

THE ROADMAP TO SUCCESSFUL
FUNDRAISING IS A
KALEIDOSCOPE

MEET OUR SPEAKERS



Tara Armbruster, Executive Director:
McKemie Place

Ronide Blanc, Director: Lotus
House Thrift



Kenyatta Brunson, President & Chief Executive
Officer: N Street Village

Beatrice Gonzalez, Director & CFO:
Lotus House



Alexis Steel, President: St. Mary's Center for
Women and Children

Amy Turk, CEO: Downtown
Women's Center



KALEIDOSCOPE – A CONSTANTLY CHANGING PATTERN

- Government Funding: Alexis Steel
- Donor Relations & Community Foundations: Tara Armbruster & Beatrice Gonzalez
- Corporate Giving & Volunteer Engagement: Beatrice Gonzalez & Alexis Steel
- Galas & Special Events: Amy Turk
- Storytelling & Reporting: Beatrice Gonzalez
- In-Kinds Donations & Social Enterprise: Ronide Blanc & Tara Armbruster
- Board Development: Kenyatta Brunson



GOVERNMENT FUNDING

Blend of public and private funds can go a long way to create a financially – strong agency!

PROS	CONS
Multi- year secured funding	Administratively burdensome depending on the type of public funds
Larger dollar potential	Federal funds require a secondary audit – increasing expenses for annual operations
Reflects a high- level of assurance in your organization	Typically, low re-budgeting authority
Potentially leads to other city, state, federal funding streams.	Can be very competitive- strategy, lobbying, and connections go a long way.

GOVERNMENT FUNDING TIPS AND TRICKS

What you need to know

- Pre- Award
 - Grant writing for government grants, specifically Federal grants, is a different skillset than private funds. Choose your writer wisely!
- Post- Award
 - Scope may have limitations depending on funder. This includes subcontractors.
 - Outcomes, metrics, and data are important!
 - Audit- Federal audit can be grueling. Make sure to plan properly!
- Close-Out
 - Financial reporting can be burdensome. Make sure to keep good records especially if you want more money!

Systems, systems, systems!

- Data system- Invest in a proper data system to ensure your outcomes are tracked.
- Depending on size of grant, may want to invest in a grant –management system for financial and programmatic management.
- Manage expectations and responsibilities carefully internally- map out roles of your program staff, leadership, administrative teams, and executive leadership

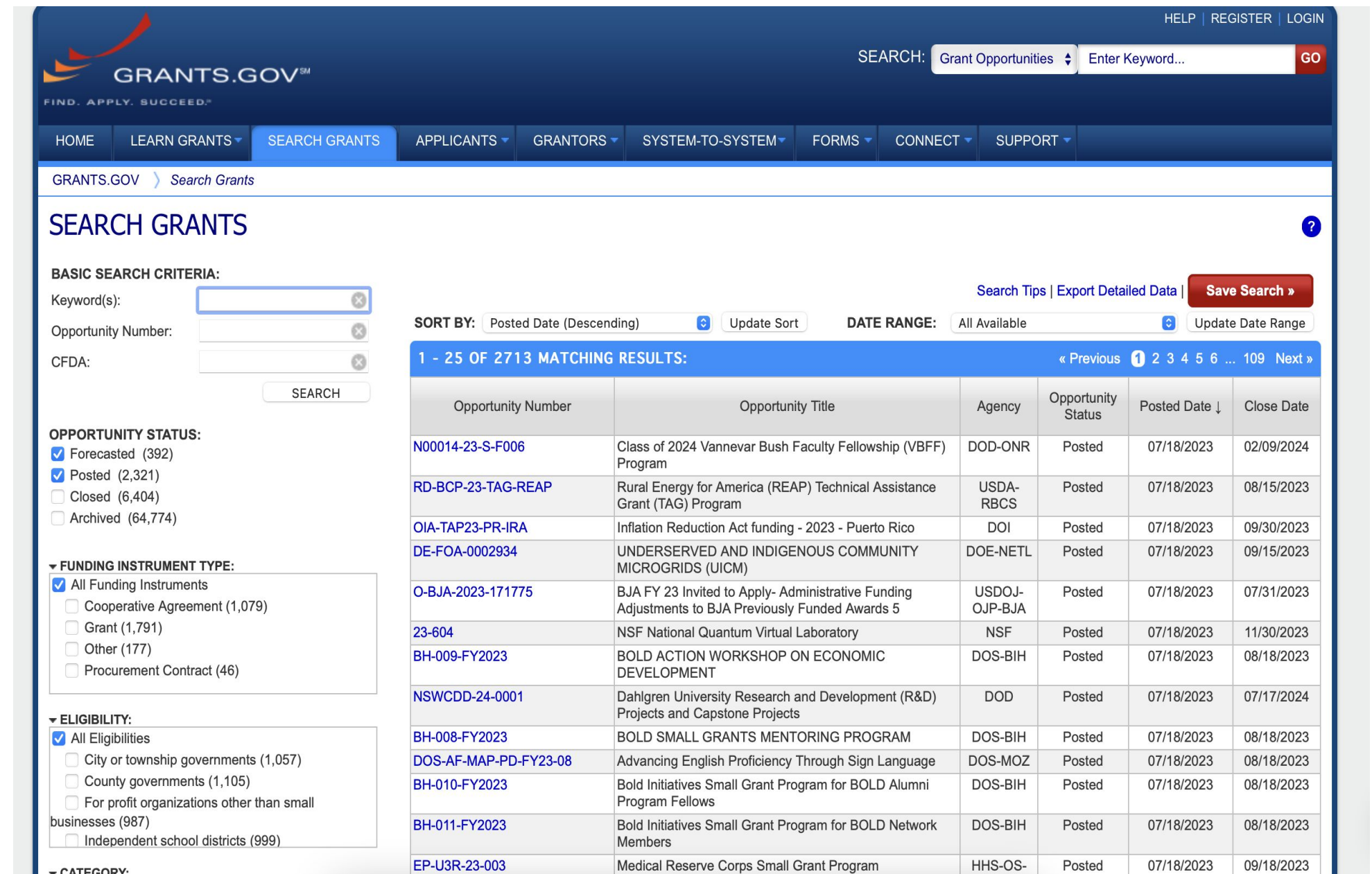
GOVERNMENT FUNDING WHERE TO LOOK

City/ State

- Check your local resources- most Cities and States will have a website dedicated to this.

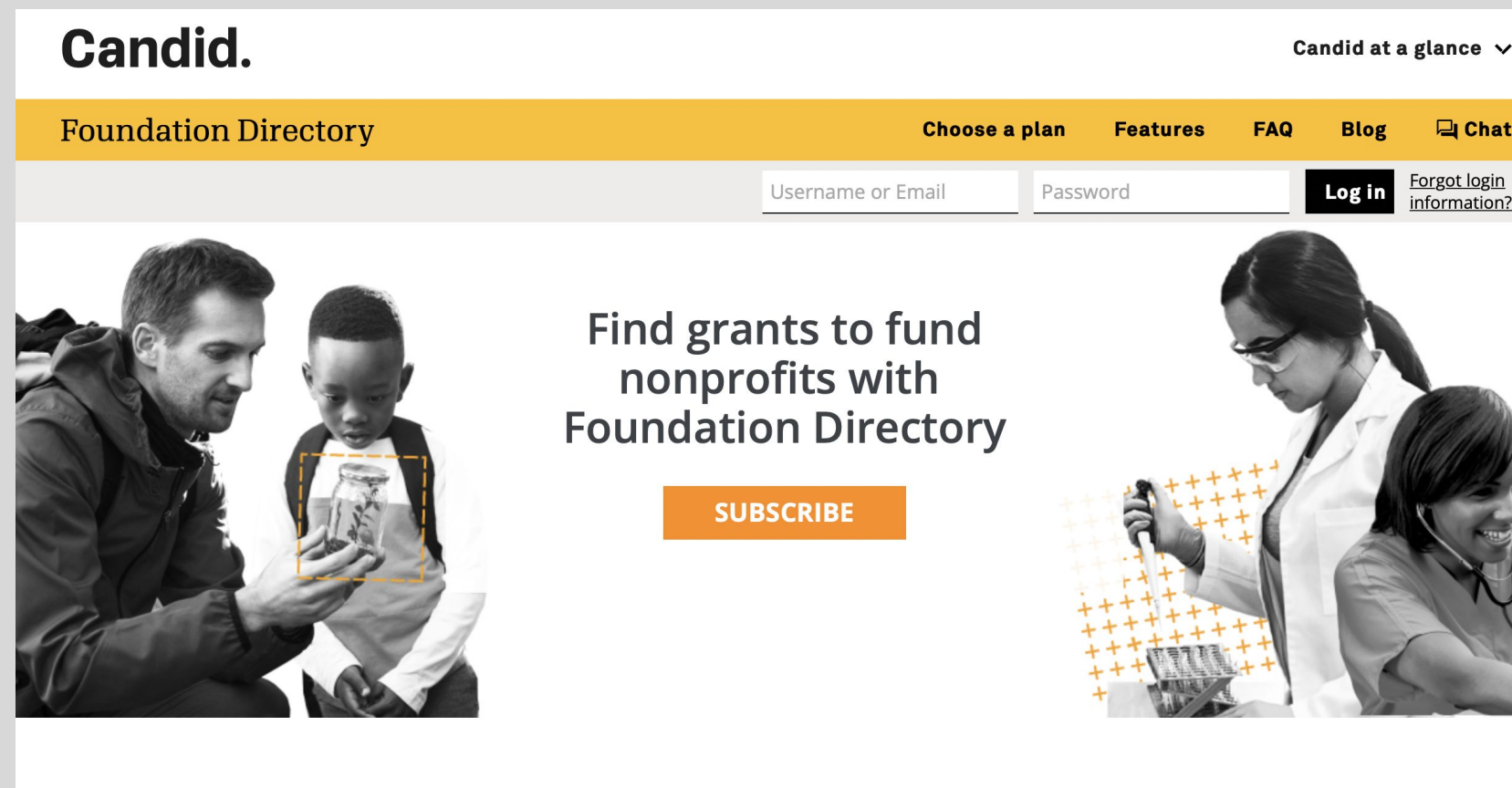
Federal

- <https://www.grants.gov/>



The screenshot displays the Grants.gov search results page. The header includes the Grants.gov logo and navigation links. The search bar shows 'Grant Opportunities' and 'Enter Keyword...'. The main content area is titled 'SEARCH GRANTS' and features several filter sections: 'BASIC SEARCH CRITERIA' with fields for Keyword(s), Opportunity Number, and CFDA; 'OPPORTUNITY STATUS' with checkboxes for Forecasted (392), Posted (2,321), Closed (6,404), and Archived (64,774); 'FUNDING INSTRUMENT TYPE' with checkboxes for All Funding Instruments, Cooperative Agreement (1,079), Grant (1,791), Other (177), and Procurement Contract (46); and 'ELIGIBILITY' with checkboxes for All Eligibilities, City or township governments (1,057), County governments (1,105), For profit organizations other than small businesses (987), and Independent school districts (999). The 'CATEGORY' section is partially visible. On the right, there are options for 'SORT BY' (Posted Date (Descending)) and 'DATE RANGE' (All Available). Below these, a table displays 25 matching results, including columns for Opportunity Number, Opportunity Title, Agency, Opportunity Status, Posted Date, and Close Date. The first few results are: N00014-23-S-F006 (Class of 2024 Vannevar Bush Faculty Fellowship (VBFF) Program), RD-BCP-23-TAG-REAP (Rural Energy for America (REAP) Technical Assistance Grant (TAG) Program), OIA-TAP23-PR-IRA (Inflation Reduction Act funding - 2023 - Puerto Rico), DE-FOA-0002934 (UNDERSERVED AND INDIGENOUS COMMUNITY MICROGRIDS (UICM)), O-BJA-2023-171775 (BJA FY 23 Invited to Apply- Administrative Funding Adjustments to BJA Previously Funded Awards 5), 23-604 (NSF National Quantum Virtual Laboratory), BH-009-FY2023 (BOLD ACTION WORKSHOP ON ECONOMIC DEVELOPMENT), NSWCDD-24-0001 (Dahlgren University Research and Development (R&D) Projects and Capstone Projects), BH-008-FY2023 (BOLD SMALL GRANTS MENTORING PROGRAM), DOS-AF-MAP-PD-FY23-08 (Advancing English Proficiency Through Sign Language), BH-010-FY2023 (Bold Initiatives Small Grant Program for BOLD Alumni Program Fellows), BH-011-FY2023 (Bold Initiatives Small Grant Program for BOLD Network Members), and EP-U3R-23-003 (Medical Reserve Corps Small Grant Program).

DONOR RELATIONS & COMMUNITY FOUNDATIONS



The screenshot shows the Candid website interface. At the top left is the 'Candid.' logo. To its right is a dropdown menu labeled 'Candid at a glance'. Below this is a navigation bar with 'Foundation Directory' highlighted in orange, and other links: 'Choose a plan', 'Features', 'FAQ', 'Blog', and 'Chat'. A login section contains fields for 'Username or Email' and 'Password', a 'Log in' button, and a link for 'Forgot login information?'. The main content area features a large banner with two images: on the left, a man and a young boy looking at a smartphone; on the right, a woman in a lab coat and a woman with a stethoscope. The text in the banner reads 'Find grants to fund nonprofits with Foundation Directory' and includes a 'SUBSCRIBE' button.

Donor Advised Giving: Sample of a local Miami Foundation which manages millions of dollars in donor advised funds.

Candid Foundation Directory: Good source for searching for private foundations. If you do not have an active profile, you should create one and ensure that it is updated with your most recent audits, 990s and other stats.



Established in 1967, The Miami Foundation is *the* foundation for people who are passionate about Miami. The Miami Foundation is focused on building a stronger Miami *forever*. Over the last 50 years we have invested more than half a billion dollars into our community, and we house more than \$427 million in assets focused on strengthening Greater Miami. We've partnered with individuals, families and corporations who have created more than 1,000 personalized, philanthropic Funds. Thanks to them and their generosity, the Foundation has awarded \$505 million in grants.

DONOR RELATIONS & COMMUNITY FOUNDATIONS

Giving is strengthened by our relationships and our ability to steward them

- Invest in a dependable and user friendly database to help track donor contact information, giving history and anecdotal information.
- Take advantage of open communication commonly associated with private giving RFPs/applications.
- Take a deep dive into their 990 and make note of any trends in giving. For Community Foundations with little to no readily available information, the 990 is a wonderful resource.
 - Do they focus on a specific geographic area?
 - Do they consistently give to a specific type of program?
 - What are their average award amounts?
- Diversify your proposals, do not assume giving priorities will remain the same year after year.
- Engage decision makers and trustees in programmatic events and volunteering whenever available.
- Connect with donor advised giving funds, these can be a great resource for private dollars.
- Though these tend to be smaller awards than federal/state/local dollars, they usually have more flexibility.



CORPORATE GIVING & VOLUNTEER ENGAGEMENT

For many corporations, engagement of their employees is key to securing funding

- Corporate Social Responsibility (CSR) and Marketing budgets are often an untapped source of funding.
- Corporations often give in regions where they have a footprint and to organizations that their employees are engaged with.
 - Create a corporate volunteering plan and strategy for your organization. If possible, be open to large scale volunteer days where corporate teams can volunteer as a group.
 - Engage in percentage of sales and other give back programs but be prepared to promote this partnership.
 - If possible, consider corporate representation on your Board.



VOLUNTEER
ENGAGEMENT



INTERNAL CHAMPIONS
INVESTMENT IN YOUR MISSION



BUILDING A SUSTAINABLE
PARTNERSHIP AND LONGER-
TERM ENGAGEMENT



CORPORATE FUNDING FOR
YOUR AGENCY!



CORPORATE GIVING & VOLUNTEER ENGAGEMENT

Corporate giving is a two way street

- Recognition of their support is key
 - Electronic recognition allows for a real time highlight of their support with the ease of sharing: website, social media, e-newsletters, etc.
- These relationships require a deeper stewarding than your federal funder might, don't lose that traction.
- Consider the synergy between your mission and their priorities – if it does not align, do not force it.



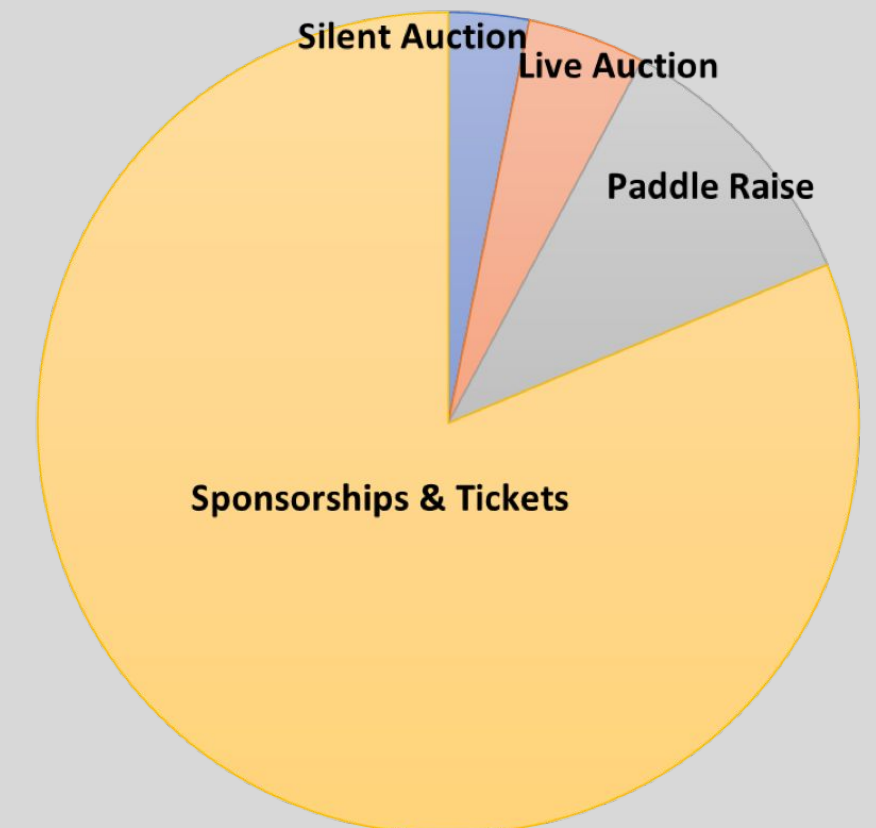
GALAS & SPECIAL EVENTS



Downtown Women's Center – Every Woman Housed Gala

- 500 guests including residents and participants
- Honorees
- Emcee
- Silent and Live Auction
- 8 months of planning with Board Committee

A Story of Board and Corporate Engagement



GALAS & SPECIAL EVENTS

Downtown Women's Center – Special Events



STORYTELLING & REPORTING

YOU GOT THE FUNDS NOW WHAT?

Reporting on the funding is just as important as applying for the funding

- Data, data, data!
 - Ensure that you have a detailed process for collecting, tracking and interpreting data which incorporates a quality assurance procedure.
- The power of anecdotes
 - Find a mechanism to collect anecdotal information and success stories which is just as powerful as hard data.
 - Consider collecting surveys from those you serve, exit letters and other methods of collecting feedback.
 - Engage your direct service team members.

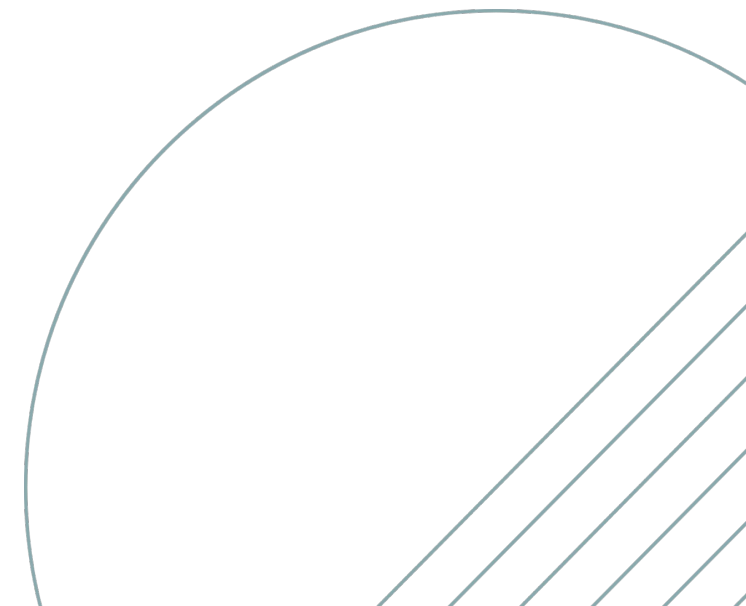


STORYTELLING & REPORTING

YOU GOT THE FUNDS NOW WHAT?

Reporting on the funding is just as important as applying for the funding

- Fiscal transparency
 - Incorporate a monthly system of reviewing grant specific allocations.
 - Spend down reports in conjunction with your software.
- Unrequired reporting
 - If a funder does not have a reporting requirement, create one!
 - This gives you the ability to emphasize the impact of their giving and why they should continue supporting.
- General marketing & storytelling – your electronic footprint tells your story!
 - Website
 - Social Media
 - E-newsletter



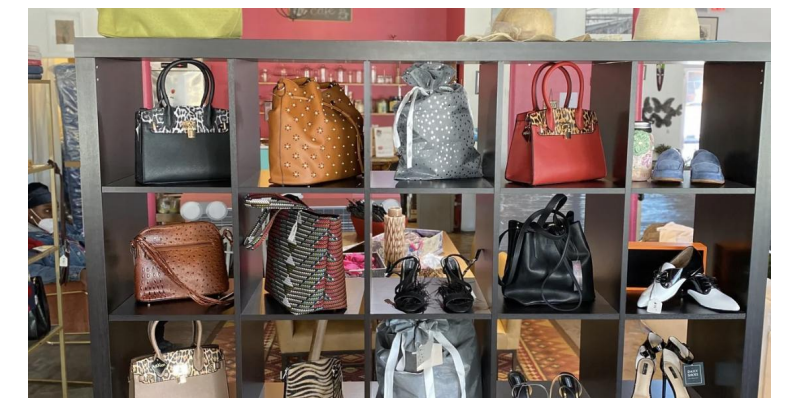
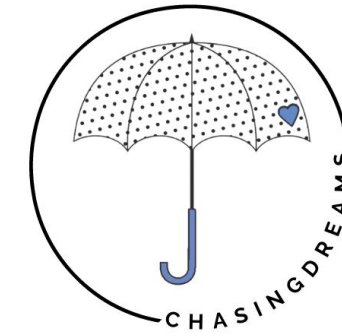
IN-KIND DONATIONS

- An in-kind donation is a non-cash gift made to a nonprofit organization. These contributions can be made in the form of time, services, expertise, and goods, often coming from large businesses but also can come from individuals.
- In general, there is one inherent danger to accepting in-kind donations: you might receive some in-kind donations that you have no use for. Declining the donation and appearing ungrateful.
- Don't be afraid to ask for the things that you need! Dedicated donors want to help your nonprofit. Make it easy for them by telling them exactly what contributions you need.
- In-kind donations can be incredibly helpful for nonprofits and provide a unique way that supporters can contribute to your cause.



SOCIAL ENTERPRISES

- A Social Enterprise is an organization or venture within an organization that advances a social mission and generates earned income in direct exchange for a product or service.
- Benefits of a Social Enterprise:
 - Decreases your dependence on grants and fundraising events
 - Brings in unrestricted income
 - Increases your sustainability and financial independence
 - Builds self confidence in the people you serve
- How to Build a Successful Social Enterprise:
 - Support from Staff & Board of Directors
 - Research and Brainstorm
 - Create a realistic business plan
 - Market Research
 - Develop your sales plan & implement it



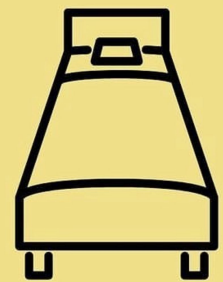
SOCIAL ENTERPRISES

How Lotus House Thrift Chic Boutique Retail Training Program Doubles as a Donation and Distribution Center

- Storefront and donation drop off for gently used clothing, shoes and furniture items
- Avoids big storage expenses and facilitates accepting items you may normally need to turn away
- Functions as alumni supportive service, providing a pathway to furnishing homes at exit facilitated by the capacity to accept these large donations
- On average, \$2 million in in-kind donations are accepted at this social enterprise/donation center
- Storefront functions as a thrift boutique, employment for alumni and workforce development for sheltered guests via paid internships, funded by grantors

We're in need of the following

Queen size bed frames
Full size bed frames
Twin size bed frames
Toddler bed frames
Mattresses



your support helps outfit the new homes of @lotushouse guests



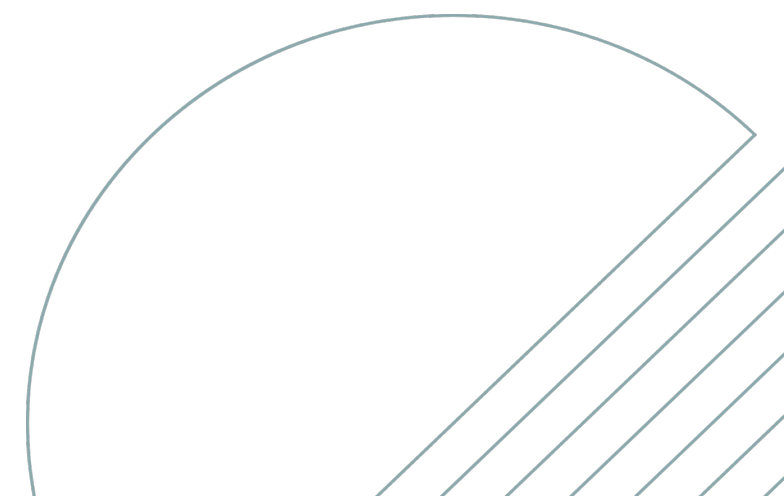


BOARD DEVELOPMENT

We need new Board Members – How to Start?

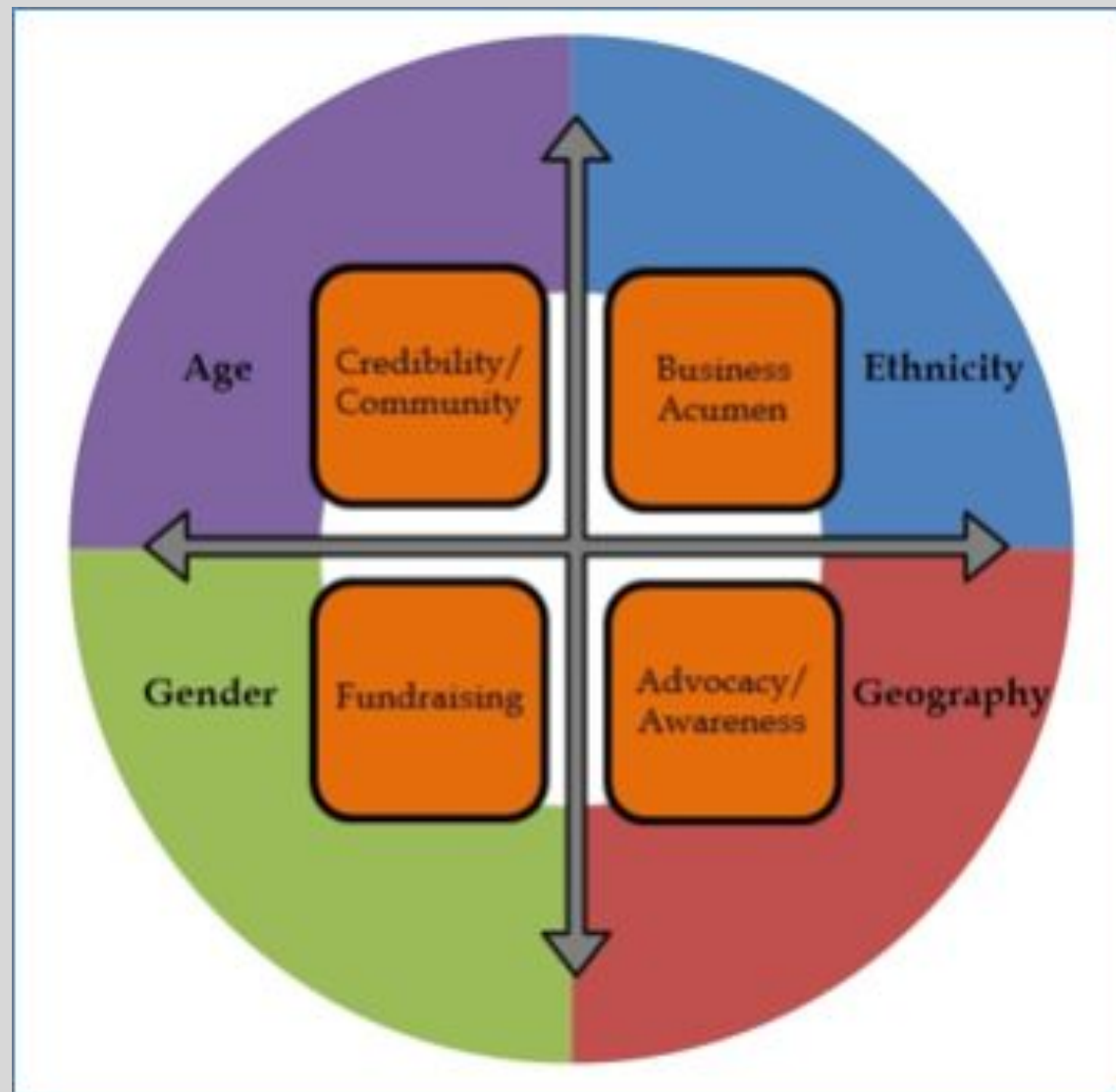
Boards should regularly assess their composition and performance, as well as individual members' contributions, to identify key traits and skills that are not represented. Self-assessments are typically done twice a year and at the start of a recruitment process. If any skills, traits, or other criteria are not represented, they can be addressed by adjusting board members' roles and responsibilities, shifting board priorities, and/or through recruitment.

DRi recommends that organizations first consider the number of board members who fulfill each of the four key board member responsibilities in the orange boxes below. These are the assets a board must possess and leverage to fulfill the obligations that will help propel the organization forward. Once the four core responsibilities have been adequately filled, the organization can then focus on diversifying the characteristics in the outer circle.



BOARD DEVELOPMENT

Key areas where Board Members are vital



- **Credibility/Community**—all boards need individuals who possess credentials, experience, and/or expertise that is relevant to the mission and community of the organization.
- **Business Acumen** — all boards need individuals who bring professional experience in business functions such as business development, strategic planning, finance and human resources.
- **Advocacy/Awareness**—all Boards need individuals who can help lobby for policies that impact the mission as well as those who can help elevate awareness on behalf of the organization.
- **Fundraising**—all Boards need individuals who can provide meaningful personal gifts, make connections, cultivate and solicit individual and corporate donors and foster strong authentic relationships.

BOARD DEVELOPMENT

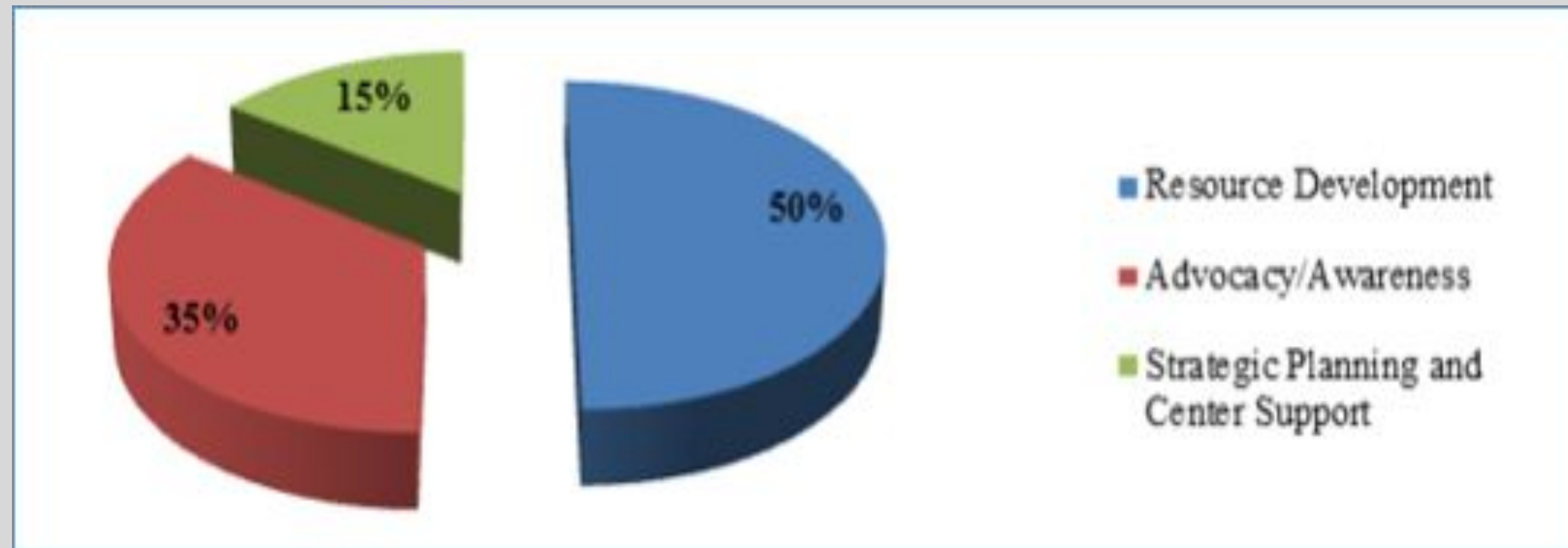
Board Chair, Board of Directors and the CEO Relationship

- The Board Chair and the CEO relationship is a vital one---these two persons must be aligned and have trust in each other's abilities; one to lead the organization and the other to lead the Board in the best interest of the organization.
- The Board of Directors works collaboratively with the Chief Executive Officer in the areas of public relations, advocacy, networking, fundraising, and long-term viability and support of the organization. The Board ensures the organization has the financial and community resources it needs for program operations and long-term fiscal stability.



BOARD DEVELOPMENT

Board of Directors Responsibilities



- The circle graph is an example of how Board members can divide their time, talents, and gifts to benefit the organization.



BOARD DEVELOPMENT

Attracting Mission Focused Board Members

One effective way in introducing new talent is to have each standing Board of Director complete an assessment matrix. It should be completed twice a year and at the start of a recruitment process to identify assets, skills, or traits that are underrepresented by the current board composition. Any gaps in the attached assessment matrix should be translated into recruitment priorities.

- This board assessment matrix should be completed by the Governance Committee of the Board of Directors at least once annually (prior to new member recruitment). Each board member should be asked to complete the individual self-evaluation and return it the Governance Committee so that they can use the information provided in the self-evaluations to complete the board assessment matrix.
- The performance measures included in the board assessment matrix should be shared with prospective new board members so that they are aware of the indicators against which their performance will be measured.
- Expectations must be clearly outlined for prospective new board members.

QUESTIONS & DISCUSSION

