



DESCRIPTION: FUNDRAISING FOR SUSTAINABILITY

PURPOSE

The purpose of this training is to help your organization build a sustainable future by increasing the engagement of the Board in an effective fund development program.

APPROACH

A qualified consultant will work with your organization to conduct this training.

Pre-Work: The executive director and other staff involved in fundraising as well as the Board chair and/or Development Chair will spend time in brief preparation with the consultant, including completing a profile of important data to inform the training process.

Board Session: On-site at your organization; takes approximately three hours of the full Board's time. Many organizations schedule this session in place of a regular Board meeting.

Follow-Up Report and Coaching: After the completion of this training, the organization receives a written report summarizing the process and listing agreed-upon priorities for next steps to strengthen your sustainability. The organization staff can access coaching from the instructor to help address priorities identified in the workshop.

The interactive Board Session will include:

- Review of your organization's fundraising profile and trends
- Board roles in fundraising
- Fund development planning
- Building relationships (Cultivation)
- Asking and following up (Soliciting and Stewarding)
- Monitoring and learning from results
- Prioritizing your work on fundraising sustainability

Key tools that will be developed to support your organization's fund development program include:

- Overview of key indicators and results of the organization's fundraising trends.
- Tailored list of key fundraising responsibilities and shared agreement of general responsibilities.
- Specific ideas of how Board members can help build relationships for your organization, in support of fund development efforts.
- Recommendations about key metrics to measure fundraising success.
- Prioritized list of action steps.

Confidentiality -- The process and report are confidential to the organization, trainer and Pathways staff.

Evaluation – Training participants are asked to return an evaluation form. Additionally, Pathways staff will follow up to track whether the organization improves and/or changes in response to the learning.

REQUIREMENTS

- The organization must be located in and serving one or more of the 18 western NC counties.
- Organization must meet Pathways “Intermediate” criteria, including prior completion and submission of the on-line Assessment. (This information is included in the On-Site Training Application, which must also be completed and submitted.)
- At least 80% of the Board members must commit to attending the training session and complete an evaluation form.
- There is no cost for this training through January 1, 2012(during the pilot phase).