

Recession-proof Fundraising

FUNDRAISING WORKSHOPS FOR THE NONPROFIT PROFESSIONAL

We can't deny the painful truth around us. Turn on the evening news and you'll hear forecasts of economic doom and gloom filled with phrases such as economic downturn, soft economy, stimulus, and recession. Forecasts for an end to these hard times range anywhere from months to years, but like the weather, we know things will get better.

It takes perseverance, innovative thinking, and a strong belief in your mission to be a successful fundraiser during these hard times. In a down economy, organizations are forced to be leaner and become more efficient, making them better positioned to take advantage of a rebounding economy. However, when faced with a recession, many nonprofits make poor choices that limit their growth, such as scaling back fundraising or becoming pessimistic.

Now is a great time to recession-proof your fundraising effort by getting back to the basics, sharpening your message, and diversifying your funding base. The Annie E. Casey Foundation/Casey Family Services, the Community Foundation for Greater New Haven, and Empower New Haven, Inc., are pleased to offer two fundraising series for nonprofits.

FUNDRAISING FOR SMALL ORGANIZATIONS WITH LIMITED FUNDRAISING EXPERIENCE

Participants will be required to attend all three workshops in this series. All workshops in this series are led by Diane Gedeon-Martin and Abbie von Schlegell.

Workshop 1: Fund Development Planning

April 29, 2009, 10 A.M. to 4 P.M.

This introductory session provides background information for those relatively new to fundraising or with less than three years of experience. Participants will understand the rationale of planning, obtain the skill set necessary to create a fund development plan, and begin to develop a plan once they return to their organization. This workshop describes the scope of fundraising and the importance of building relationships to solicit gifts. It will also give participants tools to engage the stakeholders in projecting a positive image to the community that will potentially attract prospective donors. Participants will begin to draft a development plan after analyzing sources of contributed income and considering the capacity of their own organizations.

Workshop 2: Introduction to Grant Seeking: Part I

May 21, 2009, 10 A.M. to 4 P.M.

In this workshop, participants will understand the nature of grants within their fundraising activities and learn to develop a case statement to support their work. The "case for support exercise" they completed prior to this session will help them understand the nature of the written "ask," and how the techniques apply to grant proposals. The homework exercise provided at the end of this session will allow participants to use the "case for support" they developed to begin formulating a logic model for their project or program.

Workshop 3: Introduction to Grant Seeking: Part II

June 15, 2009, 10 A.M. to 4 P.M.

The third workshop continues to explore basic grant-seeking

activities. At the very beginning of this session, participants will discuss their logic model homework assignment in groups and with the entire class. The presentation materials will provide a template for participants to use when creating grant proposals for their programs or projects once they return to their offices. This workshop will provide exercises in writing and reviewing proposals from a grantmaker's perspective.

FUNDRAISING FOR EXPERIENCED NONPROFIT ORGANIZATIONS

Participants will be required to attend all five workshops in this series. The first three workshops in this series are led by Diane Gedeon-Martin and Abbie von Schlegell.

Workshop 1: Fund Development Planning

May 19, 2009, 10 A.M. to 4 P.M.

This workshop begins with an overview of fund development planning. It provides an in-depth study of major gifts, including responsibilities of the board of directors, effective donor cultivation and solicitation, organizational accountability, and transparency. Whether you are asking for \$1,000 or more than \$1 million, the principles of the "ask" are the same. Several exercises, including writing a "case for support" and role-playing, are included to help participants formulate a solicitation strategy for seeking a major gift.

Workshop 2: Advanced Grant Seeking: Part I

June 3, 2009, 10 A.M. to 4 P.M.

This workshop for experienced nonprofit leaders will focus on enhancing their grant-seeking skills. Participants learn to use the principles of results-based accountability (RBA) when preparing their proposals. The focus of this workshop is on developing successful grant proposals and understanding how they work to satisfy the goals of the organization's strategic plan. The exercises will focus on developing goals and objectives using the RBA model.



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FUNDRAISING FOR EXPERIENCED NONPROFIT ORGANIZATIONS (CONT'D)

Workshop 3: Advanced Grant Seeking: Part II

June 16, 2009, 9:30 A.M. to 12:30 P.M.

This half-day session focuses on writing and reviewing proposals from the grantmakers' perspective. Particular attention is paid to writing and editing and viewing the proposal from the funder's perspective. Exercises incorporated into this session include writing in an active voice, effective editing, and reviewing actual grant proposals submitted for a competition.

Workshop 4: Communicating Your Story during a Recession

July 16, 2009, 9:30 A.M. to 12:30 P.M.

Learn how you can become more effective with less! Tough times can be an opportunity for organizations to set themselves apart from others. This workshop, led by Andrea Obston, covers the key components of a solid communications program, and helps participants identify their top communication needs and opportunities. Leveraging the "Big Four" communications must-dos:

- Making your website a marketing workhorse
- Building relationships through the media
- Building and using your in-house mail/e-mail lists
- Encouraging volunteers and board members to be community ambassadors

Workshop 5: Roles and Relationships between the Board and the Lead Fundraiser

July 23, 2009, 9:30 A.M. to 12:30 P.M.

The board is concerned about the balance sheet and need for program dollars. The executive director wants a higher goal set for the annual fund. The development director is looking for help and leadership. Sound familiar? Nonprofit governance is complex and demands that the board and staff work together to raise money for the organization. In order to accomplish this, everyone needs to understand each other's correct roles and responsibilities in order to carry them out. Come learn who should be doing what, and how to collaborate effectively as a team in order for your organization to maximize its mission, raise more money, and thrive into the future. This workshop is led by Sandra Wood.

HOW TO APPLY

The Recession-proof Fundraising workshops are designed to have a cumulative impact on the organization's ability to plan and implement a successful fundraising strategy. In order to gain maximum benefit from the program, participating organizations must agree to attend all the workshops in a series with at least one other person from their organization. For experienced nonprofits, board member participation will be required. *To apply for admission, go to www.caseyfamilyservices.org and download the application form, which is due by April 15, 2009. Space is limited and you are encouraged to submit your application as early as possible. Successful applicants will be notified no later than April 20, 2009. All workshops are offered at no cost.*

ABOUT THE INSTRUCTORS

Diane Gedeon-Martin

Diane Gedeon-Martin, the president of the Write Source, is a grants consultant with more than 200 clients in 23 states. Since starting the Write Source in 1993, Diane has built a reputation for creating fund development materials that get results. The materials she develops for workshops, conference sessions, and online webinars blend the best of a strong academic program with a practical approach to grant seeking that provides an exceptional learning opportunity for all. Diane is currently on faculty with the Center for Philanthropy at Indiana University, and also teaches for the Connecticut Association of Nonprofits, and the Association of Fundraising Professionals (AFP) International.

Abbie von Schlegell

Abbie von Schlegell is a respected instructor and lecturer in the areas of major gifts and capital campaigns. Abbie has been in the development field for 35 years, as a consultant with several national firms for half of her career, and as a senior development officer with four institutions. She has expertise in women's philanthropy. Abbie held key development positions at Stanford University and the University of Chicago. She also was the chief development officer for both the Shakespeare Theatre Company in Washington, D.C., and Enterprise Community Partners in Columbia, Maryland. She was the 1990 recipient of the President's Award from the Association of Fundraising Professionals in recognition of her service to the profession.

Andrea Obston

Andrea Obston brings three decades of experience in public relations and marketing to her work. She founded Andrea Obston Marketing Communications, LLC, in 1982, handling both local and national accounts ranging from insurance products to publicity for an astronaut. Before starting her own firm, Andrea worked at a large advertising firm, leading its public relations department. In 2005, she was named the outstanding Connecticut Woman Business Owner of the Year by the National Association of Women Business Owners. An active public speaker, Andrea holds the Master in Business Administration from the University of Connecticut and a bachelor's in public relations from Boston University.

Sandra Wood

Sandra Wood has counseled nonprofit organizations and donors on effective philanthropy for 30 years. She was the first vice president for philanthropic services at the Hartford Foundation for Public Giving, the largest community foundation in Connecticut. She also served as the director of development and capital campaign director for the Hartford State Company and for the Watkinson School. A graduate of Yale College and the University of Connecticut School of Law, and a member of the state bar association, she has concentrated in gift planning throughout her career in charitable development. She currently is the chair of the advisory board for the University of Connecticut's new Nonprofit Leadership Program, educating adult learners for leadership in the nonprofit sector.

APPLICATION ONLINE AT
WWW.CASEYFAMILYSERVICES.ORG