

## December Peer Networking Meeting

### ***Fundraising and Finances***

United Way of GP&SNJ

Tuesday, December 18, 2012

9:30-11:30 AM

### **Announcements**

- Claire Passantino, Let's Read Math. Want to do math in your summer enrichment program? We need Philly locations to do professional development (we can provide *free* PD session for your staff)! Read children's books and do fun standards -based math activities. Contact: Claire, 215-493-0458, [clairepass@letsreadmath.com](mailto:clairepass@letsreadmath.com), [www.letsreadmath.com](http://www.letsreadmath.com).
- Minerva Perez, Congreso de Latinos Unidos, Inc. Work opportunity! Now looking for 2 High School Coordinators. Contact: 267-240-0072, [gomez@congreso.net](mailto:gomez@congreso.net), [www.congreso.net](http://www.congreso.net).
- Edisa Rodriguez, Philly Goes 2 College. PG2C has group of college students who can speak with your youth about the college-going process and share their story! Visit [www.PhillyGoes2College.com](http://www.PhillyGoes2College.com) and book us to meet with them. Contact: Edisa, 215-686-0315, [edisa.rodriquez@phila.gov](mailto:edisa.rodriquez@phila.gov).

### **Panel Discussion**

#### **1. Alia Burton** Project Associate, Women's Community Revitalization Project.

[aburton@wcrpphila.com](mailto:aburton@wcrpphila.com)

*Bio (excerpt): Alia Burton joined the Women's Community Revitalization Project in September 2011. Her role includes providing training and technical assistance to community-based organizations wishing to develop facilities (especially child care/Head Start facilities). Ms. Burton's academic background includes a Master's program in City and Regional Planning at the University of Pennsylvania.*

- History of WCRP
- Realized early on the funding and budgets are important
- Why and how we help with funding: we understand that orgs need sound budgets for both the facilities development process and for operations, so we have helped groups understand the PA Pre-Kindergarten Scholarship Tax Credit program (component of the EITC program, which can be used for out-of-school time programs).
- EITCs (Educational Improvement Tax Credits): <http://www.newpa.com/find-and-apply-for-funding/funding-and-program-finder/educational-improvement-tax-credit-program-eitc>
- Partnering is important; handout lists of possible businesses to approach
- Networking, collaboration, organization: necessary for EITs (and fundraising in general)

#### **2. Venus David, M.Ed** Founder/CEO, So Love Autistic Center.

[vdavid@solovecenter.org](mailto:vdavid@solovecenter.org)

*Bio (excerpt): Mrs. David possesses over 15 years' experience in the non-profit and behavioral health sector – with a driving commitment to the autism population. She holds a Masters in Special Education with Minor in Behavior Modification. She currently serves on the board of three local community-based non-profit organizations, consulting on effective fundraising and program development. Recently, Mrs. David lent her curriculum development experience to one of Philadelphia's first project-based learning manuals for after-school programs.*

- Sustainability.
- Trendy: want OST programs and nonprofits to move toward licensing
- Several 21CCLC-funded OST programs in Philly

- Pay attention to what’s going on currently in the economy (Ex 1: looming “fiscal cliff” means many donors are trying to give now rather than next year. Ex 2: donors have limited \$, and when faced with the choice, would rather support hurricane disaster relief than support your OST program).
- Research and good writing are critical for grant-writing; invest in researching, evaluating, and writing skills among staff (i.e., rather than spend \$3k to hire an outside grantwriter for a one-shot deal, invest that money to train your staff on grantwriting)
- Subscribe to Foundation listservs
- Note: more dollars come from individuals than from large organizations. Also, data shows that among wealthy baby boomers, grants from women may be at least twice as much as grants from men
- Sustainability: earn money, donor base, grants (3-legged stool)

**3. Edward Garcia** Deputy Vice President of Children and Youth, Congreso de Latinos Unidos, Inc. [garciaed@congreso.net](mailto:garciaed@congreso.net)

*Bio (excerpt): Edward Garcia joined Congreso in 2006 and became Vice President of Children and Youth Services Division in 2009, overseeing out-of-school time programs and alternative education. With more than a dozen years of experience in the non-profit sector with a focus on youth development, Garcia holds a Bachelors of Arts from Florida International University.*

- Asked who in the room creates, manages, invoices for, and is familiar with their budget
- Important to know *fixed* and *variable* costs. Some program costs (e.g., rent, electricity) are likely to be steady year-round. Others (e.g., trip expenses, food) fluctuate with the season, much like attendance does.
- Think ahead in terms of what expenses to expect (Ex: given low attendance in winter, it may be more cost-effective not to add a new hire now; just wait until February to pick up the demand in spring). Consider plotting out your expenses from prior years, each overlaid on top of one another so you can visually see the pattern of the fluctuating “wave.”
- Important to be familiar with and know how to manage a budget.
- Need to know what you can/should cut back on, in terms of expenses.
- *Financial planning* (and forethought) is/are the key!

### Questions and Answers

**Q:** EITCs: Eligibility for OST (as well as preschool) programs?

**A:** Yes.

**Q:** EITCs: Income requirements?

**A:** No – see link to specific guidelines.

**Q:** How do you handle evaluation component of grant? What is not requested?

**A:** Read between the lines – most funders want a measurable outcome. Make sure it’s not “piecemeal.” Really need the evidence.

### Breakout Sessions: Take-Aways

- **Nancy’s table: grant-writing**
  - use common sense- read application directions
  - when you receive grant application, read it, answer questions
  - if asked to, volunteer as a grant reviewer, can obtain a lot of information and perspective
  - always provide substantial info and explain it – substantiate your assertions

- get to the point (don't make grant reviewers work too hard)
- don't diss colleagues (e.g., using language that suggests yours is the only program that does anything good for children); use donor template,
- don't use passive voice (omits important information)
- cultivate relationship (reciprocal) with funder

- **Alia's table:**

- details of tax credits, guidelines are very minimal,
- do homework though so you will be ready for next grant opportunity,
- why businesses are on board with the program
- be aware of deadlines (May 1 and July 1 are important dates)
- additional details available at WCRP's workshop on January 17 (Contact Alia at [aburton@wcrpphila.com](mailto:aburton@wcrpphila.com))

- **Edward's table:**

- public-funded programs dictate expectations but organizations can still maintain autonomy and show you are the expert
- measuring outcomes, sometimes have to dig for this information

- **Venus's table:**

- social enterprise model- need reality that organizations need funding and revenue, ---having - passion is not enough
- do not be dependent on donors alone, need sustainability; a lot of resources given;
- show what organization has done, determine desired outcomes and make sure you can measure them; crowd-sourcing
- look to college interns/students for help in grant-writing/fundraising

### **Next Meeting**

*Hot Topics for OST Directors and Administrators*  
Tuesday, January 15, 2013, 9:30 - 11:30 AM