

Finding Funds for Summer Fun

*How to find additional funds to support your
Summer Youth Program*

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*Learn more about The Fund Raising School at
www.philanthropy.iupui.edu/thefundraisingschool*



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SYPF Expectations and Grant Proposal Budgeting

- Our proposed budget is *accurate, reasonable* and *adequate* to fund proposed program activities.
- We will raise funds from a *diverse set of funders* who support our mission and values.
- Fund raising *letters* will be sent at least *six months in advance* of the program start date and will *stress the value of strong youth programming* to the entire community.
- Letters will be *followed up with personal contact*.



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SYPF Expectations and Grant Proposal Budgeting *TRANSLATION*



Grant funds are not total budget!



More than one funding source!



Send letters to potential donors making your case for support!

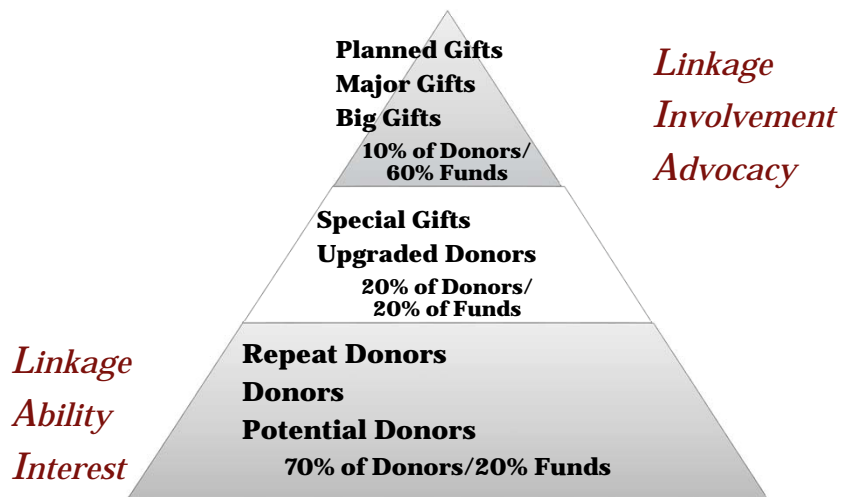


Make sure "you" contact each potential donor in person!

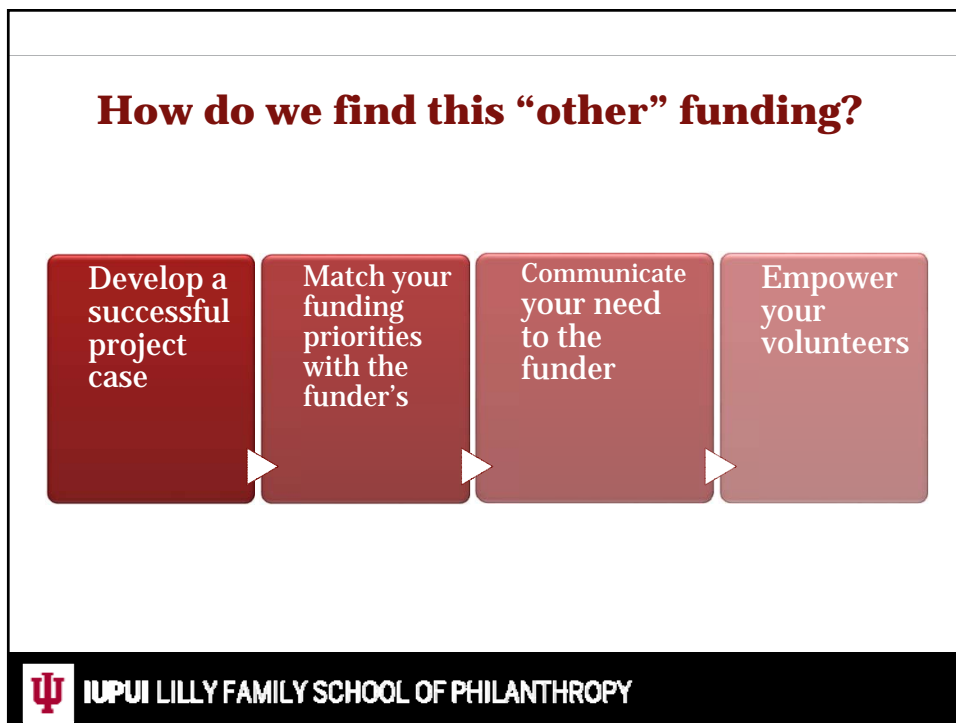
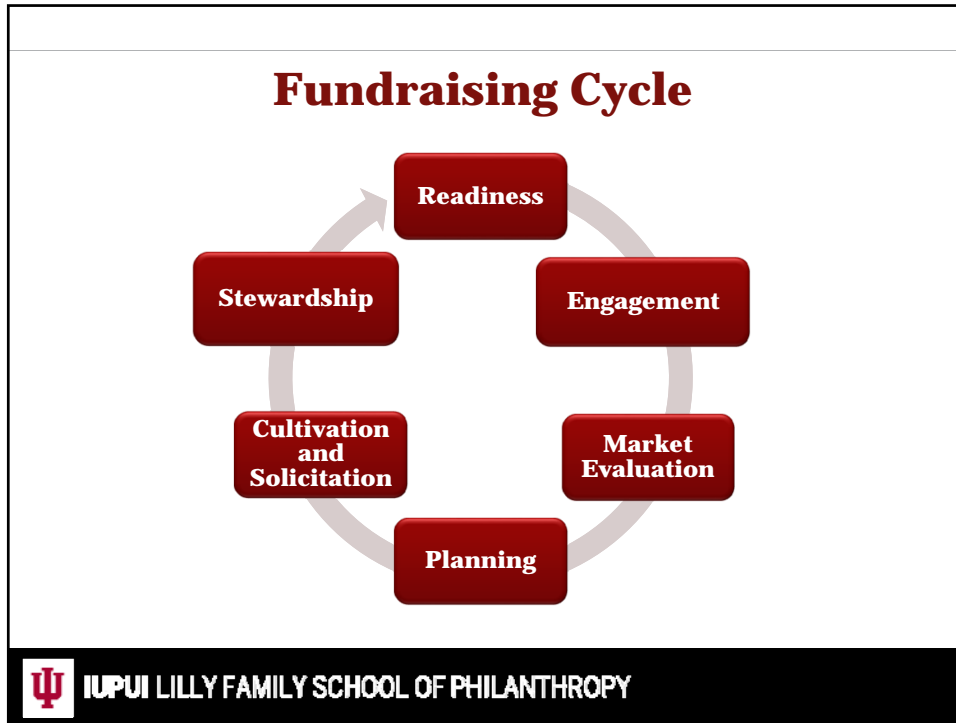


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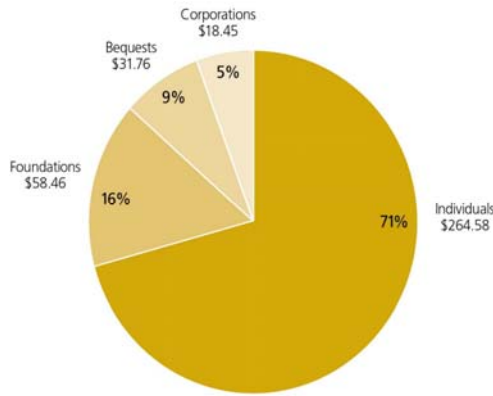
Development Process – Fundraising Pyramid



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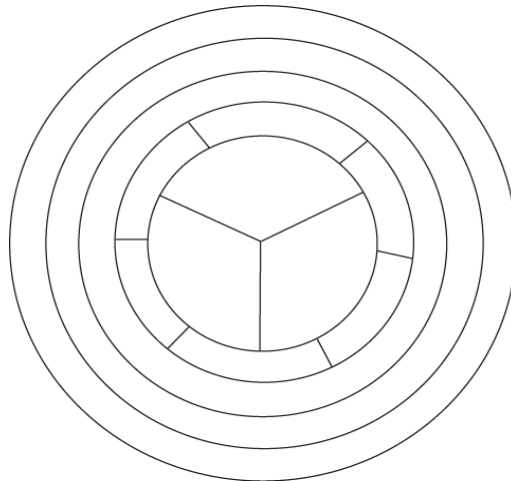


Individual Giving



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Constituency Model



Fundraising is the *Exchange of Values*

NPO ↔ **Donors**

<i>NPO Receives from Donors</i>	↔	<i>In Exchange, Donors Receive from NPO</i>
_____		_____
_____		_____
_____		_____
_____		_____
_____		_____

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Develop a successful project case

Address the need Develop the solution Build confidence in the organization Create the vision for success

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Building the Case & Mission


<p style="text-align: center;">State the most powerful philosophical or social values which govern your work.</p> <div style="background-color: #800000; color: white; padding: 10px; text-align: center; margin-top: 10px;">Fill in the blank, "We believe that..."</div>	<p style="text-align: center;">Summarize the obstacles standing in the way of realizing these values.</p> <div style="background-color: #800000; color: white; padding: 10px; text-align: center; margin-top: 10px;">Ask yourself "What is the problem we are solving, or the need we are meeting?"</div>	<p style="text-align: center;">Outline what needs to be done—the solutions to overcome the obstacles.</p> <div style="background-color: #800000; color: white; padding: 10px; text-align: center; margin-top: 10px;">Ask yourself, "What results do we want to achieve?"</div>	<p style="text-align: center;">Affirm that your organization exists to help realize these values and carry out the solution.</p> <div style="background-color: #800000; color: white; padding: 10px; text-align: center; margin-top: 10px;">Ask yourself, "What is our organizational commitment to carrying out the activities in order to accomplish all of the above?"</div>
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What the Prospective Donor Looks For

- Evidence of:
 - good management
 - Reasonable planning
 - prior support
- Persuasive presentation by credible volunteers
- Absence of pressure
- Invitation to share/join



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Annual Fund Gift Range Chart: \$60,000 Goal

Gift Range \$	# of Gifts	Cumulative # of Gifts	Prospect #	Cumulative # of Prospects	\$ per Range	Cumulative \$
3,000	2	2	10 (5:1)	10	6,000	6,000
1,500	4	6	20 (5:1)	30	6,000	12,000
750	12	18	48 (4:1)	78	9,000	21,000
500	18	36	72 (4:1)	150	9,000	30,000
250	24	60	72 (3:1)	222	6,000	36,000
<i>10% of donors</i>						<i>60% of goal</i>
100	120	180	360 (3:1)	582	12,000	48,000
<i>20% of donors</i>						<i>20% of goal</i>
Under 100 average gift \$30	400	580	800 (2:1)	1,382	12,000	60,000
<i>70% of donors</i>						<i>20% of goal</i>

Planning Tools - Your Gift Range Chart

Gift Range \$\$	# of Gifts	Cumulative # of gifts	# of Prospective Donors	Cumulative Prospective Donors	\$\$ per Range	Cumulative \$\$

Planning tools – Gantt Chart

TASK	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Submit SPYF grant	X											
Meet with fundraising team	X	X	X	X	X	X	X	X	X	X	X	X
Update plan of action and assign responsibilities	X											
Prepare case for support and fundraising letters		X			X						X	
Send out fundraising letters			X			X						X
Follow up with potential donors				X	X	X	X	X	X			X
Thank donors who gave gifts				X	X	X	X	X	X	X	X	X
Social media campaign				X		X	X	X	X	X		X
Board campaign	X	X									X	X
Program delivery							X	X	X			
Reporting results												X
Celebrate success												X



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Planning Tools - Your Gantt Chart

TASK	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12



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Planning Tools - Strategy Worksheet

Strategy	Goals	Audience	Description	When	Who	Cost
HOUSE PARTIES (total of 3)	\$3500	Friends, family, and colleagues of Board members	Small gatherings in homes of board members or other supporters	Dec, Feb, Apr	STAFF: help recruit hosts; help create invitations, thank yous; logistical support BOARD: host events; share passion for organization; invite own contacts; provide refreshments	\$200 per event
MAJOR GIFT CAMPAIGN	\$10,000	Current donors (\$100+)	Personal solicitations: phone or in person	Nov 30-Dec 31	STAFF: identify prospective donors; create talking points; assist with solicitations BOARD: identify prospective donors; conduct solicitations	Minimal; meeting and postage costs only
BUSINESS CAMPAIGN	\$10,000	Businesses in the neighborhood served	Personal solicitations for cash or in kind donations to the businesses in the neighborhood	January – March	STAFF: identify businesses, set up timeline, identify contacts, requirements, write letters, fill out applications, make solicitations BOARD: identify busienses, refer to staff, make solicitations with staff input	Minimal; postage and meeting costs only
Total Income						Total Expense

Planning Tools - Strategy Worksheet

Strategy	Goals	Audience	Description	When	Who	Cost
Total Income						Total Expense

Communicating the Funding Plan and Results

Potential Funding Source	Amount Requested	% of total project cost	Current Status	Comments
SPYF	\$10,000	43%	Application submitted	
Greater Indianapolis Health Foundation	\$5000	21%	\$5000 awarded	
Annual Support Campaign	\$5000	21%	\$2000 committed	Year end support letters to be sent 10/1/15, 10% ahead this time last year
Board Giving Campaign	\$2000	9%	\$1500 committed	Year end push under way currently
Neighborhood Business Campaign	\$1500	6%	\$0 to date	Campaign begins in January, 2016
Total	\$23,500	100%	\$8500	36% of funds already raised or committed



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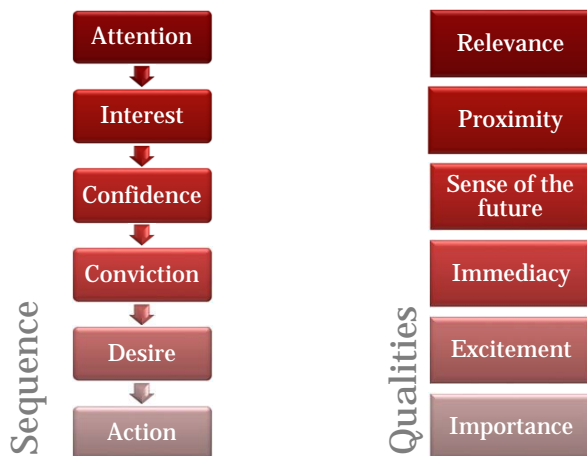
Case Expressions

- Brochures
- **Foundation proposals**
- Appeal letters
- **Campaign prospectus**
- News releases
- **Newsletter articles**
- Email campaigns
- **Social media plans**
- Infographics
- **Web sites**
- Speeches to community organizations
- **Print marketing**
- Face-to-face conversations



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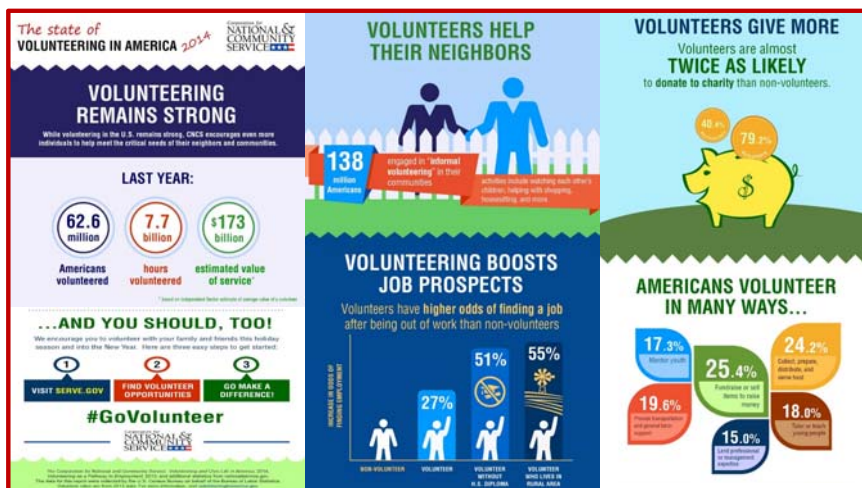
Writing Case Expressions



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Volunteering in America

www.volunteeringinamerica.gov



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Roles and Responsibilities of Board Members



Sample Board Information Sheets

BOARD SOURCE

PROSPECTIVE BOARD MEMBER INFORMATION SHEET

NAME OF PROSPECTIVE MEMBER: _____
 TITLE: _____
 ORGANIZATION: _____
 ADDRESS: _____
 PHONE: _____ E-MAIL: _____

File recruiting profile?
 YES (check Profile) _____
 NO _____

Special Skills/Expertise

<input type="checkbox"/> Financial	<input type="checkbox"/> HR
<input type="checkbox"/> Legal	<input type="checkbox"/> Technology
<input type="checkbox"/> Advertising	<input type="checkbox"/> Real Estate
<input type="checkbox"/> Marketing	<input type="checkbox"/> Other _____

Professional Background

<input type="checkbox"/> For-profit business	<input type="checkbox"/> Nonprofit organization
<input type="checkbox"/> Government	<input type="checkbox"/> Other _____

Demographic Information (if known/applicable):

<input type="checkbox"/> Gender	<input type="checkbox"/> Ethnicity/Race
<input type="checkbox"/> Age Range	<input type="checkbox"/> Other _____

Past engagement with our organization (including as current donor or member):

Yes, please specify: _____
 No _____

Other affiliations: _____

Other board service/ board training: _____

Assessment of giving/gifting potential: _____

Assessment of level of interest in serving: _____

Other pertinent information: _____

BOARD SOURCE

BOARD CANDIDATE RATING FORM

Name of Candidate: _____
 Name of Rater: _____
 Interviewed by: _____
 Date of Interview: _____

On a scale of 1 - 5 (1 = not acceptable, 5 = great), please rate the candidate on each item listed below. Please circle relevant attributes where more than one is listed.

SKILLS & INTERESTS	RATING
1. Proven interest in our mission	
2. Knowledge and understanding of our work	
3. Professional knowledge and skills relevant to the board (technology, statistics, health policy)	
4. Connections to the community (media, politics, health care)	
5. Fundraising experience and willingness to participate	
6. Ability to make a personally meaningful financial contribution	
7. Previous board experience or board training	

PERSONALITY & LEADERSHIP	RATING
1. Ability to listen well	
2. Ability to express ideas and opinions clearly	
3. Ability to participate effectively in a conversation (without monopolizing nor withdrawing)	
4. Sense of humor, positive presence	
5. Ability to ask appropriate questions	
6. Ability to participate on a regular basis in the board's work	

TOTAL: _____

OTHER STRONG POINTS (INCLUDING DIVERSITY OR DEMOGRAPHICS): _____

POTENTIAL CONCERNS: _____

Empower Volunteers

- Plan for fundraising
- Identify potential donors
- Give!
- Cultivate relationships
- Go with staff on visits
- Follow up with staff on visits
- Tell stories to staff and others about the importance of your relationship with the organization
- When relationships and plans are developed, ask for a commitment
- Steward relationships

- Say thank you
- Advocate and connect with the community
- Serve as contacts for foundations and corporations
- Develop planned giving strategies
- Assist with planning and execution of fundraising plans and programs
- Deliver gifts and/or help with appreciation activities
- Attend activities and recognize donations
- Open doors - call associates and friends and introduce them to the organization
- Ask associates and friends to help find others who might be interested and/or have the capacity to help



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Fundraising is . . .

The **right** person asking
 the **right** prospective donor
 for the **right** gift
 for the **right** program
 at the **right** time
 in the **right** way.



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