a special distinction as the first woman to lead in the organization's more than 40 year history. Sharmain Chairs the boards of trustees of the West Oak Lane Charter School and the Ogontz Avenue Revitalization Corporation (OARC). She is currently a board member of the People's Emergency Center (PEC); Philadelphia Facility Management Corporation, which owns Philadelphia Gas Works (PGW); and is on the Advisory Council of the Federal Reserve Bank of Philadelphia; Children's Scholarship Fund Philadelphia. Sharmain co-hosts a live weekly radio show, Financial Voices, on WURD 900 AM, and is a regular guest on 6abc's Inside Story. In 2010, She was appointed by Mayor Michael Nutter to serve as Co-Chair of the Advisory Committee for the Office of Economic Opportunity. In 2011 she was appointed Co-Chair of State Senator Hughes' Economic Policy Advisory Group. Prior to being named President and CEO of the Urban Affairs Coalition, Sharmain was Associate Vice President, Legislative and Community Affairs for Mercy Health System. Sharmain holds a BS degree in Education from Temple University. In 2005, she was one of three Philadelphia nonprofit leaders selected to receive a scholarship to the Harvard Business School's nonprofit leaders' summer program.

# UAC MANAGEMENT

## **Keith Daviston, CPA, Chief Financial Officer**

Keith leads and manages the Coalition's Fiscal and Business Development Departments. Keith provides strategic direction and overall supervision of finance, accounting, and sales. Keith is a seasoned finance veteran with over 22 years of progressive experience in the for-profit and nonprofit sectors. Keith served as CFO and/or Vice President at several multi-million and multi-billion dollar organizations in the for-profit and nonprofit sectors. Keith spent over a decade with MBNA/Bank of America in roles of increasing responsibility, including serving as a member of the transition team that merged MBNA's and Bank of America's operations. Most recently, Keith served as CFO of an emerging alternative fuel business, and the CFO of Tri-County Community Action Partnership. Keith served as an Army officer for 21 years in the National Guard. Keith holds a BS in Accounting from Slippery Rock University and is a Certified Public Accountant.

## **Trino Boix, Esq., Director of Operations**

Trino Boix joined the Coalition in 2002, and has over 15 years experience in nonprofit management and operations. Trino leads the Program Operations team, which provides a wide range of support to existing and emerging nonprofits. In his current role, he also oversees all contractual agreements for the Coalition, and manages risk and liability concerns. A staunch advocate for fiscal sponsorship, Trino serves on the Steering Committee of the National Network of Fiscal Sponsors. Prior to joining the Coalition, he practiced at a national, Philadelphia-based law firm. His previous legal experience includes work for the U.S. Court of Appeals for the Third Circuit and Nationalities Service Center, where he worked to prevent the deportation of migrant farm workers. Trino began his career in nonprofit management at Belmont Housing Resources of Western New York, where he developed an expertise in the interpretation and administration of Section 8 housing law. He currently serves as the President of the Homeless Assistance Fund, Inc. Trino graduated with honors from Villanova University and Temple University Beasley School of Law.

# PROUD HISTORY

- Founded in 1969; 501(c)(3)
- Historic partnership between business and community
- Nicknamed “The Urb,” its purpose was to address inequities in economic access and make a home for grassroots organizations to thrive

# FOUR DECADES OF GROWTH

- Changed name to “Urban Affairs Coalition” in 2010
- 75 community-based organizations
- 400 employees
- \$29 million dollar budget
- 100,000 families served/year

# OUR MISSION

The Urban Affairs Coalition unites government, business, neighborhoods, and individual initiative to improve the quality of life in the region, build wealth in urban communities, and solve emerging issues.

# THE STATE OF NON-PROFIT AMERICA HAS DRASTICALLY CHANGED

- Looming Budget Cuts
- Shifts in Political Priorities
- Uncertainty in the Economy
- Increased Pressure to Demonstrate Impact
- Required Return/ROI vs. Unrestricted Donations



# THE ANSWER: FISCAL SPONSORSHIP & SHARED SERVICES

We provide a common administrative and service platform whereby organizations share key administrative services in an efficient manner.

# WE SUPPORT NON-PROFITS

## *UAC Provides...*

- *Finance & Accounting*
- *HR Services*
- *Program support to our partners*

*We save you time, money and help you grow.*



# WE CREATE EFFICIENCIES FOR FUNDERS

## UAC Offers...

- *Financial Oversight*
- *One Stop Interface*
- *Consolidated Reporting*

*We save funders  
time & money.*



# OUR SHARED SERVICES

	<b>Comprehensive Services</b>	<b>Collaborative Services</b>	<b>Fee for Service</b>	<b>Consulting Services</b>
<b>Services</b>	Full suite of fiscal sponsorship services	Defined suite of fiscal sponsorship services ; central manager/ distributor of funding	A la carte shared services for finance , accounting, human resources, and other	Professional development services, building, organization & program development
<b>Legal Entity</b>	Organization uses UAC 501c3	Organization uses its own 501c3	Organization uses its own 501c3	Economic opportunity plan development, compliance monitoring
<b>Contracts</b>	Contract awarded to UAC	Contract awarded to UAC	Contract awarded to organization	Performance management and evaluation services
<b>Personnel</b>	All staff are UAC employees	Organization retains employees	Organization retains employees	
<b>Reporting</b>	UAC consolidated reporting	Project consolidated reporting	Entity reporting for organization	Entity reporting for organization

*“ The bottom line is that fiscal sponsorship stretches charitable dollars further and more effectively...”*

*Stanley Sattely, Esq. - A White Paper on Comprehensive Fiscal Sponsorship, Third Sector, New England*

# COMPETITIVE ADVANTAGE

- Freedom from administrative burdens; focus on mission and programming
- Better prepared to deal with economic downturns
- Capacity building and industry best practices
- Access to an extensive network of contacts and relationships

# OUR VALUE

- Leverage 501c3 – Speed to Market
- Fundraising
- Reduce Expenses by a Minimum of 5%
- Shared Services
- Cash Flow Management
- The Community of the Coalition
- Save Time / Focus on Mission

# POWERED BY TECHNOLOGY

- Significant investment in technology
  - Advanced budget module
  - Web based financial statements and management reports
  - Electronic accounts payable module
  - ETO – Efforts to Outcomes

# PARTNERING FOR SUCCESS

- Collaborate daily with individual consultants, other nonprofits and businesses to support the Sector
  - Organizational level
  - Program level
  - Referral opportunities



# QUESTIONS AND ANSWERS

