U.S. Speaker Program for Korea

NGO Management Workshop: Securing Financial Resources

U.S. Speaker Program
DEPARTMENT OF STATE
UNITED STATES OF AMERICA
Promoting Mutual Understanding

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Our 12 Area Overview

1. **Embracing Change**
2. **Sustainability SWOT Analysis**
3. **Stakeholder Analysis, Engagement, & Management**
4. **Sustainability Planning**
5. **Revisiting Your Case for Support**
6. **Grant Writing Summary Review**
7. **Resources for Fundraising**
8. **Collaborations and Partnerships**
9. **Professional Development**
10. **Establishing the Development Committee**
11. **Association for Fundraising Professionals Global Scholarship**
12. **Resources to Gain Insights and Perspectives**

Most nonprofit organizations at some point in the organization's life must face the reality that in order to continue to be viable they need to raise funds.

Even if grants or fees for services finance a large percentage of their programs, **eventually these funding sources may change or dry up altogether**, and, if they want to remain in operation, they will need to begin a fundraising program.

Most organizations, even if programs are funded by grants and contracts, **have unmet needs that need to be funded**.
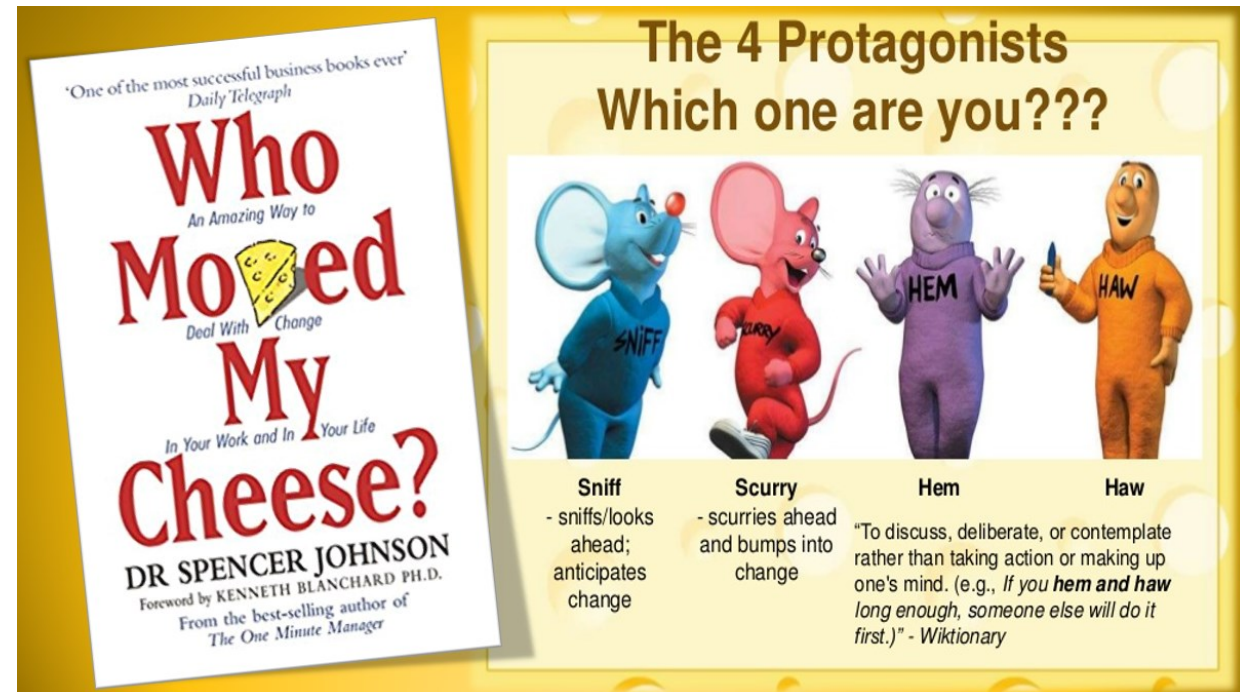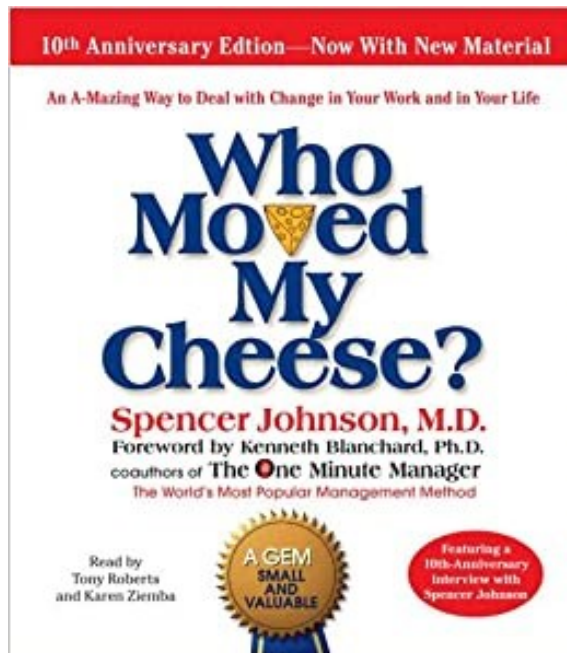
Linda Lysakowski, ACFRE

Our PARADIGM is Changing!

Our Funding Model Is RAPIDLY Changing!

WHY GOALS FAIL?

1. Unrealistic goals.

2. No tools for reviewing progress.

3. Lack of commitment at the management level.

4. Resistance to change.

5. Poor execution of action plan.

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NGO MANAGEMENT WORKSHOP: SECURING FINANCIAL RESOURCES

Go Beyond the Traditional SWOT Analysis

"A sustainability SWOT analysis is a tool that helps you assess the strengths, weaknesses, opportunities, and threats of your client's business in relation to environmental, social, and economic factors. It can help you identify the risks and benefits of pursuing a sustainable business strategy, as well as the gaps and priorities for improvement. Here are some best practices for conducting a sustainability SWOT analysis for your clients."

https://www.linkedin.com/advice/3/what-best-practices-conducting-sustainability

https://www.mossadams.com/services/consulting/specialty/health-care/strategy-integration/strategic-planning-and-implementation

Complete YOUR Sustainability SWOT Analysis!

Environmental & Social Challenges & Big Trends	Strengths, Opportunities, Weaknesses & Threats		Prioritization & Action

Challenges

- What do you and others see changing? For example:
  - Natural resource scarcity
  - Water availability
  - Waste & hazards
  - Global warming
  - Climate variability and extremes

S   Strengths

- How can our strengths address environmental challenges?
- Start with traditional list of your companies' strengths, extend the list to the partners in your value chain
- Consider core & transferable strengths (i.e. R&D, Eng.)

W   Weaknesses

- Who has similar weaknesses or faces similar risks?
- Start with risks resulting from environmental challenges impacting markets (e.g. operations, regulation, commodity prices)
- Include partners in list

Prioritize

- Which insights will influence senior company stakeholders most?
- Prioritise according to company vision and strategy
- Identify strong messengers
- Emphasise findings that would resonate with CEO and senior management

Trends

- What are the sustainability relevant big trends? For example:
  - Innovation & technology advances
  - Demographic & social shifts
  - Global economic dynamics
  - Political & regulatory requirements

O   Opportunities

- Look at threats that currently are not addressed, and how you can address these threats
- Consider the business value that can be created with new products, services and business practices

T   Threats

- Where are environmental challenges threatening future business value?
- Consider both direct threats as well as threats to partners in the value chain
- Look upstream and downstream and identify opportunities for joint action

Act

- What can be a short/mid/long term strategy?
- Categorize generated insights according to where and when you can act
- If needed, consider gathering more insights before planning action

https://www.threebility.com/post/the-sustainability-swot-analysis

Stakeholder Analysis

Courtesy to inform

Good to have on board

Necessary to Engage

Vital to Engage

Step I:
Defining The Objective

What is your goal for the stakeholders?

Define the outcomes!

What is the desired end state?

How will the stakeholders, in partnership with YOU, achieve the outcomes and the desired end state?

Establish milestones and a communications plan for all parties to execute.

Document progress, setbacks, challenges, and successes!

Five Stage Stakeholder Engagement Framework

Dimensions to consider when identifying stakeholders

➢ Responsibility
➢ Influence
➢ Proximity
➢ Dependency
➢ Representation

https://www.e-education.psu.edu/ba850/node/7

Step 2:
Stakeholder Identification

Start by creating a list of qualities that your stakeholders need to possess to achieve the desired end state and outcomes.

What are the identifying qualities that are important about the stakeholder's backgrounds that can lead you to your desired outcomes?
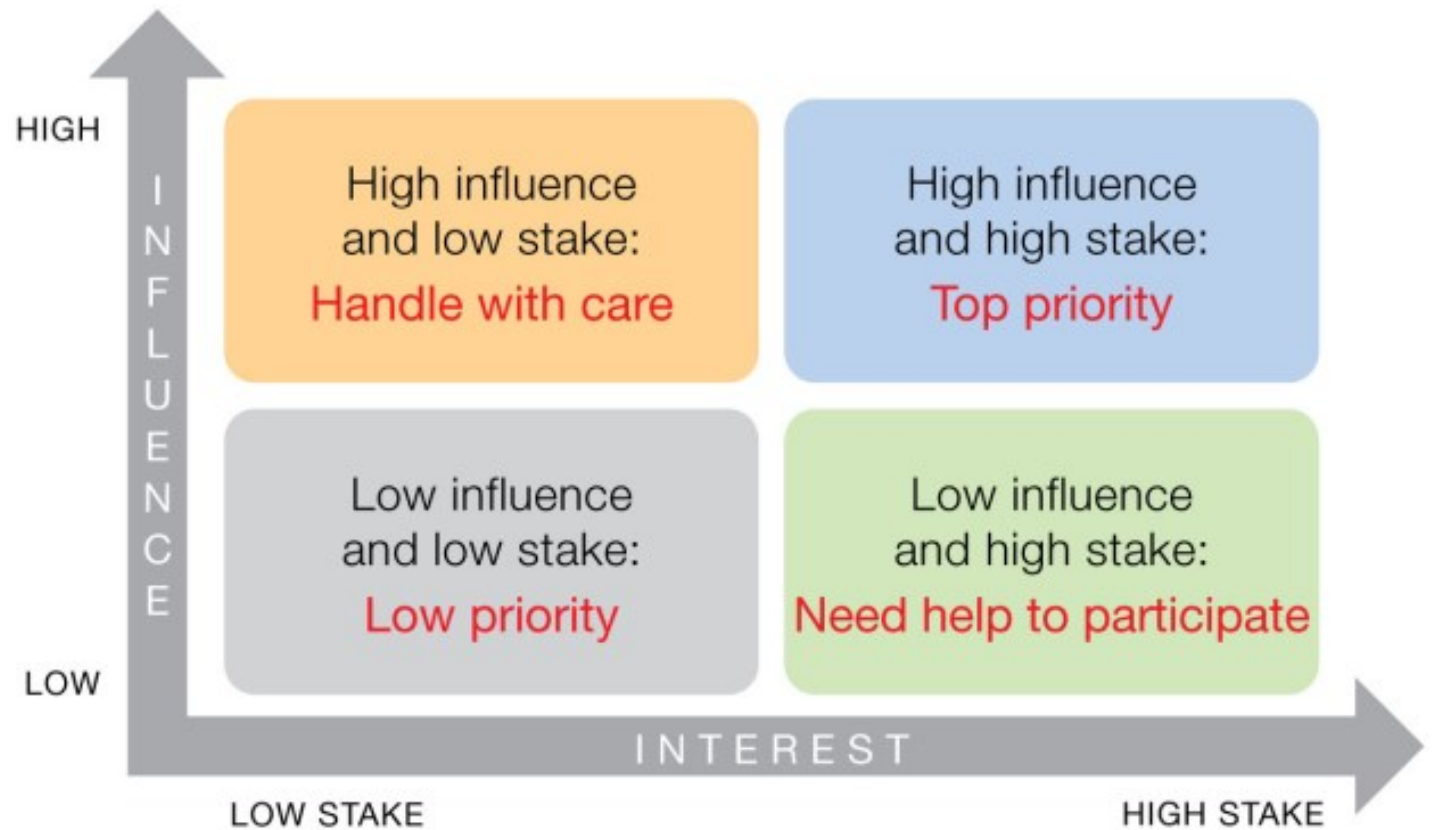
What are the roles that the stakeholders hold in the community or sphere(s) of influence in which you are engaging?

Transform those qualities into a Stakeholder Analysis Matrix and assess potential stakeholders using the matrix?

https://www.excelonist.com/excel-templates/stakeholder-analysis-template-excel/

Stakeholder Interest Matrix Example

Impact on

Stakeholder group	Finance (gain/loss)	Environment (noise, pollutions, green space)	Legislation (planning, building rig)	Business as Usual	Reputation
Visitors/users of the campus grounds (dog walkers)		✔			
Local residents		✔			
Academic departments				✔	✔
Students				✔	
Contractors	✔		✔		
Local authorities		✔	✔		

Step 3: Stakeholder Prioritization

Use Mendelow's Stakeholder quadrant matrix to assess the potential stakeholders by their willingness to engage your organization and their personal ability to effect change that helps you achieve your desired end state and outcomes.

HIGH

INFLUENCE

High influence and low stake:
Handle with care

High influence and high stake:
Top priority

Low influence and low stake:
Low priority

Low influence and high stake:
Need help to participate

LOW

INTEREST

LOW STAKE
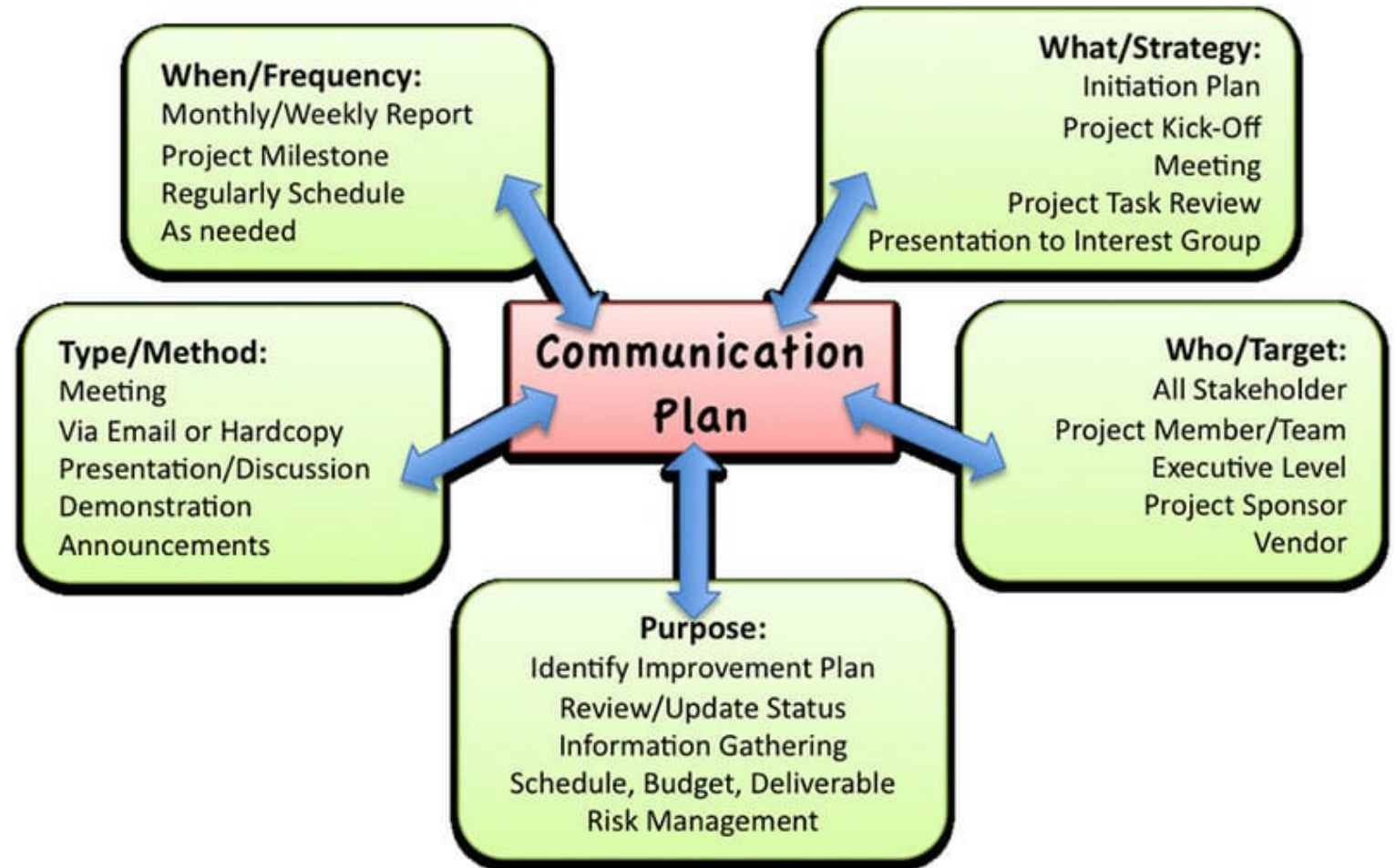
HIGH STAKE

Step 4:
Create the Stakeholder Map

Establish which stakeholders are may be blockers or critics and those likely to be advocates and supporters for the desired end state and outcome of your project.

You may color code advocates and supporters in green, blockers and critics in red, and others who are neutral in yellow.

Stakeholder Names and Roles	How Important? (Low – Med – High)	Current Level of Support? (Low – Med – High)	What do you want from stakeholders?	What's important to stakeholders?	How could stakeholders block your efforts?	What is your strategy for enhancing stakeholder support?

Design the Communications Plan

Stakeholder Management

Stakeholder Identification

Need Assessment

Stakeholder Prioritization

Stakeholder Engagement

Evaluation

Stakeholder Management

https://en.unesco.org/sites/default/files/5._presentation_spcn-01_0.pdf

Key steps of stakeholder management

Establishing A Sustainability Plan is ESSENTIAL!

Parts of a Sustainability plan

When describing the project sustainability, many NGOs focus mostly on the financial sustainability. Of course, this is an important part of the project sustainability, but it is not necessarily the most important part. While it is important to know how the project will be financed in the long term, the other parts of the sustainability plan are also very important. Without community and organizational sustainability, financial sustainability will not directly result in project sustainability.

proposalsforngos.com

COMMUNITY SUSTAINABILITY

PROJECT SUSTAINABILITY

FINANCIAL SUSTAINABILITY

ORGANIZATIONAL SUSTAINABILITY

Embrace the Competitive Advantage of Having A Sustainability Plan

Sustainability ... A Competitive Advantage

PEOPLE/PROCESS
• Innovation
• Preventing problems
• Speed
• Understand Sustainability Vision
• Support structure
• Interdepartmental teams
• Collaboration
• Employee Loyalty

PROCESS
• Departmental mentality
• Variation
• Tool kit mentality
• Self interest
• Lacking strategic focus

PEOPLE
• Reactive management
• Solving problems
• Fire fighting

PEOPLE/ ENVIRONMENT
• Employee engagement
• Public communication and reporting
• Proactiveness
• Sustainability is viewed as an integral part of what makes an organization profitable

SUSTAINABILITY
• Long-term growth
• Systems Thinking
• Profitability
• Customer Loyalty
• Stewardship

PROCESS/ENVIRONMENT
• Alignment
• Effective with supply chain
• Systems Thinking

ENVIRONMENTAL
• Compliance
• Considered an expense
• Non-competitive
• Program du jour

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https://usgreentechnology.com/wp-content/uploads/2016/07/Sustainability-Discs-4-RAC.gif

The Sustainability Planning Team

"Your sustainability planning process will require dedicated leadership from one or more leads. [Sustainability Team] Leads should have easy access to influencers and decision makers such as organizational executives and policy makers and understand the best ways to gain traction in your organization and community. At the same time, leads must be familiar with the program at the center of the work and able to dedicate time to organize meetings and agendas, manage information gathering and synthesis, and communicate effectively with all team members."

https://www.summermatters.net/wp-content/uploads/2016/08/2015-Sustainability-Plan-Workbook.pdf

https://www.i-3consulting.com/sustainability

Plan to Thrive and not barely survive!

"This document focuses on community sustainability, financial sustainability, and organizational sustainability. The sustainability plan has become more and more important because donors would like to fund projects that have the potential to survive and thrive in the long term."

"It gives you and the donor reassurance that the grant is well spent and will have a long-lasting impact, even once the support runs out."

"Many NGOs don't put enough attention to writing the sustainability plan, as it is often the last part of a proposal....When your sustainability plan is great, it can be the section that distinguishes your proposal from your competition and convinces the donor to actually fund your project."

https://proposalsforngos.com/sustainability-plan-project-proposal/

Collaborate On Your Sustainability Roadmap

https://www.slideteam.net/development-of-sustainability-plan-for-project.html

Sustainability Planning

Elements of a Sustainability Plan

Set measurable, quantifiable goals.

Discuss the means for achieving these goals.

Set timelines for achieving your goals.

Set new goals once previous ones are achieved.

One or more of the following elements may make up your program's sustainability plan:

Short and long-term goals

Research priorities

Staff and Volunteer retention and recruitment

Partnerships

Funding opportunities

Publications and presentations

Community impact

Sustainability Plan Implementation Roadmap

C. Priority Elements: *(check 1 per template)*

☐ Vision (Appendix A) ☐ Results Orientation ☐ Strategic Financing Orientation

☐ Broad Based Community Support ☐ Key Champions

☐ Adaptability to ChangingEnvironments ☐ Strong Internal Systems

☐ Marketing and Communications

Rationale: *Which task within this element (refer to self-assessment tool) will you focus on and why?*

Action Steps	Responsibility – By Whom?	Time Frame – By when will it be done?	Resource – Who or what is being used?	How will you know if you're successful?

D. Plan for Follow-up How do you plan to monitor your progress on sustainability moving forward? Who is responsible for evaluating and documenting progress?   When will you assess your progress? When will you set new milestones?

Sustainability Plan Implementation Roadmap

E. Sustainability Plan Follow-up	Date:
Progress Made:	
Challenges Encountered:	
Next Steps:	

https://www.summermatters.net/wp-content/uploads/2016/08/2015-Sustainability-Plan-Workbook.pdf

Sustainability Requires Continual Process Improvement!

"Sustainability depends on developing a clear plan for putting in place and keeping in place the key elements that make an initiative successful."

"A good sustainability plan is a roadmap that will help all stakeholders successfully reach their goals."

"Sustainability planning should be done throughout the life of an initiative. A sustainability plan works best when it is used and reviewed on a continual basis."

Sustainability Planning is a Continuous Process Loop

"Once the sustainability plan has been finalized, consider strategies to spread the word and ensure accountability through community forums and posting on organizational websites. If pursuing the latter, consider an additional step to translate your plans into messages and formats that will resonate most with your intended audiences."

Six Rings Planning Model©

PURPOSE | CORE VALUES | VISION | GOALS | OBJECTIVES | ACTIONS

Why the organization exists | What is essential to its success | Where the organization is going | Long-term priorities | Short-term quantifiable results | Specific actions, responsibilities, timetables

THE STRATEGIC FOCUS | THE PLAN
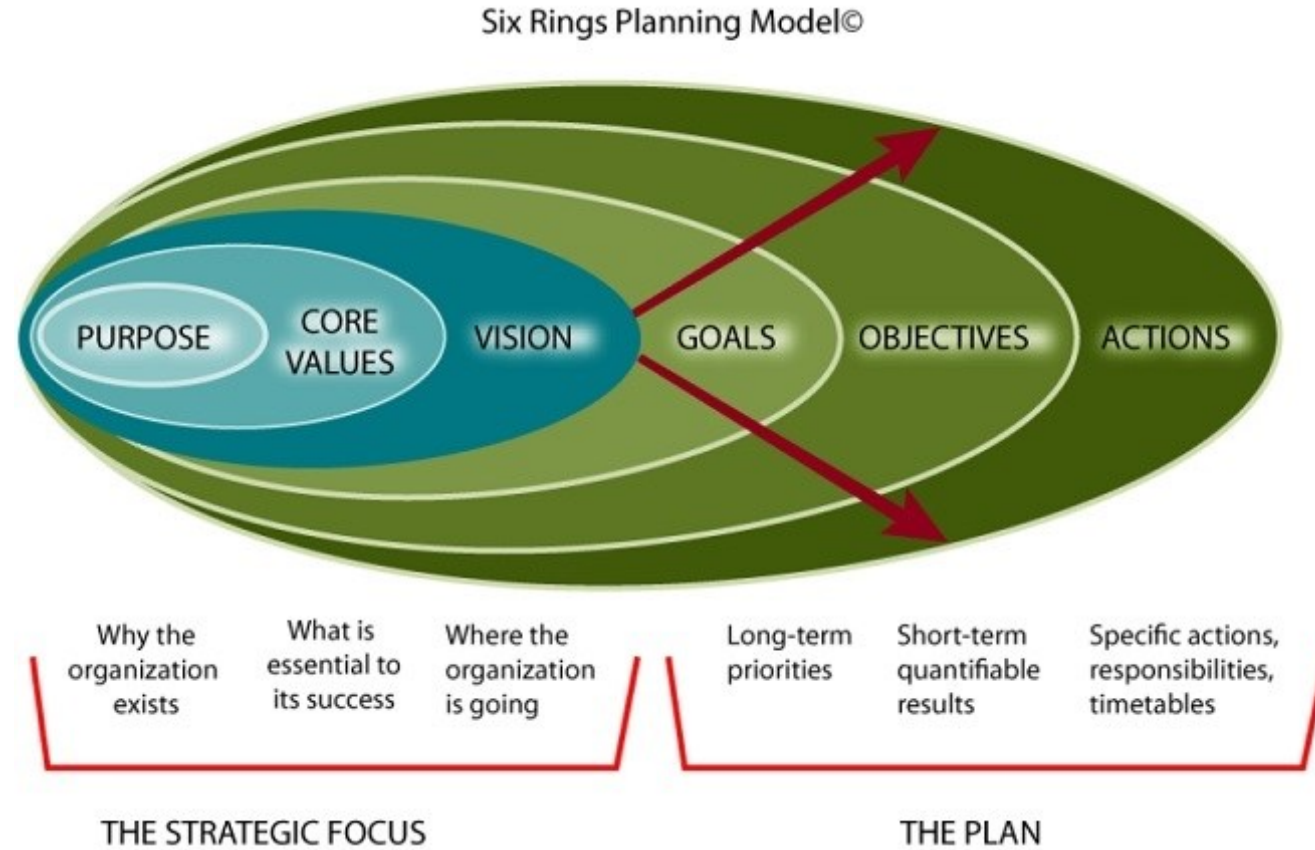
The Trinity:
Vision, Mission & Case for Support

Vision:

    What you want to accomplish

Mission:

    What you are doing now

Case for Support:

    Benefits of your organization and how
    an investment (donation) will make an imp
    Tells your story
    Motivates people to volunteer and give

A case for support casts a bold vision for a better future and invites donors to get caught up in that vision.

The Case for Support

Your case for support tells people WHY they should support your organization and its mission and vision.

The case for support lists your organization's history, its needs, and the solutions.

It also lists the qualifications for operating the programs you are proposing to fund.

Who runs the organization, staffs the program areas, governs the organization?

What recognition, awards and commendations validate your past efforts and impact?

Why Write a Case for Support?

A good case for support ensures that you, your board, your leadership team and staff all convey a consistent message when speaking to the public, developing educational materials, working with the press, and fundraising.

A good case for support is both logical and emotional.

People donate to your organization because they TRUST YOU and they believe in the mission of your organization!

The case for support tells a donor why your mission is important to her/him and to your shared communities or areas of interest.

It is CRITICAL to develop the case for support before beginning ANY fundraising programs.

All materials used in fundraising must be developed from the case for support.

What does it do?

A Case for Support positions the organization for investments (donations) that support all its activities—from annual giving, planned giving, and major gift programs, to special events.

Why us?

What are we doing that's so uniquely wonderful that the world should want more of it and support our plans?

Why now?

What's the big hurry? What changed? Why is this URGENT?

Why you?

the donor,
might care?

"Why in the world would I invest my hard-earned money in your stuff?"

18

Essential Elements of the Case for Support

o Tell your story using the success stories of real people positively impacted by your work and initiatives.

o Be genuine and sincere and speak from the heart!

o Be engaging! Generously use the word "You," and invite the reviewers to see themselves being impacted by the outcome(s).

o Do NOT merely present a listing of "facts" and "stats!"

o Your Case for Support answers the most compelling questions about your nonprofit!

It is ALWAYS about the donor!

Corporate communications

are about how great the organization is.

Favorite pronoun:

we

Donor communications

are about how great the donor is.

Favorite pronoun:

you

Dramatize your solution
using before/after stories

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Little stories are easy to remember…

When she entered our 3rd grade, she couldn't spell "cat."

At the end of the year, she could spell "Tchaikovsky."

The materials that are created from the case for support will include:

Brochures

Speeches

Press kits

Grant proposals

Volunteer training materials

Website

Videos

Appeal letters

Individual proposals

The story is about the donor

...every time someone donates to a good cause, they're buying a story, a story that's worth more than the amount they donated.

It might be the story of doing the right thing, or fitting in, or pleasing a friend or honoring a memory, but the story has value.

For many, it's the story of what it means to be part of a community.

Source: Seth Godin

Make your donor the real hero of the story…

And shift the burden for achieving success to their shoulders

Resources for Creating YOUR PROJECT'S |ORGANIZATION'S AWESOME Case Statement!

Tom Ahern on a Donor-Centric Case Statement (Video): https://youtu.be/P3_csEMrIXk

https://www.simonejoyaux.com/downloads/TellingYourStory.pdf

http://www.thefundraisingauthority.com/strategy-and-planning/nonprofit-case-for-suppor/

http://www.thefundraisingauthority.com/strategy-and-planning/non-profit-case-statement-2/

http://www.thenonprofittimes.com/management-tips/8-tips-writing-case-statement/

https://www.thebalancesmb.com/how-to-write-a-great-case-statement-for-today-s-donors-2502100

http://www.gnof.org/wp-content/uploads/2014/06/3.-Building-a-Case-Statement-Worksheet.pdf

http://www.grenzebachglier.com/2014/03/12/seven-deadly-sins-of-case-statements/

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Tips for Further Refining Your Case for Support

❖ **Avoid the 7 Reasons your Case Statement Sucks**
   http://yourbluecanoe.ca/new/7-reasons-your-case-statement-sucks/

❖ **Writing a Compelling Case for Support**
   https://ccsfundraising.com/writing-a-compelling-case-for-support-four-steps-for-getting-started/

❖ **Your Case for Support: Good Design Will Make it Stronger**
   https://mission-minded.com/your-case-for-support-good-design-will-make-it-stronger/

❖ **Samples of Good Case Stories**
   https://wiredimpact.com/blog/nonprofit-case-study-template-examples/

❖ **Create an Impact Page for your website's Case Stories**
   https://wiredimpact.com/guide/essential-web-page-content-nonprofits/impact-page/

Examples of a Case for Support

❖**Downloadable Internal Case for Support:**
 https://indd.adobe.com/view/88f8cf4f-90ce-4079-8dce-ba3c112c0543

❖**Downloadable Internal Case for Support:**
 https://www.gsep.org/content/dam/girlscouts-gsep/documents/Case-Statement.pdf

❖**External Case for Support on a website:**
 https://www.punchdrunk.org.uk/support-us/the-case-for-support/

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Learn…Practice…Refine
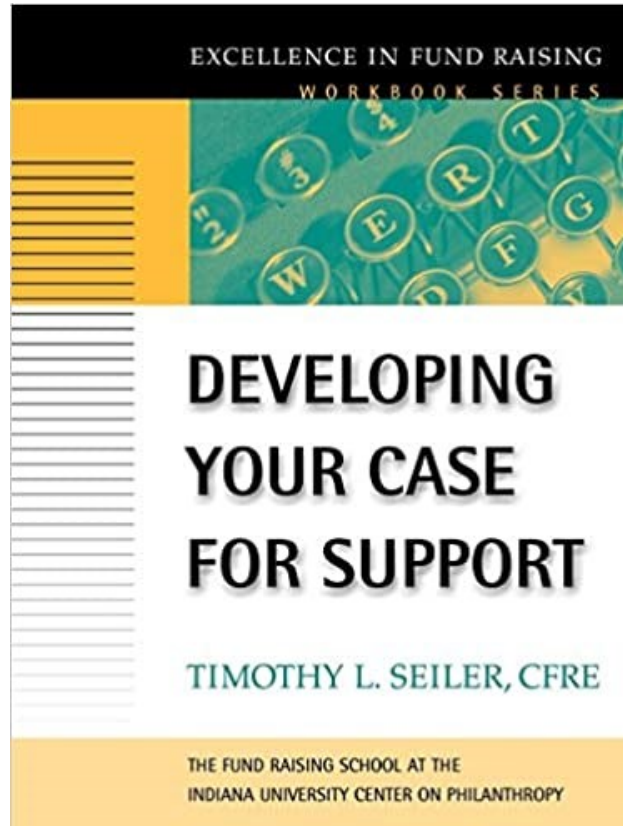
- This virtual workshop is your beginning!

- Your Case for Support and Strategic Plans are living, ever-evolving dynamic documents that require regular review and refinement as your organization's circumstances and conditions change.

- Continue to learn about the multiple ways that you can approach developing your Case for Support:

- *https://www.amazon.com/Developing-Your-Support-Timothy-Seiler/dp/0787952451*

Other Essential Tasks To Do…

Every staff member should have a copy of the Donor Bill of Rights and the AFP Code of Ethical Principles and Standards of Professional Practice. All staff must understand and commit to these standards.

http://www.afpnet.org/files/contentdocuments/donor_bill_of_rights.pdf

https://www.afpnet.org/files/contentdocuments/codeofethics.pdf

Every Nonprofit should must understand and commit to the Nonprofit Standards of Excellence.

"It identifies 6 major areas of nonprofit governance and management which include specific benchmarks and measures that provide a structured approach to building capacity, accountability, and sustainability" in a nonprofit organization.

https://standardsforexcellence.org/#

THE 5 BASIC STEPS OF THE GRANT WRITING PROCESS

1. **Grant Prospect Research**

2. **First Contact**

   Are you good fit for the Grantmaker

   LOI

3. **Research and Discussion**

   This is the bulk of the work

4. **Write and Submit**

   Draft, Review, Update and Correct before submission.

5. **Follow Up**

   Fulfillment

   Grant Reports

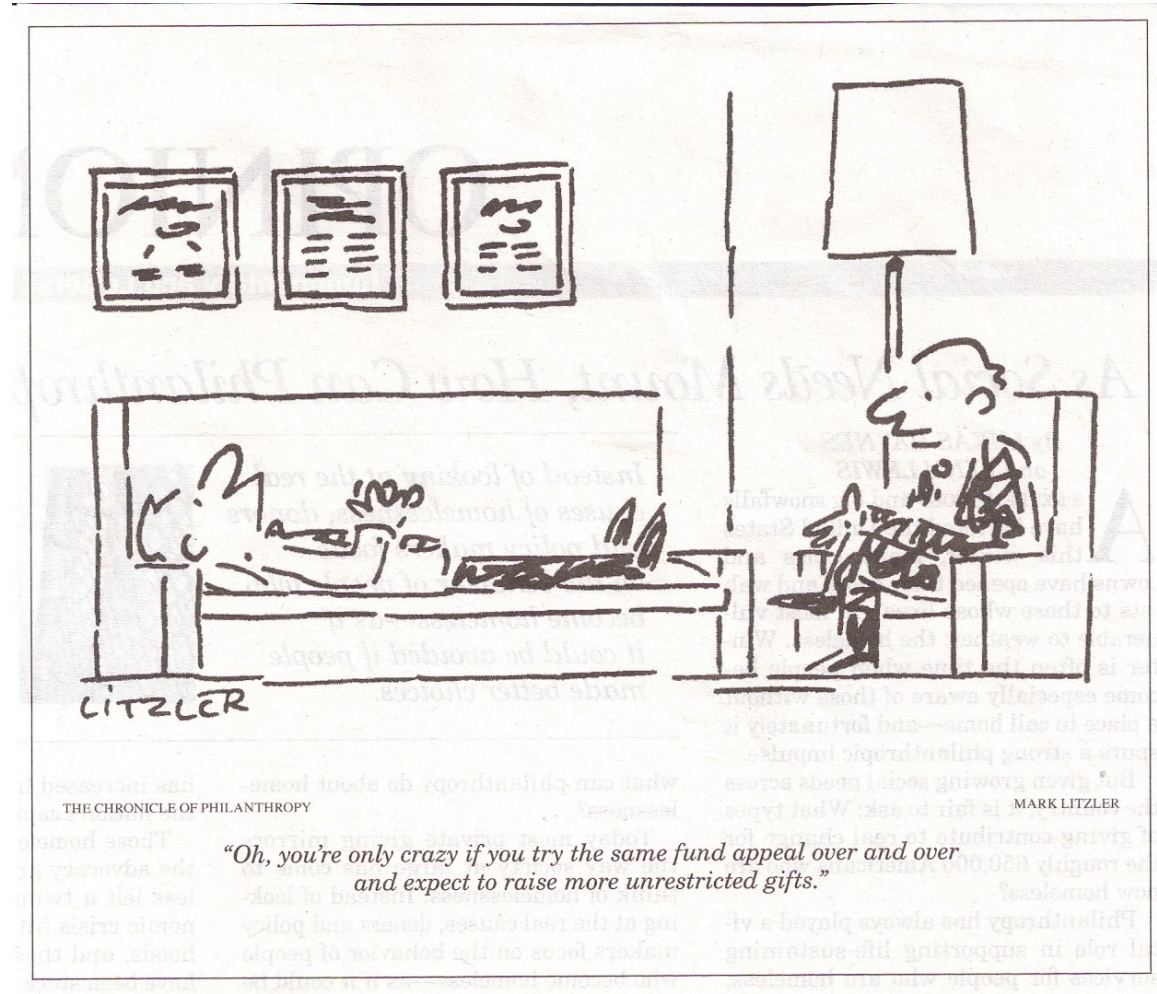See: https://www.professionalgrantwriter.org/basic-steps-grant-writing-process

"It's a foolproof formula for writing grant applications."

The Generation and Development of THE Idea

This is the major project or program for which you are seeking funding

- ❖ Agreed upon by key stakeholders
- ❖ Everyone involved should address available resources needed
- ❖ Address any service delivery barriers
- ❖ Address goals and objectives
- ❖ Establish strategies for meeting those goals
- ❖ Budget of expected income and expenses
- ❖ Realistically forecast impact with outputs and outcomes
- ❖ Have a **Sustainability Plan**

http://www.thefundraisingauthority.com/grants/grant-writing-process/

THE CHRONICLE OF PHILANTHROPY

MARK LITZLER

"Oh, you're only crazy if you try the same fund appeal over and over and expect to raise more unrestricted gifts."

The Generation and Development of THE Idea

**Attend Grant Review Panel (if available)**

Administer the program if funded
Has to be administered in accordance with what was proposed in the application and the terms of the grant contract (if offered.) Fulfillment

If the project isn't funded
Call the funder and ask why the application wasn't funded and what could be done the next time to improve the application. Then modify the application and resubmit.

Most first-time grant applications are rejected.
Perseverance is the name of the game in winning grants.
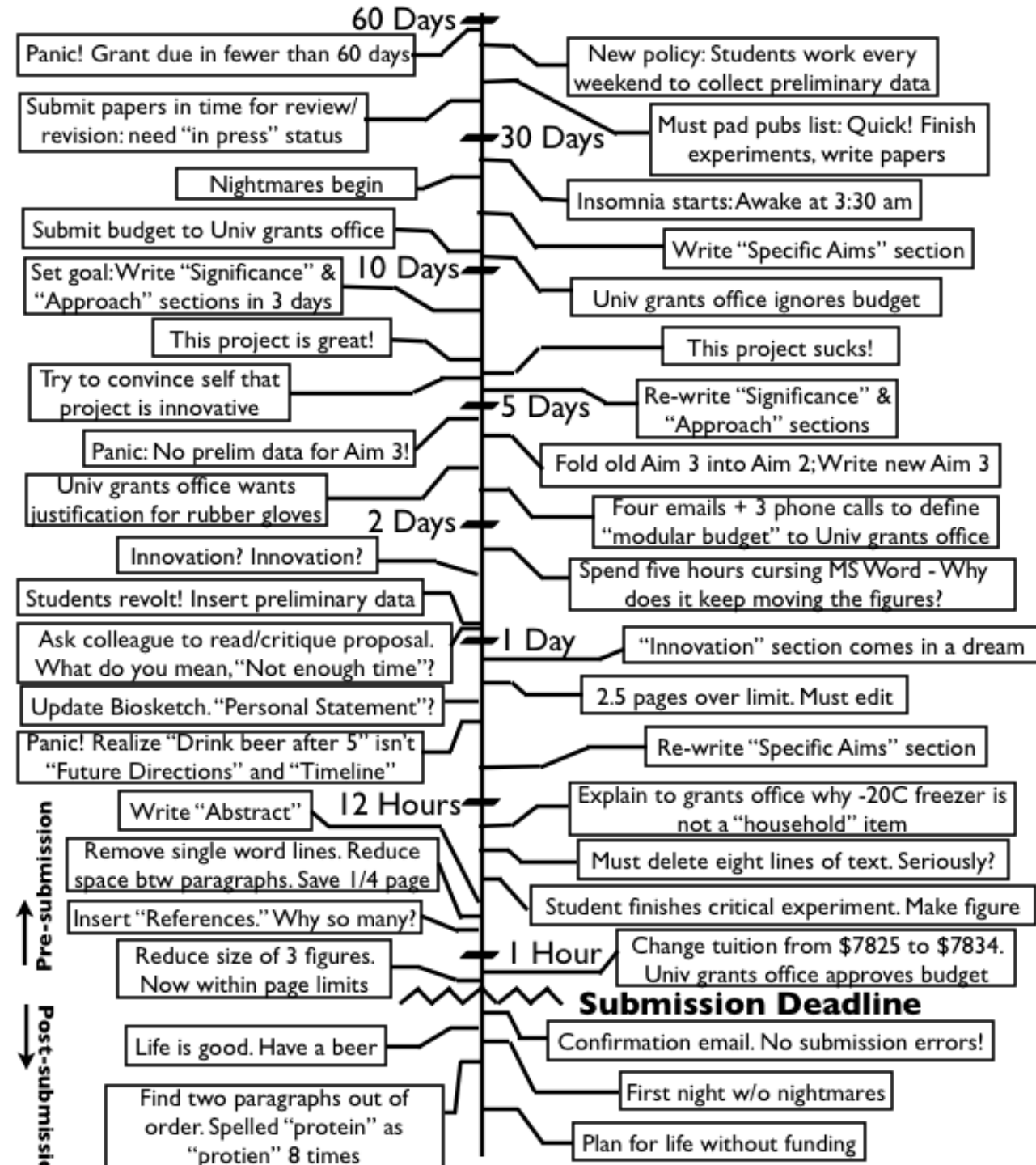
Structure of the Proposal

❑Cover letter
❑Executive summary
❑Statement of need
❑Goals and objectives
❑Methods and strategies
❑Plan of evaluation
❑Budget projections
❑Organization information

https://snowballfundraising.com/

"I still say basic research is what matters in the long run."

Keep In Mind...

Proposal Format

    Award Levels

    Forms

    Margins

    Spacing

    Character or Word Count

    Evaluation Process

    Restrictions on the Number of Pages

The Hook

    "The HOOK tailors the description of the idea to the interest of a particular funder. The HOOK aligns the project with the purpose, and goals of the funding source. This is a critical aspect of any proposal narrative because it determines how compelling reviewers will perceive your proposal to be."

https://www.ncat.edu/
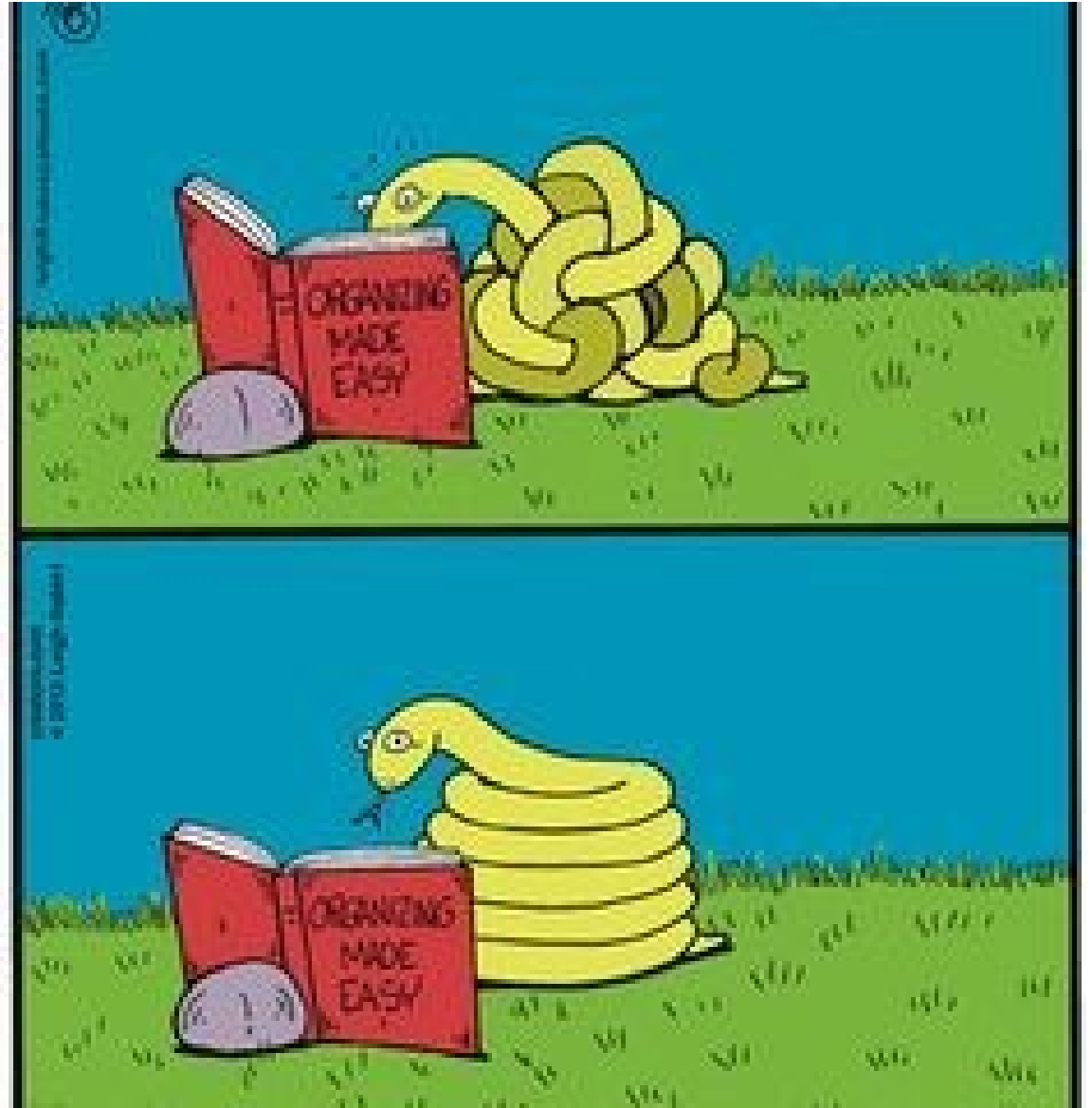
Writing The Proposal Itself

Storytelling (with supporting statistics)

Make them cry! Make them see it!

Incorporate a case study (and maintain confidentiality)

Show a real need of a real person

Use online dictionaries and thesauruses

Command of language and capture attention

Research proven best practices

Incorporate language from the experts

Research grant writing in progress.

Writing The Proposal Itself

Use best practices

Emulate evaluation results of similar successful programs

Know what works and what doesn't work

Proofread and edit

Clean it up

Write in short, hard-hitting sentences

Long-winded sentences almost always lose the reader

Impact

Outcomes NOT Outputs

Sustainability

https://www.dummies.com/business/nonprofits/grants/grant-writing-for-dummies-cheat-sheet/

Isaac Newton struggles to write the economic impact section of his 'gravity' prop

What's The Plan?

Well thought-out plan of action!

Who

What

When

Where

How

Why this approach?

Plan to evaluate

How your organization: (1) will measure the level to which the program is achieving the expected outcomes; and

2) Will document that program activities unfolded according to plans, as well as any course corrections you're making and why.

Outcomes are all about results, so how will you monitor results? This is what many funders call the "outcome evaluation" plan.

Plan for sustaining the program

"Great plan. Could we get some more details?"

The Budget & Budget Narrative

Four Essential columns:

Column 1 – Line Items

Column 2 – Total Program Budget

Column 3 – Other Funding

Column 4 – Amount of The Requested Grant: The difference between Column 2 and Column 3 is the requested grant amount.

Typically, grant proposals include budgets for one year time periods.

Remember you are projecting a budget.

Be certain that there are no expenses in your budget request that are unexplained.
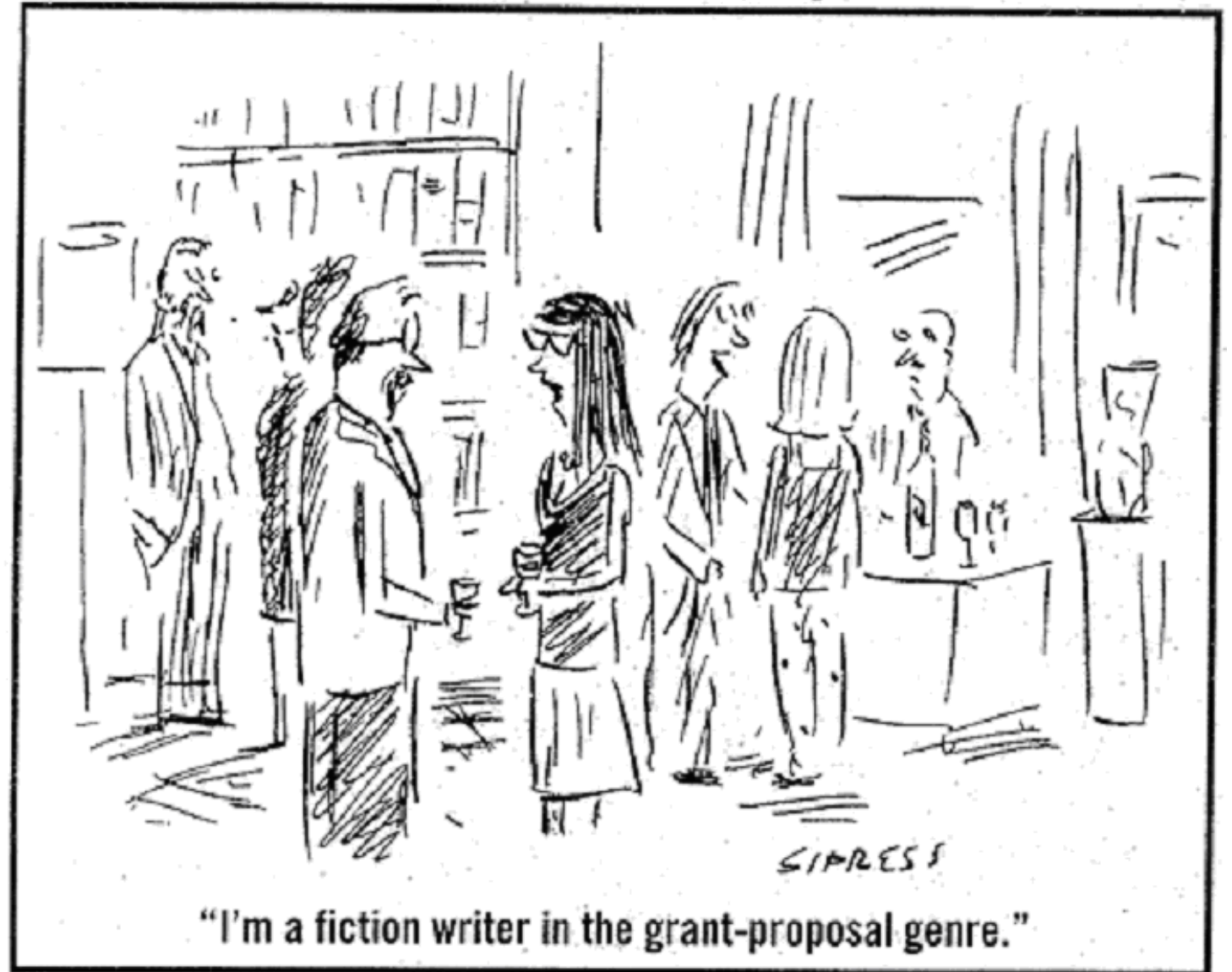
Check your math!

Final Touches

Summary

Attachments

Review ENTIRE Submission for…

- Any grammatical or spelling mistakes
- Unclear, vague, or ineffective language
- Unsupported claims or statements
- Any missing steps or data points
- Repetitive or drawn-out explanations

https://www.tgci.com/getting-grant-101

"I'm a fiction writer in the grant-proposal genre."

Directly, Simply, Concisely and Creatively

Keep your writing at about an 8th - 10th grade level.

"Those who are reviewing your grant proposals will, on average, be more educated than the average direct mail recipient and will have more experience with non-profits and grants, and thus will expect slightly elevated discourse."

Don't make your proposals difficult to read.

Avoid jargon and technical terms wherever possible.

Include headings, subheadings and white space so that your proposal looks easy to read.

"Is it just me or are these review panels getting a lot tougher?"

Be Kind to Reviewers!

Making them happy should be one of your top goals!

Use the grant-review criteria as subheadings in your proposal, making it easier for the panelists to fill out their review forms.

For example, reviewers typically have to complete a section on "Innovation."

A clearly labeled subsection on "Innovation" not only saves the reviewer time but gives you the opportunity to "educate" the reviewer on innovative aspects they may not have recognized on their own.

https://www.chronicle.com/article/10-Tips-for-Successful-Grant/242535

How not to respond to reviewers' comments.

Keep Your Story Arc Consistent

Start by talking about the problem you are facing

> Build up to the solution

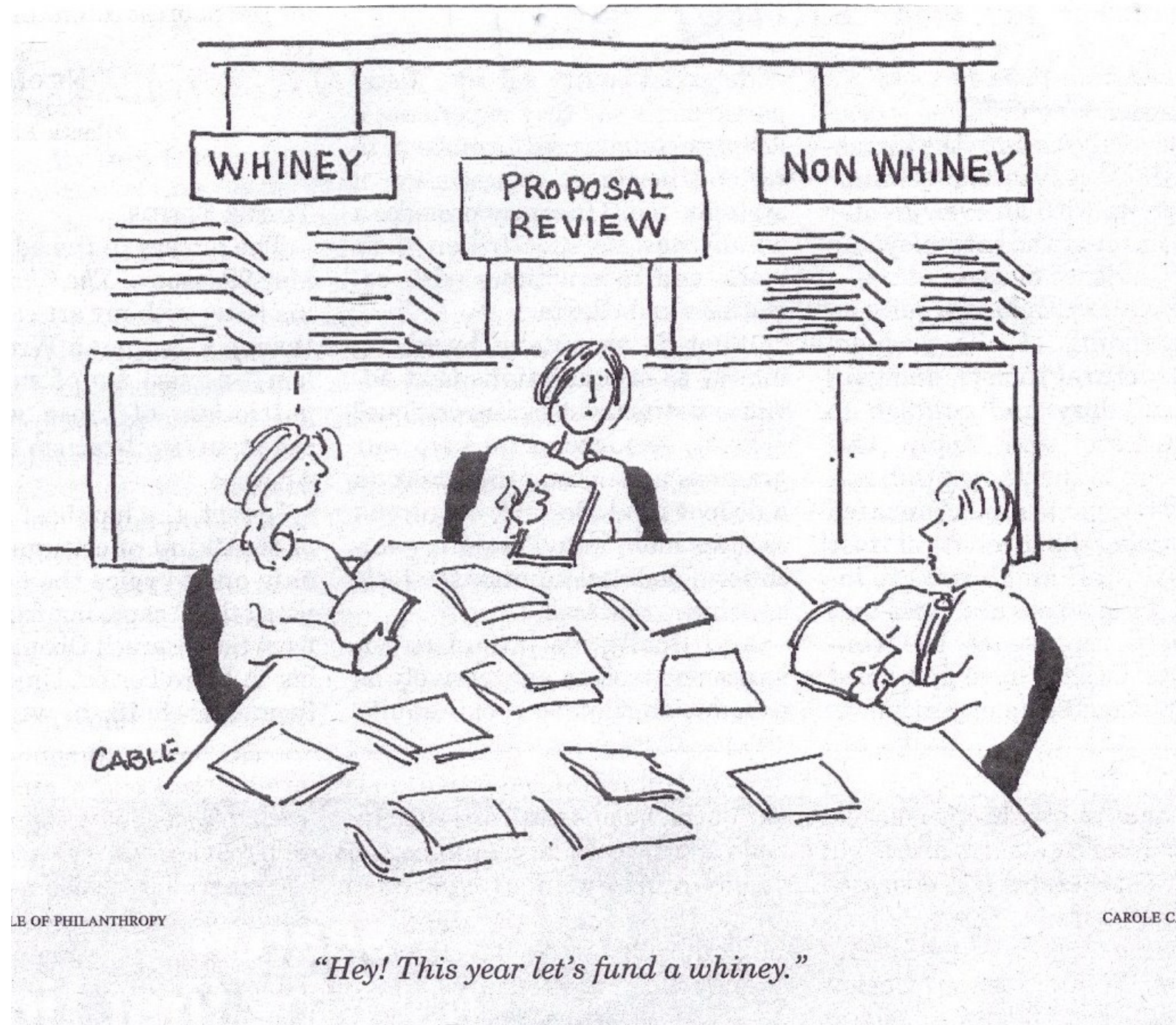> Prove that the solution will work by sharing outcomes

> and then invite the funder to become the hero of your story by funding the project.

Be sure to keep your story consistent.

> STRICTLY stick to the project, mission, and vision at hand.

And remember…"BHAG" (Big Hairy Audacious Goals!

http://www.thefundraisingauthority.com/grants/win-more-grants/

"Hey! This year let's fund a whiney."

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US COMMON GRANT APPLICATION

Go to https://www.washingtongrantmakers.org/common-grant-application

Go to https://www.commongrantapplication.com/index.php

Development Dashboard Resources

http://jmtconsulting.com/why-every-nonprofit-needs-dashboards-to-resolve-the-visibility-issue/

https://nonprofitquarterly.org/2017/11/30/financial-management-models-of-a-great-nonprofit-dashboard/

https://boardsource.org/board-support/training-education/download-resources-tools/

https://blog.capterra.com/13-free-nonprofit-budget-templates-you-should-try/

Supplemental Resources

http://www.thefundraisingauthority.com/fundraising-basics/

http://www.pamelagrow.com/14/how-to-be-a-nonprofit-development-director-charting-your-first-100-days/

http://www.thefundraisingauthority.com/fundraising-basics/fundraising-plan/

The Approach to Collaboration and Partnership

"To make these collaborations work, organizations need to find at least one common goal to work with one another, not against. Collaboration among different sectors is not only difficult to create and manage, but difficult to define and analyze common goals.   All involved organizations must think strategically to find the right fit with existing missions, organizational values, and current and future needs.

The different types of collaboration have distinct characteristics and functions. They include four stages: philanthropic, transactional, integrative and transformational. The type of collaboration will be the vehicle by which all partners will go forward. All parties need to be cognizant of their organization's own values and needs, maintain honest communication and use of multiple sources to sustain positive interaction."

https://lodestar.asu.edu/blog/2019/09/what-are-advantages-collaboration-between-nonprofit-and-profit-organizations

THREE IMPORTANT QUESTIONS TO ANSWER FIRST!

1. WHAT DO YOU WANT TO ACHIEVE?

The Oklahoma Center for Nonprofits convened nonprofit leaders to reach agreement on three questions about the assets of the nonprofit business sector in Oklahoma, the actions they could take together to address Oklahoma's challenges, and what the nonprofit business sector would need from the government to function effectively. These conversations led to the development of an open letter to state elected officials outlining the ways that the Oklahoma nonprofit sector and government can better partner for the benefit of the state.

https://thecommunityfoundationmartinstlucie.org/wp-content/uploads/2018/11/Starting-Small-But-Thinking-Big-About-Collaboration-3-Questions-to-Ask-Upfront-BoardSource.pdf

THREE IMPORTANT QUESTIONS TO ANSWER FIRST!

2. WHAT ARE THE BEST TACTICS TO MOVE FORWARD WITH OUR COLLABORATIVE EFFORTS?

https://thecommunityfoundationmartinstlucie.org/wp-content/uploads/2018/11/Starting-Small-But-Thinking-Big-About-Collaboration-3-Questions-to-Ask-Upfront-BoardSource.pdf
And https://www.proactiveworldwide.com/resources/market-and-competitive-intelligence-blog/top-3-tips-to-make-collaboration-a-competitive-advantage/

THREE IMPORTANT QUESTIONS TO ANSWER FIRST!

3. HOW WILL YOU PRIORITIZE YOUR COLLABORATIVE EFFORTS?
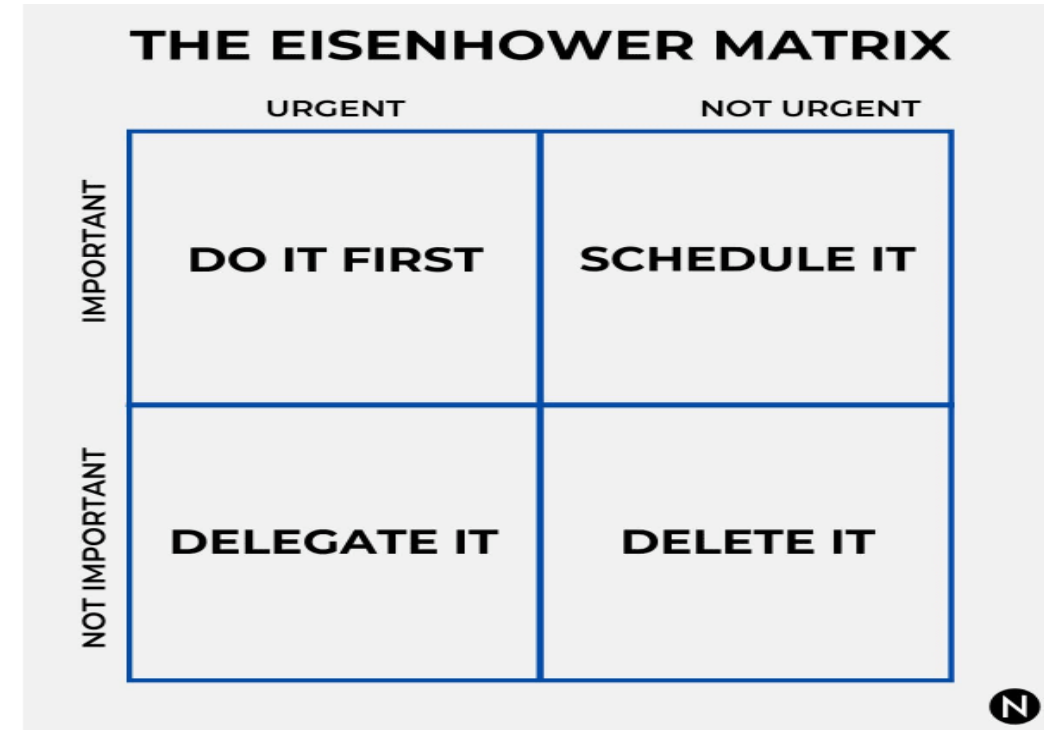
THE EISENHOWER MATRIX

	URGENT	NOT URGENT
IMPORTANT	DO IT FIRST	SCHEDULE IT
NOT IMPORTANT	DELEGATE IT	DELETE IT

FINDING MONEY! Getting Started…

➢The Chronicle of Philanthropy

https://www.philanthropy.com

➢GrantWatch

https://www.grantwatch.com/

➢GrantStation

https://grantstation.com/

➢Society for Nonprofit Organizations

https://www.snpo.org/index.php

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FOUNDATION DIRECTORY ONLINE
by Candid.

https://fconline.foundationcenter.org

90% of U.S. Foundations don't have websites.

With Foundation Directory Online, you can put Candid's extraordinary database and fundraising expertise to work for your organization, project, or client, while uncovering information on all 235,000 U.S. Foundations. It's the smartest, fastest way to win more funding.

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Corporate Social Responsibility (CSR) Training
COST EFFECTIVE & VIRTUAL

https://www.udemy.com/topic/corporate-social-responsibility

https://www.coursera.org/courses?query=corporate%20social%20responsibility

https://www.edx.org/course/corporate-social-responsibility-csr-a-strategic-ap
And
https://www.edx.org/learn/social-responsibility

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Corporate Social Responsibility (CSR) Training
COST EFFECTIVE & VIRTUAL

LinkedIn Learning

https://www.linkedin.com/learning/certification-prep-shrm-cp/corporate-social-responsibility-overview

CLASS CENTRAL

https://www.classcentral.com/course/edx-corporate-social-responsibility-csr-a-strategic-approach-9510

MINDEDGE   https://catalog.mindedge.com/courses/courses/354/corporate-social-responsibility

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Corporate Social Responsibility (CSR) Training
COST EFFECTIVE & VIRTUAL

https://www.aicpa.org/cpe-learning/course/corporate-social-responsibility

https://learn.hrci.org/courses/hr-ethics-series-corporations-and-corporate-social-responsibility

https://jobskills.aarp.org/catalogue/courses/354/corporate-social-responsibility

Establish The Development Committee

The development committee can help your organization design and implement your development plan.

This committee can also help open doors to potential donors for your organization and they can help solicit gifts.

The development committee may have several board members serve, but it should largely draw most of its members from outside the board.

Development committee members who are EXTERNAL to your Board helps the organization to expand your fundraising efforts and to cultivate future board members.

A development committee of 10 or more members can get you started with the necessary skills and talents you need.

You may divide the development committee into subcommittees such as event committee, annual fund committee, etc.

It is important to have a development committee position description with clear expectations before you recruit new development committee members!

Resources for Creating Your Development Committee

https://www.simonejoyaux.com/downloads/DevelopmentCommitteeJobDescription.doc

http://www.gnof.org/wp-content/uploads/2013/05/4-FundDevelopmentCommitteeJob-Description_Template.pdf

http://www.csaymca.org/uploads/3/4/6/6/3466162/sample-financial-development-committee-commission-description.pdf

https://www.compasspoint.org/board-committee-job-descriptions

http://nonprofitinformation.com/how-to-form-a-nonprofit-board-development-committee/

Finding Development Committee Members:

- ✓ Past board members
- ✓ Event volunteers at events
- ✓ Donors
- ✓ Chamber of Commerce members
- ✓ Civic Associations
- ✓ Graduates of leadership programs
- ✓ Local and Regional Business Leaders

Training the Development Committee

Your staff, volunteers, board members and development committee members require training in fundraising practices and techniques.

Ask a local Development Director to volunteer to conduct the training for your nonprofit.

Evaluating and Rewarding The Development Committee

Measure the committee's success against the goals and objectives set forth in the development plan.

Did the committee members…

…get actively involved with the development plan?
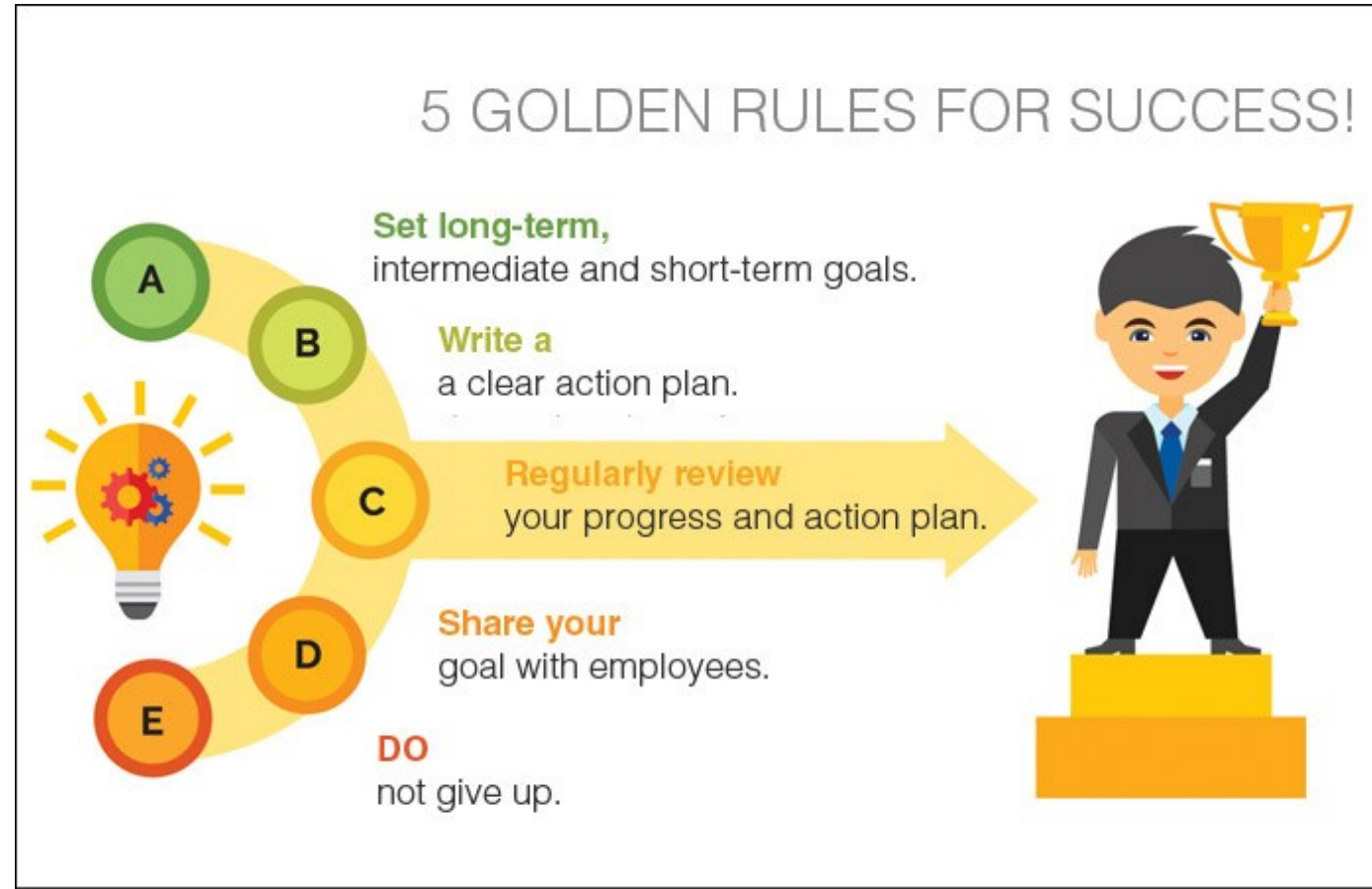
…help the organization identify new donors?

…contribute financially and help to solicit donors?

Elevating effective development committee members to the board of directors is how you can reward their work and commitment.

Engage in Professional Development!

➢ Association of Fundraising Professionals

http://www.afpnet.org/

➢ Grant Professionals Association

https://www.grantprofessionals.org/

Prepare for the
GPC Exam
Earn Your Grant Professional Certified Credential

2019
GPA
Grant Professionals Association
Member

AFP
Association of
Fundraising Professionals
Washington DC Metro Area Chapter

Gpci | GRANT PROFESSIONALS
CERTIFICATION INSTITUTE ®
Providing a Standard of Excellence for the Grant Profession

Gpa | Grant
Professionals
Association®
National Capital Area Chapter

CFRE
CERTIFIED
FUND RAISING
EXECUTIVE

Join the
Professional
Associations!

Supplemental Resources

http://www.thefundraisingauthority.com/fundraising-basics/

http://www.pamelagrow.com/14/how-to-be-a-nonprofit-development-director-charting-your-first-100-days/

http://www.thefundraisingauthority.com/fundraising-basics/fundraising-plan/

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Peer-to-Peer Support!

Subscribe to CFRE's Open Forum Digest

CFRE International's online community

https://central.cfre.org/login?returnurl=https%3a%2f%2fcentral.cfre.org%2fnetwork%2fmembers%2fprofile%2fmyaccount%2fmy-settings%3fsection%3dSubscriptions

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INEXPENSIVE COMPREHENSIVE COURSE!

AFP Global CERTIFIED FUNDRAISING EXECUTIVE (CFRE) Study Group

(Virtual) – https://afpglobal.org/certifications/certified-fund-raising-executive-cfre-program

Free Course Study Buddies on Facebook

https://www.facebook.com/groups/203049223906625/

OR

https://www.cfre.org/exam-prep/study-groups/

https://afpglobal.org/cfre-refresher-course

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AWESOME FREE OPPORTUNITY!

Nonprofit Management Essentials Online Connection

From Northwestern University Center for Nonprofit Management

Start Date: August 20, 2024

End Date: October 15, 2024

https://www.kellogg.northwestern.edu/executive-education/nonprofit-programs/online-nonprofit-management-essentials.aspx

https://web.cvent.com/event/9fdf0c42-cdc0-430a-ae61-d7892ea661e8/summary

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AWESOME FREE COURSES FOR LEADERS!

Cross Cultural Leadership Certificate

https://www.academiacentral.org/online-certificates/cross-cultural-leadership/

Inclusive and Ethical Leadership Certificate

https://www.academiacentral.org/online-certificates/inclusive-and-ethical-leadership-certificate/

Resilient Leadership Certificate

https://www.academiacentral.org/leadership-in-an-anxious-world-certificate/

Customer Centricity Foundations Certificate

https://www.academiacentral.org/online-certificates/customer-centricity-foundations/

AFP Diverse Communities Scholarship Program

As a community of inclusion, the Association of Fundraising Professionals seeks, embraces, and engages diverse individuals, groups, and organizations with a broad representation of experiences, perspectives, thoughts and cultures within the fundraising profession. Through this strategic initiative, AFP is committed to activities that increase awareness of diversity issues. As part of this commitment, AFP Global and the AFP Foundation for Philanthropy have created a diversity scholarship program to provide financial assistance for the professional development of fundraisers who are themselves members of one or more diverse communities or are employed by grassroots organizations that primarily serve diverse populations.

https://afpglobal.org/afp-diverse-communities-scholarship-program-overview-criteria

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AFP Diverse Communities Scholarship Program

The AFP Foundation for Philanthropy is pleased to offer once again the Diverse Communities Scholarship program for members of diverse communities to attend AFP ICON in Seattle, Washington, USA 2025.

The application deadline will be announced in the early Fall 2024. AFP is pleased to offer a full conference registration fee plus some travel expenses for diverse communities' scholarship recipients. THANK YOU to everyone who contributed to the diversity scholarship campaign for your generosity and for helping to ensure the success of this program.

Should you have questions about the AFP Diverse Communities Scholarship, please contact allison.sedwick@apglobal.org.

https://afpglobal.org/afp-diverse-communities-scholarship-program-overview-criteria

AFP Diverse Communities Scholarship Program

Video available at

https://youtu.be/M7t1ZnFTWiQ

https://afpglobal.org/afp-diverse-communities-scholarship-program-overview-criteria

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RESOURCES FOR CIVIC ENGAGEMENT

Go to https://civicengagementfund.org/

Go to https://www.fordfoundation.org/work/challenging-inequality/civic-engagement-and-government/

Go to https://kresge.org/news-views/efforts-to-boost-civic-engagement-by-college-students-receives-1-million-from-kresge/

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RESOURCES FOR JOURNALISM & MEDIA

Go to https://knightfoundation.org/

Go to https://newsinitiative.withgoogle.com/dnifund/dni-projects/

Go to https://www.allcommunitymedia.org/

Thank YOU!

Tony Spearman-Leach

- Mid-Atlantic Federal Credit Union Board of Directors

- Pinkney Innovation Complex for Science and Technology at Montgomery College Board of Directors and Treasurer

- Excelsior University Board Trustee ex officio and Alumni Leadership Council President

- Leadership Montgomery Board of Directors

- Story Tapestries, Inc.

  Chair, Board of Directors

- Friends of the Library

  Montgomery County

  Board of Directors

- Josiah Henson Museum

  and Park Advisory Board Chair

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