



United Way
of Greater St. Louis

MEMBER AGENCY STRATEGIC TRANSITION PLANNING SERIES

Session #3 Overview – Fund Development

July 12, 2018 | 9:00am – 12:00 noon | Wendy Dyer

FUND DEVELOPMENT TOOLS AND TECHNIQUES

This hands-on workshop provides an overview of the primary components of fund development and its planning through presentation, small and large group discussion and break-out activities to help participants build agency fundraising toolkits.

Target Audience: Board members, EDs and other staff involved in decision-making about raising funds.

Learning Objectives:

- Participants will better understand the variety of fundraising models in existence and which suits their agency.
- Participants will gain insight about primary components of fund development and their planning processes.
- Participants will utilize knowledge gained to build a toolkit of ideas for pursuing grants and contributions.
- Participants will receive Development Plan templates for use as references for building/improving agency plans.

Key Concepts:

- People are giving money away anyway, they might as well be giving to your agency.
- Development Plans should be roadmaps that are practical and easy to implement – do not overcomplicate it.
- Most funding comes from individuals.
- Gift tables are excellent planning and execution tools, often overlooked in development programs.

Concept Application/Small Group Exercises:

Study the 10 Fundraising Models and discuss which best suits your agency and how to capitalize on selected model.

Example: Development Plan templates will be provided as resources to help improve planning.

Racial Equity Lens Application:

(1) Contributing funds to support an issue, cause and/or nonprofit entity is empowering, particularly in communities of color where power has not been historically shared; and (2) shifting perspective about asking for money by recognizing staff and board's susceptibility to implicit bias, even among those who consider themselves nonracist, and understanding how the agency may have historically overlooked groups and individuals not previously included in solicitation efforts due to unconscious assumptions.

Major Take-Aways by Participants: (1) Develop a donor stewardship/gratitude plan, using impact & outcomes; (2) Prioritize focus, based on ROI calculations; (3) Use a multi-channel approach, based on giving behaviors, generations; and (4) Formalize development plans, using sample plan templates.

Key Concepts in Common with Other Sessions:

Session #2: Financial Health; #4: Financial Sustainability; #7: Innovation; #8: Vision/Strategic Direction; #9: Board Engagement, Fund Development & Messaging; and #10: Dive into Fund Development.

To Learn More:

Money For Good. <http://www.cambercollective.com/moneyforgood/>

10 Fundraising Models: https://ssir.org/articles/entry/ten_nonprofit_funding_models

Cultures of Giving, a report by the W.F. Kellogg Foundation: <http://www.d5coalition.org/wp-content/uploads/2013/07/CultureofGiving.pdf>

About the Presenter:

Wendy Dyer has enjoyed serving the nonprofit sector as a consultant for nearly 25 years. Working as a team member, she has helped to expand programs, build schools, cultural and health centers, all of which brings opportunity to thousands of people in need.