

Resource Development Strategies

A Toolkit for DVP Success

*Created for the Vital Project:
A Management Training and Technical Assistance Project for
Domestic Violence Program (DVP) grantees*

Sponsored by:

The Domestic Violence
Program



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Acknowledgements

About the Vital Project

Welcome to Vital: A Management Training and Technical Assistance Project for Domestic Violence Program (DVP) grantees. With funding from the Domestic Violence Program, we are excited to provide a full menu of customized services at no charge to your agency. The purpose of this project is to build your organization's management and operational capacity through technical assistance and professional development opportunities designed to meet the current and emerging needs of local programs. An array of exciting delivery methods are currently being offered through 2013, from custom consulting to webinars and formal class work at the University of Colorado Denver. For more information visit <http://vitalprojectcolorado.org/>

About Mission Spark and the Author

Mission Spark, LLC (www.missionspark.org) partners with philanthropy, nonprofit and social enterprise leaders to achieve transformative social change and to strengthen the social sector. They work to achieve this mission by providing results-driven consulting, training, and facilitation in Colorado. Mission Spark consultants have experience working with DVP direct service providers, state-wide funders and domestic violence service and prevention partners.

Kelleen Zubick, MFA is a Principal Consultant for Mission Spark. For over 18 years, Kelleen has worked in senior positions at nonprofits and state agencies. In her capacities as executive director, associate director, program director, and volunteer board member, Kelleen developed a track record of success in planning and management, resource development, financial strategy and management, developing and evaluating programming, and in building partnerships and coalitions. Her approach is collaborative and practical, with an emphasis on helping her clients accomplish tangible results. Kelleen compliments her experience in the social sector with national certificates of training in nonprofit governance from *BoardSource*, and in resource development from the national *Grantsmanship Center*.

About CDHS Domestic Violence Program

The mission of the DVP is to serve as the state governmental authority on domestic violence issues by providing leadership, guidance, and awareness within government agencies as well as ensuring grant funded programs deliver optimal services to victims, ultimately promoting a Colorado free of domestic violence. DVP strives to ensure that services to victims of domestic violence and their children are readily available throughout Colorado's diverse communities. See <http://www.colorado.gov/cdhs/dvp> for more information.

Using this Toolkit

Results of the self-assessment management capacity needs assessment survey sent to DVP-funded programs during December, 2012, informed the topical selection and focus of this toolkit. The survey instrument used indicators based on the Colorado Nonprofit Association's Principles and Practices of Nonprofit Excellence in Colorado (2011), and 72% of DVP-funded programs responded to the survey. Of respondents, 77% of respondents indicated a need to improve capacity around meeting fundraising goals, and 63% of respondents indicated a desire to achieve a more diversified revenue base. In light of these responses, and because Vital Project already has a webinar dedicated to grant funding, this toolkit will focus on setting and achieving fundraising goals related to individual donor programs and events and sponsorships, including through partnership fundraising strategies.

This toolkit is divided into three parts:

- 1. Fundraising Fundamentals**
- 2. Individual Donor Programs**
- 3. Events and Sponsorships**

Uses for this Toolkit:

- Sharpen organizational strategy with regard to diversifying and meeting fundraising goals
- Understand core principles for developing an individual donor program as well as effective fundraising events
- Plan initial strategies suitable for your organization through the use of practical, customizable tools
- Deepen learning through vetted 'selected resources'

Introduction

Effective fundraising means the difference between a viable organization capable of playing an essential role in its community through programs, services, outreach and education, and an organization that cannot support these operations. As such, fundraising is an on-going activity for every nonprofit. According to the National Center for Charitable Statistics, there are over 20,000 501(c)3 public charities registered in Colorado, and this represents an increase of nearly 60% since 1999. It is hardly surprising that competition for funding is fiercer today than ever and those organizations that do not diversify their fundraising bases to include a variety of non-grant sources may risk the sustainability of the important programs and services they have to offer in their communities.

While hardly a comprehensive guide to diversifying sources of revenue, this toolkit provides some fundraising fundamentals as well as practical advice for developing effective individual donor programs and events. Both of these strategies depend primarily on individuals for their revenue, and this is no accident since according to *GivingUSA's* 2012 study, individuals still make up the largest source of private funding at 73% (up by 3.9% from 2009) of the 298.42 billion contributed in 2011. We trust that with clear strategy, high visibility and a winning pitch, your 'asks' will be richly rewarded!

Characteristics of Organizations Successful in Resource Development

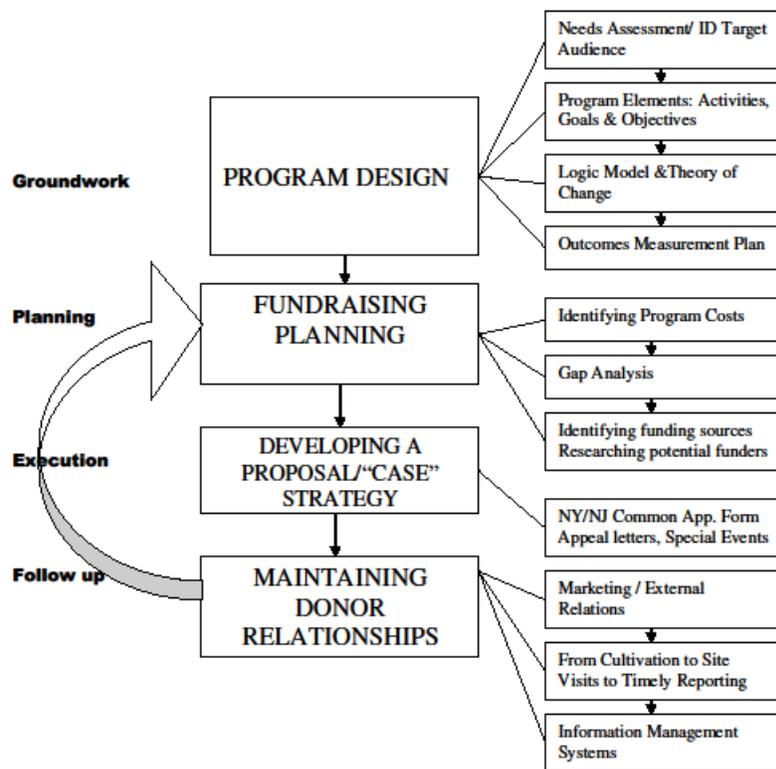
- ✓ Shared commitment to resource development among staff, board, and volunteers
- ✓ Gains visibility in and support of the community through outreach and education
- ✓ Has programming research, metrics and outcomes upon which to build a case for support
- ✓ Weighs the costs (including time) vs. return and benefits of each strategy
- ✓ Has clear assignments attached to a fundraising plan that is regularly monitored
- ✓ Has an efficient and systematic method for tracking gifts, collecting money and providing acknowledgements.
- ✓ Is guided by a Gift Acceptance Policy and CFRE Standards
- ✓ Celebrates and shares results; recognizes, cultivates, and thanks volunteers and contributors

Fundraising Fundamentals

Fundraising Fundamentals

Successful fundraising benefits the entire organization, and to be successful, it relies on all organization components—staff, board, volunteers, programming, communications, and technological infrastructure:

A COMPREHENSIVE FUNDRAISING MODEL



Community Resource Exchange © - 2010

Fundraising Fundamentals

Related to this comprehensive fundraising model are the following are **principles of resource development** that inform the strategies presented in parts two and three of this toolkit.

1. People give to people. Establish and maintain relationships. Get to know “key” people in a particular corporation/foundation/community groups, and have them help you gain credibility with the others.
2. Build a fundraising culture by making expectations explicit in board, staff and volunteer job descriptions as well as in an annual fundraising plan and by supporting these roles through communication and training. Many participants will lend credibility and promote involvement.
3. Know and be known in your community. Stay visible through outreach and education and build your network of relationships and your contact database.
4. Your donors can’t say yes to a question you have not asked them. Don’t be afraid to ask! And always be specific when asking for money, both in terms of dollar amount, and specific program, activity, or event.
5. Have regular opportunities to share and to measure progress toward fundraising goals: reports, meetings, sharing information. Know the return on your investment and have a strategy for making your investment pay off.
6. Keep accurate and current financial records, and develop a donor management system that helps you to track, acknowledge and cultivate donors

Funding Sources

What are the Sources of your Organization’s Revenue?

Cash Sources	Amount Last Year	Amount This Year	% of Budget	ROI Strategy
Individual Donors				
Grants				
Foundations				
Government				
Corporate				
Organizations (business, other charities)				
Fees for Service/Program Fees				
Sale of Product				
Special Events				
Partnership Efforts				

Adapted from: GIFT Fundraising Training Manual

Fundraising Fundamentals

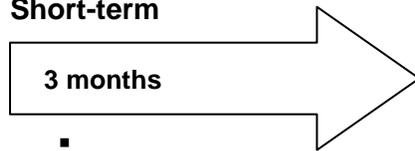
How can you Diversify your Revenue?

1. Do you need more people responsible for fundraising? Who and how?
2. What areas are not represented in your fundraising plan?
3. What can you do with the resources you have to start diversifying?

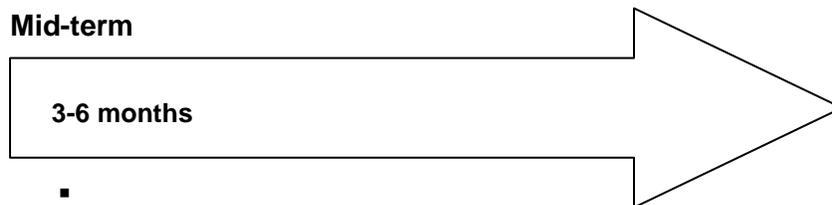
Combine Source and Timing for a Stronger Platform

Diversifying the timing of your fundraising results can help smaller organizations maintain healthy cash flow. List your sources according to revenue receipt timing. What could you do to round out your platform?

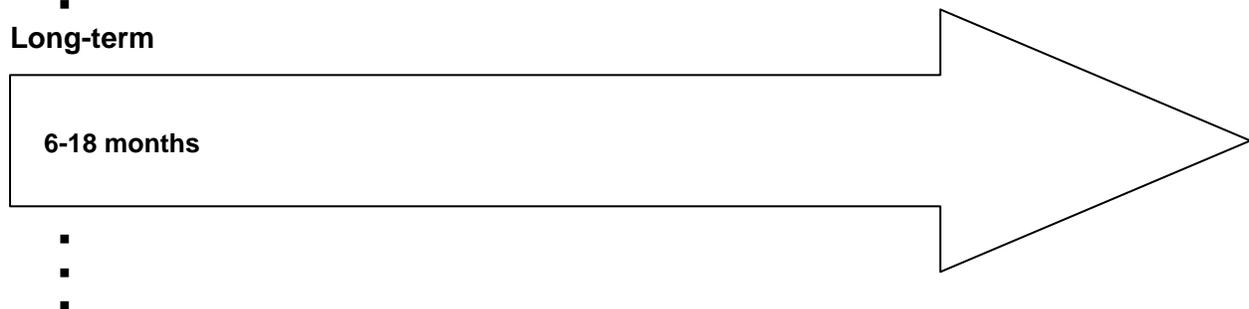
Short-term



Mid-term



Long-term



Fundraising Fundamentals

Detailed Reporting is Key

Many great fundraising plans are written, but without monitoring, plan performance and accountability tends to languish. Use the following at least quarterly to stay on track!

Sample Development Report Format

Contributions Received this Year As of (Date) _____

# and Amount	Individual	Events	Grants	Partnerships	Earned	% of Goal to date	Last Year
Repeat							
Increased							
New							
Recovered							
Total							
Unrestricted							
Restricted							

Source Activity Report (Gives a status report on the actions taken and the next steps needed)

Communications Activity Report

Next actions, by when, by whom:

Tracking Infrastructure

A good donor database is an invaluable fundraising tool, and many can be customized to support donor /contact history and management and correspondence and communications.

Blackbaud /Raiser's Edge may be an excellent system but is too expensive and not user-friendly to smaller organizations. Some popular platforms for small-mid-sized organizations are GiftWorks, www.missionresearch.com/giftworks and eTapestry, www.etapestry.com

Here are other resources to help you compare and contrast systems:

<http://www.idealware.org/>

http://www.grassrootsfundraising.org/howto/software_chart.pdf

<http://www.techsoup.org/learningcenter/databases/page4798.cfm>

Fundraising Fundamentals

My Next Steps for Fundraising Fundamentals Planning:

Activity	By When
✓	
✓	
✓	
✓	
✓	
✓	
✓	
✓	

Individual Donor Program

Part 2: Individual Donor Program

Key findings of the Colorado Nonprofit Association's Understanding Giving: Beliefs and Behaviors of Colorado's Donors included the following key findings as to why people give to charities in Colorado:

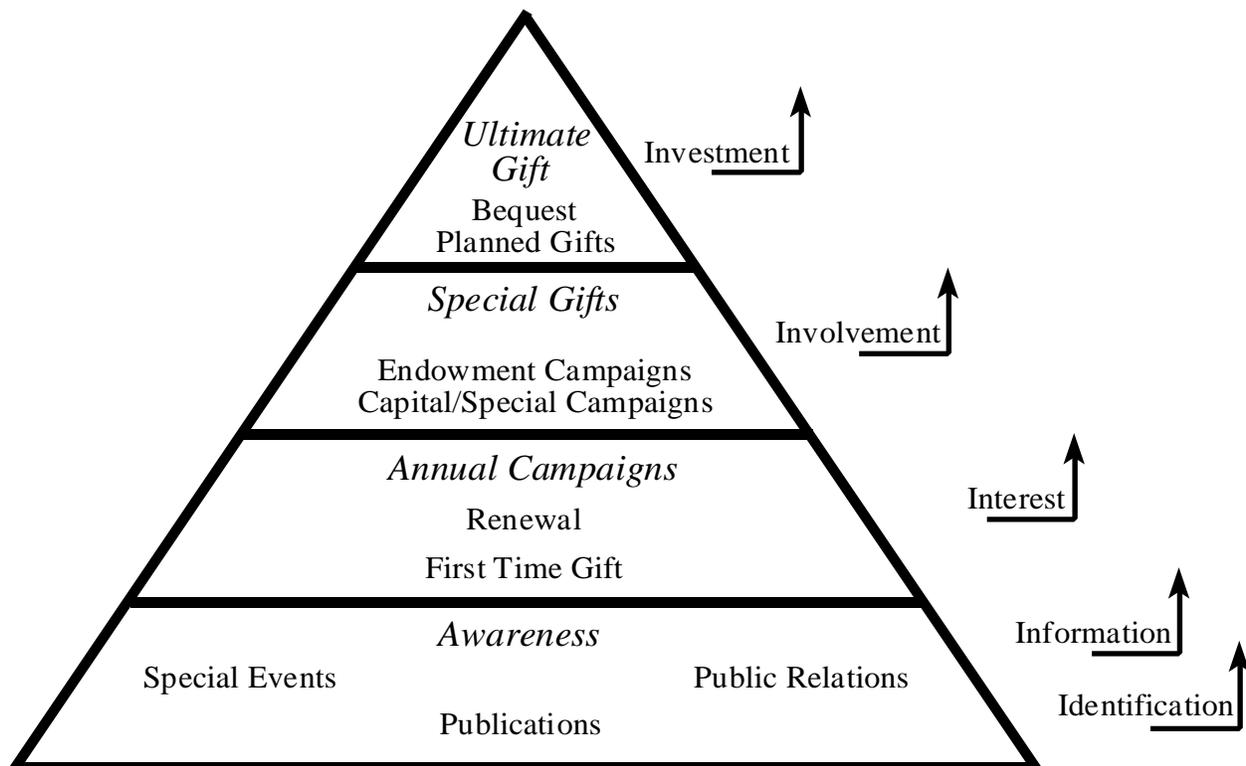
- A personal connection between the donor and the nonprofit (indirect as good as a direct connection)
- Word of mouth relating to impact of the organizations' activities
- For most, decision to give is personal/emotional
- Having a convenient way to give is important
- People tend to support organizations they have heard of

The purpose of this section of the toolkit is to help develop an individual giving program that factors in some of the research and giving principles, although the goal of every donor program is generally as simple as:

- 1.) To increase the number of individuals who contribute to your organization, and
- 2.) To increase the average gift individuals make.

Donor Program Overview

Before a sound strategy linked to financial targets can be set for your individual donor program, it is important to develop a series of events and opportunities that will continually encourage your prospects to become more engaged with your cause and to increase, or at a minimum continue, financial contributions in support of your mission. This is the program part of the *Individual donor program*, a sample of which is below.



Individual Donor Program

Donor Program Overview

Step 1: Identify and Connect Activities

The first level of your donor program forms the base of the program's giving pyramid and consists of on-going activities that introduce the general public to your organization and its important work. Generally these activities include low/no cost events and media/public awareness. Think of a combination of educational and fun but free events that you could offer every quarter that would engage some of the people who are already involved in your mission while introducing newcomers to your mission. Benevon has developed an entire fundraising model around events that engage and introduce people to organizations. Tours or breakfasts or cocktail parties are some of the formats used, and people already involved in your organization—board members or volunteers or donors—typically serve as the public face to the short program, in addition to helping recruit invitees, and then follow up personally with those who participate for the purpose of strengthening the relationship and to ask for recommendations for others who might like to learn about the organization. These are approaches to build your base, and event registration with full contact information is a must. Asking for money only makes sense after people are aware of your organization and have a personal connection to the organization—even through a volunteer or that volunteer's friend.

Sample Ideas for Identify and Connect Activities

Marketing/PR

- If you have an e-newsletter, partner with other non DVP organizations to host a sign up for your e-news after a statement on their website about why yours is an important organization to support. (Just make sure your e-news sign up include data collection!) Have someone from the partner organization follow up with the new subscriber in 4-6 weeks, about the time one of your entry events are being held....)
- Work with local news station or paper to include a story/ interview once a quarter by a donor that profiles why they are committed to your organization. Help them to highlight community results and make sure your pool of interviewees is diverse and compelling. And of course, promote the heck out of these through social media!

Events

- Tours of your organization are not practical for DVP organizations, so prepare a road show! Bring a professional presentation with compelling stories about community impact to service clubs, but also try some unusual suspects, too—College groups or dorm parties; book clubs; new mother groups, etc. Empower your board, staff and donors and volunteers to identify opportunities so that you have at least one a month, and capture information and follow up to cement the beginnings of a relationship.
- Work with a local coffee shop or eatery to feature a promotion in association with your presentation; have the manager welcome the group, provide a promotional item and introduce your organization. The group may have come for the free latte but they'll be interested to learn why you get such great community support.

What two Marketing and two Event Ideas Could you Implement?

Be creative and think about what would work in your community and what you really have the capacity to do:

Individual Donor Program

Donor Program Overview Step 2: 'Interest and Cultivate' Activities

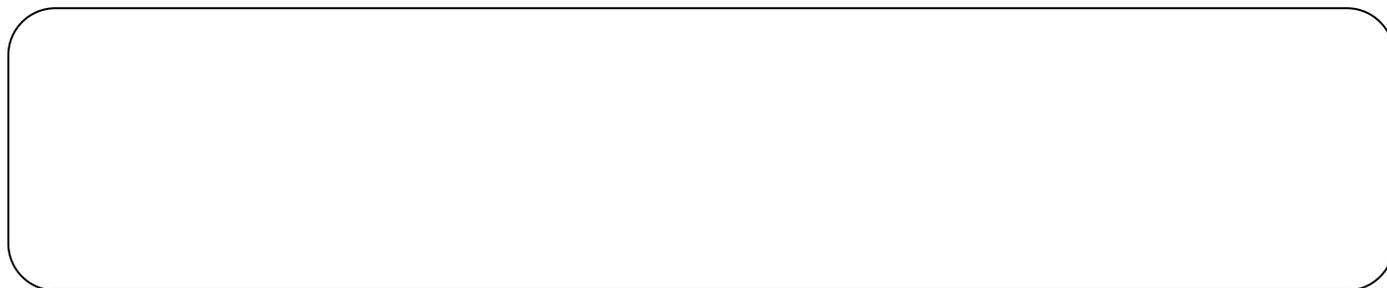
The second level of your donor program is all about cementing the initial relationship with someone who has recently learned about your organization. Two main strategies are to invite the investment of time through a volunteer activity or through attending one of the organization's signature events. Your organization's general annual appeal letter is another typical activity at this level that helps the organization confirm that it is cementing an initial relationship. Events and annual appeals include an ask for a contribution, but at this level they are typically not personalized. Personalization typically happens at this level by having a board member or senior staff member invite people to these events/personalize the fundraising letter. In addition to being thanked and acknowledged, everyone who becomes a contributor this year will be asked to consider contributing at the same or higher level in the future.

Sample 'Interest and Cultivate' Activities

- Colorado Gives Day is a great opportunity to send out targeted personalized e-mails to various segments of your board base
- A fun event that another organization is doing to support your organization (Chamber networking event where \$10 "dues" benefits your organization) is a great opportunity to further interest your base and you can even put in a call for 'special volunteers' to assist the Chamber (partner) with the event.
- Of course, your annual appeal letter/e-letter that is personalized and your annual signature event (if you have one) are not-to-be missed opportunities to cement interest and cultivate first-time contributors

What 'Interest and Cultivate' Ideas Could you Implement?

Be creative and think about what would work in your community and what you really have the capacity to do:



Donor Program Overview Step 3: 'Involve and Invest' Activities

The most effective activities for step three of your Donor Program are tailored to the interests of those who already contribute or have the ability to contribute at your "major gifts" level. If your organization does not already have a "major gift" level established but has years of donor receipts, the organization should review records of giving levels to identify a consistent break in giving, after which the contribution could be considered major to your organization. For smaller organizations, the amount may be \$500, but for larger ones it may be \$5,000. While knowing who is in this group will help you plan activities, there are some suggested activities that should deepen these donors' relationship to your organization. Whatever the activity, it is important to see the advice and to employ the talents of your donors in ways that are mutually rewarding.

Individual Donor Program

Sample 'Involve and Invest' Activities

- Develop a board stewardship program that assigns every board member to 1-3 major donors for the purpose of cultivating a deeper relationship of the donor to the organization. Stewardship activities include at least four non-solicitation activities per year-such as inviting to an event, having lunch, sending an 'article of interest', and e-mail sharing an organizational/programmatic success, and also soliciting a gift of the same or greater value in person.(Executive Director or Board Chair should be available to assist within-person solicitation).
- A board that socializes together is often a more accountable and effective board. Your organization may wish to invite the Board Chair host an annual social event, and provided the number is not too large, major donors could be invited to this event.
- Major donors can often be deeply engaged by being part of a 'strategic planning lunch' where they are invited to discuss and provide input into the new goals and objectives being considered by the board (maybe on just a narrow topic). Similarly, any programmatic 'think tank' opportunity could serve well.
- Depending on the skills and interests of your major donors, those individuals may be appropriate fits for sharing in the board's committee work (provided community members are considered for membership in board committees). Cherry picking is appropriate here, and this is a proven strategy when the fit is right to increase level of engagement.

What 'Involve and Invest' Ideas Could you Implement?

Be creative and think about what would work in your community and what you really have the capacity to do:

Plan your Time

Successful individual donor programs pay attention to developing donors at every level of the 'individual giving pyramid' to ensure a continuous pipeline of contributions with potential to grow. DVP organizations have to juggle attracting individual contributions with many other fundraising opportunities. The following guidelines will help you to maintain a higher return on the time and effort you invest in your individual donor program:

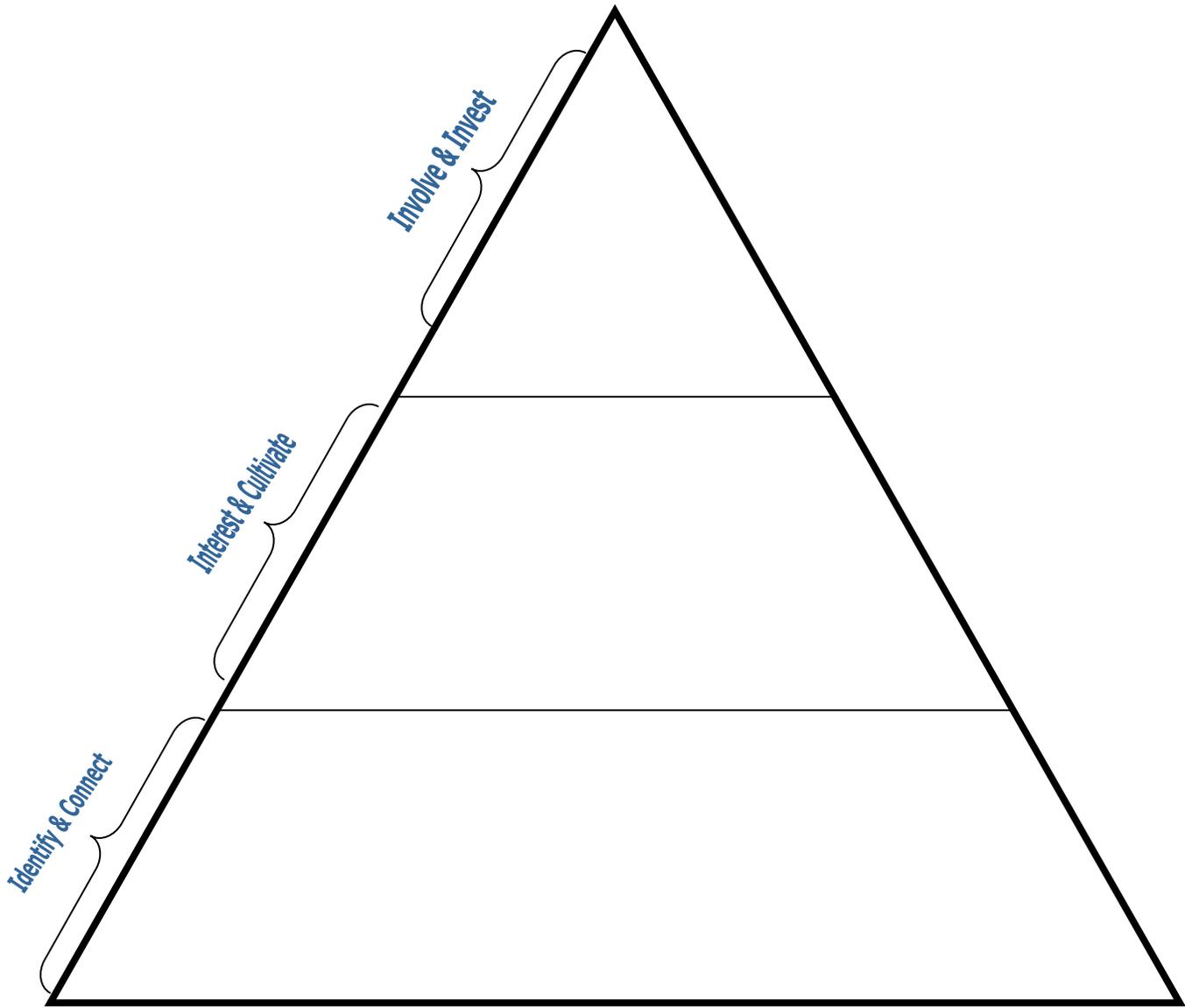
Allocation of Effort for Individual Donor Program

Area of Effort	Percentage of Time
Major Gifts: Involve & Invest	50%
Middle Gifts: Interest and Cultivate	25%
Small or few Gifts: Identify & Connect	15%
Administration	10%

Individual Donor Program

Build your Donor Program

Using the pyramid model, insert your best ideas for every level so you can get a visual of your whole program.

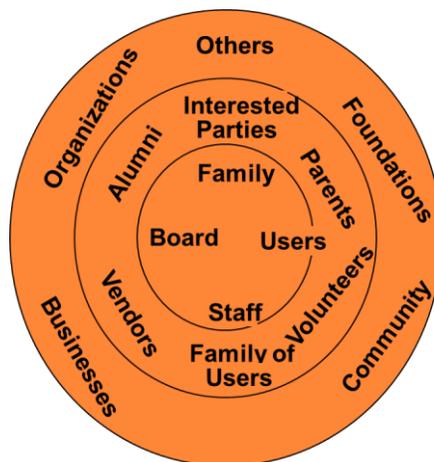


Individual Donor Program

Identifying and Evaluating Prospective Donors

Your donor prospects are people who

- Have given in the past and are prospects for a repeat or upgrade
- Have not given but are close to someone in the organization
- Interested in the cause but don't know anyone in the organization



Individual donor experts generally agree that prospects become donors, especially major donors, when all the following conditions exist:

- Linkage—there's a connection to the organization or to someone linked to the organization;
- Ability—the person has the financial ability to make a (sizeable) gift to the organization; and
- Interest—the person is engaged in the mission or the organization.

It can be helpful to your organization to assess mid-range contributors to assess their ability to help your organization financially, so that you can encourage that person to build his/her level of giving. In addition to doing some background research, you will want to develop a profile in your donor database that records prospect history and activities.

Individual Donor Program

Solicitation Process

Opening

- Talk about the prospect's interests
- Talk with them, not to them
- Involvement is the objective here

Questioning

- You are not at the point yet to talk about the project – don't rush
- Make them aware of the need before you show them how the need can be met
- Work at fact-finding and confirming motivation and needs

Listening

- Be empathetic, putting yourself in their position.
- Help them feel valued for what they have to say and that it is acknowledged as important.

Presenting

- Emphasize the benefits of what the organization does rather than dwell on the problems and needs.
- Think about ways your presentation will indirectly answer, 'how will I be "paid back" for my investment?'
- Use people success stories – project the "heart" of your organization.

Overcoming Objections

- Objections are really questions – see them as opportunities to correct real or perceived problems. Don't argue or make excuses.
- "I see your point. . ." is one way to gracefully accept an objection. Appreciate the feedback.

Asking for the Gift & Follow Up

- Ask for a specific amount of investment.
- Receive a gift with gratitude, restating the impact & share plans for acknowledging the gift.
- Be gracious if turned down and keep communication positive and ongoing.

Keep track of the following information

Prospect Name: _____	ID # _____
Solicitor Name: _____	Gift Type: _____
Date of Solicitation: _____	Solicitation Amount: _____
Type of Solicitation: _____	Location/Duration: _____
Type of Contact (Letter <input type="checkbox"/> Phone <input type="checkbox"/> E-mail <input type="checkbox"/> Face-to-Face):	
Outcome of Solicitation:	
Solicitor Comments:	
Follow-up required:	

Individual Donor Program

My Next Steps for Individual Donor Program Planning

Activity	By When
✓	
✓	
✓	
✓	
✓	
✓	
✓	
✓	

Events and Sponsorships

Part 3: Special Event Fundraising

Special events can be great vehicles for raising public awareness of an organization's mission and programs, and they also create numerous opportunities for volunteer participation, which can be a fun way to engage people in what your organization is all about. However, these benefits always need to be weighed against time and money invested. Pooling your resources to put on one successful event that nets at least 50% of gross income will be far more effective than putting on many "easy" fundraisers whose returns are relatively low. Sponsorships significantly increase the net income of special events, and that area is introduced in this toolkit as well. Planning, of course, is the key to designing a special event that will truly support your organization and the following checklist and budgeting process should get your organization on a path toward a successful special event.

Choosing a Special Event

Checklist for a Successful Special Event

Component	✓ In Progress	✓ In Place
The event will effectively showcase the organization's purpose, mission, and desired image		
The event will appeal to the organization's constituency and to others		
The event will have a niche in the community, and the idea has tested positively in broad circles		
We have at least six months' lead time to plan and to execute the event		
We can recruit enough volunteers to make the event successful		
We have access to a great event host or chair		
Ticket prices are set to provide net income		
We can sell sponsorships for this event		
We have a broad base of partners who will help publicize this event and sell tickets for it		
We have human and financial resources available to invest in the event's development, promotion and success		
The event will be memorable, make us friends, and be tons of fun!		

1. Using the checklist above, list as many special event fundraising ideas as possible:

Events and Sponsorships

2. Use the following outline to evaluate the potential to generate significant net revenue and sketch in preliminary budgets using estimates. (Use in-kind to affect cash outlay):

Calculate Cash Income

- Ticket prices x the number of purchasers (or number of tables); plus
- The amount expected to be raised through event sponsorships (use specific numbers of levels sold); plus
- The amount to be raised from silent auction items/raffles/t-shirts (if any);
- The amount expected from any other sources of income unique to the event:

This total is your gross income: _____.

Calculate Cash Expense

- Meals, drinks and other food expenses
- Printing of invitations, programs and/or posters
- Advance notification card or letter
- Postage
- Venue and other rentals
- Staging and audio/video
- Music and entertainment
- Decorations
- Awards
- Photographer
- Cost of any event contractors
- Misc. expenses unique to this event

This total is your event expense: _____. Subtract this total from Income total to get your estimated net income: _____. What percentage of gross income does this represent? _____%

3. Does the financial return merit going ahead with this event? _____(Y/N)

If "yes", proceed to special event planning tool. If "no", return to steps 1 and 2!

Events and Sponsorships

Special Event Planning Tool

	2012	2013
Purpose of the Event:	Fundraising Cultivation Other:	
Funding Focus	Special campaign General support Program	
Type of Event	Gala Cocktail Reception Lunch Breakfast/Brunch Other	
Theme "Anniversary Celebration" "Build Healthy		
Fundraising Goal	\$	
Event Budget	\$	
Sponsorship Opportunities		
Cost of tickets		
Date		
Location		
Honorees		
Event Committee		
Target Audience (Industries, sectors, profile)		
Number of Guests	# VIPs # General Guests	
Program Description		
Additional activities Raffle, Auction, Other		
Event Outcomes <ul style="list-style-type: none"> • Engage new people • Cultivate donors • Cement partnerships • Increase revenue over last year • Other 		

Events and Sponsorships

Sponsorships

When developing sponsorships for your organization—it is not necessary to limit sponsorships to events—it is helpful to first brainstorm the marketing exposure the sponsor will receive, as well as the cost levels associated with that exposure. Thereafter, make asking for sponsorships easy by creating one ‘Sponsorship Opportunities: Special Events and Programs’ packet that lists levels and exposure for the entire year. With this in hand, activate your volunteers and board and work your networks to sell sponsorships according to your fundraising goals. Cold calls will not be a good use of anyone’s time, so invest in research and networking.

Some Types of Sponsor Marketing Benefits

Presence Marketing

- Speaking opportunities for sponsors
- Sponsors receive recognition in all media coverage
- Signage prominently includes sponsors
- Print advertisements link organization and its principal sponsors

Product Distribution

- Sponsor’s products are given out at all special events
- The organization will investigate distribution of Sponsors’ products at program sites

Networking Opportunities

- Top executives and government officials host special events
- Sponsors host receptions at special events for major clients

Employee Benefits

- Volunteer opportunities will pair employee and families with our programs in a philanthropic exchange
- Organizational experts will give talks on program expertise to Sponsor employees
- Our Organization will hold a special program for employees

Community Outreach

- Special events are held for community volunteers and community groups
- Dinners with staff and community leaders can be hosted by corporate representatives.

Sample Sponsor Package

In addition to listing compelling opportunities and costs, a sponsor package will include information on your organization:

- Pitch for sponsorship opportunities
- Mission
- Programming
- Organizational successes (impact you have in the community—use data)
- Why supporting your organizations matters (research supported-big picture impact)

Events and Sponsorships

Every organization has different opportunities—the following is only an example

(short intro on 'one pager' that follows information mentioned above)

Our sponsors know that they are doing more than just receiving great statewide exposure for their company. They are helping shape the future innovators, creators, and leaders of our world by giving Colorado's youth the opportunity to receive an excellent education.

Help us Build the Future!

Join our (name of Major Gifts Level) by providing the following:

- **\$10,000 (name) Sponsorship:** Funds a 2 week (name of program) at a metro Denver high-need school, and 6 full scholarships to the next (name of program).
- **\$5,000 Innovation Sponsorship:** Funds a week-long (program) at a metro Denver high-need school and 2 full scholarships to the next (program).
- **\$2,500 Inspiration Sponsorship:** Funds 2 (type of program) a metro Denver high-need school.

Fund School and Community Programs by providing the following:

- **\$5,000 (program):** (description)
- **\$2,500 (program):** (description)
- **\$1,500 (program):** (description)

Underwrite Gala Honoree Event for educators by providing the following:

- **\$10,000 Presenting Sponsorship:**
 - 20 tickets to the event
 - Podium welcome and special recognition in program
 - Company logo in prime media placement throughout the year
 - Article in newsletter
- **\$5,000 Silver Sponsorship:**
 - 10 tickets to event
 - Listing in program
 - Company logo in event-related media
 - Recognition in newsletter
- **\$2,500 Bronze Sponsorship:**
 - 4 tickets to the event
 - Listing in event program, including logo
 - Recognition in newsletter

Events and Sponsorships

Key Strategy: Developing Fundraising Partners

Fundraising partnerships are strategic alliances with deliverables expected on both ends

Key forms of Partnerships:

- Cause Related Marketing
- Joint Events/ Sponsorships
- In-kind donations

Positioning for Partnership—where's the mutual benefit?

- Marketing Goals
- Community Affairs Goals
- Employee Relations Goals
- PR Goals
- Philanthropic Goals

In securing partnerships, it can be helpful to convert the features of your organization into benefits for your partner. For example say the following human service organization wanted to share in the costs and audience building of a joint luncheon as a way to share in proceeds and to secure more visibility and possible donor contacts. The Health Care organization can use its networks to get a really high profile speaker that the nonprofit would not normally be able to secure, so to bring an asset to the relationship (partnership rather than charity), the organization converts a feature of its audience draw to be a benefit for the prospective partner:

Feature: At the Helpful Organization's annual luncheon, the leadership of every major human services agency will be in attendance.

Benefit: The Helpful Organization's luncheon will be attended by all major human services agencies, which means that you will be promoting your business to a group of statewide human services decision-makers that are a good target audience for your health care products.

What features of your programming or organization can you convert to “partnership benefits”?

Events and Sponsorships

Tips for Cultivating and Gaining Fundraising Partners

Get Information & Give Information

- No cold proposals and no cold calls
- Invest in research & networking
- Practice initial conversations to gauge interest and learn more about areas of interest as you share your information
- Keep in loop with newsletter and invitations to organizational events or meetings

Gain Commitment

- Follow through with brainstorming by bringing focused plans for consideration
- Focus on common cause and the community benefits & corporation benefits.
- Keep your partner's obstacles to participation in mind and try to identify creative solutions
- Help this focus on the success other partnerships in community region—share success stories

Honor your Agreements In Writing

- Maintain positive relationships by putting your agreements in writing so that no one has to rely on memory and perceptions holding fast over time.
- The agreement should clearly and comprehensively describe the joint project
- State the terms and conditions of the partnership and clearly outline what each is expected to manage and to contribute
- The agreement should have a start and stop date
- The agreement should have specific guidelines for “co-branding”
- The agreement should be reviewed by the Boards/ownership of both parties.
- The agreement should have an ‘out’ clause that lists the steps to take to end the agreement
- The Agreement should be signed by board/ownership and not staff so that the terms can continue despite staff turnover

Cultivate the Relationship

- Keep informed
- Seek input & advice
- Involve
- Measure and Communicate
- Celebrate accomplishments together

What Fundraising Partnerships can you think of for your Organization?

Events and Sponsorships

My Next Steps for Events and Sponsorships

Activity	By When
✓	
✓	
✓	
✓	
✓	
✓	
✓	
✓	

Links & Resources

Books, Articles, and Reports

Fundraising in Tough Times: A No-Nonsense Guide to Surviving in a Challenging Economy
http://www.ahp.org/ric-online/recession-toolkit/pdfs/fundraising_tough_times_Warwick.pdf

Successful Fundraising in Tough Times
<http://www.philanthropyjournal.org/resources/fundraisinggiving/successful-fundraising-tough-times>

20 Emergency Funding Sources for Nonprofits
http://www.fieldstonealliance.org/client/tools_you_can_use/12-16-08_emergency_funding.cfm#earned

Fundraising When Money is Tight
<http://www.malwarwick.com/learning-resources/publications.html> (book)
http://www.ssireview.org/articles/entry/fundraising_in_tough_times/ (article)

Ten Nonprofit Funding Models
http://www.ssireview.org/articles/entry/ten_nonprofit_funding_models/

Fundraising in Times of Crisis (book by Kim Klein)
<http://www.amazon.com/Fundraising-Times-Crisis-Kleins-Chardon/dp/0787969176>

Websites

The Chronicle of Philanthropy, www.philanthropy.org/

The NonProfit Times, www.NonProfitTimes.com

Certified Fundraising Executives, www.cfre.org

