**Finding Funds for Summer Fun**

How to find additional funds to support your Summer Youth Program

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Learn more about The Fund Raising School at  
www.philanthropy.iupui.edu/thefundraisingschool

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**SYPF Expectations and Grant Proposal Budgeting**

- Our proposed budget is *accurate, reasonable* and *adequate* to fund proposed program activities.
- We will raise funds from a *diverse set of funders* who support our mission and values.
- Fund raising *letters* will be sent at least *six months in advance* of the program start date and will *stress the value of strong youth programming* to the entire community.
- Letters will be *followed up with personal contact*.
SYPF Expectations and Grant Proposal Budgeting

**TRANSLATION**

- Grant funds are not total budget!
- More than one funding source!
- Send letters to potential donors making your case for support!
- Make sure “you” contact each potential donor in person!

**Development Process – Fundraising Pyramid**

- **Linkage**
- **Involvement**
- **Advocacy**

**Planned Gifts**
- Major Gifts
- Big Gifts
- 10% of Donors/60% Funds

**Special Gifts**
- Upgraded Donors
- 20% of Donors/20% of Funds

**Repeat Donors**
- Donors
- Potential Donors
- 70% of Donors/20% Funds

**Linkage**
- Ability
- Interest
Fundraising Cycle

- Readiness
- Stewardship
- Engagement
- Market Evaluation
- Planning
- Cultivation and Solicitation

How do we find this “other” funding?

- Develop a successful project case
- Match your funding priorities with the funder’s
- Communicate your need to the funder
- Empower your volunteers
Individual Giving

Constituency Model
Fundraising is the *Exchange of Values*

NPO

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Donors

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NPO Receives from Donors

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In Exchange, Donors Receive from NPO

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Develop a successful project case

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1. Address the need
2. Develop the solution
3. Build confidence in the organization
4. Create the vision for success

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Building the Case & Mission

State the most powerful philosophical or social values which govern your work.

Summarize the obstacles standing in the way of realizing these values.

Outline what needs to be done—the solutions to overcome the obstacles.

Affirm that your organization exists to help realize these values and carry out the solution.

Fill in the blank, “We believe that...”

Ask yourself, “What is the problem we are solving, or the need we are meeting?”

Ask yourself, “What results do we want to achieve?”

Ask yourself, “What is our organizational commitment to carrying out the activities in order to accomplish all of the above?”

What the Prospective Donor Looks For

- Evidence of:
  - good management
  - Reasonable planning
  - prior support
- Persuasive presentation by credible volunteers
- Absence of pressure
- Invitation to share/join
### Annual Fund Gift Range Chart: $60,000 Goal

<table>
<thead>
<tr>
<th>Gift Range $</th>
<th># of Gifts</th>
<th>Cumulative # of Gifts</th>
<th>Prospect #</th>
<th>Cumulative # of Prospects</th>
<th>$ per Range</th>
<th>Cumulative $</th>
</tr>
</thead>
<tbody>
<tr>
<td>3,000</td>
<td>2</td>
<td>2</td>
<td>10 (5:1)</td>
<td>10</td>
<td>6,000</td>
<td>6,000</td>
</tr>
<tr>
<td>1,500</td>
<td>4</td>
<td>6</td>
<td>20 (5:4)</td>
<td>30</td>
<td>6,000</td>
<td>12,000</td>
</tr>
<tr>
<td>750</td>
<td>12</td>
<td>16</td>
<td>48 (4:1)</td>
<td>78</td>
<td>9,000</td>
<td>21,000</td>
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<tr>
<td>500</td>
<td>18</td>
<td>36</td>
<td>72 (4:1)</td>
<td>150</td>
<td>0,000</td>
<td>30,000</td>
</tr>
<tr>
<td>250</td>
<td>24</td>
<td>60</td>
<td>72 (3:1)</td>
<td>222</td>
<td>6,000</td>
<td>26,000</td>
</tr>
</tbody>
</table>

- **10% of donors**: 60% of goal
- **20% of donors**: 80% of goal
- **70% of donors**: 98% of goal

### Planning Tools - Your Gift Range Chart

<table>
<thead>
<tr>
<th>Gift Range $</th>
<th># of Gifts</th>
<th>Cumulative # of Gifts</th>
<th># of Prospective Donors</th>
<th>Cumulative Prospective Donors</th>
<th>$ per Range</th>
<th>Cumulative $</th>
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</thead>
<tbody>
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</tbody>
</table>

**IUPUI Lilly Family School of Philanthropy**
### Planning tools – Gantt Chart

<table>
<thead>
<tr>
<th>TASK</th>
<th>Month 1</th>
<th>Month 2</th>
<th>Month 3</th>
<th>Month 4</th>
<th>Month 5</th>
<th>Month 6</th>
<th>Month 7</th>
<th>Month 8</th>
<th>Month 9</th>
<th>Month 10</th>
<th>Month 11</th>
<th>Month 12</th>
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</thead>
<tbody>
<tr>
<td>Submit SPYF grant</td>
<td>X</td>
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<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Meet with fundraising team</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Update plan of action and assign responsibilities</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Prepare case for support and fundraising letters</td>
<td>X</td>
<td>X</td>
<td></td>
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<tr>
<td>Send out fundraising letters</td>
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<td></td>
<td>X</td>
<td></td>
<td>X</td>
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</tr>
<tr>
<td>Follow up with potential donors</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Thank donors who gave gifts</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Social media campaign</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<td>X</td>
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<tr>
<td>Board campaign</td>
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<td>Program delivery</td>
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<td></td>
<td></td>
<td>X</td>
<td>X</td>
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<tr>
<td>Reporting results</td>
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<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Celebrate success</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
<td>X</td>
</tr>
</tbody>
</table>

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**IUPUI Lilly Family School of Philanthropy**
### Planning Tools - Strategy Worksheet

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Goals</th>
<th>Audience Description</th>
<th>When</th>
<th>Who</th>
<th>Cost</th>
</tr>
</thead>
</table>
| **HOUSE PARTIES**  | **$3500**| Friends, family, and colleagues of board members | Dec, Feb, Apr   | STAFF: help recruit hosts; help create invitations; thank yous; logistical support  
BOARD: host events; share passion for organization; invite own contacts; provide refreshments | $200 per event       |
| **MAJOR GIFT CAMPAIGN** | **$10,000** | Current donors ($100+)  
Personal solicitations: phone or in person | Nov 30-Dec 31 | STAFF: identify prospective donors; create talking points; assist with solicitations;  
BOARD: identify prospective donors; conduct solicitations | Minimal;  
meeting and postage costs only |
| **BUSINESS CAMPAIGN** | **$10,000** | Businesses in the neighborhood served  
Personal solicitations for cash or in-kind donations to the businesses in the neighborhood | January - March | STAFF: identify businesses, set up timelines; identify contacts, requirements; write letters, fill out applications; make solicitations;  
BOARD: identify businesses, refer to staff, make solicitations with staff input | Minimal;  
postage and meeting costs only |

| Total Income | | Total Expense | |
Communicating the Funding Plan and Results

<table>
<thead>
<tr>
<th>Potential Funding Source</th>
<th>Amount Requested</th>
<th>% of total project cost</th>
<th>Current Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPYF</td>
<td>$10,000</td>
<td>43%</td>
<td>Application submitted</td>
<td></td>
</tr>
<tr>
<td>Greater Indianapolis Health Foundation</td>
<td>$5000</td>
<td>21%</td>
<td>$5000 awarded</td>
<td></td>
</tr>
<tr>
<td>Annual Support Campaign</td>
<td>$5000</td>
<td>21%</td>
<td>$2000 committed</td>
<td>Year end support letters to be sent 10/1/15, 10% ahead this time last year</td>
</tr>
<tr>
<td>Board Giving Campaign</td>
<td>$2000</td>
<td>9%</td>
<td>$1500 committed</td>
<td>Year end push under way currently</td>
</tr>
<tr>
<td>Neighborhood Business Campaign</td>
<td>$1500</td>
<td>6%</td>
<td>$0 to date</td>
<td>Campaign begins in January, 2016</td>
</tr>
<tr>
<td>Total</td>
<td>$23,500</td>
<td>100%</td>
<td>$8500</td>
<td>36% of funds already raised or committed</td>
</tr>
</tbody>
</table>

Case Expressions

- Brochures
- Foundation proposals
- Appeal letters
- Campaign prospectus
- News releases
- Newsletter articles
- Email campaigns
- Social media plans
- Infographics
- Web sites
- Speeches to community organizations
- Print marketing
- Face-to-face conversations
Writing Case Expressions

**Attention**
**Interest**
**Confidence**
**Conviction**
**Desire**
**Action**

**Relevance**
**Proximity**
**Sense of the future**
**Immediacy**
**Excitement**
**Importance**

Volunteering in America

www.volunteeringinamerica.gov
Roles and Responsibilities of Board Members

- Legal
- Representative (organization, community)
- Stewardship
- Self-evaluation

Sample Board Information Sheets

PROSPECTIVE BOARD MEMBER INFORMATION SHEET

Legal Representative
- organization
- community

STEWARDSHIP
Self-evaluation

IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY
Empower Volunteers

<table>
<thead>
<tr>
<th>Plan for fundraising</th>
<th>Say thank you</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify potential donors</td>
<td>Advocate and connect with the community</td>
</tr>
<tr>
<td>Give!</td>
<td>Serve as contacts for foundations and corporations</td>
</tr>
<tr>
<td>Cultivate relationships</td>
<td>Develop planned giving strategies</td>
</tr>
<tr>
<td>Go with staff on visits</td>
<td>Assist with planning and execution of fundraising plans and programs</td>
</tr>
<tr>
<td>Follow up with staff on visits</td>
<td>Deliver gifts and/or help with appreciation activities</td>
</tr>
<tr>
<td>Tell stories to staff and others about the importance of your relationship with the organization</td>
<td>Attend activities and recognize donations</td>
</tr>
<tr>
<td>When relationships and plans are developed, ask for a commitment</td>
<td>Open doors—call associates and friends and introduce them to the organization</td>
</tr>
<tr>
<td>Steward relationships</td>
<td>Ask associates and friends to help find others who might be interested and/or have the capacity to help</td>
</tr>
</tbody>
</table>

Fundraising is . . .

The **right** person asking

the **right** prospective donor

for the **right** gift

for the **right** program

at the **right** time

in the **right** way.