



Resource Development



PANO



**Standards for
Excellence**
Replication Partner

Resource Development

- Resource Development Plan
- Sources of Income
- Fundraising Activities
- Donor Relationships and Privacy
- Acceptance of Gifts
- Fundraising on Behalf of the Organization

No part of this presentation may be considered legal advice. Please consult your legal counsel with any questions.





Resource Development The Plan Itself: Have one!

- Plan for getting resources needed
- Diversified funding streams (income sources)
- Appropriate and aligns with values
- Board approved
- Framework for organization's financial resources
- Reviewed with budget in mind

Resource Development Costs are Reasonable Over Time

- Ensure that fundraising costs achieve a 3:1 ratio
 - Use the 990 to determine ratio
 - 3-5 years
- Calculation of Fundraising Effectiveness Ratio

Amount raised
Fundraising Expenses

(Amount spent to raise it)



Resource Development

Sources of Income

- Sources of Income
- Consider all sources and impact on:
 - Population
 - Demographics
 - Mission Alignment
 - Feasibility
 - Risk



Resource Development Materials & Activities

- Fundraising Solicitations:
 - Accurate
 - Truthful
 - Identifying organization info
 - No undue influence
 - No excessive pressure
 - Respectful of donors
- Honor promises about how donations are used
- Do not pressure people
- Required Disclosure Statements



Resource Development Donor Relationships and Privacy

- Consider needs of community
- Board approved policy
 - How donors' personal information is used
 - Donors' right to be anonymous
 - Curtail repeated mailings
 - Removal from lists
 - Donor intention
- Follow donors wishes



Resource Development

Acceptance of Gifts

- Acceptance of Gifts Policy
- Process for receiving gifts
 - Type of gifts
 - Donor source
- What the donation is used for
- What it will/will not accept
 - Example: Type of property accepted
- Whether to accept an unusual or unanticipated gift



Resource Development Fundraising on Behalf of the Organization

- Everyone who raises money must follow policies
- If using consultants, only use those properly registered (if applicable)
- No percentage-based compensation



Thank You Any Questions?

Ashley Suhler Tobin
Standards for Excellence Director
PANO
Ashley@pano.org

Standards Ed packets:

<https://pano.org/standards-for-excellence-codebook/>

