

## **IL NET**

an ILRU/NCIL National Training and Technical Assistance Project

*Expanding the Power of the Independent Living Movement*

# **MOBILIZING RESOURCES FOR INDEPENDENT LIVING**

A National Training Conference

## **Participant's Manual**

**February 15 – 17, 2006**

**Contributors to the training materials:**

**Richard Male**

Tim Fuchs

Denise Law

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ILRU Program  
2323 S. Shepherd Street  
Suite 1000  
Houston, Texas 77019  
713-520-0232 (V)  
713-520-5136 (TTY)  
713-520-5785 (FAX)  
ilru@ilru.org  
<http://www.ilru.org>

NCIL  
1916 Wilson Boulevard  
Suite 209  
Arlington, Virginia 22201  
703-525-3406 (V)  
703-525-4153 (TTY)  
703-525-3409 (FAX)  
1-877-525-3400 (V/TTY - toll free)  
ncil@ncil.org  
<http://www.ncil.org>

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***IL NET is funded through a special provisions cooperative agreement with the U.S. Department of Education, Rehabilitation Services Administration, Agreement No. H132A020004.***

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A National Training Conference

New Orleans, LA

February 15 – 17, 2006

## Table of Contents

Agenda.....	iv
About the Trainers.....	vi
IL NET Staff.....	vii
About ILRU and NCIL.....	viii
About IL NET.....	ix
Learning Objectives.....	x
Add'l Information on Richard Male & Associates.....	xi
<b>SECTION 1: Elements of a Fundraising Plan.....</b>	<b>1</b>
<b>SECTION 2: A PowerPoint Presentation by Richard Male.....</b>	<b>7</b>
Key Funding Opportunities for ILCs.....	8
Funding Trends Across America.....	8
Raising Money for National Foundations.....	10
Advantages & Disadvantages of Funding Sources.....	12
Overview of Public & Private Funding.....	13
Media, Marketing, and Money.....	14
Tips on Raising Money.....	17
Eight Step Strategic Approach to Winning Grants.....	21
Writing Winning Proposals.....	26
Corporate Sponsorships & Partnerships.....	27
Models of Corporate Support.....	31
Steps in Developing Corporate Partnerships.....	32
Raising Money from Individuals.....	34
Board & Organizational Development.....	39
Key Points of a Board President's Job Description.....	41
Key Points of an Executive Director's Job Description.....	42
Keys to Leadership.....	42
<b>SECTION 3: US Foundations Funding Disability Programs.....</b>	<b>44</b>
Foundations Funding Disability Programs.....	44
Foundations Providing Capital for Disability Programs.....	49
<b>SECTION 4: Religious Funding In America.....</b>	<b>51</b>
Contacts.....	56
<b>SECTION 5: DO GOOD ILC Case Study.....</b>	<b>61</b>
<b>SECTION 6: Sample Corporate Sponsorship Packages.....</b>	<b>67</b>
Tips.....	68
Packages.....	69
<b>SECTION 7: Sample Letter of Introduction.....</b>	<b>72</b>
<b>SECTION 8: Sample Organizational Brochure.....</b>	<b>75</b>

# Mobilizing Resources for Independent Living

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## Agenda

### February 15, 2006

7:00 pm – 9:00 pm Welcome & Reception

### February 16, 2006

8:30 - 9:00 AM Continental Breakfast

9:00 - 9:30 AM Welcome, Introductions, Expectations, Review of the Agenda

9:30 - 10:45 AM Funding trends across America: private foundations, corporations, government, religious, philanthropic trusts and individuals

10:45 - 11:00 AM Break

11:00 - 12:00 AM Advantages and disadvantages of different funding sources

12:00 - 1:15 PM Lunch

1:30 - 2:30 PM Media, Marketing and Money – strategies to “position” your ILC in your community

2:30 - 3:30 PM TIPS on raising money – 10 key principles

3:30 - 3:45 PM Break

3:45 - 5:00 PM Eight Step Strategic Approach to Grants

- Identifying funding needs
- Drafting summary statements
- Researching funding sources
- Letter of introduction
- Interview and asking for money
- Overview and “tips” on the proposal
- Politics and lobbying the grant
- Life after the decision

# Mobilizing Resources for Independent Living

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## Agenda (continued)

### February 17, 2006

8:30 - 9:00 AM	Continental Breakfast
9:00 - 10:00 AM	Corporate Sponsorships, partnerships and cause-related marketing
10:00 - 11:00 AM	Wealth in America: Raising money from Individuals
11:15 - 11:30 AM	Break
11:30 - 12:15 PM	Organizational Development and involvement: staying true to your mission and philosophy <ul style="list-style-type: none"><li>○ Role of the staff in development</li><li>○ Leading the board</li><li>○ Planning and strategic thinking</li><li>○ Hiring a grant writer or development staff person</li></ul>
12:15 - 1:30 PM	Lunch
1:30 - 2:30 PM	Continuation on the organizational development and open discussion on board and leadership issues
2:30 - 4:00 PM	Case study: DO GOOD – Independent Center in Pleasantville, USA
4:00 - 4:30 PM	Q and A follow-up to training/evaluation

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## About Your Trainers...

**Rich Male** is a recognized leader, regionally and nationally, in leadership development, fundraising, community organizing and public policy for non-profit organizations, local municipalities and schools. For 30 years he has been a trainer, consultant, keynote speaker, teacher and facilitator to literally thousands of organizations. Rich has been involved in grassroots disability rights issues and provides consultation to a variety of Independent Living organizations, including the National Council on Independent Living.

### **Rich Male**

Richard Male and Associates

50 South Steele Street

Suite 325

Denver, CO 80209

303.355.2919 (V)

303.355.7190 (FAX)

[rich@richardmale.com](mailto:rich@richardmale.com)

**Lee Schulz** has been the Executive Director of IndependenceFirst in Milwaukee, Wisconsin since 1986. Under his leadership this Center for Independent Living has grown from a \$265,000 budget to one of nearly \$20 million. He is a former Treasurer and Regional Representative Chair and currently an at-large governing board member for the National Council on Independent Living. He is also a past member of Wisconsin's State Independent Living Council and co-founder and first Chair of the Wisconsin Coalition of ILCs.

### **Lee Schulz**

Executive Director

IndependenceFirst

600 West Virginia Street, 4<sup>th</sup> Floor

Milwaukee, WI 53204

414.226.8301 (V)

414.291.7520 (TTY)

414.291.7525 (FAX)

[lschulz@independencefirst.org](mailto:lschulz@independencefirst.org)

# Mobilizing Resources for Independent Living

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## IL NET Staff

### ILRU

**Lex Frieden**

Executive Director  
713.520.0232 (ext. 116)  
lfrieden@ilru.org

**Richard Petty**

Program Director  
713.520.0232 (ext. 122)  
richard.petty@bcm.tmc.edu

**Laurel Richards**

Training Director  
713.520.0232 (ext. 135)  
lrichards@ilru.org

**Laurie Gerken Redd**

Administrative Director  
713.520.0232 (ext. 120)  
lredd@ilru.org

**Dawn Heinsohn**

Training Coordinator  
713.520.0232 (ext. 130)  
heinsohn@ilru.org

**ILRU**

2323 S. Shepherd  
Suite 1000  
Houston, TX 77019  
713-520-0232 (V)  
713-520-5136 (TTY)  
713-520-5785 (FAX)  
ilru@ilru.org  
<http://www.ilru.org>

### NCIL

**John Lancaster**

Executive Director  
703.525.3406 (ext. 30)  
john@ncil.org

**Denise Law**

Project Associate  
703.525.3406 (ext. 32)  
denise@ncil.org

**Tim Fuchs**

Training Director  
703.525.3406 (ext. 28)  
tim@ncil.org

**NCIL**

1916 Wilson Boulevard  
Suite 209  
Arlington, VA 22201  
703-525-3406 (V)  
703-525-4153 (TTY)  
703-525-3409 (FAX)  
877-525-3400 (toll-free)  
ncil@ncil.org  
<http://www.ncil.org>

## **ABOUT ILRU**

The Independent Living Research Utilization (ILRU) Program was established in 1977 to serve as a national center for information, training, research, and technical assistance for independent living. In the mid-1980's, it began conducting management training programs for executive directors and middle managers of independent living centers in the U.S.

ILRU has developed an extensive set of resource materials on various aspects of independent living, including a comprehensive directory of programs providing independent living services in the U.S. and Canada.

ILRU is a program of TIRR, a nationally recognized, free-standing rehabilitation facility for persons with physical disabilities. TIRR is part of TIRR Systems, a not-for-profit corporation dedicated to providing a continuum of services to individuals with disabilities. Since 1959, TIRR has provided patient care, education, and research to promote the integration of people with physical and cognitive disabilities into all aspects of community living.

## **ABOUT NCIL**

Founded in 1982, the National Council on Independent Living is a membership organization representing independent living centers and individuals with disabilities. NCIL has been instrumental in efforts to standardize requirements for consumer control in management and delivery of services provided through federally-funded independent living centers.

Until 1992, NCIL's efforts to foster consumer control and direction in independent living services through changes in federal legislation and regulations were coordinated through an extensive network and involvement of volunteers from independent living centers and other organizations around the country. Since 1992, NCIL has had a national office in the Washington, D.C. Metropolitan area. While NCIL continues to rely on the commitment and dedication of volunteers from around the country, the establishment of a national office with staff and other resources has strengthened its capacity to serve as the voice for independent living in matters of critical importance in eliminating discrimination and unequal treatment based on disability.

Today, NCIL is a strong voice for independent living in our nation's capital. With your participation, NCIL can deliver the message of independent living to even more people who are charged with the important responsibility of making laws and creating programs designed to assure equal rights for all.

## ABOUT THE IL NET

This training program is sponsored by the IL NET, a collaborative project of the Independent Living Research Utilization (ILRU) of Houston and the National Council on Independent Living (NCIL).

The IL NET is a national training and technical assistance project working to strengthen the independent living movement by supporting Centers for Independent Living (CILs) and Statewide Independent Living Councils (SILCs).

IL NET activities include workshops, national teleconferences, technical assistance, on-line information, training materials, fact sheets, and other resource materials on operating, managing, and evaluating centers and SILCs.

The mission of the IL NET is to assist in building strong and effective CILs and SILCs which are led and staffed by people who practice the independent living philosophy.

The IL NET operates with these objectives:

- Assist CILs and SILCs in managing effective organizations by providing a continuum of information, training, and technical assistance.
- Assist CILs and SILCs to become strong community advocates/change agents by providing a continuum of information, training, and technical assistance.
- Assist CILs and SILCs to develop strong, consumer-responsive services by providing a continuum of information, training, and technical assistance.

# **Mobilizing Resources for Independent Living**

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## **Learning Objectives**

**Participants will learn how to:**

- **Capitalize on current funding trends among private foundations, corporations, philanthropic trusts, religious, government, and individual donors;**
- **Integrate marketing and public relations into your fundraising strategies that "position" your organization for success;**
- **Recognize the advantages and disadvantages of specific funding sources and the timing patterns of each;**
- **Establish relationships with funders PRIOR to asking for the money;**
- **Develop long-term resource development strategies; and,**
- **Bring unrestricted dollars into an organization.**

RICHARD MALE & ASSOCIATES

**rich@richardmale.com**

**303-355-2919**

## **Encouraging      Inspiring      Supporting      Coaching**

Have you ever tried to explain your **organization's** problems to a consultant only to find that the solution will **cost** a lot of money, take up a great deal of your **time**, and at the end of the **experience** you don't really feel that you've learned anything?

### **It's time for a different approach to consulting and training**

A strategic approach to reaching your goals

RM&A is a team of professionals versed in fundraising, leadership and organizational development, and community/constituency development. Richard Male is a national and international trainer and consultant for nonprofits. For over 30 years, he has worked with a variety of organizations to help deepen and broaden their fundraising capacities, as well as position them in the community to significantly increase their funding. To help your **organization** succeed we can provide the following services tailored to your specific needs:

- Long Term Fund Raising Plans
- Community Outreach
- Corporate Partnerships
- Grant Proposals
- Public/Private Partnerships
- Targeted Communications
- Foundation Research
- Prospect Research
- Corporate Research

**We'll Coach You Through It!**

**Richard Male & Associates**

**Fax: 303-355-7190**

**<http://www.richardmale.com>**

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# **Section 1:** Elements of a Fundraising Plan

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# ELEMENTS OF A FUNDRAISING PLAN

By

Richard Male

## ***INTRODUCTION***

The purpose of the fundraising plan is to have a planning document that clearly spells out the overall fundraising picture of the organization. In most plans, the agency takes a historical look at the past three years and seeks to project probable funding sources three years into the future.

In the introduction to the fundraising plan, the ILC articulates the overall goals for the plan (such as we want to diversify our funding strategy, want to increase our controllable income, want to form strategic partnerships, want to broaden out from over reliance on government funding) listing the key elements within this document.

## ***BACKGROUND***

In this section we cover the historical background and impact of the organization. The key sections should include:

- History and historical impact (accomplishments) of the agency
- Mission statement
- Current Programs with one sentence description of each program

## ***CASE STATEMENT***

The case statement is a clear, concise, compelling one page statement spelling out the reasons a donor would want to make a contribution or grant to your organization.

Within the context of the plan, this statement should pull together some of the above information and should reflect the passion of the organization

## ***DEMOGRAPHIC INFORMATION – EXTERNAL ANALYSIS***

This section should encompass the external environment that is creating a need for the organization. In this section include:

- Economic and social indicators- for example poverty, educational, housing, health care; cultural and digital divide issues, etc
- Political climate- What are the political factors that are working either for or against the organization? What is happening in Washington and your state that may support or derail our efforts to raise funds for your constituency and the ILC?

## **SWOT ANALYSIS**

A SWOT (Strengths, Weaknesses, Opportunities Threats) assessment provides a quick overview of the organizational dynamics, identifies strengths and opportunities from which to build, identifies weaknesses and potential threats, and helps to determine if the threats identified are real and controllable or uncontrollable. If the threats are uncontrollable, such as the general economy or the weather, understand them, but do not spend much time acting on what is out of your control.

The Strengths and Weaknesses are INTERNAL to the organization and the Opportunities and Threats are EXTERNAL. Try to do the SWOT with a combined group of the staff and some key board members. After you list the SWOT on a flip- chart be sure to analyze what it means for the organization.

## **ORGANIZATIONAL DEVELOPMENT / DYNAMICS**

In this section the agency wants to analyze the strengths and weaknesses of the board of directors, especially as it pertains to its capabilities to raise funds. Is the board an active or passive body of people? Are their people who are positioned to open up funding doors? Does the board have a history of raising funds? Is it motivated to raise funds? Is there strong leadership on the board? What about the president of the board, is she/he a strong leader? If you would have to pick an animal or insect to describe the board what comes to mind and why? In many cases with grassroots organizations, the board was not designed as a fundraising board. Therefore, the development of a resource development committee that has strength, influence and contacts should be organized to help implement the plan.

In this section we discuss the role of the CEO/Executive Director plays in the fundraising process. Is the Executive Director the founder? Is she/he a charismatic or a passive leader? Does she/he have a strong influence on the board of directors? Does she/he have good contacts in the corporate, foundation, religious, and governmental communities? Can these contacts be used to open doors to raise new money?

What can do done to increase board and staff involvement in the fund development process? Is there a need for retreat or board training? Do new board members need to be recruited who bring in new skills, and contacts? Do we need to strengthen our fundraising committee on the board?

## **FUNDING HISTORY**

Gives a historical sense of where the money has come from to support the organization. Try to break down this analysis by funding sources and years? What % of money historically has come from government funding, private foundations, corporations, donors (individuals), earned income, religious, planned giving (if any), special events, United Way, etc. Have these percentages been increasing or decreasing during the past three years. You may want to break down the revenue by program areas since much of the public and foundation funding will be restricted to specific programs.

## ***FUNDING OPPORTUNITIES***

This is where the agency looks at funding opportunities initially for the next 12 months and into the future. Most agencies break down their funding needs into four areas:

- Programs and projects
- Administrative
- Equipment
- Capital (if you are raising money for building, expansion, or major renovations)

For each one of the areas it is important to establish **funding goals** (dollar amounts needed) for each of the areas and to write a one-page summary sheet of each of the above funding goals that include:

- Description of the funding need
- Goals and objectives of the funding need
- Impact to the community AND to the organization
- Dollar amount needed

This section is one of the longest sections in the plan because most agencies have multiple programs that need funding. In addition administrative, equipment needs and perhaps capital campaign requirements are detailed.

## ***THE FUNDING STRATEGY***

This is where the agency analyzes the primary funding sources identified by our research and includes the strategic approaches to them. Be aware that researching potential funding sources is an ongoing task that requires regular contact with the people in the community; reading the newspapers daily, regular follow-up with the funders to assure that confidence in the organization is strong and future funding opportunities are known.

Remember that much of fund raising is relationship driven so the more visible the organization is in the community through board and staff contacts the greater the possibility of receiving money. Also make sure you integrate **marketing materials** (brochures, newsletters, e-mail letters, etc) with a consistent brand image that is woven together with effective **public relations** efforts such as:

- Regular letters to the editor from board members and Executive Director
- Radio talk show interviews
- Public service announcements and press releases
- Periodic meetings with newspaper editorial boards
- Media coverage on all major news and special events
- Television interviews on public service shows
- Keying into national news stories with the local angle

In the Funding Strategy section take each individual funding category and write a few paragraphs about what is the funding strategy for each category. Such as:

- **CORPORATIONS-** Corporations in our community are funding non-profit organizations that will give them visibility and an opportunity to get in front of people to assist in their marketing efforts. Do the following to identify new companies: inventory our board, volunteers and community contacts and use these people as door openers, identify the top 50 companies in our community and read about them in business publications, internet research, newspapers; identify the appropriate person to set up the appointment. You are determining whether the “image” of the company fits into the mission and credibility of our organization. After this is done, we want to approach: Wells Fargo Bank, AT&T, JC Penney Company, Mead Paper Company, etc. For each company we want to list who will make the approach, what is our strategy, and what we are going to ask the company for?
- **FOUNDATIONS-** In the same way as above the agency needs to research the new funding sources starting with community foundations, family foundations, and philanthropic trusts. Start off in the local community, and then broaden the search to statewide and national foundations. Use all research materials available and develop the strategic approach--- target a range of 8-12 new foundations during the next year
- **GOVERNMENT-** If you have already received government funding, stay on top of existing government programs and remember that much of the public funds are being decided on the state and local level. Make sure you are proactive on the strategic approaches for public funding and you know your mayors, representatives, and senators.
- **RELIGIOUS COMMUNITY-** If your program areas fit into the religious communities’ agenda such as human services, homelessness, advocacy and social change, environmental justice, etc, develop a strategic approach to each church or temple, Use your volunteers and staff who are members of the religious institutions to make the introductions. Remember, even if you are not approaching the religious institutions for money, they are GREAT places to meet people.
- **DONORS-** Ninety percent of all philanthropic dollars come from individuals. What is our strategy for developing and/or expanding our numbers and quality of donors? Are we going to use a direct mail strategy to reach new donors? Can we identify new donors through our planned special events? What is our approach?
- **SPECIAL EVENTS-** Do we already have special events? Are we planning new ones? What are the goals of the special event- i.e. it is public relations, making money, to increase our mailing list? How can we obtain corporate underwriting/sponsorships to assure the event is profitable? What are the revenue projections? What are the costs? What are the anticipated profits? How can we leverage these events to raise new money?

- **EARNED INCOME-** Do we have an earned-income strategy for the organization? Are there any services that we can market to our constituency or the community that can generate revenue? Can we market any services to corporations that they will underwrite or contract with our agency to provide? Are there products that we can market to our members that can save them money? If any of the above looks feasible, form a committee of people (including a few successful entrepreneurs) and strategize ideas and develop a business plan.
- **MEMBERSHIP-** Does the agency have any provisions for a membership? If not, do we want to consider developing a membership category? What is our marketing and public relations strategy for maintaining our existing membership and increasing our membership by 10% during the next year?

**STRUCTURE OF THE FUND RAISING STRATEGY-** The implementation of the above elements of a fund raising plan takes an organizational commitment. Strategies and key leadership come from selected board members and the executive director. My suggestion is to form a board committee to review this document and at the monthly board meetings have the head of the fundraising committee report back to the board on the progress made, changes, etc. For each one of the above funding sources, it is important to develop tracking sheets to make sure that the results are analyzed and the appropriate changes are implemented. For each funding category the following may be desirable:

- Specific strategy with timelines for accomplishments and for what each particular person is responsible
- For each specific funding sources (Proctor and Gamble, Wells Fargo Bank, First Presbyterian Church) input on the computer data base or write on a 3"X5" card: funding source, address, phone number, contact person, date contact made, results of the contact, follow-up.
- Take the information and develop a 12 month fund raising calendar with the funding sources on the left hand of the chart and the months on top and list when organization is planning and conducting the special event, when the direct mail will be "dropped" when are we approaching key corporations, when is the RFP due, etc.
- Then for each one of the funding categories, such as FOUNDATIONS- break down for each specific funding sources when during the year, the approaches will be made to the Rose Community Foundation, Kellogg Foundation, Ford, etc.

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# **Section 2:**

## **A PowerPoint Presentation by Richard Male**

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## Key Funding Opportunities for ILCs

### ***Private Sector***

- **Private Foundations** located in your city & state, especially community foundations
- **Corporate sponsorship** of events, programs & agency
- **Religious/faith-based** community
- **Small** to moderate to major **donors**: \$50 – \$250
- **Philanthropic trusts** located at financial institutions
- **Social** entrepreneurial ventures-earned-income

### ***Public Sector***

- Ear-marked funds
  - States beginning to run significant surplus – organizing for the money
  - New Federal money coming on board in **2007-08 election year**
  - Discretionary dollars from Federal dept's for innovative ideas
- 
- 

## Funding Trends Across America

### ***The Flow of Charitable Gifts 2002: Where the Money Came From***

**\$240+ Billion**

Corporations – 5.1%

Bequests – 7.5%

Foundations 11.2%

Individuals – 76.3%

## ***Where the Money Went***

Religion – 35%

Education – 13.1%

Unallocated – 12.6%

Foundations – 9.1%

Health – 7.8%

Human Services – 7.7%

Arts – 5.1%

Public Benefit – 4.8%

Environment, Animals – 2.7%

International Affairs – 1.9%

Source: The Chronicle of Philanthropy

## ***Current Trends and Future Issues***

- Shift of **federal dollars** to state and local jurisdictions.
- Cuts at **state and local levels**, but most states will be running a surplus
- **Direct** federal dollars, in most areas, are holding steady
- **Less** federal money is available except for “trendy” issues. (Homeland security, economic development.)
- **Foundation giving** has increased by 28% since 1986, but decreased 2001 – 2003. It is expected to increase about 5% during the next few years.
- **Hurricane Katrina**: short-term impact on giving
- **Corporate philanthropic** giving is flat; strategic marketing is the growth area.
- Giving by **individuals** will increase in proportion to the economy & the perceived optimism of the donor.
- **Philanthropic trusts** managed primarily by financial institutions are growing moderately.
- **Transfer of stock/real estate** is a growth area.
- Country is **aging**.

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# **Raising Money From National Foundations**

## ***Types of Foundations***

- Private Foundations: Staffed
- Private Foundations: Un-staffed, Family / Independent
- Operating Foundations
- Corporate Foundations
- Community Foundations

## ***What National Foundations Are Looking For***

- Replication
- Broad Impact
- Strategic / Innovative Partnerships
- Geographic Focus
  - Community
  - Region
  - State

## ***Strategies For National Foundations***

- “Concept Paper” driven
- Staff focused
- Grantee or Key Person introduction
- Personal Interview is important
- Intermediaries
- Perseverance is important

## ***Philanthropic Trusts: The Hidden Pockets of Money***

- ***Managed by trust departments at Financial Institutions***
- ***Use banking relationships to gain access***
- ***Smaller grants – under \$10,000***
- ***Purpose – can be used as general operating funds***
- ***Generally long term support***

## ***Religious giving will continue to grow slightly.***

### Strategies For Religious Funding

In the training manual, a circular diagram is laid out as follows:

Outer ring: National Demonination / Religious Foundations

Middle Ring: Judicatory / Diocese

Inner Circle: Local / Religious Congregation

## ***New Corporate Philanthropy***

In the training manual, a diagram is laid out as follows:

In the middle of the diagram is the word Marketing. It is surrounded by the following words: Philanthropy; Memberships; Product Endorsement; Licensing & Certification; Sponsorships & Events; In Kind – volunteers, products, technical assistance, matching gifts; service endorsement.

### **Two Vehicles of Giving:**

- 1. Corporate Giving Programs**
- 2. Corporate Foundations/Trusts**

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# **Advantages and Disadvantages of Funding Sources**

## ***Foundations***

### **Advantages**

1. Larger Sums of Money
2. Not much paper work
3. Will fund special projects, programs, capital

### **Disadvantages**

1. Takes a long time – up to 12+ months
2. Good for only 3 years with exceptions
3. Over dependence on large grants
1. Usually does not fund admin expenses

## ***Corporations***

### **Advantages**

1. Self interest
2. Receive money over long periods of time
3. Good to leverage other private money
4. In-kind donations and product donations

### **Disadvantages**

1. Can be "nickled and dimed" to death
2. Small amounts-if given through the giving program
3. Not always responsive to new and controversial issues

## ***Churches***

### **Advantages**

1. Best donors in America
2. Long term sources of income
3. Involvement of membership
4. Donated services
5. High leverage-good potential with other church money (national)
6. Jumpstart to planned giving
7. Access to key people
8. Moral credibility

### **Disadvantages**

1. Long time to receive money
2. Must have support locally from religious leaders
3. Generally small amounts

### **Grassroots**

#### **Advantages**

1. Involves membership
2. Recruits new people
3. Demonstrates involvement when approaching corporations, foundations and churches

#### **Disadvantages**

1. Takes staff / volunteers
2. If not planned well, cost benefit ratio too low

### **Donors – Small & Large**

#### **Advantages**

1. Reliable over long run
2. Introductions to friends-increase network
3. Short timetable
4. 80+% of donations come from individuals
5. Basis of planned giving, endowment and large gifts

#### **Disadvantages**

1. Direct mail is expensive & long term
2. No obvious disadvantages with donors

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## **Overview of Public and Private Funding**

### **Public**

1. RFP Driven
2. Fee for Service
3. Proposal is Key
4. Large Amount of \$\$\$

### **Private**

1. Project / Program Driven
2. Grants
3. Relationship is Key
4. Small to Medium Grants

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# Media, Marketing & Money

## ***Marketing is...***

**a process that helps  
you exchange something of  
value for something you need.**

## ***Benefits of Marketing...***

- **Define your unique niche**
- **Reach the audience you want**
- **Decide what you want, go after it  
and become a more prosperous organization**
- **Stand out from the crowd**
- **Have a greater impact**

## ***Step 1***

- 1. Set Market Goals**
  - **Image Goals**
  - **Action Goals**

## ***Step 2***

- 2. Develop the marketing plan**
  - **Chain of command**
  - **Budgets, timeline**

## ***Step 3***

- 3. Develop a promotion campaign**
  - **Words, phrases, images**
  - **For whom is the message intended?**
  - **What do you want them to do?**
  - **What promotional techniques will do the job?**

Source: Morris Communications

## ***Strategic Thoughts***

- **Develop a marketing infrastructure – Corporate and university volunteers**
- **Look at the media in new ways – a tool for building relationships with funders**
- **What are your goals? Who are your targets?**
- **Understand the funder’s visibility goals**
- **Develop a human face and case studies**
- **Learn to use “advocacy” journalism. It gives you more control and opportunities to bond with funders.**

## ***Newspapers and Print Media***

- **Always offer the funder the visibility – news release, announcement, etc.**
- **Write or ghost write op-eds to bring the funder on record**
- **Editorial board visits – funder can take part**
- **Repackage news clippings – for mailings, newsletters, articles, etc.**

## ***Electronic Media***

- **Radio and Television public affairs programs – few in the audience, but that is ok**
- **Radio news feeds – more control, works well with smaller stations**
- **Radio talk shows – can push “hot button” issues**
- **Video and audio clips – send these around**
- **The public affairs connection – building relationships with stations**

Source: Morris Communications

## ***The Organizational 10 in 60 Presentation Exercise***

1. Your name and position with organization
2. Name and age of the organization
3. Mission of organization
4. Primary constituency / membership of organization
5. Geographic focus of organization
6. Priority issues for the organization
7. The budget of the organization
8. The name of one of the organization's funders
9. One of the organization's greatest challenges
10. An example of the organization at its best

### ***The HOOK:***

A memorable beginning which immediately captures the attention and interest of the audience.

### ***The FACE:***

A person or persons who are impacted or will be impacted by the issue.

### ***The CONNECT:***

How the issues connects to the self-interest of the audience.

### ***The FLEX:***

Options or action the audience may select I response to the issue.

### ***The CRUNCH:***

A clear request for commitment to action by the audience on the issue including a time frame for the action.

Source: Morris Communications

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## Tips on Raising \$\$

### ***Are You Ready to Raise Funds?***

1. Clear sense of mission?
2. Are your programs strong?
3. Is your Board active and engaged?
4. Are you in touch with your constituency, members or clients?
5. Is there a working partnership between staff and Board?
6. Do you have active volunteers?
7. Do your goals match your budget?
8. Are your financial systems in place?
9. Are you known and positioned well?
10. Do you have a successful track record of raising money?

### ***10 Key Principles to Successful Fund Raising***

1. People give to other people-relationship is key
2. The proposal is only 10% of the grant seeking process
3. People give because of self-interest
4. Find the “**key person**”
5. Money follows people
6. When asking for money, be specific \$\$\$, purpose and timeline
7. Plan ahead, raising money takes time
8. Diversify
9. Market and sell your organization
10. Fund raising is an everyday art

### ***Ladder of Effectiveness*** – by JSM Consulting, 1999

#### **MOST**

- Person-to-person
- Personal letter – follow up phone call
- Personal phone call – follow up mail
- Personal letter
- Personal phone call
- Special event
- Impersonal letter
- Door – to – Door
- Product sales
- Impersonal Call
- Media advertising

#### **LEAST**

## ***How to Ask for Money Whetting Their Appetite***

- Always ask for money for a specific part of your program
- Break down your request into terms “your donation will be used for ...”
- Explain why you need the money now –urgency without crisis
- If the donation is tax deductible say so
- Repeat the name of your organization often
- Say your name, the name of your group and your position
- Describe your groups activities and its effectiveness
- Describe your budget
- Describe your fund raising strategy
- Always ask for a specific amount of \$\$\$
- Ask for the dollar amount again
- Smile stop talking. Wait for a response
- Answer questions briefly
- Repeat first six steps until they say yes

## ***Average Length of Time to Raise Money***

- Short-term money (three months)
- Mid-term money (three to six months)
- Long-term money (six to eighteen months)

## ***Average Amounts of Lead Time***

### **Local Foundations**

**\$5,000+ Amount**

**6-18 months Lead Time**

### **National Foundations**

**\$10,000+ Amounts**

**12-18 months Lead Time**

### **Neighborhood Corporations**

**\$100-\$1,000 Amounts**

**1-3 months Lead Time**

### **Financial Institutions Corporations**

**\$2,000+ Amounts**

**up to 6 months Lead Time**

### **Large Local Corporations**

**\$1,000+ Amounts**

**up to 6 months Lead Time**

### **Branch Corporations**

**\$1,000+ Amounts**

**6-12 months Lead Time**

### **Churches**

**Local Congregations**

**500-2,000 Amounts**

**12-18 months Lead Time**

**Judiciary**

**\$2,500 Amounts**

**12-18 months. Lead Time**

**National (Empowerment, Special constituency, Division, Women)**

**\$5,000+ Amounts**

**6-12 months Lead Time**

**Religious Foundations**

**\$10,000+ Amounts**

**6-12 months. Lead Time**

### **Individual/Patron/Direct Mail**

**Large Donors**

**\$100-1,000+ Amounts**

**3-6 months Lead Time**

**Wealthy Donors**

**\$2,500+ Amounts**

**6-12 months Lead Time**

### ***Short-term money (up to 3 months)***

- Individuals, patrons, donors
- Small special events
- Volunteer canvassing
- Direct mail
- Neighborhood businesses
- Ask board members
- Cash flow loan

### ***Mid-term Money (3 to 6 months)***

- Local foundations
- Local churches
- Larger special events
- Service clubs
- National religious organizations
- Corporate sponsorships
- Large donors

### ***Long-term Money (6 to 18 months)***

- National and statewide foundations
- Financial institutions
- Large corporations
- Branch corporations
- Judiciary and national churches
- Government
- Professional canvasses
- United Way
- Business ventures
- Service clubs
- Large donors
- Earned income

## ***Controllable vs. Uncontrollable Income***

### **Controllable**

- Fee for Service / Contracts
- Memberships
- Small Donors under \$100
- Large Donors over \$100
- Special events
- Endowment/Wills/Bequests
- Partnerships with Corporations
- Earned Income & Entrepreneurial Ventures

### **Uncontrollable**

- Foundation Grants
- National Religious grants
- Corporate Donations
- United Way organizations
- Governments through RFPs
- Service club

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## **8 Step Strategic Approach To Grants**

### ***The 8 Steps of Highly Successful Grant Seekers***

- 1. Set clear organizational goals and determine funding needs**
- 2. Write summary page**
- 3. Research potential funders by population groups, geographic focus, trustees, types of support, amount needed**
- 4. Letter of introduction / interview**
- 5. The interview: the schmoozing**
- 6. Proposal: the marketing document**
- 7. Follow up / politics**
- 8. Life after the decision**

## **Step 1: Set Clear Organizational & Program Goals/ Determine Funding Needs**

- Program
- Administrative
- Equipment
- Capital

## **Step 2: Summary Page**

- Description of the funding needs
- Goals and Objectives of the funding needs
- Impact on the community and the organization
- Dollar amounts needed

## **Step 3: Research Potential Funders**

### **1. Fields of Interest/Population**

If you offer additional services, such as literacy training, employment services, or a health clinic, search under health care, education and employment. Certain funders support specific population groups such as African Americans, Latinos, women and children, persons with disabilities and homeless.

### **2. Geographic**

**County** - by grantmaker location shows all the grantmakers that are based in each of the counties (not necessarily where they make grants).

Check IRS 990 Form

**Where Grants are Made** - shows all the cities, counties and regions where grants have been made (note that this is not necessarily indicative of future funding patterns). Check IRS 990 Form

### **3. Types of Support**

Annual Campaigns  
Building/Renovation  
Matching Funds  
Capital Campaigns  
Emergency Funds  
Research  
Program Development  
Scholarships  
Employee Volunteers  
Equipment  
Seed Money  
Fellowships  
General Support  
In-kind Gifts  
Loan Programs  
Sponsorships  
Technical Support

#### 4. Trustees

##### **Search Engines**

Google <http://www.google.com>  
Alta Vista <http://www.altavista.com>  
Dogpile <http://www.dogpile.com>

##### **Foundation News / Information / Funding Websites**

Guide Star <http://www.guidestar.org>  
Foundation Center <http://www.fdncenter.org>  
Philanthropy News Network <http://www.pnnonline.org>  
Council on Foundations <http://www.cof.org>  
National Council of Nonprofit Assoc. <http://www.ncna.org>  
The Chronicle of Philanthropy <http://www.philanthropy.com>

##### **Affinity Group Websites From [www.cof.org](http://www.cof.org)**

\*\*Important for ILCs

Asian Americans/Pacific Islanders in Philanthropy <http://www.aapip.org/>  
Disability Funders Network\*\* <http://www.disabilityfunders.org/>  
Grantmakers Concerned with Immigrants & Refugees <http://www.gcir.org/>  
Grantmakers in Aging <http://www.giaging.org/>  
Grantmakers in Health <http://www.gih.org/>  
International Funders for Indigenous People  
<http://www.internationalfunders.org/>  
Jewish Funders Network\*\* <http://www.jfunders.org/>  
National Network of Grantmakers\*\* <http://www.nng.org/>  
Native Americans in Philanthropy <http://www.nativephilanthropy.org/>  
Neighborhood Funders Group\*\* <http://www.nfg.org/>  
Technology Affinity Group <http://www.tagtech.org/>  
Women & Philanthropy <http://www.womenphil.org>

##### **Media Websites**

<http://www.bizjournals.com>  
<http://www.newslibrary.com>  
Local newspaper website  
Local television station website

##### **Corporate Websites and Research**

Edgar <http://www.freeedgar.com> (free) <http://www.edgar-online.com>  
Foundation Center <http://www.fdncenter.org>  
Hoovers <http://www.hoovers.com>

##### **Individuals**

Yahoo's "PeopleSearch" <http://people.yahoo.com>  
Lexis-Nexis (Regis Library) <http://www.lexisnexis.com>  
Internet Prospector <http://www.internet-prospector.org>  
Local newspapers / business journals

## ***Step 4: Writing a Good Intro Letter***

**Keep the letter short—1 ½ to 2 pages at the most. Remember, the purpose is to get an interview, not to ask for funding.**

- Background / History and impact of organization
- Need for the organization – include demographics
- Goals and Objectives
- Programs of the Organization
- Brief background of the board and staff, including qualifications
- Budget size/current funders
- Calls for an interview

**Letter must be stimulating, exciting, and colorful and should jump off the page. You want the reader to feel “I must meet with these people.”**

## ***Step 5: Interview***

The Interview is **key** to obtaining funding

**You Want Three Outcomes:**

1. **“Can we submit a proposal to XYZ Foundation?”**  
Ask for funding for a specific purpose, timeline and impact.
2. **Negotiate** a dollar amount for the proposal. “We want \$25,000 to hire 250 at-risk youth for our summer employment program in Columbus.”
3. **Timeline** - submit the proposal at least 30 days before the deadline.

## ***Step 6: Proposal- The Marketing Document***

- Summary of the Proposal
- Introduction to the Proposal
- Organizational Description
- Statement of Need or Opportunity
- Plan of Action/Program Narrative
- Evaluation Plan
- Request for Funding
- Budget: Cash + In-kind = Total
- Conclusion
- Attachments

### ***Step 7: Follow up / Politics***

- Allow 30 days before proposal deadline
- Follow-up telephone call
- 2-3 contacts during the 30 day period
- Letters of support
- “Key” phone calls
- Random act of strategic “run ins”
- Be creative but cautious

### ***Step 8: Life After the Decision***

#### **If YES**

- Thank you letter –traditional
- Thank you letter- unorthodox

#### **If NO**

- Telephone Call
- Thank you letter

#### **Regardless of Yes or No**

- Put on mailing list
- Regular email and notes
- Random “run ins”
- Invite to Organization

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# Writing Winning Proposals

## ***Tips on Winning Proposals***

1. Do your research
2. Know what you want
3. Ask for it in the first paragraph
4. Be specific and concrete
5. Get rid of the jargon
6. Keep it short
7. Follow the guidelines
8. Make it easy to read
9. Proofread, Proofread!!!!
10. Get it in prior (30 days) to the deadline

## ***10 Common Reasons Grants Are Declined***

1. The organization does not meet our priorities
2. The organization is not located in a geographic area
3. The proposal does not follow our prescribed format
4. The proposal is poorly written and difficult to understand
5. The proposal is not within our funding range
6. We do not know these people, are they credible?
7. The proposal does not seem urgent - I am not sure it will have an impact.
8. The objectives and plan of action of the project exceed the budget and timelines.
9. All money for grant cycle have been allocated
10. No evidence the program will become self-sufficient after grant is complete

## ***Top 15 Inside Tips for Grant Seekers***

1. Make the phone call.
2. Unless it is in red, push for the interview
3. Don't believe everything you read
4. The most important person is the secretary – Schmooze!
5. Learn the fundraising “no-no’s”
6. Two kinds of “no” – “Now and Forever”
7. Innovation, Innovation, Innovation
8. Admit what you do not know
9. Know the competition
10. Involve the consumers – especially in the interview
11. Invest your own \$\$ - share the grant
12. Develop the partnership
13. Focus on evaluation
14. Self-sufficiency – The long haul
15. Replicability is best

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# Corporate Sponsorships & Partnerships

## *New Corporate Philanthropy*

In the training manual, a diagram is laid out as follows:

In the middle of the diagram is the word Marketing. It is surrounded by the following words: Philanthropy; Memberships; Product Endorsement; Licensing & Certification; Sponsorships & Events; In Kind – volunteers, products, technical assistance, matching gifts; service endorsement.

### **Two Vehicles of Giving:**

1. Corporate Giving Programs
2. Corporate Foundations/Trusts

### ***Cone and Roper Survey***

- 66% of the American consumers found that consumers were likely to switch brands (1993)
- 76% of the American consumers say that when price and quality are equal, they will likely switch brands to companies that are perceived as good corporate citizens (1997)
- 80% of the American consumers have a more positive image of companies that support a charitable cause than those that do not (1998)
- 92% of Americans have a more positive image of companies and product support causes – up from 80% 2001
- After Sept 11<sup>th</sup> 81% of Americans say they are likely to switch brands, when quality and price are the equal, to help a cause
- At holiday time, 64% of Americans said they planned to purchase a holiday gift that supports a cause, up from 56% in 2000
- Employees whose companies have cause related programs are 38% more likely to say they are proud of the companies values than employees whose companies do not have such programs

## ***Company and The Community***

Your Company should view nonprofits and the community as the intermediary (credibility) between the Company and the customer.

A diagram illustrates this point with lines pointing from “Company” to “Customers.” Another line points from “Members, volunteers, and constituencies” to “Customers”. Another line indicates that Non-profits and Schools connect “Company” to “Members, volunteers, and constituencies”.

## ***Product Donations by Major Corporations in 2002***

Pfizer - 376.6M  
Bristol Meyers - 288M  
Merck - 283M  
Microsoft - 179M  
Johnson & Johnson - 151M  
IBM - 91.5M  
Safeway - 60M  
Kroger - 51.6M  
Hewlett Packard - 33M  
Sears - 30.7M  
Minnesota Mining - 25.3M  
AT&T - 25.2M  
Home Depot - 20.5M  
Intel - 19.9M  
Phillip Morris - 14.4M  
Sara Lee - 14M  
Cisco Systems - 13.3M

## ***Five Pockets of Corporate Philanthropy***

1. Corporate contributions office or corporate foundation
2. Marketing/Advertising budget
3. Local branch management in community
4. Research and development
5. Board of Directors

## ***Corporate Giving***

### ***Don't Just Think of Money***

There are **THREE** primary ways in which corporations can help your organization

#### **1. Financial**

- Gifts-Traditional Philanthropy (Corporate Foundations)
- Memberships
- Marketing (Corporate Giving Programs)
- Products
- Sponsorships (special events)
- Endorsement of Services
- Matching Gifts

#### **2. In-Kind Gifts / Product Contributions**

- Office Equipment
- Computers
- Furniture
- Consumer Goods
- Printing
- Use of Facilities
- Donations for Raffles (products or services)
- Advertising (newspapers, TV & in-house/  
external corporate publications)

#### **3. Employee Involvement**

- Computers/Technical
- Marketing/Public Relations/Media/Design
- Legal (incorporation, bylaws, personnel policies, tax questions)
- Financial (budgeting, financial planning)
- Board of Directors
- Committees (standing committees/committee assignments)

## ***The Corporate Triangle***

A diagram in the training manual contains the words Community, Customer, and Employee; each word is listed on different sides of an equilateral triangle.

### ***Benefits to the NPO*** – by Independent Sector

- Impact on mission
- Increased revenue
- Enhanced visibility
- Access to new audiences
- Connections to the corporate world
- Expertise in marketing, strategy development, and other corporate experience

## ***Cause Related Marketing***

A diagram in the training manual shows a large, bold line, titled “The Bridge” connecting “Philanthropy” to “Business Bottom Line.”

“Cause Related Marketing Who Cares Wins”  
- Sue Adkins

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## Models of Corporate Support

### ***Sponsorships vs. Philanthropy***

#### **Sponsorships**

- Marketing & Advertising budgets
- Highly public
- Raise the profile of corporation, sell more, positive market awareness

#### **Philanthropy**

- Charitable donations or philanthropy budget
- Little fanfare
- Good corporate citizen, corporate image with the closet stakeholders

Source: Judith Baker

### ***Types of Corporate Sponsorships***

1. Event Marketing – one-time special event
2. Partner sponsorships – Long-term relationship
3. Cause related marketing – sponsorship promoting a specific cause or organization through a marketing, purchasing and acquiring of products and services
4. Licensing – Corporations pays charity to use charity’s name and logo on products. American Heart Association (cereal), Ducks unlimited.

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## Steps in Developing Corporate Partnerships

### ***What the Company Will Ask***

- Will the sponsorship increase visibility (how many people will be exposed to our stuff)?
- Will the visibility lead to increased sales?
- Can we meet with the Leadership of the organization?
- Will it be a one-time event relationship or a partnership?
- Does the audience and product fit our profiles?
- Are the media and public relations in place?
- Do we have enough lead-time?
- Do we have flexibility?
- How much do we have to do? Can we just show-up?
- Does the organization have good credibility? Reputation?
- Do we have an exclusive?

### ***Questions NPOs Should Consider***

- What are the benefits to the organization?
- What are the risks?
- Is this the right corporation? What are the screens?
- Is the sponsorship appropriate for the event?
- Can we deliver on our promises?
- Are there any ethical issues?
- Do we have insurance to cover liability of the event

### ***Step 1: Analyze Your Members***

- Numbers
- Income/Buying Habits /Where They Shop/Where They Bank
- Ethnic Make up
- Geography

### ***Step 2: Research the Corporations – Value Proposition***

- Markets
- Image
- Strengths
- Weakness
- Key People

### ***Step 3: Organize a Strategy Committee***

- “Entrepreneur”
- “Corporate Person”
- “Value Driven” Board Member
- Board Leadership
- CEO or Champion

### ***Step 4: Match – Assess Needs with Appropriate Corporations***

### ***Step 5: Working out the Deal/Proposal***

### ***Step 6: Approach to the Corporation***

### ***Step 7: Negotiations***

### ***Step 8: Follow Up***

#### ***Sponsorship Proposal***

- Description of organization
- Previous / similar events
- Overview of the event
- Description of who is attending
- Past sponsors and participants
- Media plan for event
- List of what sponsor is required to provide
- Separate page of contact information

Source: Karin Davis

#### ***Tips on Corp/NPO Relations***

- Corporations are looking for on going presence rather than a one-time event
- Corporations can't say how great they are as well as you can
- Some corporations are looking for “exclusive” agreements ASK!
- Relationship is key – BUT only opens the door
- Move relationships to partnerships
- Don't offer solutions in search of a problem - be clear, what are you doing, what are you seeking to change
- Become a customer first! Business relationships are better than charitable relationships
- A deal is only as good as your ability to deliver – Don't over commit
- People may forget what you say but not how they feel about you and how you make them feel
- Exceed everyone's expectations

### ***Reasons Sponsorships are Declined***

- There is no marketing angle
  - This is more of a donation
  - The event's audience is too non-specific
  - Sponsorship does not meet criteria
  - Sponsorship fee is unreasonable
  - Free event tickets and logo recognition do not justify the investment
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## Wealth In America Raising Money From Individuals

### ***Individual Giving Patterns***

- Blacks give 25% more of their discretionary income to charity than Anglo people
- American households earning \$50,000+ represent 18% of U.S. taxpayers & give 54% of charitable dollars
- Affiliated religious persons give 2+ times more to charitable groups than a non-affiliated person
- Giving rates are highest in the **West**: 8% of their discretionary income goes to charity
- People in the **East** gave 4.2% of their income to charity
- Residents of the **South** have the 2<sup>nd</sup> highest overall giving rate at 7% of discretionary income

### **Influences On Donations**

- **Marital Status** – married couples & single woman, especially single mothers, are far more generous than single men
- **Employer** – self-employed workers donate more to charity than others: 70% more
- **Education Level** – better educated people give a higher percentage to charity regardless of income level

Source: Chronicle of Philanthropy

## ***Tips on Raising \$\$ from Individuals***

- People give to people to make a difference.
- People give based on their means.
- People give in relationship to what others give.
- Start with those closest to the organization.
- 5 “Rs”:
  - Right person asking
  - Right prospect
  - Right amount
  - Right program/cause/project
  - Right time

## ***3 Types of Wealth in America***

1. Old Wealth
2. New Wealth
3. Millionaire Next Door

## ***The Development Process***

1. Identify Suspects
2. Convert Suspects into prospects
3. Convert prospect into donors
4. Increase the gift
5. Secure special gift \$1000 +
6. Secure major gift \$5000+
7. Secure planned gift, wills, bequests

## ***What to Look for in a Prospect***

1. Ability to make the size gift you want
2. Belief and passion in your cause
3. Contact – Ability to have someone make the introduction
4. Turn a Suspect into a Prospect

## ***Prospect Identification*** – Information in part by Kim Klein

### **You Already Know All the People You Need to Know**

1. Start with family and relatives
2. Next move to friends, volunteers, employees, alumni
3. Go to vendors you do business with
4. People with similar interests
5. Have the above groups make the introductions

### ***Portrait of a “Typical Millionaire”***

- 57-year-old man, married with 3 children
- Self-employed
- Involved in ‘dull-normal” business (welding contractor, pest control, paving contractor)
- Average annual family income \$100,000-\$150,000
- Average household net worth \$2 million
- Homeowner, property value \$300,000+
- First generation affluent
- Lives below means, wears inexpensive suits, drives a normal car
- Has enough money saved to live five years without having to work
- Attended public schools, children attend private schools
- Works 45-55 hours a week
- Invests 20% of taxable income each year

### ***Small to Midsize Donors***

- Most likely are the majority of your donor file
- Are cultivated from all techniques – in person, online, direct mail, etc.
- Are typically generous givers
- Sometimes willing to give more than they can afford
- Typically your \$5, \$20, \$40 donors

### ***Major Donors***

- Typically a small percentage of your donor file
  - May be cultivated using all techniques
- BUT**
- Largely like to be asked via a face-to-face meeting by a peer
  - Definitions differ from agency to agency but generally anything over \$1,000

### ***Case in Point***

Can you find one of the richest men on earth in this photo?

A photograph in the training manual shows the staff of Microsoft in 1978. A heading reads, “Would you have invested?”

## ***The Bottom Line***

- Treat every donor with respect and as though they were a major donor
- Customer service will become more important as competition in the sector increases

## ***Techniques for Raising Money***

### **DIRECT MAIL**

- Relatively inexpensive compared to other methods
- Only as good as your database
- Clean up your data – eliminate duplicates
- Establish rules for gift entry – codes

### **ONLINE GIVING**

- Passive and Aggressive Types
- Passive you have a site that has capabilities to accept donations
- Aggressive is you send emails and other marketing materials to drive people to donate
- Can be a very effective and cost efficient way to raise money - RMPBS started at \$6,000 per year now generates nearly \$200,000

### **SPECIAL EVENTS: The House Party**

- An effective and low cost method
- Little work involved
- Can raise SIGNIFICANT \$
- Most effective with a specific program/project
- Major Donor sponsors the event
- Pays for the food
- Typically small and intimate affair
- A video is shown and a QUICK pitch for money is made
- Again, A QUICK pitch (less than 5 minutes)

### **FACE-TO-FACE**

- Very effective but time consuming
- Little or no cost
- Generally a technique reserved for major donors

#### **Face-to-Face Strategies**

- Practice with friends – role-playing if this technique is stressful
- Most important part is to make the ask then
- PAUSE – Stop Talking

## **PLANNED GIVING**

- Long term strategy (small annual donors)
- One of the fastest growing segments of philanthropy
- Types (just a few)
- Bequests – A gift in a will. ( most common)
- Charitable Gift Annuity – Donor receives a fixed life income and organization receives gift principle immediately that it invests for the life of the obligation to the donor.
- Charitable Remainder Annuity Trust – Donor receives a fixed income from a charitable remainder trust. Institution receives remainder.
- Gift of property – sometimes outright other times the title transfers upon the death of the donor.

## ***A Couple Of Final Notes***

### **CUSTOMER SERVICE & DONOR RECOGNITION**

- Competition makes it more important for organizations to contact donors.
- Follow up, send thank you notes quickly, phone donors to say thanks. They'll remember you.

## ***Know Your Donors***

- Find out demographics of your donors
- Try to market to individual generations
- GI Generation was the foundation for many organizations
- Boomers next? Depends on Marketing
- Let's not forget Gen X – They're 40 now

“When you come to a fork in the road, take it.”

- Yogi Berra

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## **Board & Organizational Development Staying True to Your Mission**

### **Board of Directors – Staff Policy Sphere**

A diagram in the training manual shows a venn diagram. One circle in the diagram is labeled “Board of Directors, “the other is labeled “Executive Director and Staff.” At the intersection of the two circles, it says “Shared Responsibilities.”

Next to the diagram, a line indicates that Policies should be set by the board and carried out by staff.

#### **Which role does your board play?**

- Policy Maker?
- Watchdog?
- Micro-manager?
- Shared manager?
- Rubber stamp?

Richard Male & Assoc,

## ***Board and Staff Roles and Relationships***

- Trust between Exec Dir, Staff and Board
- Communication is key
- Board-defines what agency is doing and where it is headed
- Staff-how the tasks are accomplished
- Board-policy
- Staff- implementation
- Board-approves budget
- Staff-held accountable to spend resources
- Board-watchdog
- Exec Dir-watches over staff
- Success=common drive
- Board and Staff-independent but interdependent

## ***Elements of a Board Job Description***

- Job Title
- Reports to
- Term
- Overview of Organization
- Purpose
- General Duties and Responsibilities
- Specific Responsibilities and Expectations
- Time Commitment

## ***Functional Board Members Job Description***

- Planning Functions
- Organizational Functions
- Operations
- Budgeting and Auditing
- Fundraising and Resource Development

## ***Board President Job Description***

- Chair all meetings
- Develop meeting agenda with ED
- Assign committee chairs
- Assist in board recruitment
- Appoint yearly auditor and ensure of proper financial and legal filings
- Ensure strong staff support to the board
- Lead board in annual evaluation of Exec Director
- Lead board in review of by-laws, policies and documents to ensure the programs are meeting goals
- Serve with ED as primary spokesperson
- Sign all contracts, grants and other legal documents when appropriate
- Monitor the functioning and organizational / board discipline
- Motivate and support, become the “Leader”

## ***Board Recruitment Strategy Guidelines***

- It is an honor to be on the board. The board deserves the very best board you can develop
- You are not recruiting “warm bodies”
- The 3-W theory: Workers, Wealth and Wisdom
- Match strengths and challenges to those you have. (Board Recruitment Grid)
- Fill in the gaps, draw from your network
- Have potential member fill out a Board Application
- Do not overload board with similar skills
- Have acquaintance make the first call to potential member
- 1<sup>st</sup>- meeting should be informational, Q&A, define roles
- 2<sup>nd</sup>- meeting invite to a gathering to meet the board and key staff
- After meeting call and invite them to be a board member
- Hit the ground running

## ***Executive Director Job Description***

- Administration
- Programs and Staff Leadership
- Resource Development/Fundraising
- Strategic Thinking and Planning
- Ambassador
- Evaluation/Accountability

## ***8 Tips to Involve Your Board Members in Fund Raising***

- Energize your board members
- Conduct yearly retreats
- Become visible in your community
- Position your organization with local and state officials
- Ask board members to give you the names of their friends
- Survey board to find out where they conduct business
- When recruiting board members set high expectations
- Remember the personal touch

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## **Keys to Leadership**

### ***“13 Thoughts on the Key to Leadership”***

**by Richard Male**

- Move toward your fear / hire your weakness
- Courage is the act of leadership
- Follow your instincts
- True leadership is not a hired position
- A leader motivates people
- Listen first, then act
- Compassion and Passion without Competence is a dysfunctional action
- Leaders are made not born
- Always assume responsibility first
- The only certainty is uncertainty
- Ready-Fire-Aim
- Always plan for your Leaving
- Leaders are judged in time of Crisis and Adversity

**For further questions,  
please contact us at:**

**Richard Male & Associates  
50 S Steele St., Ste. 325  
Denver, CO 80209**

**303.355.2919**

**<http://www.richardmale.com>**

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# **Section 3:** US Foundations Funding Disability Programs

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## US Foundations Funding Disability Programs

### ***Top 100 U.S. Foundations interested in funding Disability issues as of 2004***

<b>Foundation Name</b>	<b>City, State</b>	<b>Total Giving</b>
Johnson Foundation, Robert Wood, The	Princeton, NJ	\$359,500,275
Johnson & Johnson Corporate Giving Program	New Brunswick, NJ	\$228,600,000
Weinberg Foundation, Inc., Harry and Jeanette, The	Owings Mills, MD	\$98,674,477
SBC Foundation	San Antonio, TX	\$48,159,537
Wachovia Foundation, Inc., The	Winston-Salem, NC	\$40,983,073
Daniels Fund	Denver, CO	\$34,204,475
MetLife Foundation	Long Island City, NY	\$27,656,397
Hearst Foundation, William Randolph	New York, NY	\$24,858,600
Bristol-Myers Squibb Foundation, Inc., The	New York, NY	\$21,955,432
Public Welfare Foundation, Inc.	Washington, DC	\$18,470,200
Ronald McDonald House Charities	Oak Brook, IL	\$17,332,426
Commonwealth Fund, The	New York, NY	\$15,229,313
Hearst Foundation, Inc., The	New York, NY	\$11,355,000
Merck Fund, John, The	Boston, MA	\$11,116,300
Cooke Foundation, Jack Kent	Lansdowne, VA	\$10,475,884
Shell Oil Company Foundation	Houston, TX	\$9,680,081
Monell Foundation, Ambrose, The	New York, NY	\$9,678,333
Gannett Foundation, Inc.	McLean, VA	\$9,390,364
Raytheon Company Contributions Program	Waltham, MA	\$9,252,580

Reeve Paralysis Foundation, Christopher	Springfield, NJ	\$8,455,111
Enterprise Rent-A-Car Foundation	St. Louis, MO	\$7,906,198
United States Golf Association Foundation, Inc.	Colorado Springs, CO	\$7,797,897
Mattel Children's Foundation	El Segundo, CA	\$5,924,165
Johnson Scholarship Foundation, Inc., Theodore R. & Vivian M.	West Palm Beach, FL	\$5,138,186
Brach Foundation, Helen	Chicago, IL	\$4,714,345
Tudor Foundation, Inc., The	Greenwich, CT	\$4,527,146
UnumProvident Corporation Contributions Program	Chattanooga, TN	\$4,500,000
TJX Foundation, Inc., The	Framingham, MA	\$4,475,495
Ms. Foundation for Women	New York, NY	\$4,100,250
United States Steel Foundation, Inc.	Pittsburgh, PA	\$3,688,497
Scholl Foundation, Dr.	Northbrook, IL	\$3,615,500
Sage Foundation	Brighton, MI	\$2,659,000
Skadden Fellowship Foundation, Inc., The	New York, NY	\$2,631,433
VSA arts	Washington, DC	\$2,628,108
Newcombe Foundation, Charlotte W., The	Princeton, NJ	\$1,903,280
Ziegler Foundation for the Blind, Inc., E. Matilda, The	Darien, CT	\$1,833,400
Baker Foundation, R. C., The	Orange, CA	\$1,665,150
Square D Foundation	Palatine, IL	\$1,542,609
Frankino Charitable Foundation, Samuel J. & Connie M.	Vineland, NJ	\$1,496,500
Niles Foundation, Laura J.	Greenwich, CT	\$1,496,100
Hasbro Children's Foundation	New York, NY	\$1,429,348
Disabled American Veterans Charitable Service Trust, Inc.	Cold Spring, KY	\$1,288,306

Barth Foundation, Inc., Theodore H.	New York, NY	\$1,206,000
Autodesk, Inc. Corporate Giving Program	San Rafael, CA	\$1,035,500
St. Giles Foundation	New York, NY	\$982,500
National Hockey League Foundation	New York, NY	\$861,989
McDonald Foundation, Armstrong	Lincoln, NE	\$852,130
Steelcase Inc. Corporate Giving Program	Grand Rapids, MI	\$826,500
Schott Foundation, Joseph J.	Cleveland, OH	\$761,500
Hana Foundation	St. Louis, MO	\$749,840
Carnegie Hero Fund Commission	Pittsburgh, PA	\$701,044
Milbank Foundation for Rehabilitation	New York, NY	\$642,000
Kennedy, Jr. Foundation, Joseph P., The	Washington, DC	\$600,000
Berman Foundation, Mandell L. and Madeleine H.	Southfield, MI	\$596,829
Cranaleith Foundation, Inc.	New York, NY	\$595,000
Quick Charitable Trust, Patricia	New York, NY	\$575,073
Arc of the United States, The	Silver Spring, MD	\$520,443
Ross Foundation, Dorothea Haus, The	Rochester, NY	\$476,152
Abelard Foundation, Inc., The	New York, NY	\$453,500
Edouard Foundation, Inc., The	New York, NY	\$449,500
MacDonald Foundation, Inc., Marquis George	Chicago, IL	\$424,588
Schooner Foundation, The	Boston, MA	\$410,150
Bull Foundation, Henry W., The	Santa Barbara, CA	\$410,053
Mitsubishi Electric America Foundation	Arlington, VA	\$406,748
NEC Foundation of America	Islandia, NY	\$394,000
ConocoPhillips Dependent Scholarship Program Trust	Bartlesville, OK	\$369,000

Freygang Foundation, Walter Henry	Akron, OH	\$362,016
New England Biolabs Foundation	Beverly, MA	\$351,017
Peterson Foundation, Patricia Price, The	Watsonville, CA	\$350,000
Smith Trust, May and Stanley, The	San Francisco, CA	\$342,475
Pincus Charitable Fund, The	Philadelphia, PA	\$334,585
Schultz Foundation, Arthur B., The	Alta, WY	\$325,000
Keefe Family Foundation	New York, NY	\$325,000
Patterson Foundation	St. Paul, MN	\$291,000
Looker Foundation, The	Summerland, CA	\$283,900
Lewis Foundation, Inc., The	Florham Park, NJ	\$277,000
Camphill Foundation	Kimberton, PA	\$234,184
Acorn Alcinda Foundation, Inc.	Lewes, DE	\$207,500
Sertoma Foundation	Kansas City, MO	\$190,636
Apex Foundation, The	Herndon, VA	\$182,500
Yeonas Foundation, Stephen G. and Thelma S., The	McLean, VA	\$182,350
Lodzer Organization of California, Inc.	Encino, CA	\$182,000
Special People in Need	Chicago, IL	\$164,950
SAD Foundation, The	Vero Beach, FL	\$160,435
Artists Fellowship, Inc.	New York, NY	\$156,375
Oreffice Foundation, Paul F. and Franca G.	Midland, MI	\$151,300
Viacom Foundation Inc.	New York, NY	\$150,000
Innovating Worthy Projects Foundation	Miami Beach, FL	\$144,377
Murray Foundation, Inc., The	New York, NY	\$141,000
Hayford Family Foundation, Warren J. and Mary Lou, The	Chicago, IL	\$137,500

Jewish Braille Institute of America, Inc.	New York, NY	\$129,086
Huang Charitable Foundation, Stephen & Lydia, The	Alhambra, CA	\$123,399
Ruddie Memorial Youth Foundation, The	Frederick, MD	\$119,100
American Speech-Language-Hearing Association Foundation	Rockville, MD	\$116,000
Ostberg Foundation, Inc., The	Alpine, NJ	\$112,850
Evergreen Worldwide Ministries	Seattle, WA	\$95,650
Lefkowitz Family Foundation, The	Beverly Hills, CA	\$92,530
Moldrup Foundation, Inc., Anna A., The	Fort Lauderdale, FL	\$90,000
Ridley Foundation, Inc., Jessie	New York, NY	\$88,500
American Foundation for the Blind	New York, NY	\$87,090

***Top U.S. Foundations Interested in funding Capital projects for Disability Programs as of 2004***

<b>Foundation Name</b>	<b>City, State</b>	<b>Total Giving</b>
Kresge Foundation, The	Troy, MI	\$97,714,540
Wachovia Foundation, Inc., The	Winston-Salem, NC	\$40,983,073
Daniels Fund	Denver, CO	\$34,204,475
Hilton Foundation, Conrad N.	Reno, NV	\$27,812,683
Hearst Foundation, William Randolph	New York, NY	\$24,858,600
Hearst Foundation, Inc., The	New York, NY	\$11,355,000
Shell Oil Company Foundation	Houston, TX	\$9,680,081
Monell Foundation, Ambrose, The	New York, NY	\$9,678,333
Gannett Foundation, Inc.	Boston, MA	\$201,000
Raytheon Company Contributions Program	Waltham, MA	\$9,252,580

Enterprise Rent-A-Car Foundation	St. Louis, MO	\$7,906,198
United States Steel Foundation, Inc.	Pittsburgh, PA	\$3,688,497
Sage Foundation	Brighton, MI	\$2,659,000
Baker Foundation, R.C., The Orange, CA		\$1,665,150
Square D Foundation	Palatine, IL	\$1,542,609

*For more information on the grant prospects listed above contact*

*Richard I. Male*

*Richard Male & Associates*

*50 S Steele St, Suite 325*

*Denver, CO 80209*

*303.355.2919*

[\*rich@richardmale.com\*](mailto:rich@richardmale.com)

[\*www.richardmale.com\*](http://www.richardmale.com)

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# **Section 4:** Religious Funding In America

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# Religious Funding In America

By Richard I. Male

## ***Introduction***

The faith-based community is an area where activists and grassroots organizations can “tap-into” an organized structure to help with recruiting volunteers, using facilities for meetings, raising money and expanding a base of support that brings a “moral authority” to your issues. I am not suggesting all grassroots organizations become involved with a religious institution, but I do suggest that the *best donors in America* are part of a religious community. Almost every nonprofit organization and fundraiser should become familiar with religious institutions, learn what opportunities are available for funding from them, and become visible with their membership.

Of all sources of funding for nonprofits, the religious community can be both the easiest and the most difficult to access. The difficulty stems from its decentralized nature and the relationship among the different levels of the religious structure. There are numerous religious entities and many of them have local, regional and national levels—presenting a bewildering number of entry points for the grantseeker. However, if you take the time to understand the process and work with the religious community, you will generally find a more stable and flexible source of funding than is available from foundations and corporations. In addition, your organization will have access to a group of caring and committed volunteers.

Religious communities support nonprofit organizations as a way of living out their “faith in action.” They see nonprofits as partners in meeting their outreach or mission goals. Your success in raising funds from them depends on how well your issues match their mission and whether you can establish a solid relationship of trust with the congregation.

More than 45 percent of *all* charitable contributions made in America go to support organized religion. That amounts to about \$75 billion in giving to religious and faith-based organizations, with millions of those dollars going back into the community in the form of grants and loans to nonprofit organizations. Individuals account for almost 90 percent of all charitable giving and religious individuals are the most charitable of all—the majority of individual giving goes to religious institutions.

## **Religious Structures**

Since the mid-1960s, the religious community has been an important and strategic source of funding for a wide variety of issues, including social justice, civil rights, empowerment, the environment, housing, and serving the needs of the poor and hungry.

Although each denomination is slightly different in its structure and administration, there are enough similarities to make some generalized statements. Some denominations, such as the Episcopalians, Roman Catholics and United Methodists are highly structured and operate from a central spiritual figure such as a bishop. Others, such as the Jewish, United Church of Christ and Unitarian faiths are highly democratic and decentralized, giving the local congregation latitude for what they support.

There are three levels of structures in most denominations that are important to understand. Each level is distinct, but they are woven together to support community organizations.

### **1. National Level**

The national levels of most denominations are where the central administration takes place and where the corporate officers make the major ecclesiastical, program, funding and policy decisions. The national level also houses most of the grant and loan monies for the denomination.

Housed within the national offices are a variety of separate “pots” of money that are used to support organizations both domestically and internationally. These funds are usually located in the following offices: women’s, empowerment, minority, housing, hunger, and homelessness. At the national level, grants tend to be in the \$5,000-\$10,000 range, with smaller amounts given at the regional and local levels. In the case of the empowerment funds, such as the Catholic Campaign for Human Development and Presbyterian Self-Development of People, grant amounts can be upwards of \$30,000. Frequently these funds can be granted for multiple years.

**National Religious Foundations and Religious Orders.** At the national level, but not directly under the administrative arm of a particular denomination, are a wide variety of religious foundations and religious orders that are a major source of funding for grassroots organizations. The Unitarian Veatch program, based in New York, grants more than nine million dollars annually to grassroots social change groups. The Jewish Fund for Justice and the Mazon Fund have average grant ranges of \$5,000-\$10,000. Religious orders, such as the Franciscans and the Sisters of Loretto, also make sizable contributions to the community. Follow the specific guidelines for these foundations and religious order granting programs.

## **2. Regional/Judicatory**

Closer to home are the regional or judicatory bodies of each major denomination. These are referred to by different names: in the Roman Catholic and Episcopal religions they are dioceses; United Methodists have conferences; the United Church of Christ has regions; and the United Presbyterians have two levels—synod and presbytery.

Back in the 1960s, '70s and early '80s, the regional levels were a considerable source of funding for grassroots organizations. Now, as giving is concentrated more at the local and national levels, funding at the regional level is generally either flat or declining. However, these people are important—you will need their approval of your request for national funding. Get to know the people in charge here. The best strategy is to involve a member of the denomination (either clergy or laity) in your organization and have them introduce you to the appropriate person. In addition, these religious bodies all have publications that go out regularly to their membership, which can be a great source of free publicity for your organization.

## **3. Congregational Level**

This is where the *real action* takes place. In every neighborhood, village and city in America, there are churches and synagogues. Get to know these ministers, priests, pastors or rabbis. Don't limit yourself to your own faith community. If you provide valuable education, information or services, people will be happy to have you meet their congregations. Have your board members or volunteers introduce you to the religious leaders of their congregations. Try to find a stakeholder from your group who can make the introduction for you, but if that's not possible, call and make an appointment or just walk in and introduce yourself. Don't forget this step, because local congregational leaders are crucial in helping you with your funding efforts at the regional and national levels; they can also help you establish relationships with the congregation.

Within most congregations there are a number of groups that are involved with the mission, outreach, and community service work. These include youth groups, women's groups, men's groups, mission and social action committees, and prayer breakfasts. They get together regularly and are always looking for speakers to help educate them on the issues and programs in their community. These lay leaders of the congregation are the key to long-term support for your organization. Personally, I have a preference for the women's groups because they are the "workers" of the congregation and have monthly (if not weekly) programs that provide an opportunity for you to speak. Also, when you speak, be sure you pass around a sign-up sheet to collect names and e-mail addresses.

Although local congregations continue to support shelter for the homeless and food for the needy, they are increasingly looking toward economic projects that create new jobs in a community, as well as affordable transitional housing. Bear in mind that congregational giving at the local level has remained relatively flat over the past few years, while the administrative costs continue to rise. As religious leaders are forced to use a larger portion of their budgets to keep the doors open, the roof from leaking, and the prayer books in decent repair, there is less money available for the mission, and every dollar must count. Like other funders, religious communities are stressing collaboration among their grantees—if your organization duplicates a service provided across town, you might want to get together and apply jointly for funds.

**Local Involvement.** Most religious leaders are interested in inviting their congregants to be part of the activities of an organization they support. This fits into their “faith-in-action” focus.

Some religious institutions may require local congregational involvement of volunteers. Some grassroots organizations make good use of volunteers and others do not. See if there are ways you can utilize volunteers—to provide program services, participate on a board, coordinate fundraising events, develop a marketing or PR strategy, or keep your books. Once you have volunteers from the congregation involved in your organization, they may be willing to help you raise money. Volunteers speaking on your behalf will be received better than you if they can clearly explain the mission of the organization.

**Non-cash Contributions.** Don’t underestimate the potential of in-kind contributions from the religious community. Many food pantries and homeless shelters depend heavily on food, clothing, and other supplies collected by local congregations. Many nonprofits have begun their operations by using free or inexpensive office space supplied by congregations. Again, this initial support may lead to actual dollar support as the relationship grows. People give to people, and by not rushing to get money, but by building an interest and involvement in your organization, you will receive larger sums of money in the long run.

#### **Tips and Strategies for Raising Money from Religious Organizations [sidebar]**

1. Build the relationship first, then ask for money.
2. Attend a religious service to get a feel for the congregation’s interests and to meet key lay and religious leaders.
3. Read current and past editions of the religious group’s bulletins and newsletters.

4. Speak about your organization and the issues it confronts at church or synagogue meetings whenever possible and always when asked.
5. Always pass around a sign-up sheet at religious meetings to get names, addresses, and e-mail addresses for your newsletter and direct mail appeals.
6. Invite a priest, minister, rabbi or key lay leader to be on your board or a committee.
7. Invite members of the congregation to a meeting at your organization, or take them on a tour of your project or neighborhood.
8. Travel at least once a year to the regional and national office to meet the key funders. It is critical that they know who you are. If possible, have the congregational leader make the introduction for you.

The religious community in America is the most philanthropic group of people in the country. Almost every social movement in America has had its roots in religious communities. They are looking for opportunities to support projects, people, and organizations that support their faith goals. If you are willing to take the time to understand their issues and develop relationships, their support can be long-term and sustaining.

**Beginning List of Potential Funding Sources** (compiled by Richard Male & Associates) **[sidebar]**

Here is an initial list of potential funding sources that fund nationally to a wide variety of grassroots organizations. Make sure you call or e-mail them asking for their specific guidelines and application form.

If you have any questions, please e-mail me at [rich@richardmale.com](mailto:rich@richardmale.com)

**Adrian Dominican Sisters Alternative Investment Fund:** Adrian, MI (517) 265-5135. Routinely does not award grants, but will lend funds or make investments in projects that (a) enhance economic self-determination of communities and economically disadvantaged people, (b) develop alternative economic approaches (e.g., worker cooperatives, coop housing), and (c) focus on stewardship of the land, either urban or rural.

**Contact:**

Lura Mack

Corporate Responsibility Coordinator

Phone: 517-266-3520

E-mail: [PABLura@admc-op.org](mailto:PABLura@admc-op.org)

**Catholic Campaign for Human Development:** Washington, DC (202) 541-3110. The United States Catholic Bishops' anti-poverty education and funding campaign. Its mission is to address the root causes of poverty in the U.S. through promotion and support of community-controlled organizations. This fund focuses on either economic development or grassroots social justice issues.

**Contact:**

Levon Monroe  
Grants Director  
Phone: 202-541-3329  
Web site: [www.nccbuscc.org/cchd](http://www.nccbuscc.org/cchd)

**Disciples of Christ Reconciliation Fund:** Indianapolis, IN (317) 635-3100. Focuses on projects that (a) strike at the root cause of racial discrimination, (b) aim at helping people directly, (c) have an immediate impact, (d) deal with the causes of poverty, e.g. employment, housing and education programs, and (e) have low administrative costs.

**Contact:**

T. Eugene Fisher, Sr.,  
Minister of Reconciliation  
Phone: 317-713-2447  
E-mail: [efisher@ogmp.disciples.org](mailto:efisher@ogmp.disciples.org)

**Episcopal Relief and Development:** New York, NY (212) 922-5129. Requires some Episcopal Church involvement. Interested in several human service areas, but particularly interested in disaster relief and addressing the root causes of poverty.

**Contact:**

Mary Becchi  
Domestic Grants Program  
Phone: 212-922-5129  
Mark Spina  
Overseas Grants Program  
Phone: 800-334-7626 ext. 6095  
E-mail: [mspina@er-d.org](mailto:mspina@er-d.org)

**Evangelical Lutheran Church in America – Domestic Hunger Program:** Chicago, IL, (773) 380-2709. Focuses on education, relief, organizing, and development assistance. Funded programs must have a “justice component.”

**Contact:**

Sylvia Perez

Administrative Staff for Hunger Education and Environment Advocacy  
Education

Division for Church in Society

Phone: 800-638-3522 ext. 2028

E-mail: [sylvia\\_perez@elca.org](mailto:sylvia_perez@elca.org)

Web site: <http://www.elca.org/dcs/worldhunger.html>

**Lutheran Church Missouri Synod World Relief:** St. Louis, MO (800) 248-1930. Has a two-part focus: (a) enhances or enables Lutheran ministries and (b) enables people to move from economic dependency to self-sufficiency. They have a particular interest in poor women with children, resettling immigrants/refugees, and addressing root causes of poverty and suffering.

**Contact:**

Barbara Hoffmann

Manager of Domestic Grants

Phone: 1-800-248-1930 Ext. 1386

E-mail: [ic\\_hoffmabk@lcms.org](mailto:ic_hoffmabk@lcms.org)

Web site: <http://worldrelief.lcms.org>

**MAZON: A Jewish Response to Hunger:** Los Angeles CA (310) 442-0020. Focuses funding on emergency funding, research/advocacy, and the development of food/shelter delivery systems, such as food banks and coalitions of homeless shelters.

**Contact:**

Mia Johnson

Grants Director

Phone: 310-442-0020

E-mail: [mazonmail@mazon.org](mailto:mazonmail@mazon.org)

Web site: <http://www.mazon.org>

**Presbyterian Church USA’s Committee on the Self-Development of People (SDOP):** Louisville, KY (502) 569-5791. Focuses on constituency controlled projects that address empowerment and partnerships of economically disadvantaged people who want to change systems that keep them disempowered.

**Contact:**

Clara Nunez

Associate for Program Administration

1-888-728-7228 ext 5781

[cnunez@ctr.pcusa.org](mailto:cnunez@ctr.pcusa.org)

Web site: <http://www.pcusa.org/pcusa/wmd/sdop/national.html>

**United Church of Christ's UCC Hunger Action:** Cleveland, OH (216) 736-2100. Focuses on programs that (a) address the root causes of hunger and malnutrition and (b) promote food production. Has a strong public policy component but broadly defines that to include organizations that advocate for funds or programs that alleviate suffering and hunger.

**Contact:**

Maria Porrata

Minister for Poverty and Hunger

Phone: 216 736-3710

Ted Goodfleisch

Administrative Support

Phone: 216-736-3719

**United Methodist Church's Minority Group Self-Determination Fund:**

Washington, DC (202) 547-4828. Requires some Methodist participation, but will fund most projects submitted by organizations controlled by racial and/or ethnic communities that involves youth/children, women, and/or economically disadvantaged groups.

**Contact:**

Telina Bennett

Administrator of the Minority Group Self-Determination Fund

Phone: 202-547-4828 ext. 12

**Unitarian Universalist Veatch Program:** Manhasset, NY (516) 627-6576.

Established in 1959, the Veatch Program is a project of the Unitarian Universalist Congregation in Long Island, NY. About 30 percent of funds support other Unitarian Universalist congregations and their social justice efforts. The remaining 70 percent of funds are awarded to social justice efforts regardless of church affiliation.

**Contact:**

Jan Fellenbaum

Grants Administrator

Phone: 516-627-6576

E-mail: [jan@veatch.org](mailto:jan@veatch.org)

## **Religious Funding Resource Guide – 2000 Edition**

This comprehensive guide of religious givers publishes the guidelines of most of the major denominational funds. This guide is three years old, but the publishers hope to publish a new directory next year.

**Contact:**

Resource Women  
4527 South Dakota Ave NE  
Washington D.C. 20017  
202-832-8071  
Cost: \$85

*For 30 years, Richard Male has worked with nonprofit organizations, local governments, schools and religious institutions to find practical solutions to real-life problems. He is the principal at Richard Male and Associates, a team of professionals versed in fundraising, leadership and organizational development, and community/constituency development. <http://www.richardmale.com>*

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# **Section 5:** **“Do Good ILC”** **Case Study**

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**DO GOOD ILC Case Study**  
**Mobilizing Resources for Independent Living Centers**

**CASE STUDY**

**Do Good ILC in Pleasantville, USA**

Richard Male and Associates  
50 South Steele Street  
Suite 325  
Denver, Colorado 80209  
303-355-2919  
rich@richardmale.com

## CASE STUDY

### Do Good ILC in Pleasantville, USA

#### ***Introduction***

The purpose of this exercise is to have the participants work in small groups to analyze a hypothetical situation and to learn and practice how to develop key elements of understanding and developing an overall fundraising plan.

When reviewing this case be sure to integrate not only the fundraising issues, but look at **the leadership of the board** and **executive director** and bring in as many of the external community factors as possible.

#### ***Situation***

Do Good Independent Living Center was founded in 1985 in a Midwest City of 150,000. The ILC serves a three county area. Each one of the counties is very different from the other. **One of the counties** is a working class county that has two factories employing over 1,000 people each, is heavily unionized where the majority of the people are Catholic. During the past year, this county has experienced some layoff's in the factories that has impacted the small business community.

The **second county** is primarily agricultural that raises corn and soybeans. In addition, many people who live in this country work in the large city and commute each day 30 miles. This town has quite a few agricultural related businesses including a division of Caterpillar Tractor Company, and Pioneer Seed Company. This counties largest town has 75,000 people and is growing rapidly as a suburb where people with money can move in and have 1-acre plots of land to build their homes.

**The third county** has recently been transformed into an upper middle class area where a lot of the corporate and retired agricultural money live. It has lots of expensive restaurants, the Episcopal Church and the Rotary Club Play strong roles in this country. This city is the commercial and entertainment hub of the region.

This area is politically Republican and conservative and believes that everyone who is able should work for a living. There are progressive elements in the community that are represented by the churches, unions, and some of the service clubs.

## **Mission**

The Do Good ILC is a private nonprofit organization that is controlled and directed primarily by persons with disabilities. Of a board of directors of 15 persons, 10 are persons with disabilities, two own small businesses, one is a retired pastor of a large church and two work for government agencies.

The focus of the organization is to empower person with disabilities to advocate for themselves and to take control over their lives.

## **Programs**

Since 1985, the ILC has provided a wide variety of services designed to empower persons with disabilities to take control over their lives and to become more independent. The ILC provides the following services to over 1,000 persons with disabilities within the three-country area:

- Skills training and peer counseling
- Employment programs and opportunities
- Advocacy and training
- Independent Living Skills
- Youth program
- Housings programs and issues
- Community organizing- developing leadership to work on issues on the local and state wide level

## **Staff and Board**

The first 18 years of the organization was led by the founder and executive director of the organization. John Grey was a very charismatic person who both led the staff and the board. Most of the board meeting activities centered around John describing and reporting to the board all of the good things that DO GOOD ILC was providing for over 1,000 persons with disabilities yearly.

The organization hired a woman as the Executive Director two years ago. She used to be a client of the agency and started to work as a secretary 10 years ago and showed real promise. During the years, she was promoted to project director of one of the housing programs and then directed the advocacy and training efforts. The board was very proud that it hired a former recipient of the services and has been extremely supportive of her efforts.

Lillian's management style is very different from John the founder of the organization. She is very shy with the board and provides good management and support to the board, but not much leadership. Since she was raised in a background of poverty she is still a bit nervous around people with money and has been hesitant to be visible with the radio and newspapers of the community and does not feel comfortable with corporate leaders. The board has wanted her to become a member of the Chamber of Commerce and join the Rotary Club but Lillian has not joined.

Historically, the board of directors has been very active with advocacy, but not active in any other areas of the organization. One of the members described the board as "not very engaged". The board has not had to do much in the past because John made all the key decisions and was great with the media and with the corporate leaders. Lillian's style is very laid back and does not provide strong leadership to the board. Some of the board members are getting nervous because the future funding of the organization is uncertain and the economy has been poor. There is reason to believe that some of the state and federal funding may be reduced during the next three years.

## **Funding History**

The total agency budget last year was \$1,000,000 up from \$900,000 in 2004. The ILC receives funding through a variety of federal and state grants through the SILC and other agencies. Just during the past few years, they have started to receive small amounts of funding (under \$25,000) through the counties from Community Development Block Grants. Approximately 90+% of the organizations budget comes from public funding sources. The rest of the money comes from corporate donations that average about \$2,000 from Wall Mart, K-Mart, First City Bank, First United Methodist Church and a few other miscellaneous sources. On a yearly basis the organization has an annual dinner that attracts 500 people from the area. During the past year, they started to approach corporations to underwrite the event and this event raised \$75,000 this past year, up from \$25,000 in previous years.

During the past few years, the tri-county area has formed a community foundation, and two years ago a hospital was sold and now there is a health care foundation for the area. The religious community has never been strategically approached for money, even though they historically have supported soup kitchens and food banks at their churches. A significant number of the constituents of the ILC attend churches throughout the area. Some of the restaurants and hotel in the wealthier parts of the region have made donations of surplus foods to other nonprofits, and the ILC has never approached these for support. Recently, some of the board members went to a French restaurant and the owner is a person with a disability who expressed real interest in the organization.

The organization has been notified by one of the public funding agencies that during the next three years, they will lose almost \$200,000 of their funding and has encouraged all the ILCs in the state to diversify and broaden their funding base or else they will have to lay off staff and eliminate programs.

## **Assignment:**

Please work in groups to develop an overall fundraising plan for the short term (12 months) and then look beyond that into the next three years. Consider the following questions:

- Who are the significant stakeholders in the organization and how can you involve them in raising new money
- Identify key funding sources and discuss the strategic approaches for each source during the next 12 months
- Develop funding goals for different sources (government, foundation, corporation, special event, earned-income, religious, union, etc) during the next three years in order to make up for the shortfall.
- What approaches could be used to motivate the board and director to “position” the organization better? What groups and organizations should the ILC become more involved with and why?
- How would you integrate marketing and public relations strategies in an overall fundraising plan
- Who would you add to the board to assist with the fund raising? Would you add a resource development committee where you could recruit more ‘high powered’ persons?

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# **Section 6:**

## Sample Corporate Sponsorship Package

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## Sample Corporate Sponsorship Packages

When forming a Corporate Sponsorship Package the nonprofit organization and the corporation must view their relationship as an actual partnership where both benefit in numerous ways. A Corporate Sponsorship Package is literally a package of opportunities, providing the corporation with marketing opportunities throughout the year, not just during a special event.

### ***The following steps should be considered when approaching corporations:***

1. As with foundation prospects, **inventory** your board, volunteers, and other contacts to learn who knows the key people at corporations and then use these people as “door openers” to set up appointments.
2. Before the visits, **research the company** through reading annual reports and the business sections of newspapers, and talking with other nonprofits receiving support. Learn as much as you can about their business products, the key people, and how they want the company to be perceived in the community.
3. Form a **Corporate Sponsorship Committee** made up of a few board members plus business people who are friends, and develop the specific approach and “pitch.” When approaching the company, try to meet with the **marketing vice-president** or above, and not with the community relations or philanthropic people. Remember that the corporation is looking for a *partnership* not a *relationship* so match their visibility and marketing needs with your financial needs.
4. If possible, try to **involve an employee** of the prospective corporate partner into your organization's volunteer activities. These employees can be invaluable ambassadors and will go with you to ask for the money.
5. Develop a multi-tiered approach to **partnerships** with corporations. By this we mean three to four tiers of potential sponsorships for a corporation that will result in the corporation receiving year-round visibility. For example (please note that the \$\$ amounts will be different for every organization; your Diamond Level could be \$100,000 or \$20,000 or whatever is appropriate for your organization, etc.):

**Diamond Level: \$25,000 per year**

Benefits to the corporation:

- Recognition as a sponsor of signature event: Banner or sign, free corporate table, logo in event program. Company logo on all promotional materials and press releases.
- Recognition as a sponsor of golf tournament: Banner or sign, free foursome(s), logo in program. Company logo on all promotional materials and press releases.
- Inclusion of company logo in [your organization's] newsletter.
- Logo on "Corporate Sponsors" wall in lobby of [your organization].
- Annual meeting and dinner with Boards of [your organization] and to discuss issues of importance to the community.
- Corporate logo in annual report recognizing corporation as [your organization]'s corporate partner.
- One time use of the [your organization's] mailing list for a "joint" mailing to [your organization]'s names.
- Link to corporation on [your organization's] web page.
- Other...

**Gold Level: \$15,000 per year**

Benefits to the corporation:

- Recognition as a co-sponsor of signature event: Free corporate table, corporate name in event program. Company name on all promotional materials and press releases.
- Recognition as a co-sponsor of golf tournament: Free foursome(s), corporate name in program. Company name on all promotional materials and press releases.
- Inclusion of company name in every [your organization's] newsletter.
- Corporate name on "Corporate Sponsors" wall in lobby of [your organization].
- Corporate name in annual report recognizing corporation as Golden Partner.
- Link to corporation on [your organization's] web page

**Silver Level: \$10,000 per year**

Benefits to the corporation:

- Recognition as a [your organization] corporate sponsor in signature event program. Free corporate table.
- Recognition as a [your organization] corporate sponsor in golf tournament program: free foursome.
- Corporate name on "Corporate Sponsors" wall in lobby of [your organization].
- Corporate name in annual report recognizing corporation as Silver Partner.
- Link to corporation on [your organization's] web page.

**Bronze Level: \$2,500 per year**

Benefits to the corporation:

- Recognition as a [your organization] corporate sponsor in signature event program.
- Recognition as a [your organization] corporate sponsor in golf tournament program.
- Corporate name on "Corporate Sponsors" wall in lobby of [your organization].
- Corporate name in annual report recognizing corporation as Bronze Partner.

6. Design a marketing brochure that spells out the corporate sponsorship package for your organization. This should include sections on the following pieces of information:

a. Section I – Corporate Partners Program

- Background of your organization
- Programs of your organization

b. Section II

- Why is corporate partners good for business
- Why partner with your organization – describe your constituency

c. Section III

- List of events or activities that would form the basis of the partnership. Describe the event, number of participants & demographics of people who will be attending

As your organization develops other opportunities to recognize corporate partners, these can be added at the appropriate levels. The goal is to gradually raise the corporate participation to higher levels and to solidify the partnership through providing tangible benefits. Additionally, the goal is to increase the number of corporations participating each year. In most cases, the corporate dollars will sponsor or underwrite your special events that will be discussed in the next section.

***Richard Male & Associates*** is a full-service consulting and training firm providing practical solutions for your non-profit organization. We are dedicated to guiding and supporting you with your very specific needs. Let us know if there is anything we can do to help your organization soar.

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# **Section 7:** Sample Letter of Introduction

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# Sample Letter of Introduction

DATE

Dear (Grants Administrator),

I would like to take a moment to introduce my organization, The Seasons Change Conservation Group, and to ask you to consider an appointment to meet with me while I am in New York in July.

The Seasons Change Conservation Group is among the most diverse, successful, and powerful grassroots community groups in the Northwest. For the past 26 years, Kettle Range has challenged hundreds of projects that threatened ecosystem health and inspired thousands of individuals to speak out for responsible management of their public lands. Together with our collaborators, we have safeguarded more than one half million acres of forest in the Okanogan and Colville National Forests in north-eastern Washington State.

## Mission/Goals

The goals of the Seasons Change Conservation Group are to preserve all remaining roadless areas as wild forests, thereby protecting critical habitats for native terrestrial and aquatic species. Additionally, we seek to build lasting public support for Wilderness preservation, protection of ecosystems of the Interior Columbia River Basin and promote sustainable use of natural resources. *Our mission is to defend wilderness, protect biodiversity, and restore ecosystems of the Columbia River Basin.*

Eastern Washington contains approximately *two-thirds* of Washington State's unprotected roadless National Forests. Perhaps the least known and least protected wildlands lie within the Colville National Forest. The Colville is home to the *only known* reproducing grizzly bears in the state, *the last 28* mountain caribou (reindeer) in the lower 48 states, *three of four* wild lynx populations in Washington, native west slope cutthroat, red-band and bull trout, and over 20 species of rare and sensitive plants. The Colville has more planned or proposed timber sales in roadless forests than any other National Forest in Washington. Presently, less than three percent of the forest is permanently protected through Wilderness designation.

## Current Programs:

1. **Wild Washington Campaign** – Several years ago, Seasons Change Conservation Group brought together eastern Washington forest activists to form a coalition to protect eastside roadless areas. Meeting bi-monthly, this group in 1998 became the **Wild** Washington Campaign; a coalition of 41 conservation, recreation, religious and other grassroots organizations across Washington State working to permanently protect 3 million acres of National Forest lands in Washington as Wilderness. Kettle Range ignited this group and maintains a strong executive leadership role in the coalition.

2. Forest & Rivers Program – Monitors and challenges harmful and irresponsible activities on our public lands. From 1988 to present the Forests & Rivers Program has appealed an average of 15 timber, mining, and livestock grazing permits per year. The program has made tremendous inroads into modifying or eliminating thoughtless and destructive activities in the Colville and Okanogan National Forests.
3. Parks to Peaks – Parks to Peaks is an important urban organizing effort that seeks to protect and link urban greenspace, open space, parks and trails to larger natural wild areas. The Parks to Peaks project is strengthening the wildlands conservation movement by integrating wilderness and urban conservation efforts. One goal of Parks to Peaks is to obtain greater involvement from the urban population of the Spokane-Coeur d’Alene corridor in our wilderness preservation efforts in north-eastern Washington.

### **Major Accomplishments of the Past Six Years:**

- Helped to reduce a *projected 200 million* annual board feet in timber sales on the Colville and Okanogan National Forests to *less than 60 million* board feet at present.
- In 2002, produced a report titled, “**OUT OF BOUNDS!**,” a 120-page examination of ORV recreation regulations and impacts on the Okanogan and Colville National Forests.
- Produced a detailed 158 page report in 2001 regarding noxious weed spread on our national forests entitled: “**Risky Business: Invasive species management on National Forests.**”
- In 2000, organized funding and facilitated development of an economic study by Dr. Thomas Michael Power on the value of protecting Washington’s wild national forests.
- Award \$19,600 in scholarships since 1996 to northeastern Washington high school seniors who have been accepted into university Natural Resource/Conservation programs.
- Began public hikes in 1995 - Leading several hikes per year into roadless wild forests that are at risk of logging to better connect individuals with actual wildlands at risk, and to increase Kettle Range’s constituency in urban and rural eastern Washington.

### **Organization & Board**

Kettle Range has recently experienced tremendous growth in financial resources, political influence and community outreach. Despite its location in a region of the state that can at best be called conservative and at worst hostile to environmental interests, Kettle Range built a membership base that has quadrupled in the last few years (200 to 800+). The budget of the organization has grown from \$3,000 in 1993 to approximately \$280,000 in 2002. *We currently receive support from the following foundations: Brainerd, Wilburforce, Flintridge, Bullitt, Patagonia, Burning, Kongsgaard-Goldman, and Hugh and Jane Ferguson foundations, as well as Northwest Fund for the Environment, and Temper of the Times.*

We have a *staff* of seven distributed throughout our three offices. Our home office is located in rural town of Republic Washington; in the heart of the country we are working to protect. Within the last two years, we have opened satellite offices in Winthrop, to better monitor activities in the Okanogan National Forest, and Spokane, to increase our outreach and membership efforts in Eastern Washington’s largest urban center.

The group’s board is composed of a diverse set of individuals from Republic, Colville, Kettle Falls, and Spokane and range in backgrounds from an attorney, to a National Forest Service employee, to a retired alternative high school teacher and meets monthly.

The Seasons Change Conservation Group is a unique grassroots rural-based conservation organization with statewide and regional influence in the Northwest. I will be in (FOUNDATION CITY) next month and was hoping that I might be able to take a half-hour of your time to describe Kettle Range and our programs in more detail. I'll call your office next week to set up a day and time. I look forward to meeting you!

Sincerely,

John F. Smith  
Executive Director

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# **Section 8:** Sample Organizational Brochure

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**Independence*First***  
**600 West Virginia Street, suite 301**  
**Milwaukee, Wisconsin 53204**  
**Voice (414) 291-7520**  
**TTY (414) 291-7520**  
**Fax (414) 291-7525**  
**lee@independencefirst.org**

Independence*First* Brochure:

## **The Freedom To Be Independent**

# THE **FREEDOM** TO BE **INDEPENDENT**

## IndependenceFirst

*The Resource For People With Disabilities*

IndependenceFirst  
has a vision for full  
inclusion of  
persons with  
disabilities in every  
aspect of our  
community and  
commits itself  
toward this end

## **A Catalyst for Change**

Independence *First* is dedicated to its role as a catalyst to effect change by promoting independence among people with disabilities so they can achieve all they can be.

Directed by and for people with disabilities since 1980, IndependenceFirst provides services that promote independence for people with disabilities in our community.

Dedicated staff and volunteers advocate for housing, transportation, education and employment from the main center in Milwaukee as well as satellite offices in Waukesha, Ozaukee and Washington Counties. We serve all disabilities and all ages.

### **Steering the Movement to Extend Fundamental Civil Rights to People with Disabilities**

In 1990, the Americans With Disabilities Act (ADA) extended civil rights to people with disabilities similar to those mandated on the basis of race, color, national origin, sex and religion through the Civil Rights Act of 1964. The ADA laid the groundwork to include people with disabilities in every way. Our Board of Directors, the majority of whom have disabilities, is committed to helping our community learn how to integrate persons with disabilities into the mainstream of our community.

Independence *First* has earned a national reputation as a leader advocating for the inclusion of persons with disabilities into the economic and social mainstream of our community.

## **Responding to Need**

*Over 29% of families In the United States have one or more members with a disability.*

The tradition continues as Independence*First* works to break down barriers that hinder the inclusion of persons with disabilities in our communities. The Board of Directors works to effectively respond to a growing segment of our population. Nearly 1 in 5 Americans live with a disability. Over 29% of families in the United States have one or more members with a disability. Add on friends, co-workers and other people in their lives--that's a lot of people who are touched by and care about disability issues. As our population ages and lives longer, the numbers of persons facing a disability will continue to increase.

### **Extend The American Dream to People who have Disabilities**

People with disabilities are still among the poorest and most financially vulnerable in the nation. Seventy-five percent of people with disabilities are not working, yet would like to be employed.

Capable, talented people are being denied this most fundamental of American dreams--the opportunity to improve one's own life through one's own efforts. Many rely on government social security and health coverage. Frustration and feelings of hopelessness can result in lower expectations. A cycle of poverty, unemployment, underemployment and low self-esteem ensues. This loss of potential is a loss for our whole community.

Independence*First* is working to break the cycle. Our goal is to help persons with disabilities recognize and act upon the strengths and abilities that they possess, and to show the broader community how they can benefit by expanding their understanding of diversity and its far-reaching benefits to all of us.

## **Mission**

**Our agency mission is to effectively facilitate empowerment of individuals with disabilities through**

- \* Education
- \* Advocacy
- \* Independent Living Services
- \* Coalition Building

## **Our Goals**

1. Overcome ignorance by educating people so they will understand the value of allowing people with disabilities to participate in our communities and offer assistance to do so.
2. Promote independence for persons with disabilities through education, peer modeling and community outreach.
3. Advocate with, and on behalf of persons with disabilities to breakdown all barriers that prevent them from full participation in our society.
4. Expand independent living services to respond to the current and growing need of persons with disabilities to attain self-sufficiency
5. Lead others in building the coalitions and partnerships that will bring our community together by the successful inclusion of individuals with disabilities
6. Build our capacity to offer high quality services based on sound organizational practices and a diversified funding base that responds to community need.

**Our programming is results oriented to achieve our goals.**

# Education

## Education through Outreach and Technical Assistance

Most people want to do the right thing: they just aren't sure how to go about it.

Independence*First* connects them to information that successfully tears down attitudinal and physical barriers. We help people recognize the social and economic benefits of including people with disabilities. Highlights include

\* **Barrier Free Buildings:** Technical assistance to builders, architects and businesses to build barrier free structures and modify existing environments for accessibility.

\* **Barrier Free Entertainment:** Outreach and technical assistance to entertainment venues to educate them on how to include persons with disabilities as patrons.

\* **Barrier Free Work:** To celebrate the ten-year anniversary of the ADA, Independence*First* joined the Milwaukee Institute of Art and Design (MIAD) and University of Wisconsin-Milwaukee to create a photo exhibit highlighting individuals with disabilities at work. Displays at venues throughout the state including MIAD, Northwestern Mutual, the State Capitol will reach thousands and attach faces to personal stories of the challenges and successes of working in our community with disabilities.

\* **Barrier Free Schools:** Provide presentations at schools to educate youth about how to accept and include persons with disabilities in their lives.

\* **Barrier Free Web site:** Independence*First's* own web site acts as a role model to others on how to make a web site accessible to many.

## **Advocacy**

### **Self-Sufficiency over Self-Defeating Systems**

“Discrimination toward people with disabilities must start with each one of us taking the message to the larger community, and then combining our resources to offer solutions with a lasting impact.”

### **Promoting Freedom and Justice through Systematic Change**

Independence*First* believes that the voices of people with disabilities are the best advocacy strategy. Our vision is to eliminate economic and social discrimination toward people with disabilities. The process must start with each one of us taking the message to the larger community, and then combining our resources to offer solutions for a larger and lasting impact.

- Support individual advocacy and teach individuals with disabilities how to advocate for themselves
- Inform through the publication of newsletters, email, “phone trees,” and website
- Offer voter registration assistance and non-partisan voter education
- Bring forward local concerns to the National Council on Independent Living office in Washington, DC and actively work to determine national advocacy priorities
- Coordinate efforts to keep and expand services that support independent living in the local, state, and federal budgets
- Address accessibility of public buildings and provide suggestions to make buildings barrier free
- Represent persons with disabilities in the community such as the Access Committee of the Governor’s Council on Domestic Violence

# Independent Living Services

## Supporting Self-Sufficiency through:

- \* **Information and Referral:** IndependenceFirst has a wide range of resources for persons needing information or referrals regarding disability related issues in metro Milwaukee.
- \* **Life Skills Training:** Offer people with disabilities training in areas such as money management, housekeeping, communication, self-advocacy, transportation, transition support from nursing homes to the community, pre-vocational skills, employment and socialization.
- \* **Peer Support:** Match a staff member trained volunteer with a person who has a similar disability who is having problems coping.
- \* **Housing:** Help locate affordable, accessible housing as well as provides technical assistance in how to make homes accessible. Administer Affordable Housing Program (AHP) to help low income persons with disabilities purchase homes. Promotes the development of accessible housing in our community.
- \* **Employment Services:** Provide a range of service from acquiring the "soft" skills such as interviewing and filling out applications; benefits counseling to help people with disabilities access Social Security work incentives to enable them to work without losing health care; intern and mentor program for college graduates to get the experience to compete for jobs in their chosen field.
- \* **Personal Assistive Services:** Recruit, train and provide personal care services to assist individuals with disabilities remain in their own home rather than being forced into residential/institutional care.
- \* **Assistive Technology:** A full resource center to access assistive technology including information on over 17,000 products and services as well as 350 devices available for trial use. Administration of a revolving loan program to help people with disabilities buy assistive technology to allow them to function independently at home, work and school. In addition, a computer recycling program helps people with disabilities obtain a computer as well as getting basic training and instruction on its use.
- \* **Wheelchair Sports and Adapted Recreation:** Offers sports opportunities filling the void of social isolation with basketball, softball, ice hockey, snow skiing, bocce ball, floor hockey, sailing, street hockey, tennis and water skiing. Teaches healthy competition, teamwork and promotes healthy activity.
- \* **Camp for Kids with Severe Disabilities:** Offers an integrated weeklong camp experience with the YWCA for kids who would otherwise not have the opportunity.

## **Coalition Building**

Independence*First* promotes collaboration with/between public and private entities in our community to educate for the full participation of persons with disabilities in our community.

## **Build Capacity**

Independence*First* has historically relied on fee for service and government funding to achieve its goals. The Board of Directors has recognized that it must diversify its funding base in order to offer financial stability and meet the growing population of persons with disabilities.

### **Your invitation to Invest in the Freedom to be Independent....**

Independence is about making decisions and increasing control over one's life. It is about the right to succeed and the right to fail. Persons with disabilities should have the freedom and the opportunity to control their own lives. Partner with us to promote the inclusion of persons with disabilities into the economic and social mainstream of our community.

### **Make our world a better place**