



Toolkit for Program Sustainability, Capacity Building, and Volunteer Recruitment/Management

INTRODUCTION

This toolkit is intended to help you, as either a current or potential AmeriCorps grantee, to develop a program that is sustainable, builds organizational and local capacity, has the full involvement of community volunteers, and produces outcomes beyond those accomplished by AmeriCorps members alone. It will lead you through the processes for developing a sustainability and capacity building plan and applying a variety of methods, approaches and strategies to carry out that plan.

The toolkit contains the following sections:

	Section Title	Contents
1	Overview of Corporation Requirements	Explanation of Program Sustainability, Capacity Building, and CNCS Requirements
2	Strategies for Capacity Building Activities	Discussion of Four Key Strategies for Developing a Plan, with Suggested Activities and Examples from AmeriCorps Programs
3	Nine Steps to Develop a Program Sustainability Plan	Step-By-Step Guide to Developing a Plan
4	Sample Sustainability Plan	Example of a Complete Plan Using the Strategies Presented in this Toolkit
5	Directory of Website Resources	Additional Internet Resources for Developing Your Plan

Note: *This toolkit was developed from material provided by Campaign Consultation, Inc., with assistance from Aguirre International. It is intended to provide useful tools and information to both potential and current AmeriCorps programs and help orient them to the thinking required to develop a program that demonstrates sustainability, capacity building, and the involvement of volunteers. However, relying on this information cannot guarantee an award, and the toolkit should not be referred to by program applicants in their application submissions.*

1. OVERVIEW OF CORPORATION REQUIREMENTS AND EXPECTATIONS

A. WHAT IS PROGRAM SUSTAINABILITY?

Program Sustainability is the ability of an AmeriCorps program to continue engaging a community's citizens to meet the needs of the community, through potentially changing circumstances and sources of support. The Corporation for National and Community Service views its grants as investments, expected to yield results significantly beyond those attributable to the specific Federal funds provided. The 2004 AmeriCorps Guidelines include a variety of suggestions for achieving program sustainability, including the diversification of revenue sources, partnerships and collaborative strategies, organizational and community capacity building, and the strategic use of AmeriCorps members and community volunteers. Because your AmeriCorps program is designed to address critical local needs, you need to begin developing strategies early for how services will build on the specific activities supported by your grant.

B. WHAT IS CAPACITY BUILDING?

Capacity Building is a process that helps a program or organization enhance its mission, strategy, skills, systems, infrastructure, and human resources to better serve community needs. Experience has shown that to foster and *sustain* effective programs, organizations must be both viable and well-managed. Regardless of how imaginative a program's design may be, its effectiveness will be largely dependent on a variety of other factors, including the skill of the organization in implementing the program, its financial viability, its capacity to establish effective quality controls, its ability to measure program performance, its skill in creating partnerships and mobilizing volunteers and resources for its activities, and its ability to provide various forms of administrative support.

Therefore, capacity building is essential to the sustainability of programs and sponsoring organizations so they can continue to meet community needs efficiently and effectively. The next section of the Toolkit provides some specific examples of how AmeriCorps programs have successfully used capacity building to enhance their prospects for sustainability.

C. WHAT ARE CNCS REQUIREMENTS?

CNCS envisions a key role for AmeriCorps members in building program capacity and developing local volunteers.

"AmeriCorps strengthens communities by involving citizens directly in serving

community needs. AmeriCorps members help bring individuals and groups from different backgrounds together to cooperate in achieving constructive change and to solve critical community problems....”

*“...A fundamental purpose of AmeriCorps is to help recruit, support, and manage the vast networks of volunteers that meet community needs. By creating volunteer opportunities and helping organizations to effectively engage volunteers, AmeriCorps programs multiply their impact, build organizational capacity, and support the development of sustainable programs ... Accordingly, successful applicants will be those that address how their AmeriCorps program will effectively engage and support volunteers in meeting community needs.”
(2004 AmeriCorps Guidelines, p. 13)*

Likewise, CNCS recognizes the crucial importance of sustainability principles:

The Corporation sees sustainability as vital to meeting the needs of communities across the country. In order to ensure that Corporation programs are sustainable, applications should include specific information that demonstrates how an organization intends to improve capacity and move towards sustainability, ensuring that its national and community service program can continue in the absence of Corporation funding. We will use plans and progress towards achieving sustainability as a criterion in making new and continuation grant awards. (2004 AmeriCorps Guidelines, p. 18)

With regard to AmeriCorps members, the *Guidelines* further notes that the role members may play in the building of capacity has changed:

*“Previously the Corporation had advised that only AmeriCorps*VISTA members may conduct certain capacity-building activities. We now encourage AmeriCorps members to engage in certain capacity building activities as well. For example, AmeriCorps members may recruit and manage other volunteers...write training materials...assist in raising funds and securing resources to support service activities...conduct outreach to expand the number of individuals served...develop community partnerships that are intended to strengthen communities...” (2004 AmeriCorps Guidelines, p. 18-19)*

This toolkit will help you consider strategies for incorporating the Corporation for National and Community Service’s new requirements into your program.

D. EXPECTATIONS AND BENEFITS

CNCS expects your program to demonstrate how AmeriCorps members can reinforce and build relationships with partners such as community leaders, foundations, residents,

organizations, and businesses. CNCS encourages programs to address issues such as the following in the program planning process:

- The extent of your organization's tools and infrastructure to support AmeriCorps members in their volunteer recruitment and management work.
- How local relationships cultivated and forged by AmeriCorps members will be consistently linked to organizational leadership.
- How the program will be continued, in dollars and time, after AmeriCorps resources (including members) end.

There are corresponding benefits for sponsors of AmeriCorps programs who use this approach. AmeriCorps members will be available for many program capacity building efforts as well as for recruiting, organizing, and coordinating volunteer activities. These activities can help your program to:

- Identify and respond to changing community needs.
- Build community support for effective and needed services.
- Design and implement community outreach strategies.
- Cultivate partnerships and generate funds and in-kind resources

E. WHAT THE CORPORATION FOR NATIONAL AND COMMUNITY SERVICE WILL LOOK FOR IN PROGRAMS AND APPLICATIONS

In assessing program performance and evaluating future applications, CNCS will consider how programs deal with a range of activities related to capacity building and assuring program sustainability. Evaluators will be looking to see if programs:

- Show diversity of partners, financiers, resources, and/or plans to achieve such diversity.
- Show plans/strategies for what will happen after AmeriCorps grant ends.
- Identify all present stakeholders and partners; include them in program planning activities and collect input from them on program objectives, activities, etc.
- Make and implement plans/strategies for researching and contacting potential stakeholders and partners.
- Construct and use communication networks in the community and among all stakeholders and partners (present and future) and keep the community and stakeholders informed.
- Develop and implement an outreach plan to further the program and increase its visibility; prepare a case for program support.
- Develop and implement a plan to make regular visits and presentations on community activities, accomplishments, involvement, and needs.
- Approach and work with the media, hold events, prepare materials, interviews, fact sheets, press releases, etc.

- Orient and train staff, members, and volunteers in the skills and techniques of marketing and program promotion.
- Research potential grant-making groups (foundations, agencies, and corporations) and other donor or contributory groups.
- Write and submit grant proposals to diverse sources to fund the program.
- Prepare and implement a resource development strategy that includes a variety of approaches (mailings, events, one-on-one appeals, fee for service activities, etc.).

CNCS has a particular interest in volunteer recruitment and management, and will want to know if programs:

- Assess program needs and match them with appropriate volunteer roles and skills.
- Research likely sources of potential volunteers.
- Prepare and utilize a “volunteer marketing strategy or plan.”
- Prepare program materials, make presentations, and inform the community about the program.
- Recruit volunteers to play active roles in the program (and not just supply administrative support).
- Prepare and use volunteer interview and screening plans and develop hiring and selection tools and procedures.
- Develop a complete volunteer strategy that includes volunteer position descriptions, policies, and procedures.
- Design and implement a strategy to direct volunteer efforts and energy into needed community services.
- Develop and carry out a plan for volunteer orientation and training.
- Monitor, coordinate, and assess volunteer performance.
- Provide feedback and skill development opportunities to volunteers, and ways to recognize volunteer contributions.
- Include opportunities for volunteers to increase their responsibilities and skills.
- Provide structure and opportunities for coaching volunteers.
- Transfer responsibilities from AmeriCorps members to volunteers, as members finish their service and/or the grant ends.

2. STRATEGIES FOR CAPACITY BUILDING ACTIVITIES

There are four key types of strategies to consider when building the capacity and, ultimately, the sustainability of your organization and its AmeriCorps program. These are:

- Recruitment and Management of Volunteers.
- Partnerships with Community Members and Organizations.
- Marketing and Promotion.
- Increase and Diversification of Resources.

In the sections that follow, each of these strategies will be discussed in more detail, including how to get started, sample activities for AmeriCorps members, and scenarios that are based on techniques other AmeriCorps programs have used to implement these strategies. This information is intended to give you “food for thought” as you plan and carry out your own activities in these four areas. You will find further ideas in the Web resources listed in Section 6.

A. Recruitment And Management of Volunteers

GETTING STARTED

Volunteer recruitment and skillful management of volunteer resources can be powerful tools for capacity building, but it is important to ask the following questions before engaging AmeriCorps members in these activities:

Are you committed to using volunteers?

- What volunteer skills and experiences do you need to make your program successful?
- Are the vision, mission, goals, and objectives for the program intelligible and in writing?
- Are there volunteer job descriptions?
- Have you clearly stated what you expect from volunteers?
- Is there a volunteer orientation process?

Is your organization inclusive?

Successful programs recruit volunteers who represent the full range of diversity in the community. AmeriCorps members can identify and expand the base of volunteers participating in your activities if your organization has a hospitable environment. Consider these questions as you plan your volunteer recruitment and management:

- Does your organizational culture honor differences?
- Are your recruitment and training materials accessible to audiences from different language and educational backgrounds?
- What do you do to make people from different ethnic and cultural backgrounds feel wanted, welcomed, and needed?

Do you know the major reason why people volunteer?

The major reason people volunteer is because someone asked them to. Be sure to reserve time in your program for AmeriCorps members to ask people to join the initiative.

Who are the Community Advocates (sometimes called “Community Champions”) who can help you recruit volunteers?

Community Advocates usually are:

- Credible community members you can count on to enthusiastically support your program.
- Influential, well-known, and respected members of the community.
- Strategic thinkers with excellent negotiating skills.
- Board members, advisors, and engaged community partners/stakeholders
- Community members with talents in critical areas, i.e., fundraising, plan and policy development, and building public awareness.



SPECIAL TIPS

Make good use of your Community Advocates. (They are your potential Champions!) Consider requesting their continued advice in developing and improving your AmeriCorps program:

- Ask two or three of your current community advocates to help shape (or reshape) your proposal; *use their ideas!*
- If you are submitting a new application, ask them to review the final draft before it is mailed to the Corporation for National and Community Service.
- Recruit them as volunteer AmeriCorps program advisors.

With this strategy, AmeriCorps members can arrive at your site with the immediate support of these community advocates. Your program will take off faster and be stronger for your efforts in these areas.

SAMPLE ACTIVITIES FOR MEMBERS

Consider some of the following volunteer recruitment, program development, and management activities in developing and improving your program plan and the role your members play in accomplishing them:

- Assess your program's needs and determine what skills would best help you address those needs; look for volunteers with those skills.
- Build an organizational plan and structure to direct volunteer energy into needed community service activities.
- Organize volunteer management principles through the development of position descriptions and policy / procedure statements tied to your program's objectives.
- Prepare a volunteer marketing plan, including research into the likely sources of the type of volunteer skills you need and how to access them.
- Produce program materials and make public presentations to recruit volunteers.
- Recruit community volunteers and leaders to play active, significant roles within your organization or program.
- Design and conduct orientation and training of volunteers to insure they understand the program, its activities, their specific roles, and your expectations of your volunteers.
- Monitor, coordinate, and assess volunteer performance.
- Provide ongoing skill development opportunities to volunteers.

- Provide feedback to volunteers on their work; recognize and celebrate volunteer contributions.
- Identify new volunteer assignments to help grow their personal capacity, as well as the capacity of your organization.
- Provide ongoing coaching to volunteers to help them develop different and/or higher levels of volunteer responsibility.
- Transfer responsibilities from AmeriCorps members who leave at the end of the grant to other volunteers in your program.

SCENARIOS

The following five scenarios illustrate a range of ways and activities in which AmeriCorps programs can effectively utilize members to recruit, manage, and develop volunteers.

Volunteer Scenario 1: Developing Systems and Materials for Volunteer Recruitment and Support

*Member Role:
AmeriCorps members assist in developing the program's systems for volunteer recruitment and management.*

AmeriCorps members in one program develop, plan, and implement strategies and systems to recruit adult volunteers to become mentors to at-risk youth. Specifically, the members develop the processes and materials necessary to build and maintain an effective volunteer component of the mentoring program. Under the direction and supervision of staff, members then recruit and enroll adult volunteers who are called "Senior Partners" and work alongside the members in direct service activities.

Among the many strategies, members can:

- Develop and implement strategies, tactics and the "plan" to recruit volunteers.
- Write volunteer position descriptions.
- Develop promotional materials.
- Approach organizations with potential volunteer bases with opportunities for partnering.
- Develop and make volunteer recruitment presentations.
- Develop a volunteer training manual.
- Plan and conducting volunteer training.
- Develop a volunteer policies and procedures manual.

Volunteer Scenario 2: Volunteer Recruitment and Support through Special Project Development

*Member Role:
Members coordinate volunteer recruitment as an integral component of their individual project development activities with their project partner*

An AmeriCorps program partners with a mix of nonprofits, schools, and government agencies. Each agency provides a proposal outlining a potential project. The program matches each agency with an AmeriCorps member. Members and agency representatives are trained in the best practices of volunteer program development and management. The member then works with the agency to develop a volunteer recruitment and management plan within and specific to the project. The agency and member create outcome objectives, recruit volunteers to work on the project, and implement the plan over the member's

year of service. Members have helped create volunteer projects within diverse partner agencies to tutor and mentor at-risk youth, protect the environment, provide services for the elderly and people with disabilities, renovate low-income housing, and much more. In this particular program, 296 AmeriCorps members mobilized over 30,000 volunteers across the state. AmeriCorps members leave behind programs that can be sustained on their own, using volunteers.

In this approach, in addition to roles already mentioned in Scenario 1, members:

- Develop a proposed project and an implementation plan that includes volunteer recruitment and management.
- Create outcome objectives for the project and the volunteer component.
- Develop appropriate systems within the project for the enrollment and management of volunteers.
- Coordinate the recruitment of volunteers.
- Implement the plan with an emphasis on the project's sustainability.

Volunteer Scenario 3: Increasing the Level of Service through Volunteers

Member Role: AmeriCorps members in the program recruit volunteers with the goal of increasing the level of service provided to the community

Members in another AmeriCorps program recruit and train volunteers in underserved rural communities as participants of the Disaster Action Team in their community. After extensive orientation and training, the members manage the Disaster Action Teams. These Teams have greatly increased the program's reach and the communities' ability

to prepare for and respond to disaster situations. During the last four and a half years, AmeriCorps members have certified over 20,000 volunteers and recruited over 800 Disaster Action Team volunteers. These members and volunteers have jointly educated over 250,000 people, and delivered thousands of educational training programs. When disaster strikes, volunteers and AmeriCorps members serve side-by-side.

In addition to many of the roles already suggested, members can also:

- Cultivate partnerships with community organizations, i.e., non-profits, schools, government agencies, faith-based institutions, etc.
- Assess community needs and matching them through recruitment of volunteers with appropriate skills.
- Train and coach volunteers to assume specific leadership or technical roles on the Teams.

Programs can further strengthen this approach by making volunteer program development and management training available to members, to increase their skills in these areas.

Volunteer Scenario 4: Selected Members Specialize in Volunteer Recruitment and Management

Member Role: A limited number of members take on the role of recruiting and managing volunteers to enhance the service offered by the program

*In an AmeriCorps*National Direct program, members construct homes and build relationships with partner families and volunteers. AmeriCorps positions fall into four categories, one of which is Volunteer Coordinator. Members assigned to this position are responsible for the recruitment, retention, and appreciation of volunteers and management of special volunteer programs. This division of tasks allows the AmeriCorps program to recruit volunteers with diverse skills and experiences. But not all members have to have experience in volunteer recruitment or management to achieve program goals.*

Programs can be designed to center the volunteer recruitment/management work around a small core group of members. In addition to the many volunteer management activities already described, specifically these programs would:

- Create member positions and tasks that are specific to an ongoing volunteer recruitment/management strategy and, ultimately, create volunteer positions/tasks that take over and continue this important work. Since the number of members/volunteers coordinating this volunteer strategy is limited, resources should be used to provide them advanced preparation and training.
- Create and recruit for specific volunteer roles that complement the strengths of

members in the different tasks or teams.

Volunteer Scenario 5: Engaging Service Recipients as Volunteers

Member Role: Members concentrate on engaging service recipients as volunteers.

*Another AmeriCorps*National Direct program, with a goal of youth development, focuses on youth as both service recipients and catalysts for social change through volunteer service. Members create and implement training and recruitment opportunities specifically designed to attract youth volunteers, develop opportunities for the young to take leadership roles, learn skills in project development, practice collaboration and partnership, and much more.*

Members can:

- Develop recruitment strategies targeted to program recipients.
- Develop opportunities for program recipients to take on new, more responsible roles (leadership, coordination, etc.) through their service activities.
- Create training opportunities and curricula for program recipients.
- Help program recipients organize service days and other events and projects in the community.
- Help program recipients demonstrate the impact and value of their work to the community. This may also be one of the most effective strategies for recruiting more volunteers.

* * * * *

AmeriCorps members are a unique and vital resource to your program and can be utilized in a variety of ways to assist with the recruitment and management of community volunteers. We have provided examples which range from including all members in some volunteer management activities to a few members managing a specific volunteer program. We encourage you to consider these various approaches in developing a plan to strengthen your individual program.

B. Partnerships with Community Members and Organizations

GETTING STARTED

A clear understanding of the following issues is required before AmeriCorps members can work on successful partnering relationships with individuals and other organizations in the community:

- Guiding principles and conditions for the AmeriCorps program's involvement in any partnership-building activity.
- Type and degree of partnering (i.e., are you at a communication, coordination, cooperation, or collaboration level?).
- Goals and expectations set by the sponsoring organization.
- Goals and expectations set by the partner organization.



SPECIAL TIP

Remember in using AmeriCorps members to promote partnering activities, make yourself available to ...

- Establish member authority to speak on behalf of your organization.
- Take measures to ensure that member authority is credible.
- Ensure that the partnering activity truly represents the wishes of the decision-makers in each partnering organization.
- Advise members and remain connected to the partnerships so that when they leave, you can sustain the relationships.

SAMPLE ACTIVITIES FOR MEMBERS

- Recruit community volunteers and organizations to serve as partners to your organization.
- Construct communication networks among all your "stakeholders", i.e., all the parties involved in your program: participants, partners, beneficiaries, and other agencies in the community.
- Collect input from the community on your program's activities and results.
- Continually seek and identify potential partners (other community organizations, businesses, government agencies, etc.) who share your goals.
- Convene meetings of partners and potential partners to discuss possible collaborative activities.
- Cultivate partner interest and involvement.

- Report significant program outcomes to partners.
- Organize celebrations of progress and successes.

SCENARIOS

The following are two scenarios illustrating how AmeriCorps programs have effectively utilized members to develop and sustain partnerships.

Partnership Scenario 1: Succeeding with Limited Resources

Member Role: AmeriCorps members provide services, e.g., developing partnerships and building organizational capacity, for more than one organization at the same time.

A higher education institution, a K-12 school, and two neighborhood organizations came together to apply for AmeriCorps funding. These organizations could not individually manage an AmeriCorps program, but their partnership has allowed them to “share members” to accomplish goals without depleting their resources. AmeriCorps members assist with various programs, including coordinating programs and recruiting volunteers for the two neighborhood associations; organizing a Youth Corps Club where junior high students plan and implement service projects; and recruiting and coordinating volunteers to assist in the renovation of dilapidated properties in the neighborhood.

Applicants with limited resources may find it beneficial to work with other organizations and share AmeriCorps members. While members’ time will be split, goals can still be reached, and the results broadened - reaching a greater distance across the community. Organizations may choose to undertake the following activities:

- Partnering with other organizations to maximize resources.
- Working with organizations that have similar goals in mind.
- Sharing an AmeriCorps member’s time, given that clear direction, supervision, and realistic expectations are in place.

As a conduit between cooperating organizations, the AmeriCorps member can act as a bridge for resources and information. In addition to many of the roles already seen, the members’ activities can include specifically:

- Coordinating programs, both individually for the partners or across the organizations.
- Building the volunteer components, e.g., leveraging and recruiting volunteers, designing volunteer positions, planning and conducting volunteer training, etc.
- Organizing service projects.

- Helping the partners maximize resources, i.e., benefit from each other's resources, best practices and strengths.

Partnership Scenario 2: Sustained Activities through Strong Partnerships

Member Role: Members focus on partnership development and strengthening.

A partnership in one state successfully brought together a local community college, two school districts in different counties, and numerous public schools to run an AmeriCorps project. The partnership was initiated by the community college president who succeeded in getting the school districts and schools to identify and promote a common vision: to improve the reading ability of local elementary school children. The partners divided responsibilities as follows:

The Community College:

- *Wrote and reported on grants.*
- *Provided administrative support and served as a fiscal agent.*
- *Helped with member recruitment, provided training, and coordinated weekly member meetings and service projects.*

The Public Schools:

- *Contributed the cash match required for AmeriCorps members.*
- *Provided in-kind donations of space, materials, and furniture for members.*
- *Conducted the initial orientation.*

This approach requires strategies and a commitment to develop and nurture strong partnerships. AmeriCorps members can be involved in such activities as:

- Researching and making contacts with new public schools and other potential partners.
- Staffing and facilitating partner meetings .
- Helping to develop memoranda of understanding.
- Recognizing the contributions of partner schools with celebrations and publicity.
- Assessing and relaying community program successes to all partners.
- Continually inviting and orienting new partner schools.
- Developing outreach materials for partners and stakeholders.
- Organizing and reinforcing partnership networks, structures.

- Recruiting volunteers.
- Developing volunteer training materials and curricula; organizing training events and activities.

C. Marketing And Promotion

GETTING STARTED

Start by considering ways in which AmeriCorps members might conduct marketing and promotional activities for your program or organization.

Community organizations can use marketing vehicles such as...

- Brochures
- Newspaper articles
- Radio interviews
- Public service announcements

... for a variety of purposes like ...

- Recruiting volunteers
- Building stakeholders' interest
- Informing potential partners about your activities and the programs outcome.

Meeting different audience interests and organizational needs requires using different messages and vehicles to achieve specific goals. Multiple contacts with each audience are needed before your message will be remembered.

SPECIAL TIP

- Connect your AmeriCorps members with your Community Advocates.
- Identify additional volunteers or individuals who can clearly articulate the value of the organization.
- Develop a marketing/outreach and communications plan.
- Get involved in, and coordinate events that will attract media attention.
- Use a variety of communication vehicles to tell your organization's story.
- Understand who the audience is, and what message should be conveyed.

SAMPLE ACTIVITIES FOR MEMBERS

Consider some of the following marketing and promotional activities in formulating your program application and the role your members might play in accomplishing them:

- Develop a community outreach plan to increase your program and organizational visibility: How will you “tell your story”?
- Develop a list of community “stakeholders” and potential “stakeholders” who need to know your story.
- Prepare appropriate materials and strategies to “tell your story” and adapt them according to the audience and their interests.
- Design and make regular visits and presentations on activities, accomplishments, and involvement.
- Provide media interviews about your program and attract media attention through different media events.
- Prepare articles for the newsletter, program fact sheets, etc.
- Orient and train members, and use them to orient and train volunteers in the skills and techniques of marketing and promoting your program.

SCENARIOS

The following are three scenarios illustrating a range of ways AmeriCorps programs have effectively utilized members for marketing and promotion.

Marketing/Promotion Scenario 1: Public Education

Member Role: Members present information to a variety of groups. Presentations include information on national service as well as their specific assignment

Members from one program providing environmental assistance in watershed areas participated in the legislative briefing for the coastal environmental committee. In addition, they regularly deliver environmentally based public outreach presentations throughout their communities. These presentations focus on the value of national service as a strategy as well as on the environmental needs throughout the watershed areas.

Marketing/Promotion Scenario 2: Media and Community Outreach

Member Role: Members contact media and other community contacts in relation to a specific project or event.

A reading program planned and implemented a month-long AmeriCorps Everyone Reads Tri-Community Read-A-Thon. The members played an active role in contacting the local media, businesses and non-profit agencies in each of the three communities. They created news

releases, brochures and pamphlets for distribution. Three newspapers announced and covered the event, local radio stations covered the event in two languages, and 74 different sponsoring partners participated in the event. According to the mayors in the three communities, this support was generated by the members themselves – “their enthusiasm and dedication encouraged others to support the read-a-thon.”

Marketing/Promotion Scenario 3: Promotion Booths

Member Role: Members organize and run promotion booths and resource centers during statewide events.

Members from another program annually plan and staff a booth at the local County Fair promoting the grantee’s program and AmeriCorps, as well as the work of national and community service in general. Many Fair participants stop by for stories, brochures and pamphlets.

D. Increasing and Diversifying Resources

GETTING STARTED

Non-profit fundraising and resource development are important responsibilities of an organization. This section provides strategies and ideas that both AmeriCorps staff and members may use to help build a strong, diverse base of resources for your organization’s projects.

It is essential to note that there are certain fundraising activities that can and others that cannot be paid for out of grant funds and/or performed by AmeriCorps members. These activities are discussed in the OMB circulars applicable to your organization and the AmeriCorps Provisions, notably Provision #5 on Fundraising. In addition, pp. 109-111 of the 2002-2003 AmeriCorps Program Director’s Handbook provides explanations, examples and references on fundraising by program staff or members. For example, organization staff members cannot charge to an AmeriCorps grant time involved in organized fundraising solely to raise capital or obtain contributions, but they may carry out many other tasks in support of the program’s resource development. Likewise, members cannot perform fundraising functions to pay an organization’s general operating expenses, but they perform many valuable resource development tasks. It is important that program staff review the above-cited references thoroughly to understand not only the limitations on certain activities, but also the many activities which can and should be integrated into a program’s strategic and practical plan for resource development.

The table below includes many of the common development methods employed by non-profit agencies. Which ones does your organization currently employ? Are there any that you are not currently using that might prove worthwhile for your organization? What roles could your staff and members play in supporting them?

Common Fundraising Methods

Method	Definition	Contributors
Stakeholder Giving	Gifts by individuals who have a special interest in the activities of an organization.	Board, Staff, Volunteers, and Constituents.
Direct Mail Fundraising	Solicitation of funds by mass-mailings directly to individual donor prospects.	Members of Organization, individuals in the community, and individuals sharing the Organization's vision.
Annual Giving	A fundraising program that generates gift support on an annual basis to support yearly budgets or general operations.	Members of Organization, individuals in the community, and individuals sharing the Organization's vision.
Major Gifts/Grants	A significant donation to a not-for-profit organization.	Individuals, Corporations, and Foundations.
Capital Campaigns	An intensive fundraising effort to meet a specific financial goal within a specified period of time for one or more major projects, such as the construction of a building.	Wealthy individuals who share the Organization's vision, other stakeholders, members of Organization, and individuals in the community.
Endowment Campaigns	A campaign to obtain funds specifically to create or supplement a permanently restricted net asset, the principal of which is protected and the income from which may be spent for an organization's operating expenses.	Wealthy individuals who share the Organization's vision, other stakeholders, members of the Organization, and individuals in the community.
Planned Giving	A pre-arranged gift, such as a bequest, life insurance policy, charitable remainder trust, or gift annuity.	Members of the Organization, individuals in the community, individuals sharing the Organization's vision, and those needing annuity income.
Resource Donations	Donations of time, talent, equipment, supplies, free or discounted services, and free or discounted products.	Businesses and professionals in the community.
Fees for Services	Charges for services an organization already provides (or can provide) to clients and other community members.	Beneficiaries of services provided.

Typical Fundraising Activities

Though there is great diversity in fundraising methods, the following steps are critical to most or all of them:

- Develop your vision, mission statement, and case for support.
- Identify all potential stakeholders.
- Research prospective donors.
- Communicate and cultivate relationships with stakeholders and prospective donors.
- Work to develop stakeholder and donor “buy-in” for the program and activities
- Prepare and make the request for support (“the Ask”)
- Carry out follow-up to “Asks” made
- Demonstrate accountability and results to stakeholders and donors.

Principles of Fundraising

The following is a list of nine valuable fundraising principles for AmeriCorps grantees.

1. Don't make your organization dependent on government funding

Sustained government funding can cause over-dependency and distortion of an organization's mission. Studies routinely demonstrate that non-profits that rely solely or primarily on government funds become, over time, subject to the changing priorities of the funding agencies.

2. Place your eggs in many baskets.

Your organization will more financially protected if it raises funds from many different sources, including individuals, corporations, foundations, and the government. An organization should avoid relying on a single source to support most of its activities.

3. Fundraising begins at home.

It is vital to demonstrate that your board members, staff, volunteers, and the community-at-large have made gifts to your organization.

4. Focus on individuals.

Despite all the attention given to foundation grants and corporate giving, individuals contribute the majority of philanthropic dollars (approximately 84% in 2001).

5. Don't neglect other sources of income.

Earned income – fees for service, sale of products, royalties, endowment income, etc. – provide nonprofit organizations with substantial revenue.

6. Gain control of as many different revenue sources as possible.

Commercial or earned income is preferable to foundation grants or government grants because it is self-generating income (i.e. the organization has control of the production of this resource and does not have to rely on the decisions of others).

7. Demonstrate improved performance in program quality and efficiency.

Providing regular updates on activities and outcomes is important both in terms of being accountable to your AmeriCorps program's current investors and for attracting new funding partners. It is a good strategy to develop a public relations plan highlighting your program's outcomes and organizational effectiveness to help spread the word on the value of your program to the community.

8. The timeframe for capacity building and assuring program sustainability will vary.

Factors such as an AmeriCorps program or its sponsoring organization's age, size, and history will determine how easy it will be to build capacity or assure program sustainability.

9. A sustainability plan is needed before a grant is awarded.

Unfortunately, too many non-profits develop a sustainability plan only in the final months of a three-year grant – when there may be insufficient time left to assure its success.

For example, in response to a request for a sustainability plan, a Midwestern foundation received the following response: "We would hold on as long as we could pay our bills, while hoping for a miraculous rescue." CNCS calls for applicants to develop their plans and strategies *before* a grant is awarded.



SPECIAL TIPS

- Connect AmeriCorps members with Community Advocates (see Volunteer Recruitment & Management Section).
- Determine program needs.
- Build relationships.
- Develop your Case for Support – the reasons people will give to the program (See Section 4, below, for more information on Building Your Case).
- Assign costs.
- Select resource-gathering methods.
- Build activity timeline for the year.
- Implement!

SAMPLE ACTIVITIES

Consider some of the following resource development activities in formulating your program plan and the valuable role your members can play in accomplishing the plan. Although AmeriCorps members may not engage directly in fundraising activities to support the organization, they may raise funds for specific service activities and engage in many capacity building and resource mobilization efforts to support those activities. Of course, board members, staff, volunteers, community “champions”, and partners can be valuable participants in all of the following efforts.

- Researching potential grant-making foundations and government agencies so that you know who they are and what they are interested in funding.
- Writing and submitting grant proposals to different sources and different types of sources.
- Identifying and cultivating stakeholders: community members and organizations who could be interested in, or benefit from your activities.
- Preparing presentations and materials for one-on-one appeals.
- Developing written materials for direct mailings.
- Organizing a telephone fundraiser or a “phone-a-thon.”
- Developing special fund raising events (such as a walk-a-thon or auction).
- Developing win-win strategic partnerships with businesses.

SCENARIOS

The following are three scenarios illustrating a range of ways AmeriCorps programs have effectively utilized members for resource development.

Resource Development Scenario 1: Corporate Partnerships for Resource Development

Member Role: Members assist in developing and enhancing corporate partnerships

*An AmeriCorps*National Direct program is highly successful at forming long-term corporate partnerships. These partnerships meet the needs of the corporations while maintaining commitment to the organization’s own priorities and projects. For example, members in one of its affiliates coordinate volunteer opportunities for a corporation’s employees. In this role, the members work side by side with corporate volunteers, consistently enhancing the strength of the partnership.*

AmeriCorps members can be, and are involved in such activities as:

- Identifying potential corporate partners.
- Researching common goals and interests.
- Maintaining a database of “corporate friends.”
- Developing strong financial record-keeping processes.
- Creating volunteer orientation and training procedures and manuals.
- Coordinating corporate volunteer activities.
- Preparing publicity and reports that strengthen corporate ties.

Resource Development Scenario 2: Fund Diversification

Member Role: Members support sustainability and resource diversification efforts through participation on a “development team”

Successful resource diversification must include a conscious marketing plan and strategies to increase visibility in the community. In one AmeriCorps program, members participate on a “development team”, assisting with the design and review of the outreach plan, meeting with like organizations and working with individual donors and events.

In this capacity, members can:

- Research corporate, foundation and local prospects, identifying common goals.
- Develop program articles for the organization’s newsletter, submitting program postings for the website community and current and potential supporters/donors.
- Coordinate - and use volunteers to coordinate - special events to mobilize potential board members, investors/partners, and volunteers.

Resource Development Scenario 3: Developing Streams of Earned Income

Member Role: Members generate/coordinate fee-for-service opportunities

Being creative and generating revenue through fees or other kinds of earnings is an innovative sustainability strategy. These must be consistent with OMB guidelines, so be sure to consult the sections on program income in the OMB Circulars relevant to your organization. One AmeriCorps project started its first year with an AmeriCorps grant and traditional funding from foundations. Over the course of the first year, the program participated in numerous civic engagement projects, handing out flyers to improve visibility and generating media attention and interest at worksites whenever possible. Within months, the organization had more requests for civic engagement projects than it

could fill. It kept detailed records of every request (who requested the members, for what specific work, how often...) and developed a daily rate for projects by tracking costs associated with each project: member and supervisor costs, insurance, transportation costs (maintenance, rent, fuel for van), general and administrative costs, equipment, FICA, and unemployment insurance. In this way, one type of AmeriCorps project became a fee-for-service enterprise that helps pay for other AmeriCorps services that cannot pay for themselves.

Organizations seeking fee-for-service opportunities to offset other program costs need to assess their strengths and match them to the unmet needs of the community. They must also keep good business records, monitor volunteers' progress on their assignments, and be aware of non-displacement issues in the AmeriCorps Provisions (#31). In these activities, AmeriCorps members can:

- Research program strengths, community needs, and alternative strategies for meeting those needs.
- Prepare promotional brochures and materials.
- Contact and work with the media.
- Train volunteers to do specific jobs.
- Coordinate sites, times, volunteer efforts, and monitor volunteer performance.
- Work with community clients, and prepare agreements.

* * * * *

Volunteer Recruitment and Management, Partnerships with Community Members and Organizations, Marketing and Promotion, and Increase and Diversification of Resources are all vital strategies to assist you in building capacity and achieving sustainability in your programs. For additional information on any of these strategies, visit the *National Service Resources website* (www.nationalserviceresources.org), where you can conduct searches on any of the above topics (sustainability, capacity building, volunteer recruitment, resource development, etc.). Among the many resources that will be identified for you will be the *Sustainability website* (www.SustainAbilityOnline.com), a database of effective practices with entries in these areas, and many of the entries listed in Section 5 of this toolkit, the Directory of Website Resources.

3. NINE STEPS TO DEVELOP A PROGRAM SUSTAINABILITY PLAN

Step 1: **Build your “Case for Support.”**

Prospective supporters need to clearly understand what you are doing, why you are doing it, and what results you are seeking to accomplish.

There is no better way to recruit volunteers, raise program awareness, attract funding, build advocates and stakeholders, engage partners, and unite volunteers and staff in a common vision than by putting into writing a clear statement of your “Case for Support” (i.e., why people should pay attention to your program).

There are no shortcuts. Building the “Case for Support” is the opportunity to get everyone debating until they share a common vision that feeds the mission and spawns the reason why people should care. In a nutshell, this is the process:

- Identify and define the problem.
- Determine and explore the root cause of the problem.
- Describe the resulting need.
- Develop a realistic response to meet the need.
- Define and clarify the desired outcome.
- Develop and share a vision.
- Define the support needed to accomplish the vision.
- Develop your case for support

– Ask for and promote that support.

- Step 2:** Have program staff and AmeriCorps members work continually to build and sustain relationships.
- Step 3:** Have AmeriCorps members develop a program advisory committee that has broad contacts in business, philanthropic, and social service communities and includes local, informal, and influential community leaders.
- Step 4:** Draft a sustainability plan - strategies and actions - for:
- Volunteer recruitment and management (including volunteer development) – see Sample Sustainability Plan in Section 4.
 - Partnership building.
 - Outreach and marketing.
 - Resource development.
- Step 5:** Review, revise, and endorse your case statement and sustainability plan.
- You, as a staff leader, and your AmeriCorps member(s) should call your Case for Support Team (volunteers, stakeholders, advocates, etc.) back together to review the draft sustainability plan.
- Push the group to volunteer to oversee the action steps. Hand out calendars, divide the group up into four groups and have each team prepare a timeline for a quarter of the year. Come back together, report back, revise.
- Step 6:** Continue to call your team together on a regular basis to report back, monitor progress, review and revise the plan and strategies accordingly.
- Step 7:** Explain how you will use the results of your program assessment to make better use of your resources.
- Step 8:** Address how you will market your program and its outcomes regularly to reinforce and build your stakeholder base and community reputation.
- Step 9:** Explain how you and your AmeriCorps members plan to use your partnerships to leverage resources for your program.

4. SAMPLE SUSTAINABILITY PLAN

A sample sustainability plan follows to illustrate how an organization might draw on the sample activities presented above in Section 3. It is intended to serve as an example only, not as a substitute for your own plan.

DEVELOPING YOUR SUSTAINABILITY PLAN

1. Group the components (“what you’re going to do”) together in the year in which they are expected to occur. In this example, the plan presents activities during two program years in two large tables.
2. List the components in the first column of each table in the order in which they are expected to occur. In the example, the organization has chosen to present components that are part of a capacity building strategy based on increasing and diversifying resources (see above, Section 3, Part D). Notice how the organization has based its components on the list of activities common to most fundraising methods presented above in the discussion on Increasing and Diversifying Resources.
3. List appropriate action steps (“how you’re going to do it”) in the second column of each table that correspond to the components. These steps should show that you have thought through what is necessary to make each component you have listed happen. Be sure to mention AmeriCorps members’ roles in each of these activities. You may find the “Sample Activities for Members” in the discussions of Strategies for Capacity Building Activities (Section 3) helpful.
4. Finally, estimate a timeline (“when you’re going to do it”) in the third column of each table for each component. If a component or activity will not have a specific conclusion, you can substitute “ongoing” for a future completion date.

Sample Sustainability Plan—Year 1

Component /Method	Action Steps <i>(Remember to include how marketing and volunteers can help you do this)</i>	Timeline
<p><i>Develop: Mission, Vision, Case for Support</i></p> <p><i>Research and identify potential stakeholders</i></p> <p><i>Communicate with stakeholders</i></p>	<p><i>Talk to staff and community members about why this program is needed, who will benefit, why your organization is the best organization to undertake it.</i></p> <p><i>Identify and talk to informal community leaders who might have common vision/mission.</i></p> <p><i>Solicit ideas from Commission, schools, other agencies, faith communities about who might share interests with your program.</i></p> <p><i>Talk to local businesses about how your program can benefit their interests.</i></p> <p><i>Introduce self and program to local media. Provide media tour, press kit or news release.</i></p>	<p><i>Month 1-3</i></p> <p><i>Month 1-3</i></p> <p><i>Month 1-3</i></p>
<p><i>Initiate relationship with potential stakeholders</i></p>	<p><i>Schedule community/partner meeting.</i></p> <p><i>Select informal team of helpful community members, agency representatives and business people act as advisory committee. Formulate meeting agenda.</i></p> <p><i>Prepare invitations and ask folks who recommended individuals to invite them personally.</i></p> <p><i>Prepare written materials for participants outlining the program's general purpose and vision. Language should match community interests garnered from earlier community interviews.</i></p>	<p><i>Month 4</i></p>

Sample Sustainability	Plan—Year 1, continued	
<i>Continue to cultivate stakeholders</i>	<i>Hold meeting. Include shared vision exercise to get input and expand vision to more stakeholders.</i>	<i>Month 4</i>
<i>Create buy in</i>	<p><i>Output of meeting should be:</i></p> <ul style="list-style-type: none"> • <i>Expanded vision that includes community stakeholders/potential partners</i> • <i>Identification of interested individuals and organizations to continue to advise the project</i> <p><i>Summary of meeting highlighting groups that participated and seemed most interested.</i></p> <p><i>Assign Advisory Committee to share with those who could not attend.</i></p> <p><i>Invite press to cover meeting, highlight participants and outcomes.</i></p> <p><i>Determine follow-up steps to re-contact participants quickly.</i></p> <p><i>Send thank you notes and copies of press coverage.</i></p>	<i>Month 4</i>
<i>Make the ASK</i>	<p><i>Determine best strategic partnerships and key community leaders to involve.</i></p> <p><i>Determine appropriate level of collaborative commitment to ask for.</i></p> <p><i>Determine who should ask for partnership involvement. Jointly develop strong “case” for potential partner’s involvement. Be specific about level of commitment requested.</i></p>	<i>Month 5</i> <i>Month 5-8</i>
<i>Follow-up</i>	<i>Formalize relationship with MOU’s, volunteer position description, formalize advisory committee roles, etc.</i>	<i>Month 5-8</i>

Sample Sustainability	Plan—Year 1, <i>continued</i>	
<i>Be a Good Steward</i>	<p><i>Continue to cultivate current partners and new stakeholders through:</i></p> <ul style="list-style-type: none"> • <i>Offering opportunities for continued involvement in shaping the program through regular meetings and dialogue.</i> • <i>Sharing the credit.</i> • <i>Celebrating small successes.</i> • <i>Making sure program is mutually beneficial to all partners.</i> 	Month 8-ongoing

<i>Sample Sustainability Plan—Year 2</i>		
<i>Component /Method</i>	<i>Action Steps (Remember to include how marketing and volunteers can help you do this)</i>	<i>Timeline</i>
<i>Develop: Mission, Vision, Case for Support</i>	<i>Talk with staff, and community partners and stakeholders about outcomes of year 1. Review progress toward goals, who will benefit, who else needs to be involved. Review community needs and trends. Revise mission and vision as necessary. .</i>	<i>Month 13-14</i>
<i>Research and identify potential stakeholders/ prospects</i>	<i>Research corporations, local businesses, foundations other givers who have an interest in your cause. Solicit ideas from partners, staff, volunteers, advisory committee about contacts they might have to potential givers who share interests with your program.</i>	<i>Month 13-14</i>

<i>Sample Sustainability Plan—Year 2</i>		
<i>Component /Method</i>	<i>Action Steps (Remember to include how marketing and volunteers can help you do this)</i>	<i>Timeline</i>
<i>Communicate with stakeholders</i>	<p><i>Talk to local businesses about how your program can benefit their interests. Ask for their ideas.</i></p> <p><i>Identify any products or services of your program that are valued in the community and could produce income to offset project expenses. Create a team and marketing plan to develop and market this business.</i></p> <p><i>With staff and advisory committee, discuss financial goal of \$20,000. Identify budget items that could be provided in-kind by partners, other stakeholders. Select methods and teams for fundraising/resource gathering for the year. Use more than one fundraising method (grant writing, direct mail, special event, in-kind resource gathering, phone-a-thon, personal solicitation).</i></p> <p><i>Cultivate relationship with media. Craft messages. Announce fundraising campaign. Highlight accomplishments. Share credit with partners.</i></p>	<i>Month 13-16</i>

<i>Sample Sustainability Plan—Year 2</i>		
<i>Component /Method</i>	<i>Action Steps (Remember to include how marketing and volunteers can help you do this)</i>	<i>Timeline</i>
<i>Initiate relationship with potential prospects</i>	<p><i>Select team from advisory committee and other community leaders to act as fundraising committee.</i></p> <p><i>Formulate strategy for meeting with prospects individually.</i></p> <p><i>Prepare fundraising/resource gathering plan with objectives and timelines.</i></p> <p><i>Launch fundraising effort.</i></p> <p><i>Prepare and send requests for appointments and letters of inquiry.</i></p> <p><i>Prepare written materials for solicitation teams outlining the program’s vision, mission and case for support.</i></p>	<i>Month 14</i>
<i>Continue to cultivate prospects</i>	<p><i>Invite prospects to tour program, review accomplishments, suggest improvements. Ask them who else should be involved.</i></p> <p><i>Match language and outcomes to prospect’s interests.</i></p> <p><i>Send thank-you notes for meetings and contacts.</i></p>	<i>Month 15</i>

<i>Sample Sustainability Plan—Year 2</i>		
<i>Component /Method</i>	<i>Action Steps (Remember to include how marketing and volunteers can help you do this)</i>	<i>Timeline</i>
<i>Create buy in</i>	<p><i>With fundraising committee, ask for donations, share solicitation responsibilities.</i></p> <p><i>Invite press to cover progress, highlight participants and outcomes.</i></p> <p><i>Plan on-going meetings with fundraising committee. Celebrate successes.</i></p> <p><i>Send thank you notes and copies of press coverage to all committee members and prospects.</i></p>	<i>Month 15-ongoing</i>
<i>Make the ASK</i>	<p><i>Depending on method being used, implement—write and submit grants, develop mailing list and pitch for direct mail, meet with prospects—ask for specific support</i></p> <p><i>Remember limitations for staff and AmeriCorps members’ involvement in this task!</i></p>	<i>Month 16-18</i>
<i>Follow-up</i>	<p><i>Confirm pledges, arrange for payments to be recorded, follow up on grant requests—is more information needed?</i></p> <p><i>Schedule to re-contact donors to thank and update on progress, build mailing list. Plan next part of fundraising effort.</i></p>	<i>Month 16-18</i>

<i>Sample Sustainability Plan—Year 2</i>		
<i>Component /Method</i>	<i>Action Steps (Remember to include how marketing and volunteers can help you do this)</i>	<i>Timeline</i>
<i>Be a Good Steward</i>	<p><i>Continue to cultivate current partners and new stakeholders through:</i></p> <ul style="list-style-type: none"> <i>• Offering opportunities for continued involvement in shaping the program</i> <i>• Sharing the credit.</i> <p><i>Celebrating small successes.</i></p> <p><i>Making sure donors are updated, invited to be involved in new ways.</i></p> <p><i>Review fundraising efforts and identify lessons learned for future campaigns.</i></p>	<i>Month 18-ongoing</i>

Sample Sustainability Plan—Year 3

Component /Method	Action Steps <i>(Remember to include how marketing and volunteers can help you do this)</i>	Timeline
<i>Develop: Mission, Vision, Case for Support</i>	<p><i>Talk with staff, donors and community partners and stakeholders about outcomes of year 2.</i></p> <p><i>Review progress toward financial goals, who will benefit, who else needs to be involved.</i></p> <p><i>Review community needs and trends revise mission and vision as necessary.</i></p> <p><i>Develop annual report to summarize progress and attract new supporters.</i></p>	<i>Month 24</i>
<i>Research and identify potential stakeholders/prospects</i>	<p><i>Research corporations, local businesses, foundations other givers who have an interest in your cause.</i></p> <p><i>Look for influential people who are stakeholders to act as program champions.</i></p> <p><i>Build your advisory committee with business leaders and other local influential community members.</i></p> <p><i>Ask for feedback from any corporation or foundation that did not fund. Use contact to build future relationship. Try to target next ask to their interests and philosophy.</i></p> <p><i>Solicit ideas from partners, staff, volunteers, advisory committee about contacts they might have to potential givers who share interests with your program.</i></p>	<i>Month 25-26</i>

Sample Sustainability Plan—Year 3

<i>Component /Method</i>	<i>Action Steps</i> <i>(Remember to include how marketing and volunteers can help you do this)</i>	<i>Timeline</i>
<i>Communicate with stakeholders</i>	<p><i>Talk to local businesses about how your program can benefit their interests. Ask for their involvement.</i></p> <p><i>Identify any the progress your income-producing products or services have made in offsetting expenses. Review and revise marketing plan.</i></p> <p><i>With staff and advisory committee, discuss financial goal of \$50,000. Identify budget items that could be provided in-kind by partners, funders, other stakeholders.</i></p> <p><i>Determine core elements of your program. Brainstorm other means to provide them, beyond AmeriCorps funding.</i></p> <p><i>Select methods for fundraising/resource gathering for the year. Determine whether to repeat last year’s methods. Use more than one fundraising method (grant writing, direct mail, special event, in-kind resource gathering, phone-a-thon, personal solicitation).</i></p> <p><i>Cultivate current and new relationships with media. Craft messages. Announce fundraising campaign’s progress. Highlight accomplishments. Share credit with partners.</i></p>	<i>Month 25-28</i>

Sample Sustainability Plan—Year 3

<i>Component /Method</i>	<i>Action Steps</i> <i>(Remember to include how marketing and volunteers can help you do this)</i>	<i>Timeline</i>
<i>Continue to cultivate prospects</i>	<p><i>Invite prospects, donors to tur program, review accomplishments, suggest improvements. Ask them who else should be involved. Ask them to be involved in new ways.</i></p> <p><i>Match language and outcomes to prospect’s interests.</i></p> <p><i>Send thank-you notes for meetings, contacts, donations.</i></p> <p><i>Talk with partners about resources available to meet common goals and defray expenses</i></p>	<i>Month 27 - ongoing</i>
<i>Create buy in</i>	<p><i>With fundraising committee, ask for donations, share solicitation responsibilities.</i></p> <p><i>Invite press to cover progress, highlight participants and outcomes.</i></p> <p><i>Plan on-going meetings with fundraising committee. Celebrate successes.</i></p> <p><i>Send thank you notes and copies of press coverage to all committee members, prospects, and donors.</i></p>	<i>Month 28- ongoing</i>

Sample Sustainability Plan—Year 3, continued

<i>Component /Method</i>	<i>Action Steps</i> <i>(Remember to include how marketing and volunteers can help you do this)</i>	<i>Timeline</i>
<i>Make the ASK</i>	<i>Depending on method being used, implement—write and submit grants, develop mailing list and pitch for direct mail, meet with prospects—ask for specific support.</i> <i>Remember limitations on staff and AmeriCorps members’ involvement in this task!</i>	<i>Month 16-18</i>
<i>Follow-up</i>	<i>Confirm pledges, arrange for payments to be recorded, follow up on grant requests—is more information needed?</i> <i>Schedule to re-contact donors to thank and update on progress, build mailing list. Plan next part of fundraising effort.</i>	<i>Month 26-ongoing</i>
<i>Be a Good Steward</i>	<i>Continue to cultivate current partners and new stakeholders through:</i> <ul style="list-style-type: none"> • <i>Offering opportunities for continued involvement in shaping the program</i> • <i>Sharing the credit;</i> • <i>Celebrating small successes;</i> • <i>Making sure donors are updated, invited to be involved in new ways.</i> 	<i>Month 28-ongoing</i>

5. DIRECTORY OF WEBSITE RESOURCES

Capacity Building

The Hauser Center for Nonprofit Organizations, Kennedy School of Government, Harvard University

<http://ksghauser.harvard.edu>

Research and articles on capacity building.

The Brookings Review

Directions in National and Community Service:

http://brookings.edu/dybdocroot/press/review/rev_des.htm

Background on building capacity through volunteer service.

Center on Nonprofits and Philanthropy

<http://www.urban.org/content/PolicyCenters/NonprofitsandPhilanthropy/Overview.htm>

Resources and research on trends in giving and trends in resource development.

SustainAbility Website

<http://www.SustainAbilityOnline.com>

Program Sustainability

1. Volunteer Recruitment and Development

How to Recruit and Retain Volunteers

<http://nonprofit.about.com/library/weekly/aa090199.htm>

Includes tips on preparing for volunteers, keeping records of volunteers and their work, helping volunteers feel comfortable at their assignment, and showing appreciation for volunteers.

Recruiting Volunteers

<http://www.serviceleader.org/manage/recruit.html>

This website leads directly to valuable content on volunteerism, including volunteer screening, matching, legal issues and risk management, online recruitment, and volunteer management software. Service Leaders is also the home of the Virtual Volunteering Project, with hundreds of ideas, tips, and real-life examples for any organization that wants to involve volunteers via the Internet.

USAFreedomCorps

<http://www.USAFreedomCorps.gov>

The new USA Freedom Corps website is "the most comprehensive network of volunteer resources and service organizations ever assembled." This White House sponsored website provides one-click access to information and resources related to such effective practices as mobilizing volunteers from both

the non-profit and corporate sectors.

Volunteer Library

<http://www.sustainabilityonline.com/HTML/Volunteers/index.html>

Read and download current articles aimed at assisting you in identifying and successfully working with the volunteers and stakeholders of your program. The library also includes a series of links to additional resources, such as publications and organizations related to working with volunteers and stakeholders.

Volunteer Recruitment: Tips from the Field

<http://www.txserve.org/txcvcs/resources/volrec/recruit.html>

This web page outlines four specific steps to a successful recruitment process. Hosted by the Texas Commission on Volunteerism and Community Service, it was developed by Sarah Jane Rehnberg, PhD. and Betsy Clubine.

Volunteer Tools

<http://www.sustainabilityonline.com/HTML/Volunteers/index.html>

Download tips and worksheets to help you build better relationships with your volunteers and stakeholders. Adapt these practical resources to fit the needs of your program.

Creative Volunteer Roles

<http://www.energizeinc.com/art/npcrea.html>

This article by volunteerism expert Susan Ellis guides thinking regarding volunteer roles outside the box and in new directions. Several examples are offered and tips on how to apply these creative examples to your initiative.

The Points of Light Foundation

<http://www.pointsoflight.org>

The Points of Light Foundation has many resources for volunteer organizations including books and materials to purchase and conferences and training events you can register for online.

NSRC: Sample Forms Collection

http://nationalservicerresources.org/resources/sample_forms

See examples of forms and documents you can use for volunteer management. Includes everything from job descriptions to exit interviews. New forms are added regularly.

Retaining Volunteers/Keeping Volunteers Motivated

<http://www.serviceleader.org/new/managers/2003/04/000071.php>

Several links to on-line resources, from professional articles to tips from the field, are included here.

Retention and Recognition

<http://www.casenet.org/program-management/volunteer-manage/retenrec.htm>

This long excerpt from the book *Volunteer Management*, by Steve McCurley and Rick Lynch covers in detail the proactive steps you can take to motivate your volunteers and ensure that they feel valued.

Supervision

<http://www.energizeinc.com/art/subj/super.html>

This page includes links to articles and excerpts which offer tips on addressing problems with volunteers, maintaining open communication, and being an effective leader.

Volunteer Management Review

<http://charitychannel.com/vmr.shtml>

Charity Channel is an online community with over 100,000 participants discussing every aspect of voluntary-sector issues in hundreds of forums. On this page, you can subscribe to the newsletter *Volunteer Management Review* or browse back issues.

Volunteer Supervision

<http://www.casenet.org/program-management/volunteer-manage/index.htm>

Volunteer Supervision has excellent articles on virtually every aspect of volunteer management, including recruitment, screening, retention, and supervision.

2. Partnership Building

Principles for Partnership

<http://www.pfdf.org/leaderbooks/L2L/fall2000/austin.html>

The Peter F. Drucker Foundation for Non-Profit Management provides many resources on leadership in the nonprofit world. This page is an article by James Austin, chair of Harvard University's Initiative on Social Enterprise. The article includes a number of tips and tools for creating stronger partnerships, and a case study to illustrate the principles in action.

Collaboration Tools

<http://www.sustainabilityonline.com/HTML/Collaboration/index.html>

Download tips and worksheets to help you and your partners work better together. Adapt these practical resources to fit the needs of your program. Use these tools yourself and share them with your partners.

Collaboration Library

<http://www.sustainabilityonline.com/HTML/Collaboration/index.html>

Read and download articles to assist you in successfully working with partners to achieve mutual goals. On a regular basis, newspapers, conventional magazines, and e_magazines are reviewed and then excerpted for access through the library. The library also includes a series of links to additional resources, such as publications and organizations related to collaboration.

3. Marketing and Promotion

American Society of Association Executives

<http://www.asaenet.org>

Described as the association for association executives, ASAE is dedicated to enhancing the professionalism and competency of association executives, promoting excellence in association management, and increasing the effectiveness of associations to better serve members and society.

Cone Communication

<http://www.conenet.com>

Cone, Inc. is a strategic marketing communications firm with a passionate commitment to the new and innovative. Cone builds leadership-brands both on and offline by creating strategic positions and campaigns for its clients. They provide strategic counseling and services in areas such as brand-centering, marketing communications, public relations, online marketing and promotions, strategic philanthropy, cause-related marketing, and community and employee relations.

Council for the Advancement and Support of Education

<http://www.case.org>

The Council for the Advancement and Support of Education (CASE) is an international association of education advancement officers, who include alumni administrators, fundraisers, public relations managers, publications editors, and government relations officers. The ultimate goal of advancement professionals is to enhance their institutions by bringing in support – be it in the form of money, alumni loyalty, public esteem, or new students. In turn, CASE's purpose is to help these people advance the cause of education. It does this by offering information resources and training opportunities to aid members.

Getting the Word Out: Marketing your Project or Agency in Real Time

<http://www.sustainabilityonline.com/HTML/Marketing/index.html>

Whether you're trying to market your project to attract new volunteers or marketing your agency's successes to potential investors, the problem's the same. How do you fit in a new set of public relations tasks into your already too full schedule? This session will focus on the steps common to the start of any marketing effort that can be incorporated readily into an ED's schedule. By starting with a campaign plan and making better use of the things you already do, this workshop will make the link between great marketing success and the future of your project.

Independent Sector

<http://www.independentsector.org>

Independent Sector is a national leadership forum, working to encourage philanthropy, volunteering, not-for-profit initiative and citizen action that help us better serve people and communities. Founded in 1980 and based in

Washington DC, Independent Sector is a national coalition of voluntary organizations, foundations and corporate giving programs.

Institute for International Research

<http://www.iir-global.com>

The Institute for International Research (IIR) is the world's largest international information company with a global network of offices in 36 countries including the United States, Canada, The United Kingdom, Germany, Asia, Australia, Latin America, and the Middle East.

The Institute for Public Relations

<http://www.instituteforpr.com>

Through publications, lectures, awards, symposia, professional development forums, and other programs, the Institute for Public Relations has been at the leading edge of efforts to promote and encourage academic and professional excellence. The Institute's mission is to improve the effectiveness of organizational management by advancing the knowledge and the professional practice of public relations and public affairs through research and education.

Public Service Advertising Research Center

<http://www.psaresearch.com>

The Public Service Advertising Research Center is an on-line information library dedicated to public service advertising, brought to you by Goodwill Communication.

Public Relations Society of America

<http://www.prsa.org>

The Public Relations Society of America (PRSA), headquartered in New York City, is the world's largest professional organization for public relations practitioners. The Society's almost 20,000 members represent business and industry, counseling firms, government, associations, hospitals, schools, professional services firms and nonprofit organizations.

Amherst Wilder Foundation

<http://www.wilder.org>

The Amherst H. Wilder Foundation is a nonprofit health and human service organization that serves the greater Saint Paul, Minnesota area. The Foundation originated in 1906 as a result of the generosity of the Amherst Holcomb Wilder family, which established the Foundation through their wills. The legacy of the Wilder family would be "to relieve, aid and assist the poor, sick, and needy people of the City of Saint Paul."

4. Increasing and Diversifying Resources

Indiana University Fund Raising School

<http://www.philanthropy.iupui.edu/fundschoo.htm>

Explore this web site for educational opportunities in fund-raising.

Association of Fund Raising Professionals

<http://www.nsfre.org>

Explore the resource center and publications of this national network of fund-raising professionals.

Foundation Center

<http://www.fdncenter.org>

Search by types of program funded, types of support provided, region funds offered to, etc. Research foundations and grants in depth.

Fundraising Research_ Government and Private Foundations

<http://www.cdpublications.com>

CD Publications announces grants to be issued in the future by the government and private foundation sector.

Fundraising Research _ Staying Current

<http://philanthropy.com>

Chronicle of Philanthropy is billed as the newspaper for NPOs.

Resource Development Tools

<http://www.sustainabilityonline.com/HTML/Resources/index.html>

Download tips and worksheets to help you in your fundraising/resource gathering efforts. Adapt these practical resources to fit your own particular needs.

Resource Development Library

<http://www.sustainabilityonline.com/HTML/Resources/index.html>

Read and download current articles aimed at assisting you to obtain funds and resources for your program. On a regular basis, newspapers, conventional magazines, and e-magazines are reviewed and then excerpted for access through the library. It provides information on best practices on prospecting, developing relationships with backers, and proposal writing.

Ventures in Philanthropy- Revenue generation in the nonprofit sector

<http://ventures.yale.edu/factsfigures.asp>

Articles on trends and statistics on giving.

SustainAbility Website

<http://www.SustainAbilityOnline.com>

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For additional information on any of the topics treated in this toolkit, visit the National Service Resources website at: <http://nationalserviceresources.org> and the Sustainability website at <http://www.SustainAbilityOnline.com>.