

Fund Development Capacity Building Program 2008/2009 Guidelines & Information

Program Description

With support from the United Way of the Columbia Willamette, TACS offers its 6th annual **Fund Development Capacity Building Program** to help community-based nonprofit organizations increase their individual donor fundraising.

The **Fund Development Capacity Building Program** is designed to serve a wide variety of community-based nonprofits. Funding is limited to organizations that serve people economically disadvantaged, youth, communities of color and immigrant and refugee communities. We welcome applications from organizations of all levels of fundraising experience: from those where the executive director, other staff, consultants, or volunteers do the fund development work to those with dedicated fund development staff.

Through an application process, ten community-based nonprofit organizations will be selected to participate in the 6th annual **Fund Development Capacity Building Program**. Participating organizations will:

- Conduct a comprehensive fund development audit
- Create and implement a comprehensive fund development plan
- Increase their ability to identify and motivate community donors
- Expand the capacity of board members, staff and volunteers to raise funds
- Get help with fundraising data collection from technology experts
- Receive consulting support on organizational capacity and development issues

The Program will offer comprehensive support to participating organizations including:

A series of four intensive trainings are led by fundraising expert trainer, **Sharon Bosserman-Benson**. The trainings are designed to help participants:

- Increase their ability to assess current fundraising strengths and identify areas in which additional capacity need to be developed
- Develop compelling case statements; prepare and mobilize their boards to help with fundraising
- Identify and build relationships with potential donors most likely to support their issues
- Develop comprehensive fund development strategies, goals, and performance measurements
- Undertake implementation of their comprehensive fund development strategies

See page 2 for dates and times of trainings

Structured homework assignments offer a hands-on approach for participants to practice what they learn and develop useful fund raising tools specific to their organization's needs. Participants will be given feedback on homework assignments due at each of the trainings sessions.

Individual consultation to support the completion of the homework assignments, and assist with organization challenges, including opportunities to increase the board's involvement with fundraising. TACS Consultants **Guadalupe Guajardo, Cliff Jones, and Bob Hazen** will provide individual coaching assistance to the Primary Participants, and will be available to meet with each participating agency's entire board. Guadalupe Guajardo and Bob Hazen are both able to work with boards or staffs in Spanish and/or English.

Written materials such as inventories, and planning and evaluation tools that will support monitoring the progress and success of your fund raising goals.

TACS NPower Program will provide expert technology assistance to help your organization assess its capacity to track donors, understand the effectiveness of your fundraising efforts, and target your fundraising appeals, including database reporting assistance, and help selecting appropriate fund development software.

Timeline | Application Process & Program Trainings

September 12, 2008	Applications for participation must be received no later than 4:30 pm on September 12, 2008 – earlier submissions encouraged
October 17, 2008	Invitations to participate will be sent out to 10 selected organizations (all applicants will receive notification)
October 31, 2008	Commitments from selected participants required by this date, including confirmation of attendance at Orientation
November 7, 2008	<i>Orientation, 8:30 - 11:30 am</i>
November 10 – December 9, 2008	Participants must be available to meet with their assigned Coach and complete Organizational Assessment (to be scheduled)
December 10, 2008	<i>Data Collection & Overview training, 8:30 - 10:30 am</i>
Four Full Day Trainings 8:30 – 4:00 pm Fridays	<input checked="" type="checkbox"/> January 16 <i>Refining Your Case Statement</i> <input checked="" type="checkbox"/> February 13 <i>Building Donor Relationships</i> <input checked="" type="checkbox"/> March 13 <i>Asking for Money</i> <input checked="" type="checkbox"/> April 17 <i>Refining & Implementing Your Plan</i>
May 15, 2008	Final program assignments completed
May 29, 2008	<i>Reunion Gathering & Graduation; Final evaluation and data completed</i>

Eligibility Requirements

Organizations must also meet the following requirements:

1. Be a 501(c)(3) tax-exempt nonprofit corporation for at least one year
2. Provides services that help youth, people of low income, communities of color, or immigrant and refugee communities
3. Be located in one of the four counties served by the UW of the Columbia Willamette:
Clark, Multnomah, Washington, Clackamas Counties
-AND-
4. Have an annual operating budget of \$1 million or less

The group of participants selected will be primarily small and mid-sized organizations that reflect the breadth of United Way's commitment to the four-county area (Clackamas, Clark, Multnomah, and Washington Counties), with a focus on human services.

The Fund Development Capacity Building Program will provide useful fundraising tools, skills and information. Ultimately the progress that each participating organization makes in increasing its fund development capacity will depend on the commitment and effort made by both the staff and board toward implementing the strategies developed through the Program. ***In order to be successful, this Program requires the participation of the organization's board, executive director, staff and/or volunteers.***

All levels of experience in fund development are welcome—however, one of the key factors will be the readiness of your staff and board to commit time and energy to develop and implement fund development strategies.

Participant Expectations

In order to fully benefit from the Fund Development Program, each nonprofit will be expected to identify a **Fund Development Team** who will participate in this program together. The Fund Development Team will consist of a **minimum of two or three people**. If the organization's executive director acts as the Primary Participant a minimum of two people is required. If the executive director **does not** act as the Primary Participant, a minimum of three people is required. The Team will consist of:

- At least one board member
- The organization's executive director
- One member who will be designated as the **Primary Participant** (staff, executive director, board member, or volunteer). It is highly encouraged the Primary Participant be a staff member, but this is not required. The executive director may be designated as the Primary Participant. The Primary Participant will take the lead in ensuring the team and the organization is sufficiently involved.

Each Team member must be willing and able to participate in the following ways:

Primary Participant – he or she will lead the organization's efforts throughout the program. This person agrees to:

- Attend the **November 7 Orientation**
- Attend all individually scheduled coaching sessions
- Attend **all four scheduled full-day training sessions**, and the **final session on May 29, 2009**
- Ensure proper staff or personnel attend all required **technology trainings**
- Act as lead participant for your organization, including informing others of all training times and homework, etc.
- Ensure that all homework assignments are completed including preparation of the Fund Development Plan
- Brief other Team members on the progress made, and help them prepare for the trainings which they will attend
- Participate in the evaluation of the program

Board Members –one or more **board members** will take a fund development leadership role for their board. Your Board must be willing to commit to:

- Identify a **Primary Board Participant** who will be responsible for attending the Orientation on November 7, 2008
- The board must commit to have at least one board member attend each of the four full-day trainings (this may be different a board member for each training), and the **Primary Board Participant** will be responsible for ensuring attendance
- The Primary Board Participant will be responsible for informing all other board members about the trainings

- The Primary Board Participant will function as a two-way liaison between the board and program Primary Participant, sharing information with the board, and sharing the board’s perspective and questions with the trainers and consultants
- Participate in developing the Fund Development Plan
- The Primary Board Participant will commit to remaining on the board for at least one year after the conclusion of the Program (until June 2010)
- Participate in the evaluation of the Program

The **Executive Director** agrees to:

- Actively support the involvement of the Primary Staff Participant, and Primary Board Participant or act as the Primary Staff Participant, and support the Fund Development Team
- Actively support the involvement of the board member(s) participating in the program—including assisting in ways to engage board members.
- Attend the **Orientation on November 7**, and as many other trainings as possible (*this is strongly encouraged*)
- Facilitate completion of the homework assignments (this may involve assistance with data analysis, assigning staff to provide assistance with gathering information required, etc.)
- **Actively support and encourage** cooperation of all staff, board, and volunteers needed to achieve the organization’s capacity building goals.

Participant Sliding Scale Fees

Thanks to support from United Way, the Fund Development Capacity Building Program is available to community-based nonprofits at a subsidized rate based on a sliding fee scale.

Participating organizations will share the cost of the training, consultation, written materials, and other resources. The cost per participating organization will range **from \$300 to \$500. Participating organizations may pay fees in advance of the program or make payments on a mutually agreeable payment schedule.**

The sliding fee scale will be based on participating organization's annual budgets as follows:

Budget Size	Fee
• Under \$350,000	\$300
• \$350,001 – 500,000	\$400
• \$500,000 – 1 million	\$500

How to Apply

We want make this application process as easy as possible for your nonprofit. If you are unclear about what we are asking in any of the questions, please call Tere Mathern, project coordinator, at 503.239.4001 x 103 or send her an email to tm@tacs.org.

You are welcome to attend a TACS/UW Fund Development Program application Help Session:

- August 7 | 9:00 – 10:00 am with Cliff Jones & Tere Mathern
- August 12 | 3:00 – 4:00 pm with Guadalupe Guajardo & Tere Mathern

These sessions are free and limited to 15 participants. RSVP is required. To sign up for one of the sessions, please call project coordinator, Tere Mathern at 503.239.4001 x103.

Suggested Steps:

1. Read the Guidelines & Application
2. Sign up to attend a Help Session
3. Discuss participation with your board and staff
4. Discuss the attendance and participation requirements, and obtain board and executive director agreement and approval to participate
5. Complete the Application for Participation
6. Make sure you have all required signatures
7. Include a copy of your **IRS tax-exempt letter** and a **list of your board members** with affiliation, and term length and time period, and phone numbers
8. Submit your application by mail or hand delivery to:
Tere Mathern, TACS/UW Fund Development Program
1001 SE Water Avenue, Suite 490
Portland, Oregon 97214

Applications must be received **no later than 4:30 pm on September 12, 2008 at TACS' office:**
1001 SE Water Ave, Suite 490, Portland OR 97214

When will you hear from TACS?

- Between September 18 and Oct 12 you may hear from us by phone if we need to gather additional information regarding your organization
- All applicants will receive a letter or an email informing them of the status of their application by October 18
- Participant commitments are required by November 2