



“TOOLS FOR SUCCESS” WEBINAR SERIES FOR ASSETS FOR INDEPENDENCE GRANTEES

Fundraising Resources for IDA Programs

December 14, 2012



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- Having trouble dialing in?
 - Just listen on your computer!
 - Connect your speakers or a headset to your computer.
- **Having technical difficulties? Contact tmurphy@cfed.org**

Housekeeping

- This webinar is being recorded.
- A transcript and link to the recording will be available 1 week after the webinar.
- The webinar will last for a half hour.
- **Having technical difficulties? Contact tmurphy@cfed.org**

Housekeeping

- All webinar attendees are muted to ensure sound quality.
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Not an AFI grantee yet?

- Assets for Independence (AFI), which is administered through the Office of Community Services (OCS) at the U.S. Department of Health and Human Services, provides federal funding to community-based nonprofits and government agencies for Individual Development Accounts (IDAs).
- To learn more about applying, visit www.idaresources.org
- Upcoming Orientation Session:

Prospective Grantee Webinar: Developing Resources and Partners

Wednesday, January 9, 2013 2:00 – 2:45 PM EST

Register at www.idaresources.org

Your Guest Speaker

- **Devin J. Thompson**

Deputy Director of Development, CFED

- As the Deputy Director of Development, Devin oversees key functions and creates systems to ensure the smooth operation of the resource development office. As the manager of CFED's grant-writing staff, he ensures that the organization is responsive to the needs and interests of funders and maintains strong and productive relationships between those funders and CFED's program departments.



Your Moderator

- **Yehwroe Sinyan**

AFI Resource Center



- The AFI Resource Center provides training and technical assistance to AFI grantees, their project partners, and other organizations that are providing asset building services across the nation.

Objectives of the Session

- To learn how to use three new “Tools for Success” fundraising resources.
- To learn about the diversity of fundraising options and how to capitalize on them.
- To understand the makings of a “stellar” fundraising grantee.

Tools for Success



A Guide to Proposal Writing

This guide is intended to help guide AFI grantees as you prepare proposals for finding non-federal matching funds. The following worksheet will walk you through all the questions you need to consider, help you outline your proposal and give you space to prepare preliminary responses before moving them into the template provided by the funder. The funder to whom you are applying should also provide you with guidance for drafting a proposal, and additional resources are available in [The Foundation Center’s Guide to Proposal Writing](#).

What Makes Up a Proposal?

The essential elements of a proposal outline the problem, solution, the organization and its expertise and funding (include sustainability).

Defining the Problem and Proposing a Solution: The Statement of Need

Why is an IDA program necessary in your community? (Be sure to use messaging that reflects your donor’s key interests. See the Communication Frames resource and Messaging Template for more help with this.)	
What are the right facts or statistics to support your argument for the funder you are approaching? (Use personal success stories where possible; cite the data specific to your community; provide evidence of support from established community leaders.)	
How is your IDA program a different, or better, way to create economic self-sufficiency for families than other programs in your locale?	
How will your IDA program appeal to funders with specific interests?	

The Details of Your Project Description

1. **Objective:** What will be achieved by the project? What

Additional Questions?

Tools for Success



Fundraising Resources

Below is a list of fundraising resources that may be helpful during the proposal writing process. These are in addition to the resources available to you through the [AFI Resource Center](#).

Fundraising Resources and Capacity Building

- [Foundation Center](#) – you can also find your [local](#) Cooperating Collection
- [GrantSpace](#)
- [Strengthening Nonprofits: A Capacity Builder's Resource Library](#)
- [Network for Good Learning Center](#)
- [National Center for Charitable Statistics](#)
- [GuideStar](#)
- AFI Tools for Success Webinars: [State and Local IDA Funding](#) and [Fundraising Strategies](#)

Resources for Building Your Needs Statement

- [USA CenStats Database](#)
- [Federal Financial Institution Examination Council Data](#) (by county and MSA)
- [New America Foundation Federal Education Budget Project](#)
- [Association for Enterprise Opportunity Data Center](#)
- [Assets & Opportunity Scorecard](#)

Resources to Make the Case for IDAs

- [American Dream Demonstration Reports](#)
- [CFED reports and literature](#)
 - [Why Assets Matter](#)
 - [Weathering the Storm: Have IDAs Helped Low-Income Homeowners Avoid Foreclosure?](#)
 - [Household Financial Security Framework](#)
 - Additional resources can be found at the [CFED Assets Research Library](#)

Additional Questions?

Tools for Success



Donor Profile Template

Before you can make a lasting and mutually beneficial long-term relationship with a donor, whether an individual or organization, you have to know what links that funder to your cause and organization. These shared interests and common vision inform your approach to “the ask” and help direct your communications with that funder in the short- and long-term. Something as simple as knowing which board member is appropriately positioned to invite a prospect to an event or remembering facts about your donor’s family can make the difference between a “Yes” and “No (at this time)”.

The template on the following pages is intended to help you develop a profile for prospective or current donors. The completed donor profile can inform your outreach to specific donors that you have identified for the AFI IDA program, and the profile should be updated after each interaction with that donor. You may also want to regularly update your donors with information about the program, successes, and messages of appreciation.

Last Edited: MM/DD/YY	By:
+	
Name (including maiden, if appropriate)	
Nickname/Prefers to be called	
Birthday	
Address	
Phone numbers (business, cell, home)	
Email	
Alternate Address	
Category (choose one)	Prospect Donor Planned Giving Prospect
Relationship to organization, including date relationship began (e.g. Who referred them? How did they become interested or involved? Have they volunteered? Any board member or staff friendships?)	
Recommended Next Steps (as of MM/YY)	

Additional Questions?

Fundraising Fundamentals

- What makes a grantee a “stellar” fundraiser?
- For more additional tips and ideas consider revisiting our previous webinars on fundraising:
 - [State and Local IDA Funding](#)
 - [Fundraising Strategies for IDA Programs](#)

Contact Information

For general questions about the AFI program,
visit www.idaresources.org.

- **Devin J. Thompson**
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- **Yehwroe Sinyan**
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Thank you!

Assets for Independence Resource Center

- AFI Resource Center:
 - 1-866-778-6037
 - info@idaresources.org
 - www.idaresources.org
- AFI Program Website:
 - www.acf.hhs.gov/assetbuilding