

Fund Development Planning

August 30, 2023



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https://www.dropbox.com/scl/fi/4ek4pqbcpbiz2dw83k81j/Hawaii-CSBG-Fund-Development-Planning_NCAP-Share.pdf?rlkey=mujksys1h0pha28tbdj0ynjfg&dl=0

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The Promise Of Community Action

Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community and we are dedicated to helping people help themselves and each other.

Labor Acknowledgement

Every community owes its existence and vitality to generations from around the world who contributed their hopes, dreams, and energy to making the history that led to this moment. Some were brought here against their will, some were drawn to leave their distant homes in hope of a better life, and some have lived on this land for more generations than can be counted.

*We acknowledge that much of what we know of this country today, including its culture, economic growth, and development throughout history and across time, has been made possible by the labor of enslaved Africans and their ascendants who suffered the horror of the transatlantic trafficking of their people, chattel slavery, **family separation**, and Jim Crow. We are indebted to the seeds they carried on slave ships, their labor, their stewardship of the land, and their sacrifice, and we must acknowledge the tremors of that violence throughout the generations and the resulting impact that can still be felt and witnessed today.*

YOU
ARE
ON

LAND



#HonorNativeLand
USDAC.us/NativeLand

Artwork & Design by
Warren Mantaya - Tamaya & Kha'po Owingsh
Jaclyn Roessel - Dine



Land Acknowledgement

<https://native-land.ca/>

- **This meeting is being held on the traditional lands of the Nā moku ‘ehā People, and I pay my respect to elders both past and present, who have stewarded this land throughout the generations.”**
 - Please take a moment to consider the many legacies of violence, displacement, migration, and settlement that bring us together here today.



Agenda

- Welcome & Introductions
- Understanding the Need and Setting Priorities
- Identifying Funding Sources
- Defining Your Strategy

Question?

What is your biggest challenge in funding your initiatives and activities?

Funding Challenges

- Categorical requirements that limit flexibility
- Uneven reliability on levels of funding from year to year
- Political decisions that result in cuts or elimination of programs
- Funders that expect initial investments will yield long-term sustainability
- Decisions driven by the bottom line rather mission and overall program integration

When Fund Development Happens

- As an element of the strategic planning process
 - Often warrants a separate task group or committee
- As a focused topic for a board retreat
- To prepare for significant organizational change
 - Adding a significant grant
 - Merging with another organization
- As an organizational development process, typically with an outside consultant
- Can be used for one program or the whole agency

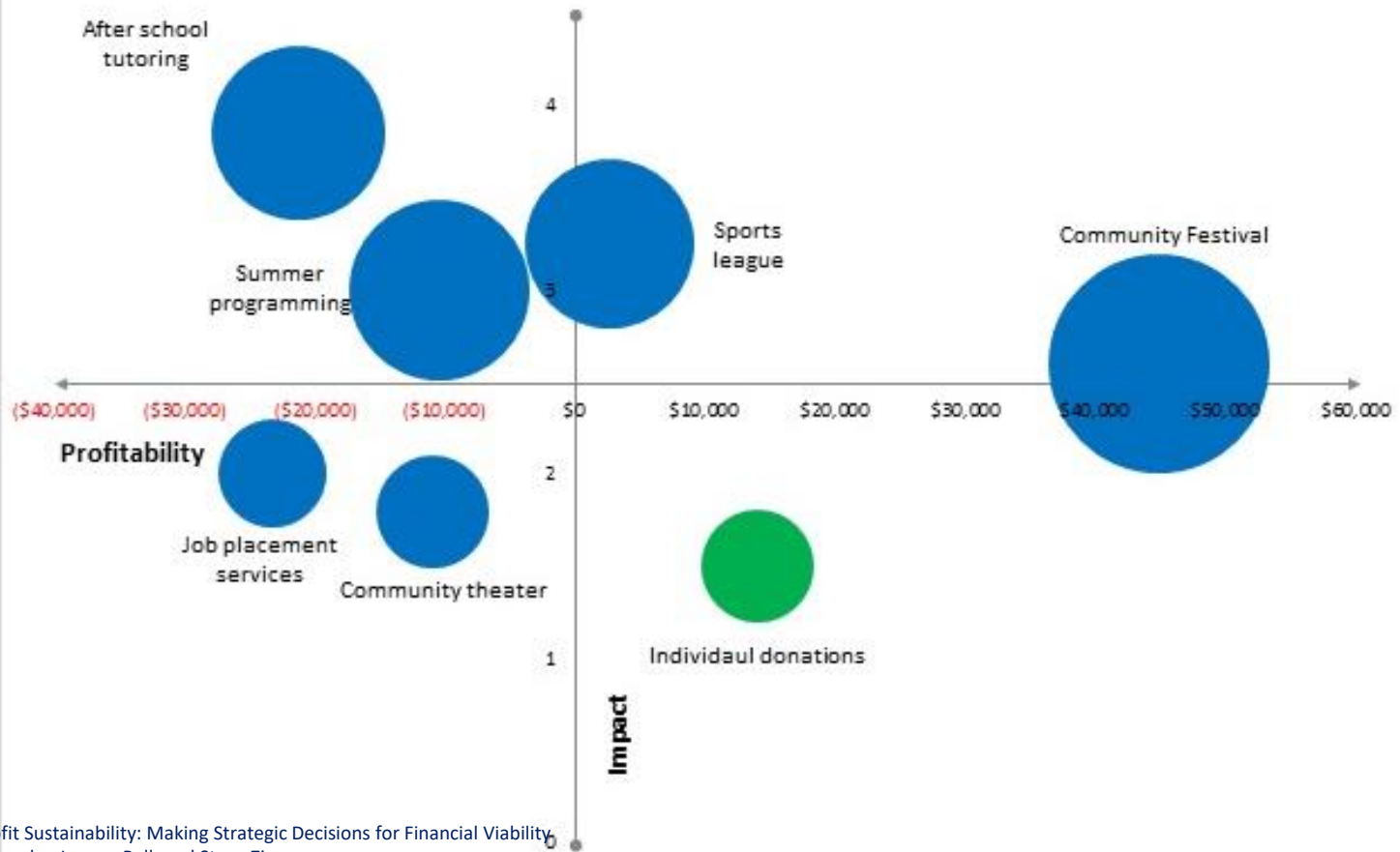
A Dual Bottom Line



Source: Nonprofit Sustainability: Making Strategic Decisions for Financial Viability
Book by Jan Masaoka, Jeanne Bell, and Steve Zimmerman

A Dual Bottom Line

Matrix Map



Source: Nonprofit Sustainability: Making Strategic Decisions for Financial Viability, Book by Jan Masaoka, Jeanne Bell, and Steve Zimmerman

Developing A Fund Development Plan

- What are your financing goals?
- What financial resources do you need?
- How are you currently investing your resources?
- What financing strategies will support your goals?
- How will you work together to support your goals?

Revenue Types and Sources

- Government Grants and Contracts
- Foundation Grants
- Social Enterprise
- Fee-for-Service
- Fundraising
- What Else?

Government Grants and Contracts

- Most CAAs are very experienced and skilled at responding to government RFPs
 - Use This To Your Advantage
- Don't Forget State and Federal Opportunities
 - Enroll in state contract/vendor system
 - Join state grants listserv
 - Join grants.gov and select your preferences
- Relationships Matter

Foundation Grants

- Do Your Research
 - The Foundation Center www.foundationcenter.org
 - The Council on Foundations www.cof.org
 - Candid (Guidestar) www.guidestar.org
- Types of Foundations
 - Corporate Foundations www.corporatephilanthropy.org
 - Private Foundations www.foundationcenter.org
 - Community Foundations
 - Family Foundations
 - Faith-based Programs
- Relationships Matter

Social Enterprise

- Think Community Economic Development
- Social Enterprise
- Social Enterprise Toolkit available at <https://communityactionpartnership.com/community-economic-development-ced/>



Fundraising Quiz

An organization cannot rely solely on its state and federal grants and should engage in efforts to generate unrestricted funds.

True or False?

Fundraising Quiz

An organization cannot rely solely on its state and federal grants and should engage in efforts to generate unrestricted funds.

TRUE!

- ✓ State and federal grants restrict use of funds
- ✓ Diversification of funding often essential for sustainability and flexibility

Fundraising Quiz

Generating funds is mainly the Executive Director's responsibility, not the board's.

True or False?

Fundraising Quiz

Generating funds is mainly the Executive Director's responsibility, not the board's.

False

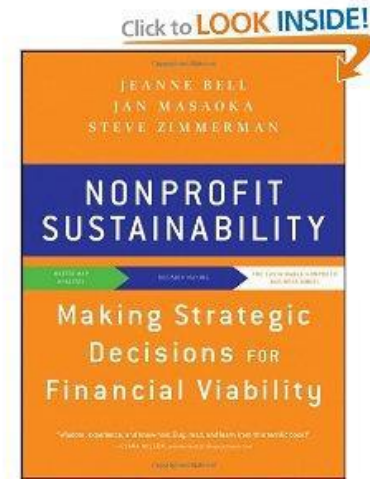
- ✓ Joint effort –both bring different resources/skills
- ✓ If no unrestricted funds, board must spearhead fundraising efforts

Next Steps—Discussion

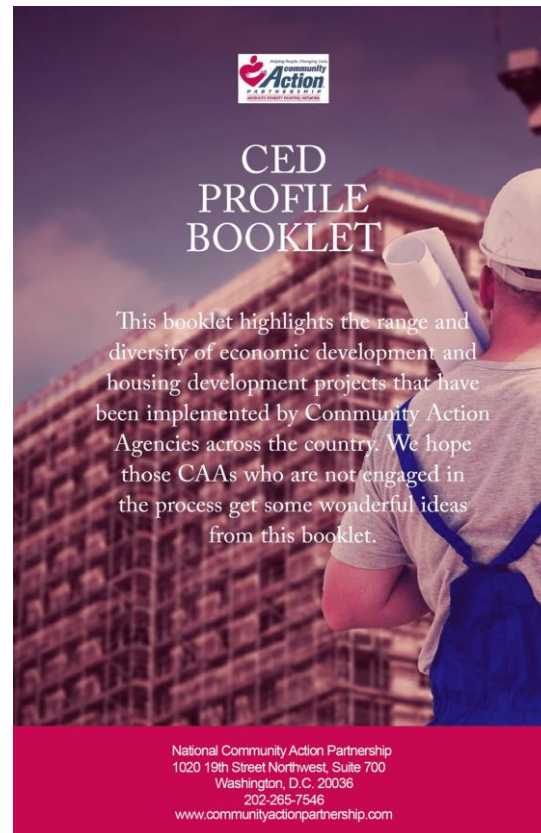
- What other sources, tools, or resources would be helpful for fund development?
- What financing strategies will support your goals?
- How will you work together to support your goals?

Matrix Map Resources

- Nonprofit Sustainability: Making Strategic Decisions for Financial Viability (2010)
 - Jeanne Bell, Jan Masaoka, Steve Zimmerman
 - Fiscal Oversight combined with programmatic oversight
 - www.josseybass.com



Community Economic Development Resources



<https://communityactionpartnership.com/community-economic-development-ced/>

Thank you!



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