



It is all in the technique.

What You Should Know Before You Conduct a Fundraising Event or Write a Grant

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Federal Resource Face to Face Workshop Moderator

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Company History:

April 1, 2003, Ann F. Clark started a business called Development Directions, Inc, to provide full service fund development consulting services such as:

- Conducting Funding Searches
- Grant Writing
- Fund Development Training
- Event Management
- Creating and Conducting Campaigns
- Board and Staff Training

Prior to establishing Development Directions, Ann was the Chief Operating Officer for Resource Connections, a small company that specialized in fund development for nonprofits. She was the fund development associate for the YMCA of Metropolitan Detroit, serving the needs of 16 branch offices, two camps, as well as corporate staff at the main office of the YMCA of Metropolitan Detroit.

Throughout her career, she provided expertise for numerous services including:

- ◆ Developed sustainable annual campaign, which includes developing corporate fundraising strategies, funding searches, developed individual donor strategies, written grant proposal, and solicited major donors. Provided services, through consulting, to many non-profit agencies including, HP Devco and Matrix Theatre.
- ◆ Organizational development, which included internal systems for tracking and managing fundraising activities; provided services in this area to Midnight Golf Program, and Centro Multicultural.
- ◆ Educational components which includes training board members, volunteers, and staff including creating and implementing committee structures, creating job descriptions for committees, how to make the “ask” for funds/donations. Provided services in this area to the Contemporary Art Institute of Detroit, Midnight Golf Program and Matrix Theatre.
- ◆ Conducted workshops on creating fundraising events, managing fundraising events, how to start a nonprofit, and grant writing. Provided services in this area to New Detroit, Wayne County Community College, and Michigan Community Action Agency.
- ◆ Special event creation/management, which included creating, managing and implementing events for International Institute Foundation, HP Devco and Rugiero Promise Foundation.

Certifications:

- ◆ Development Directions has a License from the State of Michigan as a Professional Fundraiser # MIFR 28011
- ◆ Development Directions became a MSHDA Technical Assistance Provider in 2/9/04.

Fundraising Events Overview

Why Have an Event?

- A forum to let community know what your organization does
Displaying pictures, video presentation and brochures.
- Way to raise money for your organization.
Opportunity for corporate visibility by sponsorships.
Another avenue to get donations (IT DOES NOT REPLACE THE NEED FOR AN ANNUAL CAMPAIGN).
- Expand your donor base.
Attract other donors that you might not

Draw Backs of Event:

- Cost money
Certain amount of money is spent up front in most cases.
- Takes staff time
Coordinating meetings, researching sights, designing promotional materials, marketing pieces, assisting volunteers in sending solicitation letters, sending invitations, tracking invitations, working with sight staff and catering, etc.
- Takes volunteer commitment – event must be board/volunteer driven
Volunteers will not take an active role if they have no input in the planning the event.
Volunteers are a big part of the public relations aspect of the organization. Through them the organization can have doors opened into the corporate and business world.
- May not be able to ask same corporate donors that supported you in your annual campaign or other projects.
They may only support you once a year and you have to select which project.
- No guarantee the event will be successful
Things can happen such as snow storm if in winter, picking wrong type of event and it does not attract people

How to Select Volunteers and Structure Committee?

- Identify a volunteer to chair the committee. *Have a written job description for that position. Most volunteers want to know what the job is and how much time will it take?*
- Work with chair of event to identify volunteers that will work on the committee. Also you want to pick people that work well together – teamwork is critical in planning and executing an event.
- Staff that is selected for the committee should be at a minimum. The purpose of having volunteers is to lighten the load on staff.

Selecting the type of Event

- Call first meeting together and brainstorm ideas for an event.
- It is always better if the chair and staff assigned to this project have some prepared suggestions for types of events. It helps start the committee discussing suggestions and plants the seeds for other ideas to spring from.
- For established events – this can be an opportunity to put a different spin on it. It is important to be careful with established events. People are use to it a certain way, so it might be advisable to make small changes. If the net profit has been declining or just staying the same, this is time to make bigger and more drastic changes.
- It is critical to understand type of event you want in order to select the site.

Selecting Site

- The type of event governs where you can have an event. For example Walk for Warmth you need space for walkers, do you want it indoors or outdoors or both. These are some of the things that need to be considered in making your selection.
- Do any of your board members or volunteers have personal contacts at corporations or businesses that could hold your event in their place of business?
- Having at a business location cuts down on the overhead expenses. You can bring a caterer in or you can solicit donations of food for events.
- For hall rentals you cannot usually bring in any outside food - must use their caterer.

Identification of corporations, businesses and individuals to solicit

- Board members and volunteers should identify companies and individuals. *(Need name, title, company name, address, phone and fax numbers)*
- Staff needs to identify all vendors the organization uses.
- Pull list of current and past donors.
- Compile all lists to eliminate duplications
- If volunteers have a direct link to an organization they should be the one to solicit donation.

- Everyone needs to be sensitive to donors have they just contributed to an event or made a donation.

Securing Speakers/Celebrities

- This is an age-old problem. Depending upon whom you want, the next step is seeing if they will appear at no cost or just their travel.
- Sometimes board members and volunteers may have a connection and can assist you in this endeavor.
- An organization's best bet is to try to secure someone who has a link to the type of programs your organization supports.

Invitation List for Event

- Board members and volunteers should identify people.
- Staff should also identify people
- Do not forget city and state officials – where appropriate

Design Budget

- Designing budget is critical. This will be the key for how hard your volunteers will work.
- What is the goal \$ you want to raise – it is important to set a goal – volunteers like to attain goals.
- What are the items you will need printing, signs, food, etc.
- Part of the budget is figuring what you need to charge to cover expense and also make your net profit goal.
- Based on what the budget volunteers may be able to assist in getting printing in-kind through their own work or associates they know. These items still need to be on budget, because it gives a good picture on what was saved by acquiring in-kind donations.
- Part of the budget can also be corporate sponsorship solicitation.

Preparing for Successful Grant Proposals

Starts by Developing a Good Concept & Budget

Problem/Needs Statement

DO NOT MAKE STATEMENTS IN YOUR NEED STATEMENT THAT YOU CAN NOT SUPPORT WITH DATA FROM A RECOGNIZED SOURCE.

When preparing your need statement you must document your claims. If you state that your population is below the poverty level. You must be able to back it up with data. You can get that data from many sources. For poverty level the U.S. Census Bureau (www.census.gov/) can help you.

SEMCOG (www.semco.org) is great with population projections such as “What is the senior population going to be in 20 years.

Center for Disease Control and Prevention (www.cdc.gov) data on HIV and other illnesses.

Some other sources you can look at are Universities, local department of health offices, newspapers, etc. Whatever sources you look to get supporting data, make sure that it is a recognized authority.

Michigan Nonprofit Association (www.mnaonline.org/researchins.asp) is a great resource for nonprofits from data to information on how to start a nonprofit.

Goals of Project:

Objectives to meet those goals:

Measurable Outcomes:

Objectives, Activities and Outcomes must tie into together

Objective	Activities	Time/Frame	Person Responsible	Measurable Outcome

Target Population:

Age: _____
Sex: _____
Race: _____
Geographic Area: _____

Timeline:

When does it start?
When does it end?

If ongoing, you will need to explain.

Staffing Needs of Project:

Concept Form Definitions

Problem/Needs Statement

- Relates to purposes and goals of organization.
- Is there a special reason why you and/or your organization are uniquely suited to conduct the project?
- Does not duplicate services which already being provided in service area or it will enhance or work in collaboration with existing services.
- Is it an underserved population?
- Is supported by statistical evidence, which is supported by statements from a reliable source such as newspaper articles, college, university or other well known organization.

Goals of Project:

- Goals are the large statements of what you hope to accomplish but usually aren't very measurable. They create the setting for what you are proposing.

Example: To effectively use volunteers as a major factor in helping people to learn.

Objectives of Project:

- Are operational, tell specific things you will be accomplishing in your project, and are very measurable.

Example: To recruit a group of undergraduate students (15-20 students each semester) at University XX to become volunteers in the XXX project.

Measurable Outcomes:

- Must relate to the goals and objectives.

Example: 17 students are recruited and trained as volunteer mentors.

Population:

Age: What is the age of population you will be serving?
Sex: What is the make up the population (# male, # female)
Race: What is the ethnic make up of the population?

Geographic Area: What is the service area which you will be providing the services? All of a City or is it a specific boundary – then state all four boundaries by using major city streets. What is the economic make up of the area?

Timeline: Shows them the activities from start to finish – funder wants to see the details.

Staffing Needs of Project:

- Who do you need to pay to run program? And why?
- If you need a supervisor to assist? And why? Is staff costs realistic?
- One teachers per ## of students.
- What are their credentials of staff for running program?

Budget Development

Common Grant Budget Format

- A. Organizational Fiscal Budget \$ _____
- B. Time period this budget covers: _____ to _____
- C. For a CAPITAL request, substitute your format for listing expenses. These will likely include: architectural fees, land/building purchase, construction costs, and campaign expenses.
- D. **Expenses:** include a description and the total amount for each of the following budget categories, in this order. (Include this information in a budget summary as an attachment to this sheet.)

	Amount Requested from this organization.	Total project expenses
Salaries		
Payroll Taxes		
Fringe Benefits		
Consultants and Professional Fees		
Insurance		
Travel		
Equipment		
Supplies		
Printing and Copying		
Telephone and Fax		
Postage and Delivery		
Rent		
Utilities		
Maintenance		
Evaluation		
Marketing		
Other (specify)		
Totals		

E. Revenue

	<i>Committed</i>	<i>Pending</i>
1. Grants/Contracts/Contributions		
Local Government		
State Government		
Federal Government		
Foundations (itemize)		
Corporations (itemize)		
Individuals		
Other (specify)		
2. Earned Income Events		
Publications and Products		
3. Membership Income		
4. In-Kind Support		
5. Other (specify)		
6. Total Revenue		

Budget Narrative

Make sure budget has these elements in its creation:

- What you bringing to the table? What part of what you already do is in kind to your own project?
- What other resources exist in the community that will support the project – get partners/collaborators in kind \$\$, so it can be part of the budget process?
- Any budget line items – **MUST MATCH YOUR WRITTEN PROGRAM NARRATIVE.**

Salaries

List each position by name (Executive Director, Teacher etc.) and salary for each. Break them down by \$xx per hour times xx hours per week times xx weeks.

Taxes & Fringe

You can use 26% or breakdown exactly what you are paying for such as health benefits, taxes, etc.

Consultants and Professional Fees

List what they are and breakdown by \$xx per hour times xx hours per week times xx weeks.

Insurance

List what type of insurance and what. If it is insurance to cover program for youth - state that.

Travel

Breakdown all travel by person, mileage etc. Explain why they need to pay travel expenses.

Equipment

List all equipment, and what it will be used for.

Supplies

List all supplies and breakdown to how much per item they cost and what they will be used for. (10 youth x \$15 per book = \$150. Books are used as part of the xxxx education program.)

Printing and Copying

Breakdown by per copy costs.

Telephone and Fax - List all expenses.

Postage and Delivery - Completely breakdown costs and for what project.

Rent

Breakdown - itemize. Why are you paying rent? Who is it too?

EXPLAIN, EXPLAIN, EXPLAIN – DO NOT LEAVE ANY QUESTIONS IN READERS MIND AS TO WHAT THE COSTS ARE AND WHY YOU NEED THEM.