

Funding

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Agenda



- Introduction
- Overview of fundraising strategies
- Making decisions regarding fundraising
- Successes & Challenges



Introduction



Discussion

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How has your organization obtained resources to fulfill its mission? What worked? What did not work?



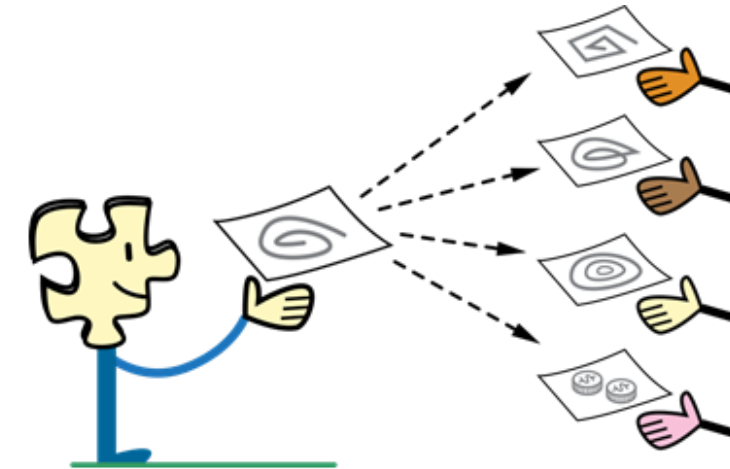


Overview of Fundraising Strategies



How do coalitions/organizations obtain resources?

- Ask
- Share
- Charge
- Earn



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Ask

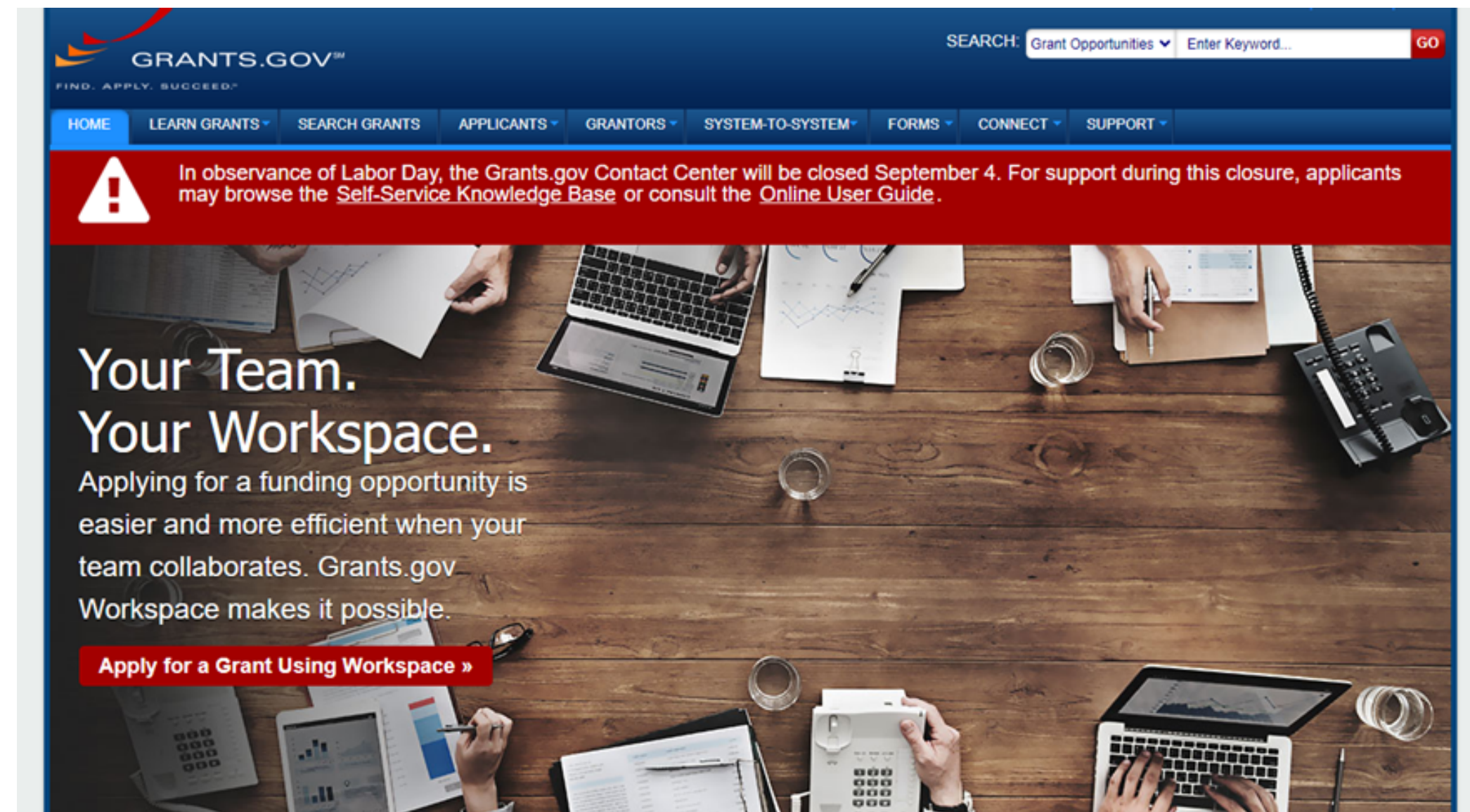
- Grants
- Fundraisers
- Individual Donors
- United Way/Payroll Giving
- Endowed Funds/Planned Giving

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- Local, state, federal, and community foundation
- Large and small
- Watch out for restrictions

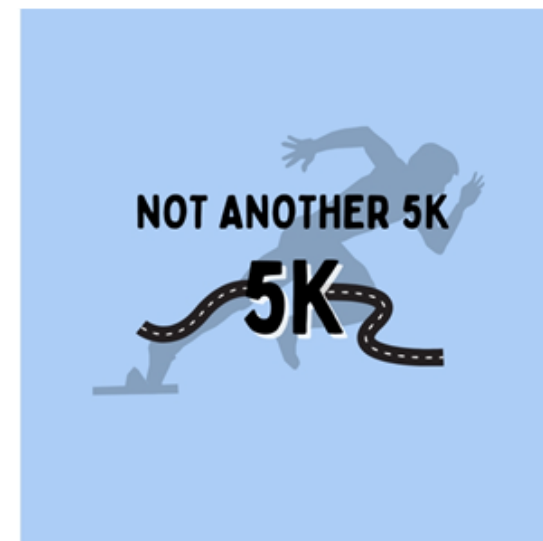




Fundraisers

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- Most successful when they meet more than the need of generating revenue (e.g., launching a new program)
- There are many considerations when planning and implementing a fundraiser:
 - Is it good for the coalition/organization as a whole?
 - Are the resources (time, money, etc.) needed to implement the fundraiser worth the estimated funds that will be raised?
 - Does the proposed fundraiser align with our mission?



Join us for one Pup Crawl night, or all,
& have a howling good time!

March 4 to 7:30p each night

Thurs	Fri	Sat
3 Bend Brewing Bend Brewing Company	4 Crux Crux	5 Worthy Worthy Brewing
10 10 Barrel West 10 Barrel Brewing Co	11 Boneyard Boneyard	12 Wild Ride RDM Wild Ride Brewing
17 Deschutes Deschutes	18 AVID AVID & Immersion	19 Bevel Bevel
24 Cascade Lakes Cascade Lakes	25 Goodlife Goodlife	26 Humane Society Humane Society

PUP CRAWL
Humane Society of Central Oregon

Pet express 100% Benefits the Animals thanks to Sponsors & Breweries

Logo glass & 1 beverage \$10
Logo Glass & 1 Beverage at 3 different nights \$25
Pup Crawl T-shirt \$15
for info & pupdates visit hscso.org



Other “Asks”

- Individual donors
- United Way/payroll giving
- Endowed funds/planned giving

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- Asset sharing
- In-kind
- Leverage shared positions

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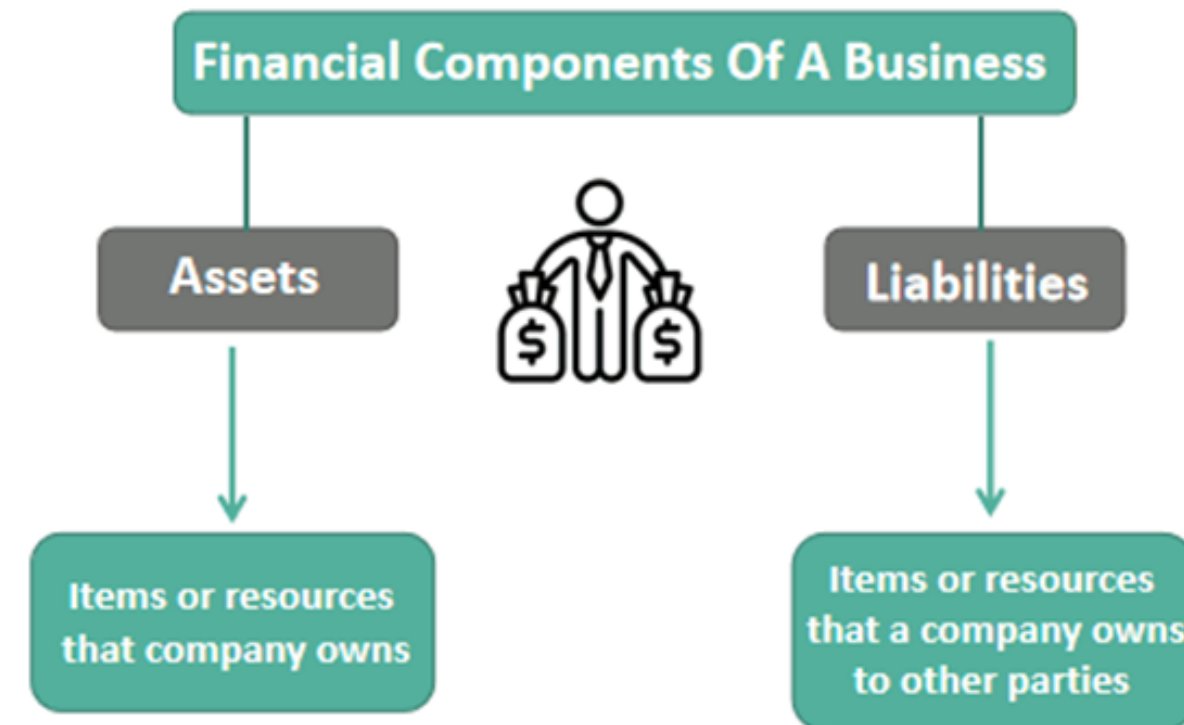


Asset Sharing

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- Assets are things like income, equipment, and space
- Collaboration with other agencies

Assets Vs Liabilities





In-Kind Contributions

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- Anything not considered an “asset”
- Includes staff time, supplies, materials

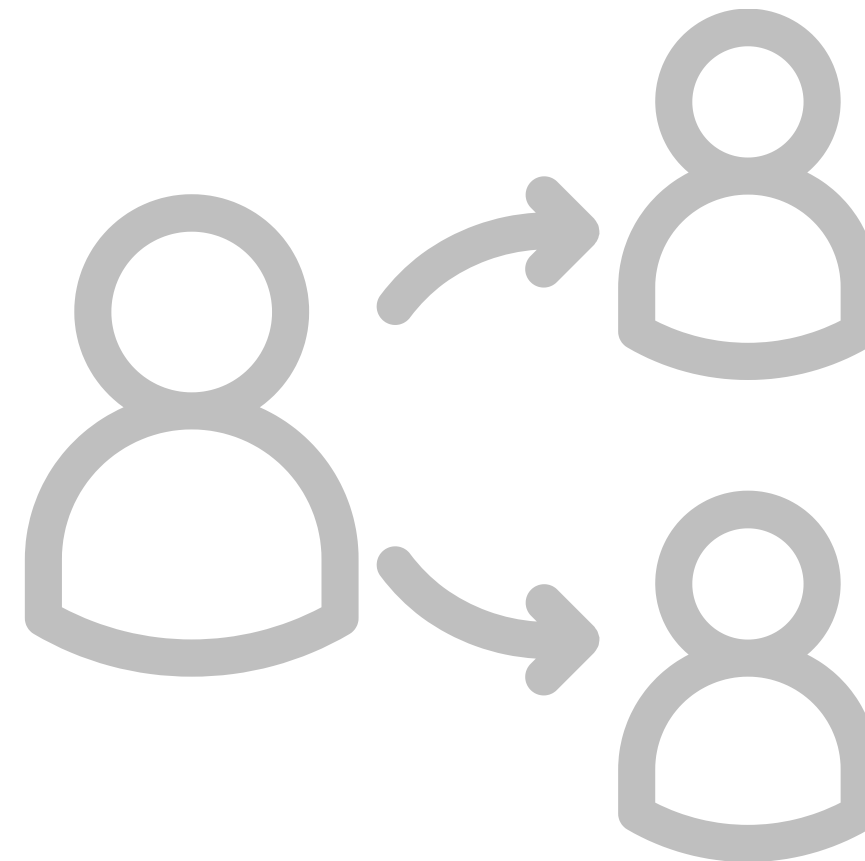




Leveraged Shared Positions

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- When two or more coalitions or organizations share a staff position (e.g., Human Resources)





Charge

- Fee for service
- Fine/penalty with revenue to prevention
- Line item in a budget
- Membership dues
- Tax revenue



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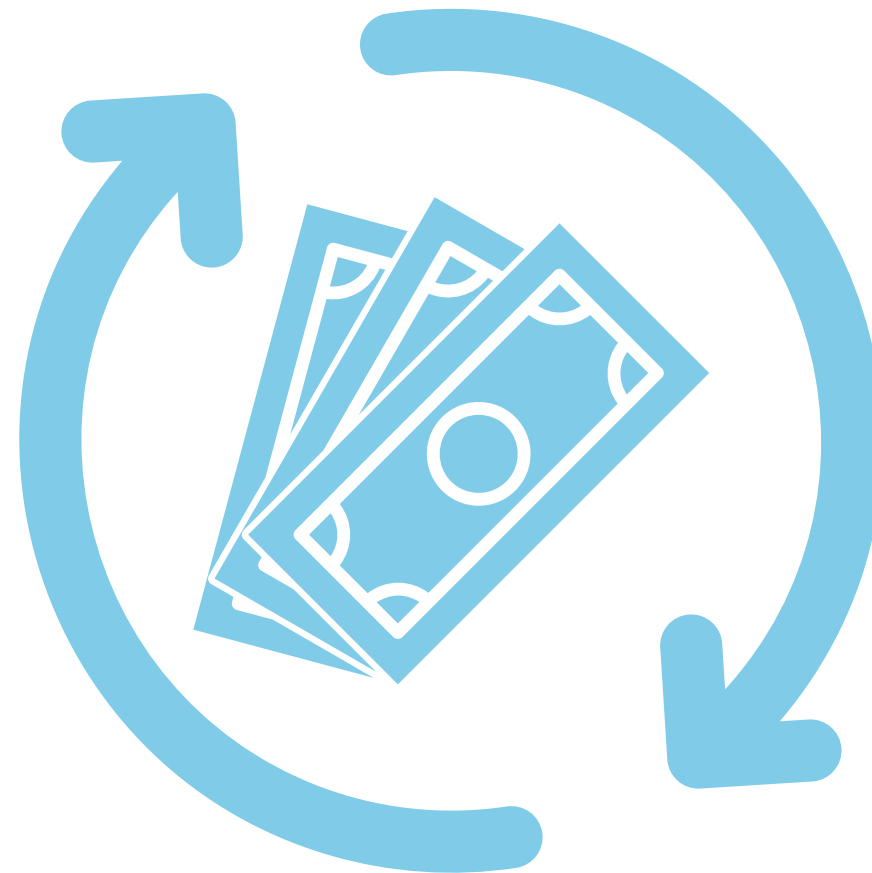




Fee for Service

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- Charging for a service provided to the community (e.g., training)

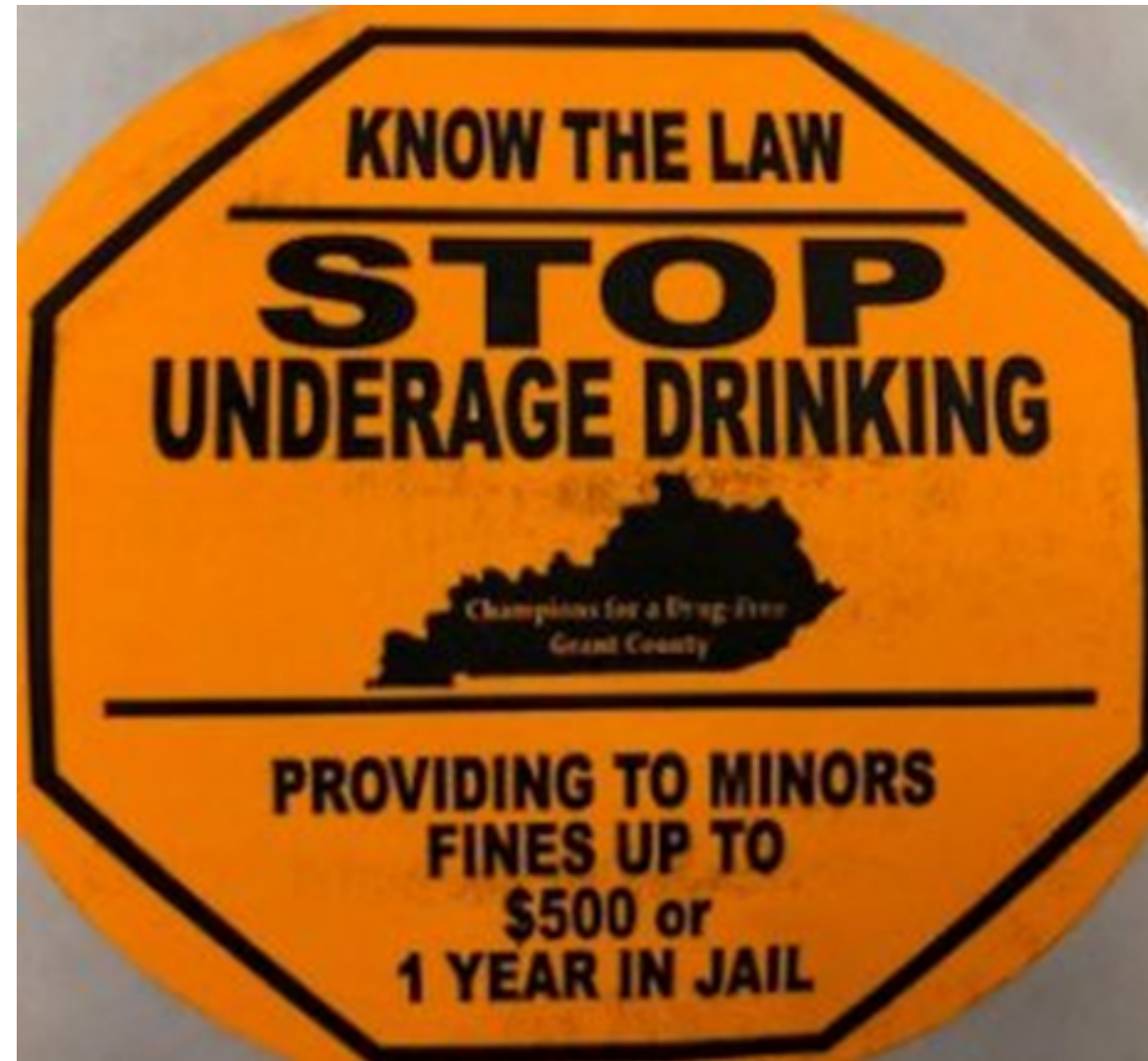




Fine/Penalty with Revenue to Prevention



- Funding from fines or penalties associated with breaking laws and regulations
- For example, fines collected from those convicted of providing alcohol to minors





Line Item in a Budget



- City/county prevention budget
- Other community-based organization or non-profit agency budget

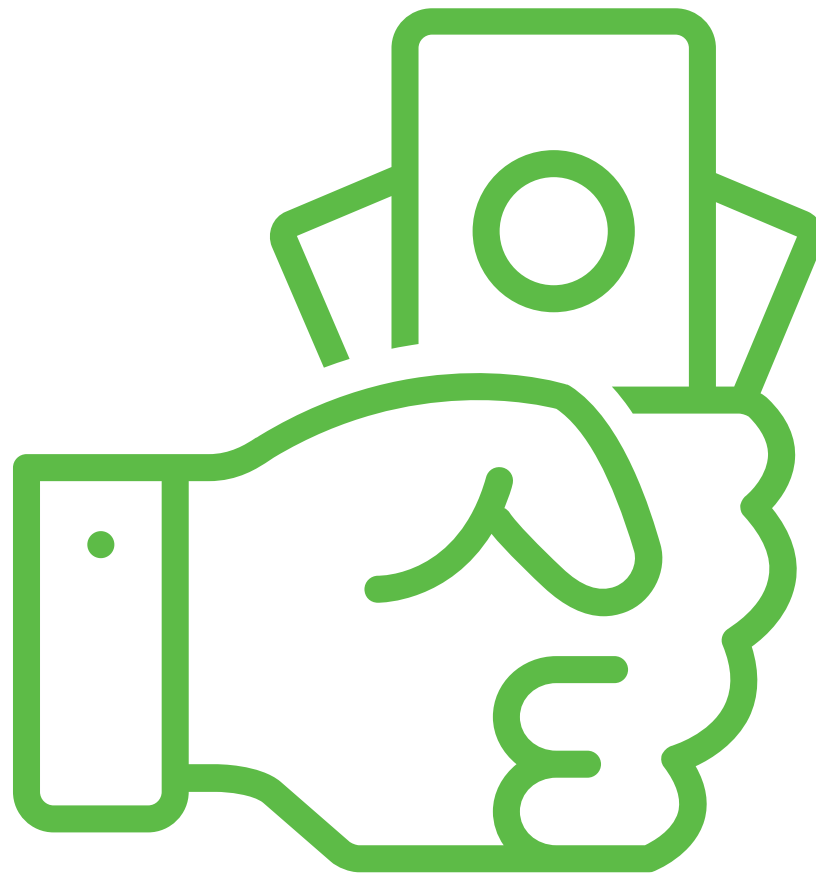
FY15 Budget Request Line-Item Worksheet - Example					
<u>Account No.</u>	<u>Account Description</u>	<u>FY 13 Actual</u>	<u>FY 14 Operating Budget</u>	<u>FY 15 Base Request</u>	<u>FY 15 New Initiatives</u>
EMERGENCY MEDICAL SERVICES					
101-5199-00000-11001	Compensation - Fulltime Regular	\$911,872	\$945,000	\$945,000	\$86,000
101-5199-00000-11050	Compensation - Overtime	\$21,045	\$15,000	\$15,000	
101-5199-00000-12001	Social Security (FICA)	\$69,743	\$66,250	\$66,250	
101-5199-00000-12010	Retirement Plan	\$88,152	\$90,100	\$90,100	
101-5199-00000-12013	Employer 401(A) Contribution	\$1,800	\$1,800	\$1,800	
101-5199-00000-12020	Insurance - Group Health - Employees	\$74,200	\$74,200	\$74,200	
101-5199-00000-12070	Other Employee Benefit Charges	\$34,450	\$34,450	\$34,450	\$28,000
	PERSONAL SERVICES	\$1,201,062	\$1,226,800	\$1,226,800	\$94,000
101-5199-00000-21028	Services - Wireless Phones	\$49	\$300	\$300	
101-5199-00000-22002	Repair & Maint - Office Equipment	\$795	\$800	\$800	
101-5199-00000-22030	Electricity	\$73,001	\$75,000	\$77,000	
101-5199-00000-22034	Natural Gas	\$21,721	\$25,000	\$22,000	
101-5199-00000-22037	Water & Sewer	\$8,550	\$10,000	\$9,650	
101-5199-00000-23001	Travel & Lodging	\$5,426	\$10,000	\$10,000	\$1,000
101-5199-00000-23002	Conferences & Schools	\$1,519	\$5,000	\$5,000	\$1,000
101-5199-00000-23003	Dues & Memberships	\$1,340	\$2,000	\$2,000	
101-5199-00000-23004	Books & Subscriptions	\$1,452	\$1,700	\$1,700	
101-5199-00000-25001	Supplies - Office	\$1,199	\$1,300	\$1,400	\$1,200
101-5199-00000-25006	Supplies - Medical	\$44,648	\$50,000	\$48,000	\$6,000
101-5199-00000-25021	Supplies - Clothing/Employee Uniform	\$5,572	\$5,600	\$5,600	
101-5199-00000-25025	Supplies - Housekeeping	\$10,364	\$9,500	\$9,000	
101-5199-00000-25030	Supplies - Small tools	\$787	\$800	\$800	\$300
101-5199-00000-27009	Op Equip - Other	\$4,725	\$7,000	\$3,550	\$15,000
	OTHER OPERATING EXPENDITURES	\$181,147	\$204,000	\$196,800	\$24,500
101-5199-00000-42002	Vehicle Corrective Maint	\$16,780	\$30,000	\$26,000	\$1,600
101-5199-00000-42004	Tires & Tubes	\$7,133	\$8,000	\$8,000	
101-5199-00000-42005	Fuel Allocations/Unleaded	\$95,630	\$100,000	\$110,000	\$12,000
101-5199-00000-42010	Vehicle Preventative Maint	\$22,224	\$25,000	\$25,000	\$3,000
101-5199-00000-42011	Vehicle Insurance Charges	\$9,335	\$9,300	\$9,300	\$900
101-5199-00000-42012	Vehicle Replacement Charges	\$41,352	\$45,000	\$45,000	\$8,000
101-5199-00000-44001	Copier	\$3,163	\$3,000	\$3,400	
101-5199-00000-44002	Postage	\$314	\$400	\$400	
101-5199-00000-44003	Printing	\$80	\$400	\$400	
101-5199-00000-44004	Telephone System Base Charge	\$1,984	\$1,800	\$1,800	
101-5199-00000-44006	Telephone System - Long Dist	\$324	\$400	\$400	
101-5199-00000-44007	Telephone System - Other	\$0	\$200	\$200	
101-5199-00000-44008	Copier Paper	\$548	\$600	\$600	
	INTERNAL SERVICE CHARGES	\$198,865	\$224,100	\$230,500	\$25,500
TOTAL EMS		\$1,581,074	\$1,654,900	\$1,654,100	\$144,000



Membership Dues

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- Works best when coupled with value-added services that only the coalition can provide, such as policy updates, lobbying efforts, evaluation, research, etc.





Tax Revenue



- Usually requires an act by a legislative body
- Most successful when tied to the problem you are working to address (e.g., alcohol taxes and underage drinking)



- Entrepreneurial activity
- Business plan
- Partial ownership of for-profit enterprises

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Entrepreneurial Activity

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- For example, a catering company owned by a job training organization





Business Plan

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- The products or services you have, their relative value, how you intend to market them, to who, and a timeline for implementation





Partial Ownership of For-Profit Enterprises



- Develop a relationship with a business that shares the values and mission of what you do

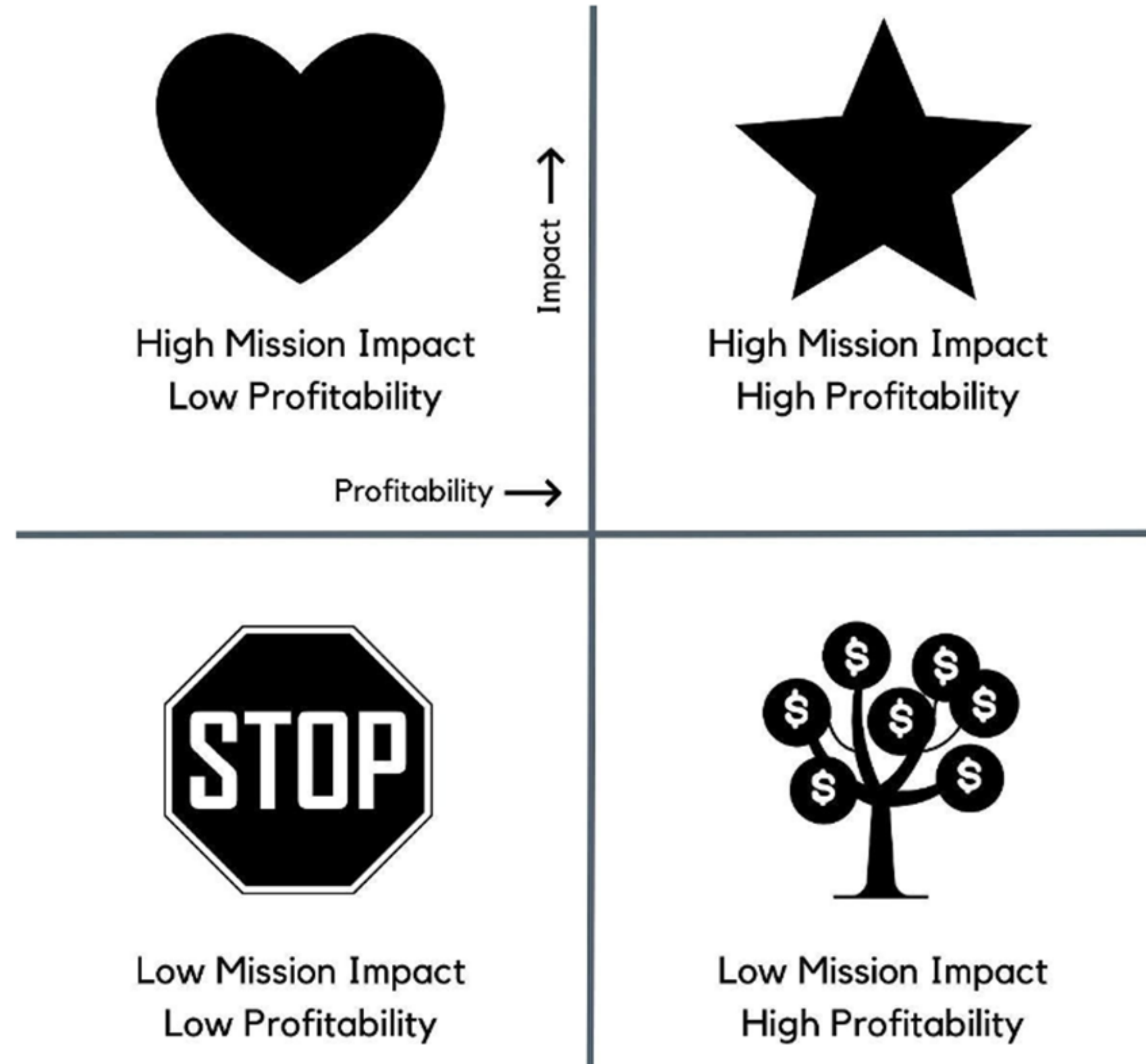


Making Decisions Regarding Fundraising



To apply or not to apply?

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Successes and Challenges



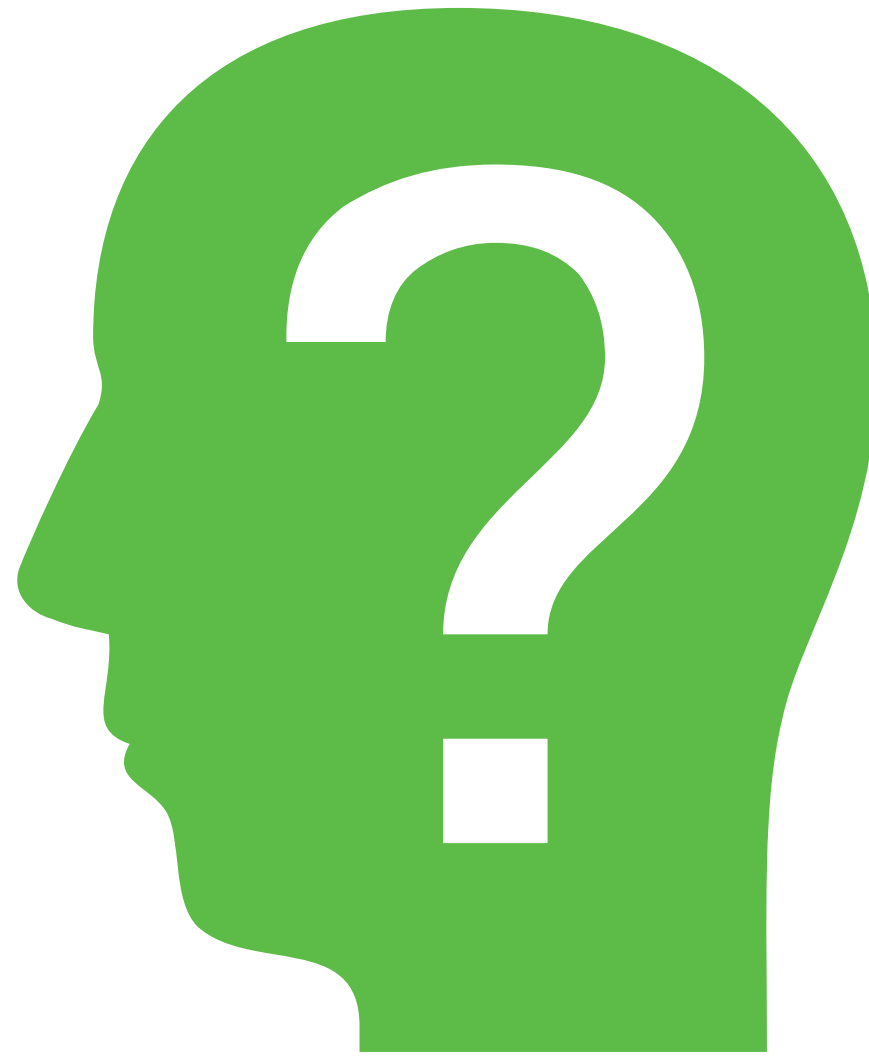
Successes & Challenges



- What has been your experience with different types of fundraising?
- Based on your experience, what advice do you have for others?



What questions do you have?



epiphany community services