Participatory Training Guide for Community Co-facilitators

PART 4: Securing Funds for Your Organization

EDITED BY: Shirley Allen-Pope Marechalnie Miller Sally Migliore Patricia Norman Dena White

PROGRAM SPONSORED BY:
Cooperative Extension Program North Carolina A&T State University and the W. K. Kellogg Foundation
Published By:

Cooperative Extension Program North Carolina A&T State University
Greensboro, North Carolina

October 2003

For More Information Contact:

Patricia W. Norman
Voices Reaching Visions
Cooperative Extension Program
P. O. Box 21928
Greensboro, NC 27420
(336) 334-7008
## CONTENTS

Preface ................................................................................................................................. iv
Acknowledgments ................................................................................................................ v
Overview ............................................................................................................................... vi
Introduction to the Co-facilitator’s Guide ............................................................................. v
Table of Tool Kits .................................................................................................................. xvi
Table of Flip Charts ............................................................................................................. xviii

### PART 4: Securing Funds for Your Organization

<table>
<thead>
<tr>
<th>Session</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Identifying Your Organization’s Funding Needs</td>
<td>1.1</td>
</tr>
<tr>
<td>2</td>
<td>Identifying Funding Sources for Your Organization</td>
<td>2.1</td>
</tr>
<tr>
<td>3</td>
<td>Identifying and Selecting Types of Fundraising</td>
<td>3.1</td>
</tr>
<tr>
<td>4</td>
<td>Developing Tools and an Action Plan for Fundraising</td>
<td>4.1</td>
</tr>
<tr>
<td>5</td>
<td>Following Up on Your Fundraising Action Plan</td>
<td>5.1</td>
</tr>
</tbody>
</table>
PART 4 TOOL KITS

Session 1

1.1 Major Funding Areas of an Organization
1.2 The Voices of People Organization Involved in Communities
1.3 Characteristics To Consider When Assessing an Organization’s Capacity To Secure Funds

Session 2

2.1 Categories of Funding Support
2.2 Resources for Locating Funding Sources
2.3 Profile Sheet: Categories of Funding Sources
2.4 Discussion Questions
2.5 Funding Source Rating Scale

Session 3

3.1 Types of Fundraising
3.2 Factors To Consider When Selecting Types of Fundraising
3.3 Discussion Questions: Selecting the Types of Fundraising
3.4 Specific Ways To Implement Types of Fundraising
3.5 Annual Event
3.6 Membership Drive
3.7 Fee-for-Service or Fee-for-Product Business Venture
3.8 Special Event
Session 4

4.1 Developing the Pledge Card
4.2 Developing the Case Statement
4.3 Developing the Appeal Letter
4.4 Designing Flyers and Tickets
4.5 Developing the Letter of Inquiry/Intent
4.6 Sample Letter of Inquiry Instructions
4.7 Developing the Letter of Request
4.8 Completing the Grant Application
4.9 Sample Grant Application
4.10 Components of a Proposal
4.11 Developing the Project
4.12 Proposal Outline
4.13 General Tips for Writing Proposals
4.14 Action Plan Steps

Session 5

5.1 Discussion Questions: Evaluating Your Progress
5.2 Strategies for Future Action
5.3 Planning To Show Appreciation
## PART 4 FLIP CHARTS

### Session 1

1. Funding Needs of the Voices of People Organization ........................................ 1.9
2. Funds Needed for Action Steps in Major Areas .................................................. 1.11
3. Total Funds Needed in Major Areas .................................................................. 1.12
4. When Funds Are Needed in Major Areas ......................................................... 1.14
5. Previous Fundraising Experience .................................................................... 1.16
6. Funding Sources/Methods/Organizational Factors ........................................... 1.16
7. Fundraising Experiences .................................................................................. 1.17
8A. Reflecting on the Capacity of (Your Organization) To Secure Funds:
   Who Is Involved? ............................................................................................... 1.20
8B. Reflecting on the Capacity of (Your Organization) To Secure Funds: Structure...... 1.21
8C. Reflecting on the Capacity of (Your Organization) To Secure Funds:
   Financial Experience and Stability .................................................................. 1.22
8D. Reflecting on the Capacity of (Your Organization) To Secure Funds: Credibility ... 1.23
9. Who Will Be Involved To Secure Funds? .......................................................... 1/25

### Session 2

10. Funding Sources You Know ............................................................................. 2.10
11A. What You Know about Funding Sources: Individuals ................................... 2.10
11B. What You Know about Funding Sources: Organizations/Churches ............ 2.13
11C. What You Know about Funding Sources: Businesses ................................... 2.13
11D. What You Know about Funding Sources: Foundations ................................ 2.13
11E. What You Know about Funding Sources: Corporations ................................ 2.14
11F. What You Know about Funding Sources: Government Agencies ............... 2.14
12. How To Identify Funding Sources .................................................................... 2.16
13. Resources for Locating (Your) Funding Sources ............................................. 2.17
14. Preparation for Research of Funding Sources ............................................... 2.20
<table>
<thead>
<tr>
<th>Page</th>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>Volunteer Pairs for Completing Funding Source Profile Sheets</td>
<td>2.22</td>
</tr>
<tr>
<td>16</td>
<td>Funding Sources Profile Sheets</td>
<td>2.24</td>
</tr>
<tr>
<td>17</td>
<td>Who Would Most Likely Fund (Your Organization)?</td>
<td>2.25</td>
</tr>
</tbody>
</table>

**Session 3**

| 18A  | Selecting Types of Fundraising: Operations                          | 3.12 |
| 18B  | Selecting Types of Fundraising: Capital Improvements                 | 3.13 |
| 18C  | Selecting Types of Fundraising: Programs and Special Projects        | 3.13 |
| 19A  | Type of Fundraising: Annual Fund                                     | 3.16 |
| 19B  | Type of Fundraising: Fee-for-Service or Fee-for-Product Business Venture | 3.19 |
| 19C  | Type of Fundraising: Grassroots Fundraising                          | 3.21 |
| 19D  | Type of Fundraising: Capital Campaign                                | 3.24 |
| 19E  | Type of Fundraising: Grants                                          | 3.26 |

**Session 4**

| 20   | Developing (Your Organization)’s Pledge Card                        | 4.9  |
| 21   | Developing (Your Organization)’s Case Statement                      | 4.11 |
| 22   | Developing (Your Organization)’s Appeal Letter                       | 4.14 |
| 23   | Developing (Your Organization)’s Flyers and Tickets                 | 4.16 |
| 24   | Developing (Your Organization)’s Letter of Inquiry/Intent and Letter of Request | 4.19 |
| 25   | Completing (Your Organization)’s Grant Application                   | 4.21 |
| 26   | Developing (Your Organization)’s Project                             | 4.25 |
| 27   | (Your Organization)’s Evaluation Component                          | 4.26 |
| 28   | (Your Organization)’s Action Plan                                    | 4.30 |
| 29   | Determining Costs To Implement Fundraising                           | 4.35 |
| 30   | Total Cost To Implement Fundraising                                  | 4.36 |
Session 5

31  Evaluating (Your) Fundraising Progress ................................................................. 5.9
32A Planning To Show Appreciation: Members ............................................................... 5.12
32B Planning To Show Appreciation: Other Supporters .................................................. 5.12
32C Planning To Show Appreciation: Donors ................................................................. 5.13