

A person wearing a plaid shirt is sitting at a wooden desk. They are looking at a laptop screen which is out of focus. Their right hand is holding a pencil and writing on a spiral-bound notebook. The background is dark and blurred.

# SUSTAINABILITY PLANNING

LOOKING BEYOND THE GRANT TIMELINE





# Funding For Good

Owner, Mandy Pearce (*right*)

Lead Consultant, Marie Palacios (*left*)

development coaching | board development  
| budgeting | template creation | strategic  
planning | grant research | consensus  
building | community planning

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# Takeaways

1.


Key components of sustainability planning

2.

Tips on how to include capacity building components in proposals


3.

Communication strategies to engage and retain donors



How can I communicate with donors that their immediate support lays the foundation for long-term sustainability and success?

- Asked every successful grant writer, ever.



“First and foremost, the corporate funder wants  
their dollars to have a measurable impact.  
They want their brand  
to be equated with good citizenship.”

– Michael Devlin, Director of Grants,  
Harvard Pilgrim Health Care Foundation





# Typical Sustainability Replies on Grants

- Diverse funding streams (fees for service, major gifts, corporate sponsors, annual fund, monthly giving, etc.)
- Social enterprises
- Draw downs from endowments or investment income
- History of increased giving from year-to-year
- Experienced development staff to secure dollars from year-to-year
- List of pledges promised for a program or project

**But these are not the only options, and one size does not fit all.**

# How to Answer the Sustainability Question

## The wrong answers:

- God will provide.
- We plan to develop alternative funding sources, including foundations, personal donors, and fundraising events.
- Because we are a new organization and just beginning to create a fundraising plan, we are working to diversify our income streams over the next few years.
- We are implementing a special event and the proceeds will benefit this program/project in the next fiscal year.



# Sustainability: The RIGHT Answers

## **Right Answer #1**

We have a long-standing commitment to the planning process, as reflected in our current strategic plan, which emphasizes funding and identifies the resources needed to continue our work in the future. A copy of our strategic plan is available upon request

## **Right Answer #2**

We have a designated staff person responsible for raising these resources, and they have a successful ##-year track record of doing so. (Cite some indicator(s) of their success)

## **Right Answer #3**

As the leadership of our organization, our BOD has an explicit and committed role as both fundraisers and donors, as stated in their description of responsibilities, which they all individually honor. Our Board of Directors Pledge is available upon request.

## **Right Answer #4**

We have a track record of successful fundraising events, appeal letters, personal donations, and other initiatives for cultivating resources. \*Give examples



# Sustainability: The RIGHT Answers *cont.*

## **Right Answer #5**

We have a successful track record of managing projects of similar scope. \*Give examples

## **Right Answer #6**

We have established relationships with other community partners, service providers, volunteers, funders, and other stakeholders who are committed to working with us to achieve our mutual missions through this project. \*Give examples

## **Right Answer #7**

We have an Operating Reserve that covers at least three months of operating expenses, and a policy that governs how our reserves can and cannot be used. Our Operating Reserve policy is available upon request.

## **Right Answer #8**

Our grant writer and Board of Directors have received training from [insert organization you have partnered with for training] on how to cultivate sustainable funding and other resources using proven, replicable strategies. \*Insert any organization where you are receiving development training that is relevant.



## Helpful Hint

Think of long-term sustainability, not just year-to-year or crisis-to-crisis.

Begin to think in ways that will **show a partner or funder** that you have thought through **how their dollars will be used to create the sustainability you AND they seek.**



# NEXT LEVEL

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BEYOND THE BASICS



## Sustainability Planning in Grants 5 Examples:

1. Program Development
2. Leadership Development
3. Consumable vs Long-Term Impact
4. Staff Time
5. Marketing Materials

# Content without Context is Meaningless

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# Program Development

## Need funding now to do 'x' in the future.



Building Bridges seeks \$10,000 to purchase our first 5 pressure washers to get our social enterprise and job training program off the ground without initial debt.



Each pressure washer has a 20-year expected life-span and the revenue generated through our pressure washing services will cover ongoing maintenance.



This initial investment will allow Building Bridges to grow our business and generate the revenue to sustain quality and consistent programs for many years to come.

# Leadership Development



We need “x” to hire our first development director to help us reach out current fundraising goals, prepare for an upcoming capital campaign and establish our first planned giving program.



We need ‘x’ to increase our current part-time Executive Director to full-time. Community needs for housing have continued to increase at a rate of 5%+ or more annually for the past 3 years in Smith County. A full-time ED will significantly increase our organization’s capacity to facilitate partnerships, enhance programming, expand services, and diversify funding streams.

# Consumable vs Long-Term Impact

## **REMEMBER: Capacity vs Consumable**

Ronald McDonald House Charities (RMHC) awards grant dollars for things the children in program use/hands-on, such as:

- cots to sleep on
- brushes for grooming horses
- crayons
- paper
- books
- vans for transporting the youth

The cots, brushes and van are all items that will help build organizational and program capacity (i.e., sustainability). The other items are nice to have, but they are consumable. Once they are used, there will be an annual need for replacement.

# Staff Time

## Tips for Securing Salaries

When requesting “salaries” consider what the donor seeks to fund:

1. Direct Services

2. Capacity Building

- Highlight the unique skills/qualifications of the staff member and explain how this person/position increases the program’s impact.
- Explain what “problem” this staff member can resolve.
- Confirm how you intend to sustain the position after the initial funding cycle.

# Marketing Materials

## Forward Thinkers: Marketing

You need marketing materials, so how do you ask for them and relate them to sustainability?

**You need to think:** *How will it generate income in the future?*

**Example 1:** Creation of our first website will not only increase exposure for the organization but allow for ease of access by current and potential clients.

Additionally, a website will allow us to have online fundraising platforms, a donate now page, a dedicated planned giving section, highlight campaigns, events, etc. and it will facilitate email list growth. As a result, our potential donor prospects will increase and allow us to raise more dollars and create long-term sustainability.



# Marketing Materials

## Forward Thinkers: Marketing

*Continued*

**Example 2:** A well-designed planned giving brochure will allow us to share ways to give and the impact of giving with major donor prospects and leave them with information that will answer questions after our meeting.

These brochures can have a huge impact in securing planned gifts after an initial conversation. Planned giving impacts sustainability in perpetuity through endowment investment and annual draw downs.

# Marketing Materials

## **Forward Thinkers: Marketing**

*Continued*

1. Consider replacing words such as “printing or postage” with terms such as:

- outreach
- community engagement
- visibility initiative

2. Focus on the potential “outcomes” vs “outputs”

(product vs. the impact created)

A photograph of two people, likely a man and a woman, sitting on a rusty metal fence. They are seen from behind, looking out over a vast, green, hilly landscape. The person on the left is wearing a white long-sleeved shirt, blue jeans, and a dark blue baseball cap. The person on the right is wearing a brown long-sleeved shirt, blue jeans, and a dark baseball cap, and is pointing their right arm towards the horizon. Both are wearing green rubber boots. A semi-transparent white rectangular box is overlaid in the center of the image, containing the title text.

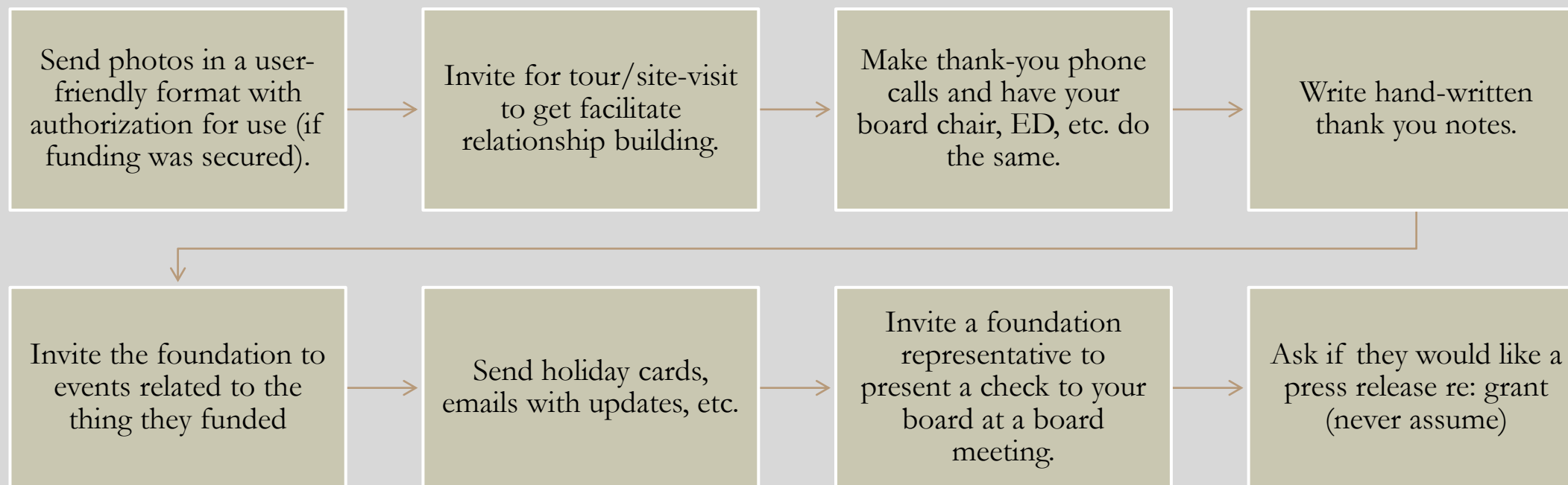
# **COMMUNICATION STRATEGIES TO ENGAGE AND RETAIN DONORS**



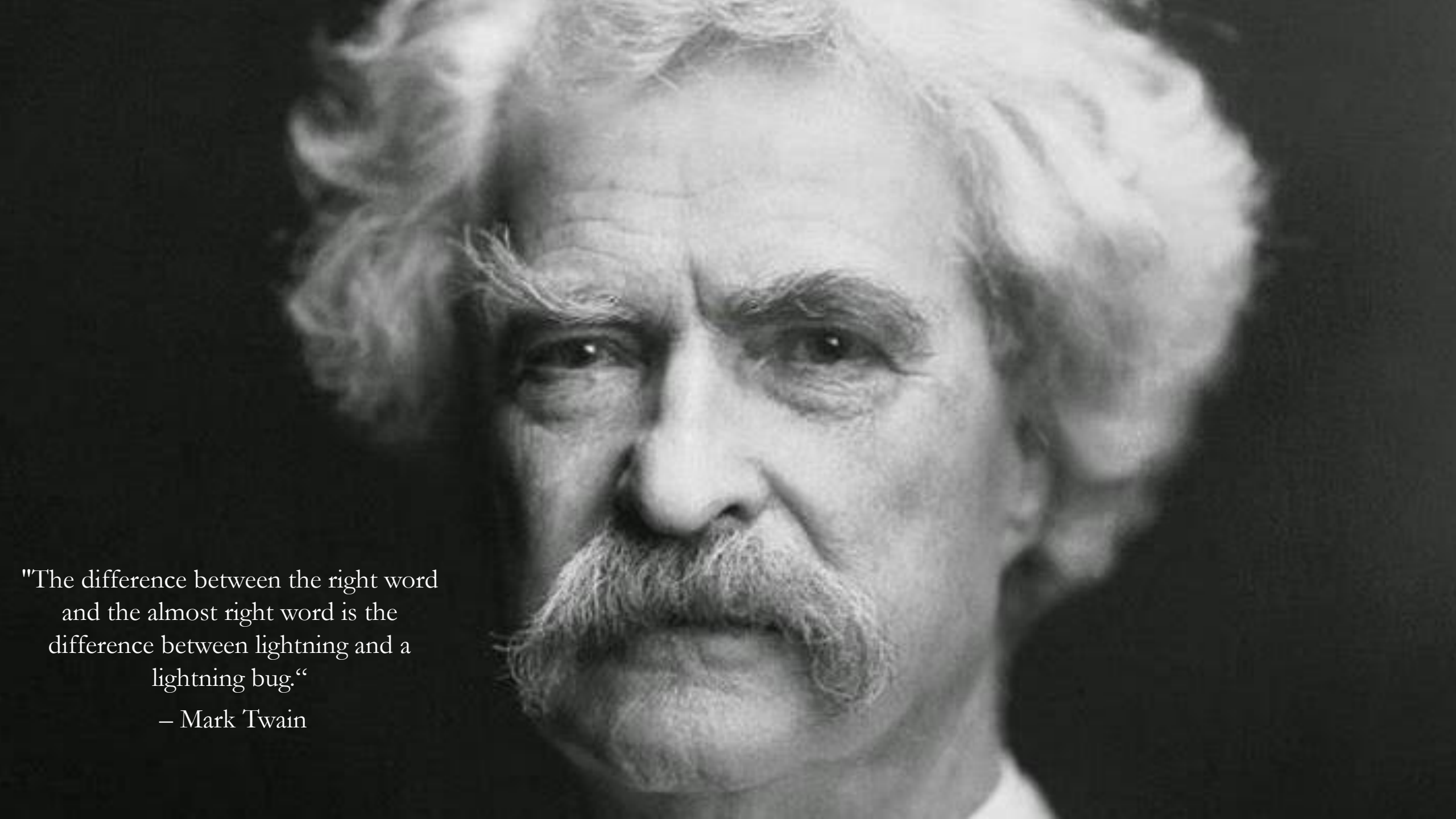
## Through the Lens of Foundation Donors

- Have you done your due diligence?
- Is your request time-sensitive?
- Did you reach out early to start the relationship building process?
- Did you follow the foundation guidelines for the best way to initiate contact (phone, email, in-person, etc.)?
- Is your submission 'quality'?
- Did you follow-up with a thank-you for the opportunity to apply?
- Did you follow-up for feedback if you were not funded?

# Ways You Can Build a Great Relationship With Foundations





A black and white portrait of Mark Twain, showing his face from the chest up. He has a prominent mustache and curly hair. The background is dark.

"The difference between the right word  
and the almost right word is the  
difference between lightning and a  
lightning bug."  
— Mark Twain



## Grant Writing Webinar Series

WRITING WITH INTENT

### **The Writing With Intent webinar series is for you if:**

1. you've never written a grant before and want high-quality training
2. you're a writing pro & need to keep your skills up-to-date

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**Covering topics such as:**

- Effective Grant Research
- Timesaving Templates
- Executive Summaries and LOIs
- Program Design
- Budgeting to Fully Fund Your Overhead
- Budgets
- Sustainability Planning
- Partnership Agreements Made Easy
- Cold Turkey Conversations with Donors
- The Measure of Success: Creating Tools and Processes to Report Impact



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**Q + A**





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