



---

## RESOURCES FOR SUSTAINABILITY PLANNING AND ACTIVITIES

---

There are literally hundreds of Web sites that offer tools and information related to the many aspects of sustainability, from getting your board involved to launching a major giving campaign. Similarly, a search on Amazon.com or other online booksellers will yield thousands of print publications on the topics of fundraising and sustainability. This training supplement presents a hand-picked list of materials that will serve as a good starting point for U.S. Department of Education, Office of Safe and Drug-Free Schools mentoring programs. We encourage you to spend a little time investigating the following resources (and others you may find as you review these materials) and see which ones are likely to be most helpful for your own unique situation. Many of them are available for free on the Internet, through the Mentoring Resource Center's Lending Library,\* or at your local public library.

### **MRC Publications on Sustainability Topics:**

***Building a sustainable mentoring program: A framework for resource development planning***, provides information about how to develop a comprehensive sustainability plan based on your assessment of internal and community assets.

<http://www.edmentoring.org/pubs/sustainability.pdf>

***Continuing mentoring program services: Fundraising and other sustainability practices*** is a case study of how one mentoring program developed a solid base of support using a diversified combination of local and national resources.

[http://www.edmentoring.org/pubs/sustainability\\_study.pdf](http://www.edmentoring.org/pubs/sustainability_study.pdf)

***MRC Fact Sheet #5: Getting started with program sustainability***. This fact sheet provides a concise overview of the key steps involved in developing and implementing a comprehensive sustainability plan for your OSDFS mentoring program.

<http://www.edmentoring.org/pubs/factsheet5.pdf>

***MRC Fact Sheet #9: Sustainability on the fly***. This fact sheet offers quick and simple sustainability activities that program staff can incorporate into their already busy schedules.

<http://www.edmentoring.org/pubs/factsheet9.pdf>

***MRC Fact Sheet #12: Preparing for tomorrow today***. This issue examines the art of reinventing partnerships to sustain your OSDFS mentoring program. This brief resource offers advice on creating scenarios based on your program's future financial and in-kind needs.

<http://www.edmentoring.org/pubs/factsheet12.pdf>

---

(\*The MRC Lending Library can be accessed online at:  
[http://www.edmentoring.org/lending\\_library.html](http://www.edmentoring.org/lending_library.html).)

---

## Resources Available to OSDFS Mentoring Grantees Through the MRC Lending Library:

***Five life stages of nonprofit organizations: Where you are, where you're going, and what to expect when you get there.*** Simon, J.S. and J.T. Donovan. (2001). Saint Paul, MN: Amherst H. Wilder Foundation.

The Life Stage model can help any mentoring program or nonprofit understand its current status and prepare to move forward. Directors, board members, and consultants can use this guide to identify problems, prepare for transitions, and watch for warning signs. A very good resource for OSDFS mentoring programs as they prepare to transition off grant funds.

<http://www.nwrel.org/resource/singleresource.asp?id=14029&DB=res>

OSDFS mentoring grantees can borrow items directly from the collection by using the username "grantee" and the password "success" or by calling Library Associate Kay Logan at 503-275-0135. Further guidelines for using the library can be found online at:

[http://www.edmentoring.org/lending\\_library.html](http://www.edmentoring.org/lending_library.html).

***Foundation fundamentals: A guide for grantseekers, 7th Ed.*** Schladweiler, K. (2004). New York, NY: The Foundation Center.

A comprehensive guide on how to identify and cultivate foundation and corporate funding. It includes historical information on foundations, information on Internet searches, presentation strategies, planning tools, and a comprehensive list of fundraising resources.

<http://www.nwrel.org/resource/singleresource.asp?id=16194&DB=res>

***Fundraising for the long haul.*** Klein, K. (2000). Berkeley, CA: Chardon Press.

This book is an excellent resource on developing a comprehensive fundraising strategy for any grassroots organization.

<http://www.nwrel.org/resource/singleresource.asp?id=14031&DB=res>

***Fundraising on the Internet: The e-PhilanthropyFoundation.org's guide to success online.***

***Jossey-Bass Nonprofit and Public Management Series, 2nd Ed.*** Warwick, M., T. Hart and N. Allen (Eds.). (2002). San Francisco, CA: Jossey-Bass.

The book covers the basics of online fundraising and also covers more advanced topics such as developing effective Web content for repeat visitors, conducting advocacy campaigns, and utilizing charity portals. An outstanding resource for programs seeking to implement online fundraising.

<http://www.nwrel.org/resource/singleresource.asp?id=14179&DB=res>

***Fundraising responsibilities of nonprofit boards.*** Greenfield, J.M. (2003). Washington, DC: Board-Source.

A brief guide to the role of boards in fundraising and sustainability planning.

<http://www.nwrel.org/resource/singleresource.asp?id=15198&DB=res>

***Mentoring toolkit guidebook: Techniques and approaches for building partners in your community and strengthening your program.*** (2005). Sacramento, CA: California Governor's Mentoring Partnership.

This toolkit includes a 25-minute promotional video hosted by Lynn Swann, a resource CD and a booklet. Part 1 of the toolkit focuses on building partners in business, education, community, and youth groups. Part 2 focuses on strengthening your program. Subsections include increasing program visibility, reaching out to mentors, reaching out to mentees, program sustainability, and tracking successes. The accompanying CD includes sample forms, flyers, ideas for media pitches, activities, etc.

<http://www.nwrel.org/resource/singleresource.asp?id=16203&DB=res>

Library resources cont.

***Secrets of successful fundraising: The best from the non-profit pros.*** Weisman, C. (Ed.). (2000). St. Louis, MO: F.E. Robbins & Sons Press.

Fundraising tips from 19 non-profit consultants and leaders on topics such as planned giving, hiring consultants, direct mail, grants, corporate giving, Internet fundraising, and donor recognition.

<http://www.nwrel.org/resource/singleresource.asp?id=14620&DB=res>



**Select Print Publications on Sustainability and Organizational Development:**

***Effective fundraising for nonprofits: Real-world strategies that work.*** Bray, I. (2005). Berkeley, CA: Nolo.

This book efficiently covers everything a beginning fundraiser or new nonprofit manager needs to get started on building a strong development program. Chapter topics include “Fundraising Tools” and “Developing Your Plan,” as well as getting grants, designing donor-friendly Web sites, raising money through business activities, and bequests and planned gifts. Handy checklists, highlighted tips, and forms and templates to get you started make this book highly user-friendly and practical.

***Fearless fundraising for nonprofit boards, Revised Ed.*** Worth, G. (2003). Washington, DC: Board-Source.

Written for the individual board member as well as board chairs, development committee chairs, and chief executives, this brief book presents ways to motivate and empower board members so they wholeheartedly involve themselves in fundraising activities.

***FriendRaising: Community engagement strategies for boards who hate fundraising but love making friends.*** Gottlieb, H. (2006). Tucson, AZ: Renaissance Press.

This workbook is devoted to helping board members of nonprofit organizations become comfortable with the concept of “friend-raising” rather than “fundraising,” offering specific activities that board members can use to expand and deepen community involvement in the organization. Based on the author’s personal experiences, the workbook can be particularly helpful for boards of new nonprofits and those that are having difficulty sustaining themselves.

***The grass roots fundraising book: How to raise money in your community, Updated and Revised Ed.*** Flanagan, J. (1992). Chicago, IL: Contemporary Books.

This is an indispensable resource for novice community fundraisers. Flanagan includes foolproof money-making strategies already tested by hundreds of successful fundraisers, the basics of organizing special events, advice on approaching philanthropists, a step-by-step guide to direct mailing, and much more.

***Grassroots fundraising journal.***

An outstanding periodical with practical advice for busy nonprofit and community leaders. Subscribe or download back issue articles at:

<http://www.grassrootsfundraising.org/>

Print resources cont.

**Grassroots grants: An activist's guide to grantseeking, 2nd Ed.** Robinson, A. (2004). San Francisco, CA: Jossey-Bass.

An excellent resource on applying for grants and how to incorporate grant funding into an overall sustainability plan.

**Insider's guide to grantmaking: How foundations find, fund, and manage effective programs.** Orosz, J.J. (2000). San Francisco, CA: Jossey-Bass.

Written from the foundation staffer's perspective, this book has a lot of useful information for any program seeking foundation funds.

**Securing your organization's future: A complete guide to fundraising strategies, Revised Ed.** Selzer, M. (2001). New York, NY: The Foundation Center.

This guide describes how to strengthen your nonprofit's capacity to raise funds and promote long-term stability and shows how to determine the best mix of funding resources for the long term. Worksheets and case studies help you formulate your own plan. An annotated bibliography is included.

**Special events: Proven strategies for nonprofit fundraising, 2nd Ed.** Wendroff, A.L. (2003). Hoboken, NJ: John Wiley & Sons.

This book provides a logical and comprehensive outline of event planning, with a special emphasis on fitting these events into the larger framework of the nonprofit's organizational goals. An accompanying CD includes sample timelines, worksheets, checklists, budgets, writing examples, decision tables, and contracts.



**Select Online Publications on Sustainability and Organizational Development:**

**Developing a sustainability plan for Weed & Seed sites.** (2005). Washington, DC: U.S. Department of Justice, Office of Justice Programs.

This guidebook, originally designed for local Weed & Seed programs funded by the Department of Justice, has excellent advice and a process that could easily be adapted by OSDfS mentoring programs as they plan for their post-grant services.

<http://www.ojp.usdoj.gov/ccdo/pub/pdf/ncj210462.pdf>

**Effective capacity building in nonprofit organizations.** Silverman, L., L. Taliento, H. Baumann, D. Salinas, R. McCabe and M. Banos. (2001). Reston, VA: Venture Philanthropy Partners.

This comprehensive guide can help mentoring programs assess where their services fit in the community and how they can engage resources to sustain the program. Especially useful is the appendix, which features a self-assessment grid that can help a program identify areas of need beyond just funding.

[http://www.dol.gov/cfbci/tlc/docs/SustainabilityLibrary\\_SectionD\\_1/Mckinsey-fullreport.pdf](http://www.dol.gov/cfbci/tlc/docs/SustainabilityLibrary_SectionD_1/Mckinsey-fullreport.pdf)

---

Online resources cont.

**Finding funding: A guide to federal sources for out-of-school time and community school initiatives, Revised and Updated Ed.** Padgette, H.C. (2003). Washington, DC: The Finance Project. A comprehensive resource on finding federal funding with useful tips that any program will find useful.  
<http://www.financeproject.org/Publications/FundingGuide2003.pdf>

**Fundraising ideas that work for grassroots groups.** Wyman, K. (1995). Ottawa, Canada: Department of Canadian Heritage, Voluntary Action Program.  
An excellent overall review of local fundraising strategies, especially for nonprofits with limited resources.  
<http://www.pch.gc.ca/progs/pc-cp/pubs/e/pdfdocs/Fr4grass.pdf>

**Guide to funding research.** (2006). New York, NY: The Foundation Center.  
An excellent overview of Foundation Center resources and the basics of beginning the search for funding opportunities.  
<http://foundationcenter.org/getstarted/tutorials/gfr/>

**Guide to special events fundraising, 2nd Ed.** Wyman, K. (1990). Ottawa, Canada: Canadian Heritage, Voluntary Action Program.  
This resource is a very, very comprehensive guide to event planning for nonprofits.  
<http://www.pch.gc.ca/progs/pc-cp/pubs/e/pdfdocs/SpecEv.pdf>

**The road to sustainability: Sustainability workbook.** (n.d.). Flint, MI: National Center for Community Education.  
This 51-page workbook includes planning tools and worksheets for developing a sustainability plan, information on major funding sources for afterschool programs, and a list of resources for further learning.  
<http://www.afterschoolalliance.org/sustain.pdf>

**Rural fundraising: Success stories for CASA/GAL programs.** Klein, K. (2006). Seattle, WA: National CASA Association Resource Library.  
This guide describes successful and easy-to-imitate fundraising strategies for rural programs. An introductory essay titled "Raising Money in Rural Communities" is followed by 15 examples of successful strategies, from direct mail to events to earned income. Examples are described in detail, and most are accompanied by sample materials.  
<http://www.casenet.org/program-management/resource-dev/rural-fundraising.htm>

**Show us the money! Fundraising fundamentals for mentoring programs. Mentoring Plus Workshop Series.** Webster, B.E. (2001). Folsom, CA: The EMT Group.  
A large training resource that is also useful as a stand-alone resource, this curriculum covers many aspects of fundraising, such as grants, events, individual donations, and long-term planning.  
<http://emt.org/userfiles/ShowUsSeries3.pdf>

**Strategic planning: Five steps to a more secure future. In The sustainable nonprofit.** Richardson, C. (February 17, 2004). New York: The Foundation Center.  
This brief Web article offers some excellent planning advice and addresses common misconceptions about strategic planning.  
<http://foundationcenter.org/pnd/tsn/tsn.jhtml?id=60800001>

Online resources cont.

***Sustaining community-based initiatives: Module 1. Developing community capacity.*** (1995). Battle Creek, MI: W.K. Kellogg Foundation.

This resource covers several useful topics, such as developing program leadership, building community support, and conducting a community resource assessment.

<http://www.wkkf.org/Pubs/Health/Pub656.pdf>

***Using NCLB funds to support extended learning time: Opportunities for afterschool programs, Strategy Brief.*** Fortune, A., H.C. Padgett and L. Fickel. (2005). Washington, DC: The Finance Project.

This resource covers many different funding streams, such as comprehensive school reform, supplemental services, and other innovative programs.

<http://www.financeproject.org/publications/usingnclbfunds.pdf>



### **Select Organizations, Resources, and Search Tools Related to Sustainability:**

**America's Promise** offers templates and sample documents to assist you with every phase of your efforts to engage corporations and businesses. They're designed to be downloaded and customized with your specific information.

<http://www.americaspromise.org/community/corptoolkit/tools.cfm>

The **American Association of Fundraising Counsel** promotes and supports ethics, excellence, and leadership in advancing philanthropy. It also has a private foundation that publishes an annual report called Giving USA and keeps track of philanthropic news and trends.

<http://www.aafc.org>

**Business Week** online has a section devoted to philanthropy, including an interactive chart of top corporate donors that shows cash and in-kind gifts, percent of gross revenue and net profits, and general giving priorities.

<http://www.businessweek.com/bwdaily/philanthropy/index.html>

The **Catalog of Federal Domestic Assistance** is a searchable database that lists all federal funding opportunities, including some that are anticipated to be funded. Also provided are links to other government sites and tips on grantwriting.

<http://www.cfda.gov>

The **Chronicle of Philanthropy's** guide to grants, including an electronic database (fee required for use) of corporate and foundation grants.

<http://philanthropy.com/>

The **Coalition for Community Schools** advocates for community schools as the vehicle for strengthening schools, families and communities. Their Web site includes a great page on funding collaborative school-community programs, with links to additional online resources.

<http://www.communityschools.org/funding.html>

---



Organizations and tools cont.

**Common Ground Consulting** offers numerous resources for mentoring programs and other social profit organizations, including downloadable board development and sustainability planning tools, articles, and links to other sites.

<http://consultcommonground.com/index.cfm>

The **Corporation for National and Community Service (CNCS)** provides comprehensive information about its programs and how organizations can benefit from them. You can also find your state's CNCS state office contact information here.

[http://www.nationalservice.gov/for\\_organizations/overview/index.asp](http://www.nationalservice.gov/for_organizations/overview/index.asp)

The **Council on Foundations** has an excellent free searchable database of local community foundations. If you aren't aware of the community foundations in your area, this is one way to find them quickly.

<http://www.cof.org/Locator/index.cfm?menuContainerID=34&crumb=2>

The **Finance Project** is a nonprofit research, consulting, technical assistance, and training firm for public and private sector leaders. Their Information Resource Center has useful resources on sustainability planning, including a database of promising practices.

<http://www.financeproject.org/irc/promising.asp>

<http://www.financeproject.org/index.asp>

The **Foundation Center** has fundraising information and links to the sites of hundreds of grant makers. The site has a quick search engine that's available at no cost and a more comprehensive searchable database available by subscription. It also offers workshops in grantwriting and other services. Their proposal-writing tips are especially useful for novice grantwriters.

<http://foundationcenter.org>

**Fundsnet Online Services** has access to hundreds of resources, including links to grant makers and a useful tool to find foundations by state.

<http://www.fundsnet.com>

**Giving Institute: Leading Consultants to Nonprofits** (formerly the Association of Fundraising Professionals) promotes best practices in the field of philanthropy. Its Web site has useful information on all kinds of resource development strategies and posts an annual report on giving in the United States.

<http://www.afpnet.org/index.cfm>

The **Grant Consideration Rubric** is a tool that allows you to evaluate which grants are most appropriate for your program based on eligibility, suitability, and other factors.

<http://www.k12grants.org/tips/tools.htm#Blank Overview>

**Grants.gov** allows organizations to electronically find and apply for current competitive grant opportunities from all federal grant-making agencies. Grants.gov is the single access point for over 900 grant programs offered by the 26 federal grant-making agencies.

<http://www.grants.gov>

---

### Organizations and tools cont.

The **Grantsmanship Center** offers workshops in grantsmanship, fundraising publications, a free newsletter, a link to the daily digest of grant opportunities from the *Federal Register*, and state-by-state information on public and private funding sources.

<http://www.tgci.com>

**Philanthropy News Network Online** is a daily online news service that reports on nonprofit agencies and philanthropy.

<http://www.pnnonline.org>

**SchoolGrants Index to Sample Proposals** provides copies of successfully funded proposals for a wide variety of youth and educational initiatives.

[http://www.k12grants.org/samples/samples\\_index.htm](http://www.k12grants.org/samples/samples_index.htm)

**United Way's** site describes its national priorities and has a zip code search to find your local organization.

<http://national.unitedway.org/>

**Wilder Collaboration Factors Inventory** is a tool for assessing the factors that influence the success of a collaborative partnership between two organizations. This can be a useful tool for programs that are seeking new partners for increased sustainability.

[http://surveys.wilder.org/public\\_cfi/index.php](http://surveys.wilder.org/public_cfi/index.php)



## Software and Tools for Tracking Individual Donors and Funding Sources:

### **Exceed!Basic**

Geared towards nonprofits. Good for managing both individual donors and campaigns.

<http://www.telosa.com/products/ebasic/index.html>

### **Sage Fundraising 50** (formerly Paradigm)

This company has a few higher-end versions, but this is the one that would be most applicable to mentoring programs or nonprofits in general. It can do donor profiling, special event management, integration with online fundraising (apparently it works well with PayPal and Network for Good), management of recurring campaigns, and other useful reporting and charting functions.

<http://www.sagenonprofit.com/products/fundraising/paradigm/default.aspx>

### **Raiser's Edge**

This product has been a popular nonprofit choice for a long time. It can handle a wide variety of fundraising methods: direct giving, events, estate giving, etc. It features a lot of automated tasks, such as generating thank you letters, receipts, membership renewal notices, etc.

<http://www.blackbaud.com/products/fundraising/raisersedge.aspx>

---

### Donor software cont.

#### **GiftMaker Pro**

Another software package with modules you can add, including an event planning module, and a volunteer management module. They really pride themselves on their Prospect Rating System, which supposedly enables you to target those donors that really are likely to come through for you.

<http://www.campagne.com/nonprofit/software/giftmakerpro.html>

#### **DonorPerfect**

This product comes in both a PC-based format (on a local machine) and a Web-based format that can be accessed remotely. It also has tools that can help target potentially fruitful donors. It does a good job of tracking donor history and does some nice reporting and data analysis.

<http://www.donorperfect.com/>

#### **Donation Solution**

This one also tracks volunteer tasks and hours, making it highly flexible. One drawback is that it offers a Web-interface only; your program does not actually house the software or the actual data. But they do offer a sliding monthly price depending on number of names being tracked.

<http://www.donationsolution.com/>

### **Database Resources (for researching options or building a customized tracking tool)**

#### *Inexpensive donor databases*

<http://www.techsoup.org/howto/articles/databases/page1642.cfm>

#### *Choosing specialized software (or using what you already have)*

<http://www.coyotecom.com/tech/software.html>

#### *Donor management software comparison*

<http://www.techsoup.org/howto/Files/donormatrix.pdf>

#### *Database planning guide*

<http://www.techsoup.org/howto/Files/DatabasePlanningWorkbook.pdf>

---

## Online Donation Services:

### Entango

Geared specifically towards nonprofits. Can be done with a merchant account or without. Set-up fee is a little stiff, but this is a very popular and trusted service.

<http://www.entango.com/>

### Network for Good

This is a Web site that you can use to solicit volunteers online AND accept donations. They do this in conjunction with the GuideStar, which lists all nonprofits that submit 990 forms to the IRS. You may want to take the time enhance your GuideStar profile. They take a 3 percent cut, which is fairly reasonable.

<http://www.networkforgood.org/Npo/fundraising/donations/>

<http://www.guidestar.org/>

### Just Give.org

Also uses GuideStar to list nonprofits. They can set up an online donation system for your Web site.

<http://www.justgive.org/html/nonprofits/index.html>

### Groundspring's Donate Now

Aimed at nonprofits. Features the ability to create donation pages that have the look and feel of your Web site. Cheap to set up with monthly fees thereafter.

<http://www.groundspring.org/services/donatenow.cfm>

### Click and Pledge

This service also targets nonprofit clients.

<http://www.clickandpledge.com/>

### Kintera Sphere

Very in-depth; almost more of a comprehensive fundraising software. But, it can do everything your nonprofit needs around online donations.

[http://www.kinterainc.com/site/c.owL8JoO7KzE/b.1488561/k.7407/Kintera\\_Sphere\\_Overview.htm](http://www.kinterainc.com/site/c.owL8JoO7KzE/b.1488561/k.7407/Kintera_Sphere_Overview.htm)

### PayPal

Originally designed for buying stuff off eBay, this tool has grown quite a bit. The ability to accept online donations is apparently one of the options you have if you create an account with them, and you can simply insert the button/code into your existing Web site.

<http://www.paypal.com/>

There is an additional listing of available services online at:

<http://www.affinityresources.com/pgs/awz55Online2.shtml>

### Articles and Resources About Soliciting Online Donations

*Online donations: Sorting out the chaos*

<http://www.techsoup.org/howto/articles/funding/page1208.cfm>

*Online donation engine providers*

<http://www.affinityresources.com/pgs/awz55Online2.shtml>

*Some legal implications of soliciting online using third-party hosting agents*

<http://www.nonprofits.org/npofaq/16/21.html>

*Exploring the options: Online donation processing choices for nonprofits*

<http://www.onphilanthropy.com/site/News2?page=NewsArticle&id=5353>

*How to accept donations online using credit cards*

<http://www.nonprofits.org/if/idealist/en/FAQ/QuestionViewer/default?category-id=58&item=23&section=16&sid=35073798-34-dqMCz>