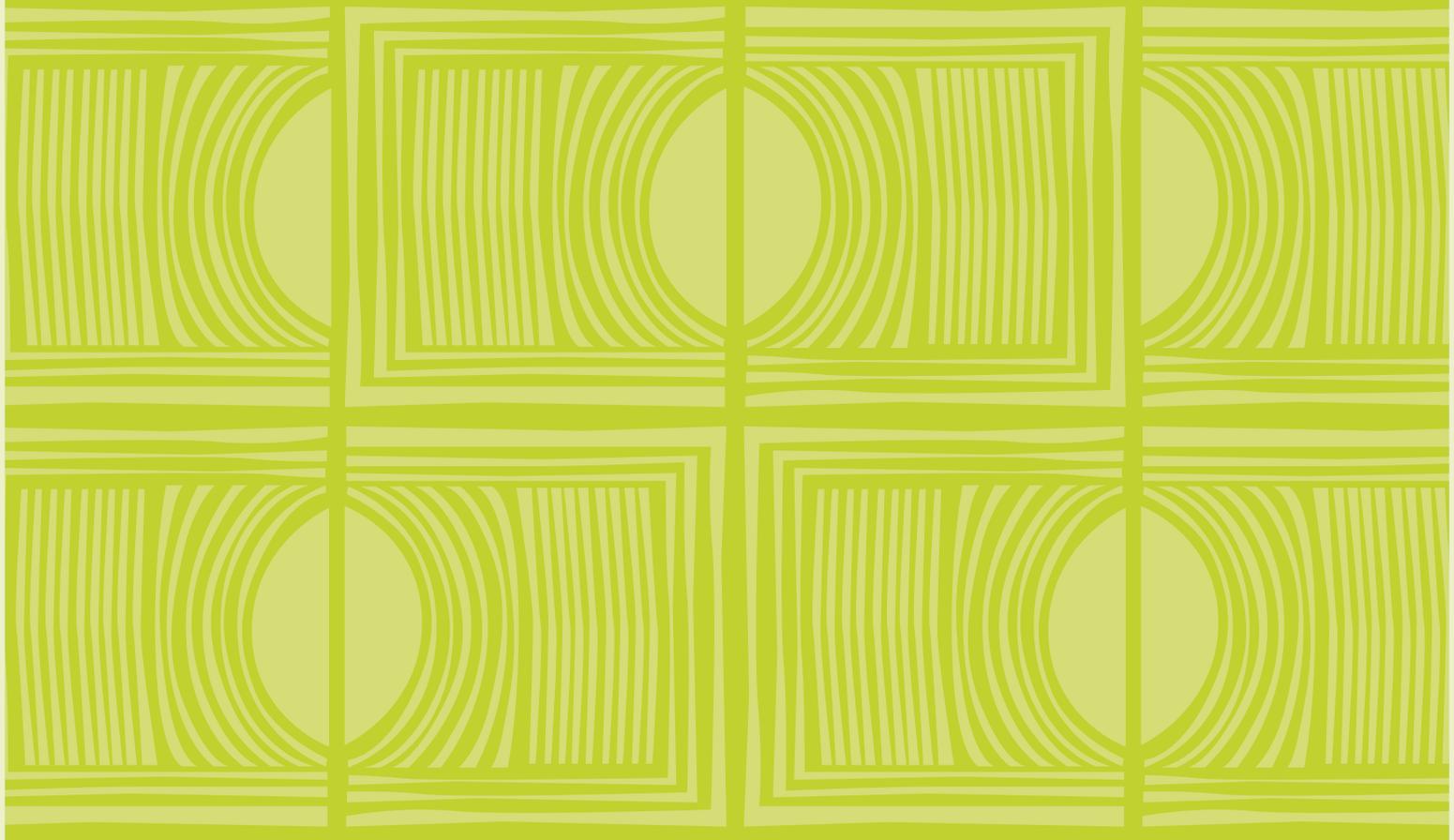


Building the Love

Part I: Building Rapport Between Sponsoring Organization and Senior Corps

2008 National Conference on Volunteering and Service
Atlanta, GA | June 1-3, 2008



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**RESOURCE & FUND
DEVELOPMENT**
INITIATIVE

Background

Corporation for National and Community Service

Created in 1993, the Corporation for National and Community Service manages more than 1.5 million Americans annually in improving communities through service. The Corporation supports service at national, state, and local levels through:

- AmeriCorps, whose members serve with local and national organizations to meet community needs while earning education awards to help finance college or training;
- Learn and Serve America, which helps link community service and learning objectives for youth from kindergarten through college as well as youth in community-based organizations; and the
- Senior Corps, the network of programs that helps Americans age 55 and older use their skills and experience in service opportunities that address the needs of their communities. Senior Corps includes RSVP, Foster Grandparent Program, and Senior Companion Program.

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Overview of Build the Love – Part I: Building a Relationship with Your Sponsor

Building the relationship with your supervisor is the first step to increasing the grantee organization's fiscal support for your program. If your sponsor doesn't see your project's relevance or value, they may not prioritize fund raising for your project. Your supervisor's enthusiastic support for your project depends upon some very concrete variables that will directly influence how much institutional support you get. Your job is to treat your supervisor as your most important stakeholder.

Learning Objectives

As a result of this session, participants will be able to:

- Identify the methodologies to thoroughly weave a Senior Corps project with the Sponsor Organization's vision and mission.
- Incorporate the tools to identify and communicate points of reciprocal benefit
- Begin a plan to effectively market your project to a love-level within the Organization

Agenda

- | | |
|-------------------------------------------------|------------|
| I. Introductions and Participant Expectations | 10 minutes |
| II. Define Your Relationship | 10 minutes |
| III. 4 Strategies to Enhance Your Relationship | 60 minutes |
| o Strategy #1: Clarify Mutual Mission and Goals | |
| o Strategy #2: Identify Shared Stakeholders | |
| o Strategy #3: Assess Mutual Benefits | |
| o Strategy #4: Enhance Communication | |
| IV. Summary, Evaluations, Close | 10 minutes |

Facilitators

Linda Brown Rivelis, CFRE President

Linda Brown Rivelis is president of Campaign Consultation, Inc. She has developed and implemented awareness, funding and mobilization campaigns for abused and neglected children, community service, education, family planning, AIDS/ HIV, the arts, museums, adults and children with physical disabilities, crime prevention, disaster relief, health care, people with mental retardation, public television, voter registration and welfare reform. In her thirty years of fundraising experience, she is responsible for raising more than \$60,000,000.

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**Sharon Rabb, MA
Project Specialist**

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Introductions & Participant Expectations

On a scale of 1-5, five being the best of relationships, how would you characterize the health and vitality of the relationship between your Senior Corps project and the grantee organization and vice versa?

1__

2__

3__

4__

5__

Check-in...

- What would you like to be able to do when you leave this session?

Reminder and Definitions

Reminder:

Fund raising by Senior Corps project directors is **not** a prohibited activity. Fund raising is important to keep projects solvent.

However, charging fund raising time and other costs to the federal or required non-federal share of the grant is **not** allowed.

This means that if you are SC project staff, your involvement in fund raising for your SC projects will be dictated by whether or not you have funding that is **not federal and not part of your non-federal share**. If you are 100% supported by the federal grant and non-federal share, you cannot be directly involved in fund raising for your project. In this case, you have several options which are outlined in the FAQ's at the end of this book. You should discuss your specific situation with your supervisor and with your Corporation state CNCS office.

Definitions:

Program Volunteers: Your RSVP, FGP, or SCP volunteers.
Remember—SCP and FGP volunteers can never fund raise!

Fund Raising Volunteers: Members of the community who could identify and secure cash or in-kind resources, products or services for your project.

Advisory Council: Assumes the responsibility of planning, decision-making, and acting as advisor to, and supporter of, the project it serves. An Advisory Council has no fiduciary responsibilities to the organization it serves.

Board of Directors: A group that is legally charged with the responsibility to govern an organization and/or corporation. In a non-profit organization the Board reports to the stakeholders (rather than the stockholders) of the community served by the organization.

Define Your Relationship

Relationships differ with some projects being very tightly enmeshed with their sponsor's goals and objectives and receiving strong support in areas of management and fundraising. Other projects function with wider autonomy. Still others are only tangentially aligned with their organization/agency.

Is your relationship built on...

Shared Mission and Goals

On a scale of 1 to 5, five being the highest degree of shared mission and goals, how well are the mission and goals of the grantee organization and the Senior Corps project aligned?

1__ 2__ 3__ 4__ 5__

Common Stakeholders

Who are the stakeholders that are shared between the grantee organization and the Senior Corps project?

Mutual Benefits

What benefits does the grantee organization provide for the Senior Corps project?

What benefits does your Senior Corps project provide to the grantee organization?

Support for the work you do

Project Directors--What did you do last month to update your supervisor/sponsor on your activities and successes?

Supervisors...what are you doing with this information you get from project directors?

Strategies that Can Enhance Your Relationship

A strong relationship between Senior Corps sponsor and project staff will make it possible to work together to secure the necessary resources to keep your project healthy. To build the love we will engage in the following 4 strategies:

Strategy #1: Clarify Mutual Mission and Goals

Strategy #2: Identify Shared Stakeholders

Strategy #3: Assess Mutual Benefits

Strategy #4: Enhance Communication

Strategies that Can Enhance Your Relationship

Strategy #1: Clarify Mutual Mission and Goals

Senior Corps project directors should be thoroughly familiar with all of the grantee organization's programs and projects. Study your grantee organization's brochures and materials and consider:

- Is the Senior Corps project mentioned anywhere in the grantee's materials?
- How is the Senior Corps Project supporting or impacting the whole organization? How could you do so more extensively?

For example, Senior Corps project directors are often out in the community and they have a great deal of useful information they can bring back to their supervisors in the organization. Sometimes grantees that are large organizations are distanced from the benefits of the project. If you consistently and vibrantly express your core work, you can seek ways to help your organization meet these goals and therefore see the value of your project.

Strategies that Can Enhance Your Relationship

Strategy #1: Clarify Mutual Mission and Goals

Write the mission and goals for both the grantee organization and the Senior Corps project in the appropriate boxes below.

Grantee Organization	Senior Corps Projects
<p style="text-align: center;">What is the mission?</p> 	<p style="text-align: center;">What is the mission?</p>
<p style="text-align: center;">What are the goals?</p> 	<p style="text-align: center;">What are the goals?</p>

Where are they the same or similar?

Where can one enhance the other?

Strategies that Can Enhance Your Relationship

Strategy #1: Clarify Mutual Mission and Goals

Use this chart to help identify programming, services, products and audience/clients. Project directors and supervisors can complete this chart together to identify where goals intersect.

Example

	Grantee Organization Goals: Head Start	Project Goals: Foster Grandparents
Programming/ Services/ Products	Involve children in early learning	<i>Serve children and youth with special needs</i>
Audience/ Clients	Children, parents	Children, seniors

	Grantee Organization Goals:	Project Goals:
Programming/ Services/ Products		
Audience/ Clients		

Strategies that Can Enhance Your Relationship Strategy #1: Clarify Mutual Mission and Goals

What actions could you take to clarify mission and goals?

1. _____

2. _____

3. _____

4. _____

5. _____

Strategies that Can Enhance Your Relationship

Strategy #2: Identify Shared Stakeholders

Stakeholders are people who communicate with and make connections to help achieve mission impact. Both Senior Corps projects and grantee organizations have internal and external stakeholders:

- External stakeholders are those who are directly or indirectly impacted by your programming, services and products. They are your clients and the community at large.
- Internal stakeholders are those people within your organization who have an accountability investment in your success.

Identify stakeholder in the four boxes below, then circle those that are the same.

Grantee Organization Stakeholders	Senior Corps Project Stakeholders
<u>External</u>	<u>External</u>
<u>Internal</u>	<u>Internal</u>

Strategies that Can Enhance Your Relationship Strategy #2: Identify Shared Stakeholders

What stakeholders do you hold in common, and how could you maximize their value?

Common Stakeholders

How to Maximize Their Value

1. _____

2. _____

3. _____

4. _____

5. _____

Strategies that Can Enhance Your Relationship

Strategy #3: Assess Mutual Benefits

Knowing what you have to offer and where you need help is the beginning of a strong working relationship between a sponsor and its Senior Corps project staff. Use the boxes below to chart strengths and needs of your grantee/project. Look for areas where you can support each other.

Example

Grantee Organization	Senior Corps Project
<u>Strengths/Benefits:</u> Strong media contacts	<u>Strengths/Benefits:</u> Strong Case for Support
<u>Needs:</u> Help to define its mission	<u>Needs:</u> Opportunities to publicize successes

Grantee Organization	Senior Corps Project
<u>Strengths/Benefits:</u> 	<u>Strengths/Benefits:</u>
<u>Needs:</u> 	<u>Needs:</u>

Strategies that Can Enhance Your Relationship

Strategy #3: Assess Mutual Benefits

Pick a scenario below. List the possible benefits each partner might gain from the relationship:

1. The Jackson County Library sponsors a Foster Grandparent Project:

Jackson County Library	Foster Grandparent Project

2. The Somerville Community Clinic sponsors a Senior Companion Project:

Somerville Community Clinic	Senior Companion Project

3. The Eastern Carolina United Way sponsors an RSVP Project:

Eastern Carolina United Way	RSVP Project

Strategies that Can Enhance Your Relationship

Strategy #3: Assess Mutual Benefits

Now list the resources you hold and record how your partner benefits from these resources.

My Resources:

My Partner Benefits:

1. _____

2. _____

3. _____

4. _____

5. _____

Strategies that Can Enhance Your Relationship Strategy #4: Enhance Communication

1. Build a Case for Support:

- "The reason why an organization both needs and merits philanthropic support." **The AFP Fundraising Dictionary*
- "It is a public statement that must stand alone without explanation." **The AFP Fundraising Dictionary*

How might having a Case for Support help you if the grantee organization is fund raising for its Senior Corps project?

2. Provide a clear explanation of the Senior Corps project's annual income and expenses:

Income

Project Grant
In-kind
Private Funding
Fees
Government income
Other

Expenses

Project Director Salary
Administration
Project materials
Project overhead
Service delivery
Other

Why is it important to have easily understood and accessible budget actual?

Strategies that Can Enhance Your Relationship

Strategy #4: Enhance Communication

3. Build a Sponsor Communication Agreement:

In any endeavor, having a plan keeps you focused. Create a schedule for regular communication on any schedule that works for both you and your supervisor. Regular communication will prevent any misunderstandings from growing to crisis level and will strengthen the bond among the project director, project director supervisor, and the grantee organization executive team.

A written communication agreement between sponsor and project can include:

- a) Schedule of regular meetings
- b) Calendar of your activities
- c) Materials to share with your partner
- d) "Good news" to share with your partner

Record below with whom you should meet or send regular communication?

How can a communications agreement lead to more active support from your partner?

Summary

Create a three-month plan to build rapport.

Strategy	Month 1	Month 2	Month 3
Clarify Mission and Goals			
Identify Shared Stakeholders			
Assess Mutual Benefits			
Enhance Communication			

Additional Resources

Senior Corps Strategy Webinars

http://www.nationalservicerresources.org/resources/online_pubs/senior_corps/sc_fundraising_webinars.php

Building Rapport-Grantees and Senior Corps Projects (recorded webinar.) CNCS Resource Center, Senior Corps Fund Raising and OMB Cost Principles, Fund Raising Resources.

Developing a Case for Support to Tell Your Story (recorded webinar.) CNCS Resource Center, Senior Corps Fund Raising and OMB Cost Principles, Fund Raising Resources.

Putting It All Together-How Grantee Organizations Can Appropriately Engage Project Staff and Leadership Volunteers to Fund Raise for Senior Corps Projects (recorded webinar.) CNCS Resource Center, Senior Corps Fund Raising and OMB Cost Principles, Fund Raising Resources.

Summary, Evaluations and Close



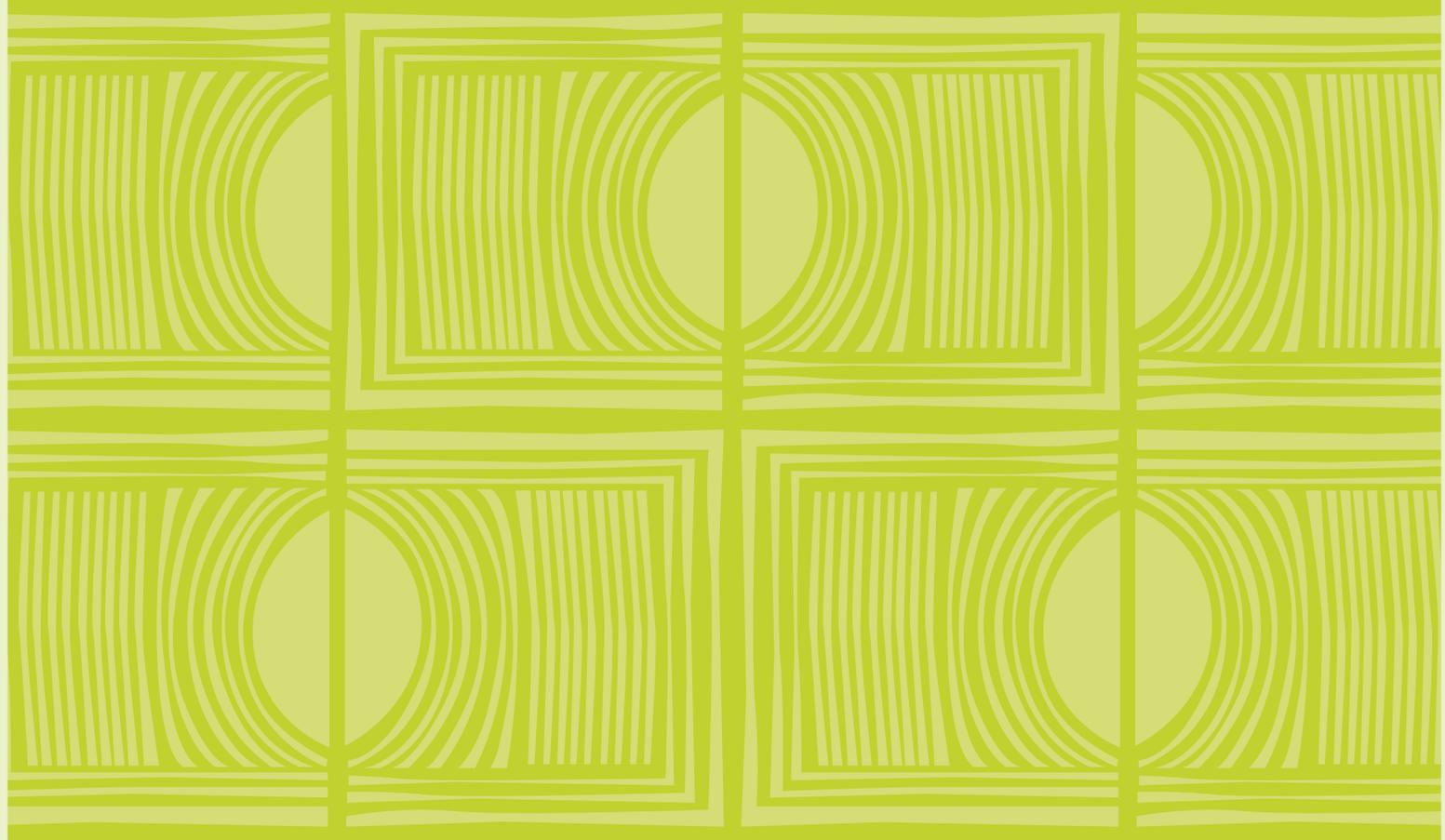
“One of the Top 100 Inner City Companies in the U.S.” – Inc.

Thank You!

Building the Love

Part II: Make It Easy for Sponsoring Organizations and Senior Corps Projects to Successfully Partner in Fundraising

2008 National Conference on Volunteering and Service
Atlanta, GA | June 1-3, 2008



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Overview of Build the Love – Part II: Make it Easy for Sponsoring Organizations and Their Senior Corps Project Staff to Successfully Partner in Fund Raising

Determining development roles and responsibilities is a crucial first step in planning to fund raise. During this workshop participants will review tools to build their Case to support their project as well as tips on using the networking and educational roles of project directors to build fund raising capacity.

Learning Objectives

As a result of this session, participants will be able to:

- Use the tools to develop a compelling Case for Support
- Reference methods to achieve communication ease such as a detailed accounting of project needs with cost breakdowns, etc.
- Begin to apply the techniques necessary to create a shared plan of roles and responsibilities for fundraising between a Senior Corps grantee and its project staff.

Agenda

I. Introductions & Participant Expectations	10 minutes
II. Building a Case for Support	25 minutes
III. Presenting Your Budget	10 minutes
IV. Creating an Internal Communications Plan	10 minutes
V. Defining Roles and Responsibilities	20 minutes
VI. Summary, Evaluations, Close	15 minutes

Facilitators

Linda Brown Rivelis, CFRE President

Linda Brown Rivelis is president of Campaign Consultation, Inc. She has developed and implemented awareness, funding and mobilization campaigns for abused and neglected children, community service, education, family planning, AIDS/ HIV, the arts, museums, adults and children with physical disabilities, crime prevention, disaster relief, health care, people with mental retardation, public television, voter registration and welfare reform. In her thirty years of fundraising experience, she is responsible for raising more than \$60,000,000.

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On a scale of 1-5, five being the best of relationships, how would you characterize the health and vitality of the relationship between your Senior Corps project and the grantee organization and vice versa?

1__ 2__ 3__ 4__ 5__

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Building a Case for Support

Definition #1

"The reason why an organization both needs and merits philanthropic support."

**The AFP Fundraising Dictionary*

Definition #2

"It is a public statement that must stand alone without explanation."

**The AFP Fundraising Dictionary*

The Case for Support...

- Focuses on how you are the best solution to a community problem.
- Keeps your story consistent, concise and meaningful
- Can be used in many different arenas
- Is a 7-9 page document that keeps your story consistent, concise and meaningful
- Is a dynamic "living" document that can be revised as your program grows.

* Building a Case for Support is allowed under OMB rules.

Building a Case for Support

The Case for Support includes...

- A discussion of the community “problem”
- A solution to the community “problem”
- Your organization’s response – Centered on the Senior Corps project
- Your plans for the future
- Your organization’s unique qualifications
- Ask and donor benefits

*What community problem does your project address?
(in 10 words or fewer)*

Building a Case for Support

Your Case for Support can be used by...

- Project director
- Grantee organization's executive team
- Fund raising and marketing staff of the grantee organization
- Media specialists
- Board of Directors or Advisory Council
- Others in the community who have volunteered to help you raise funds

Your Case for Support can be used to...

- Attract partners and volunteers
- Orient your organizational leadership to your project's work
- Write proposals
- Prepare press materials
- Develop brochures, promotional materials and fact sheets
- Market your remarkable work without "re-inventing the wheel" every time

How might having a Case for Support help you if your supervisor or another grantee organization staff member is fund raising for your project?

Building a Case for Support



<http://www.campaignconsultation.com/gizmos/case/index1.swf>

Presenting Your Budget

Print out a record your project's annual income and expense summary. Use the worksheet to develop your own budget presentations to donors, sponsors and your fund raising volunteers.

Example

<u>Income</u>	<u>Amount</u>	<u>Percentage</u>
Private Funding	\$ _____	_____ %
Government (<i>name</i>)	\$ _____	_____ %
Sponsor (<i>name</i>)	\$ _____	_____ %
<i>Other Revenue:</i>		
In-kind	\$ _____	_____ %
Total Income	\$ _____	100%

<u>Expenses</u>	<u>Amount</u>	<u>Percentage</u>
Service delivery:		
_____	\$ _____	
_____	\$ _____	
_____	\$ _____	_____ %
Materials and supplies	\$ _____	_____ %
Personnel (<i>stipends, etc.</i>)	\$ _____	_____ %
Administration (Rent, Office supplies, etc.)	\$ _____	_____ %
Other	\$ _____	_____ %
_____	\$ _____	_____ %
_____	\$ _____	_____ %
Total Expense	\$ _____	100%

Creating an Internal Communications Plan

Regular communication between you and your sponsor will keep each of you informed and ready for action, deadlines, and important events. Use the schedule below and seek input from your sponsor on a regular basis.

Make time in your schedule to...	Weekly	Monthly	Annually
Make face-to-face contact with your supervisor and other management leaders at your organization	✓		
Share a success story	✓		
Forward all notes of appreciation...fyi	✓		
Provide 1 page written overview of activities summarizing success stories		✓	
Share budget report (income to expenses)		✓	
Ask for advice on challenges		✓	
Refresh and review your Case for Support with your sponsor director			✓
Develop program budget			✓
Ask to be put on the agenda to make a presentation to the sponsor Board of Directors about the accomplishments of your Senior Corp project and volunteers			✓
Report on activities of fund raising volunteers			✓
Other	✓	✓	✓

Creating an Internal Communications Plan

Base Your Communications on Each Other's Learning Style

Keep in mind that there are differences in learning style and tailor your communications to the perceived learning style of the recipients of your messages. Or use a mix of approaches.

A visual learner may be happy with email, but an auditory learner may need a follow-up phone call.

It may take a while to figure out what is best for both of you. If in doubt, do it all!

Learner	How They Learn	Some Approaches to Use
Visual Learners (60%)	Through looking at images	<ul style="list-style-type: none"> • Provide written reports and materials • Highlight important points in Bold or Color • Provide diagrams/charts • Send emails • Use spell check (errors are distracting) • Other
Auditory Learners (30%)	Through hearing the spoken word	<ul style="list-style-type: none"> • Meet face to face • Leave phone messages as follow-up to written communications • Avoid background music and sounds • Other
Kinesthetic/Tactile Learners (10%)	Through doing and interacting	<ul style="list-style-type: none"> • Invite to see your project/initiative in action • Use face to face meetings where learner can perceive facial expressions and body language • Other

What kind of learner are you?

Defining Roles and Responsibilities

Experience from the Field

Additional Resources

Senior Corps Strategy Webinars

http://www.nationalservicerresources.org/resources/online_pubs/senior_corps/sc_fundraising_webinars.php

Building Rapport-Grantees and Senior Corps Projects (recorded webinar.) CNCS Resource Center, Senior Corps Fund Raising and OMB Cost Principles, Fund Raising Resources.

Developing a Case for Support to Tell Your Story (recorded webinar). CNCS Resource Center, Senior Corps Fund Raising and OMB Cost Principles, Fund Raising Resources.

Putting It All Together-How Grantee Organizations Can Appropriately Engage Project Staff and Leadership Volunteers to Fund Raise for Senior Corps Projects (recorded webinar.) CNCS Resource Center, Senior Corps Fund Raising and OMB Cost Principles, Fund Raising Resources.

Summary, Evaluations and Close



“One of the Top 100 Inner City Companies in the U.S.” – Inc. Magazine/ICIC”

Thank you!

APPENDIX

**Frequently Asked Questions Concerning Fund Raising and
Senior Corps Grants
January 18, 2008**

As a result of our monitoring program, an issue of fund raising – especially as it relates to 100% grant-funded project directors – was raised as a concern. We find ourselves in a challenging situation regarding the issue of fund raising by Senior Corps Project Directors and the limitations defined in the OMB Cost Principles. Therefore, we have prepared the attached draft FAQs and would welcome any feedback you have.

We know that this causes uncertainty for our Senior Corps programs. However, we are confident that we can work with each Senior Corps grantee to navigate the changes necessary to be compliant. Corporation staff will be engaged in helping you manage this change to our practices around the use of Senior Corps grant funds for fund raising. In the meantime, please be assured that we are looking at options for assisting grantees to address this issue with the minimal possible disruption to project operations.

BACKGROUND

1. What government-wide requirements apply to raising funds under our Senior Corps grant?

Senior Corps sponsors must follow all applicable OMB Cost Principle circulars:

- [OMB Circular A-87](#) for State, Local, and Indian Tribal Governments [Located at [2 CFR, Part 225](#)]
- [OMB Circular A-122](#) for Nonprofit Organizations [Located at [2 CFR, Part 230](#)]
- [OMB Circular A-21](#) for Educational Institutions [Located at [2 CFR, Part 220](#)]

These OMB Cost Principles apply to grant programs across the Federal Government and define the type of costs that grantees may include on a Financial Status Report (FSR) as costs being charged to a federally funded grant. The cost principles implement government-wide decisions on what types of costs may not be included in federal grant-funded programs, or claimed as meeting grant match requirements.

One of the specific types of costs discussed in the Cost Principles is fund raising. Specifically, the OMB Circulars A-122 and A- 21 do not allow grant funds to be used for the costs of “organized fund raising, including financial campaigns, endowment drives, solicitation of gifts and bequests, and similar expenses incurred solely to raise capital or obtain contributions.” Circular A – 87 has a similar provision.

2. What is the definition of grant funds?

Grant funds are defined as federal funds and required non-federal share.

3. *Is this a new requirement? If not, why is the Corporation raising this issue now?*

No. Organized fund raising costs have been unallowable under the OMB Cost Principles for many years. The Corporation is addressing this issue across all Senior Corps programs to ensure consistent guidance and practices in this area.

4. *How does the disallowance of costs for “organized fund raising” under the OMB Cost Principles work?*

If the Corporation learns that an FSR includes costs for organized fund raising, those costs (as either grant charges or matching expenditures) will be disallowed.

5. *How does the disallowance of costs for “organized fund raising” affect staff costs charged to the grant?*

Staff costs will be disallowed as charges to the grant, including required non-federal share, to the extent the time associated with those costs were spent on “organized fund raising.” This means that Senior Corps project staff whose salaries and benefits are 100 percent charged as direct costs to the federal grant may not engage in “organized fund raising” on behalf of the sponsor organization.

ACHIEVING COMPLIANCE

6. *At our sponsoring organization, there is no alternative to the project director devoting some time to fund raising for the project. Is there any way this can be done in compliance with the OMB Circulars?*

Yes, by reducing the time the project director charges to the grant’s federal or required non-federal share to reflect the time he or she actually spends on fund raising activities.

For example, a project director who needs to spend 5 percent of his or her time on fund raising activities would charge 95 percent of his or her time on the budget and FSR (either as federal costs or required non-federal share). Another project staff member, who might spend 15 percent of their time writing grant applications, would allocate 85 percent of his or her time on the FSR, the other 15 percent would be paid from excess non-federal funds, or other funds available to the sponsor. You must keep appropriate time records to support your cost allocation. Making this kind of change to the budget will actually give sponsors more flexibility in managing their programs.

7. *May costs related to “organized fund raising” for the project, such as project staff time, mailings, etc., be charged to “Excess” non-federal funds?*

Yes. The OMB circulars on allowable costs do not apply to funds that are not included in the grant as either costs to be reimbursed by grant funds or matching costs financed by the sponsor. Project sponsors are free to spend their non-federal funds that exceed the budgeted

match on anything they determine is appropriate for their project, including the costs of fund raising.

8. *The Corporation requires a full time director, unless specifically exempted. Isn't this requirement inconsistent with guidance that project directors who engage in organized fund raising not charge 100 percent of their time to the grant?*

Those are not the same things. We encourage a full time director. While time spent on organized fund raising activities may be within the scope of a director's responsibilities, it cannot be charged to the federal or required non-federal share.

9. *What staff activities are considered "organized fund raising" under the OMB cost principles?*

"Organized fund raising" includes all efforts to obtain funds to cover capital or operating costs, or to solicit in kind contributions. The test is the purpose of the event, not the amount of funds raised. Examples include:

- Conducting a financial campaign or endowment drive
- Soliciting specific gifts or bequests
- Applying for grants (See Question 12 regarding continuation applications for Senior Corps grants)
- Applying for support from local community foundations, such as the United Way

10. *What staff activities will NOT be considered "organized fund raising" under the OMB cost principles?*

Senior Corps project staff may disseminate information about the project's activities, accomplishments, and outcomes, as well as provide information about the grant application, the governing regulations, and the grants terms and conditions. Even if that information is going to be used by someone else to raise funds for the program, this will not be considered "organized fund raising."

For example, project staff may:

- Negotiate a grant budget following approval of a grant application.
- Provide information about the project to a grant writer.
- Inform community organizations and leaders about the project, its activities and accomplishment and the non-federal funding requirements of the grant.
- Negotiate as part of the Memorandum of Understanding with a volunteer station for the volunteer station to provide cash and/or in-kind support for the project, so long as such contributions are not a precondition of providing the station with volunteers.
- Respond to questions or provide information to state or local governments that may decide to contribute to the cost of the program.

11. As part of our grant-supported efforts to inform and educate the general community about project activities, may we include information about how members of the public can make donations to support the project?

Yes. So long as the primary purpose of the activity is informing and educating the community at large, and the activity falls with the scope of the grant, it would be permissible to include information as to how interested persons can make donations. For example, it is permissible for a grantee to prepare and distribute a newsletter, or maintain a website (even though the web site includes information about how to make donations to support project activities). Another example would be an “open house” for the public to learn more about the project and what the volunteers are doing in the community. Under these circumstances the grantee could include information on how an interested person could support the project.

12. May project staff charge time spent preparing second and third year continuation applications for their project to the Corporation to the current grant?

Yes. This is an administrative action required by the Corporation to continue the current grant, and is not considered “organized fund raising.”

13. May project staff who are 100 percent funded by the grant spend time writing a new three-year application (“renewal” application) for their project?

No. The resources of the current grant cannot be used to request funds for the next grant period. This time may be charged to Excess.

14. What are some other options available to sponsors, such as “self-incorporated” projects, who lack other resources to spend on fund raising activities?

Other options include:

- (a) Ask members of your Board of Directors to assist:** Board members of non-profit organizations frequently play a key role in fund raising.
- (b) Use Sponsor Organization Staff:** Staff of a sponsoring organization that are not charged to the Senior Corps grant may engage in fund raising without regard to the OMB Cost Principle restrictions.
- (c) Make Use of the project Advisory Council:** As noted in Senior Corps program regulations, the membership of the Advisory Council should include people who are “capable of helping the sponsor meet its administrative and program responsibilities including fund raising, publicity, and programming for impact.” The Advisory Council can help raise both the required non-federal share and other funds. In addition, Advisory Council members can be asked to prepare renewal grant applications.

- (d) **Seek Other Pro-Bono Volunteer Grant Writers:** Small nonprofits frequently are able to get pro-bono help in grant writing from community members.
- (e) **Participate in United Way or other Community Wide Campaigns.** In this case, fund raising is undertaken by professionals in the community-wide organization.
- (f) **Offer internships to local universities and colleges,** especially for graduate students with experience in grant writing, marketing, non-profit administration.

15. *May we count the value of fund raising volunteer time spent fund raising as an in-kind contribution to the grant?*

No. Because fund raising is not an allowable cost under the OMB Cost Principles, the value of volunteer time spent on fund raising may not be counted as an in-kind contribution to the grant.

16. *Do state funds fall within same fund raising restrictions?*

Yes, if the state funds are used as part of the required non-federal share.

17. *May we solicit gifts from participants or beneficiaries?*

No. Our statute prohibits such activities.

18. *If we already submitted a grant application that does not reflect the Cost Principles, what should we do?*

For grants already submitted to the Corporation for funding (i.e. January 01, 2008 cycle), we will make the award and work with the grantee to amend the budget. It is our expectation that all grants submitted after January 01, 2008 will reflect compliance with OMB Cost Principles as outlined in this document.

19. *What support will the Corporation provide in implementing the OMB Cost Principles?*

Corporation field staff members are available to answer any questions you might have. Also, we are developing webinars and other online courses to provide assistance.

RSVP VOLUNTEERS

20. *May RSVP volunteers assigned to the project to perform administrative functions engage in fund raising on behalf of their own project?*

Yes. RSVP volunteers assigned to perform administrative functions may raise resources for their projects, consistent with the approved application.

21. *May RSVP volunteers engage in fund raising on behalf of an FGP or SCP project sponsored by the same organization that sponsors their RSVP project?*

Yes. As in the case of fund raising on behalf of their own project, RSVP volunteers may raise resources for an FGP or SCP project sponsored by the same organization that sponsors their RSVP project.

22. *May RSVP volunteers who serve on the project's Advisory Council engage in fund raising in their capacity as Advisory Council members?*

Yes. One of the specific roles of Advisory Council members is to help the sponsor meet its administrative and program responsibilities including fund raising.

GENERAL

23. *May a project director accept an unsolicited donation for the project on behalf of the sponsor?*

Yes. Acceptance of an unsolicited donation is not considered fund raising.

24. *May project staff charge their time and related expenses spent soliciting volunteer recognition items and/or support?*

Yes. However, time and related expenses spent soliciting volunteer recognition items can only be charged to Excess funds.

25. *As a project director, may I charge to the grant the time I spend participating in internal discussions of the project budget and presenting the case for my sponsor to allocate funds to meet the grant's non-federal funding requirement.*

Yes. Such activities are considered part of the project director's management responsibilities.

26. *May we charge to the grant staff time to attend fund raising workshops at the Corporation sponsored conferences and/or other approved conferences?*

Yes, professional development time is an allowable cost.

27. *If we have been charging certain fund raising costs, including project staff time, to the grant, what can we do to correct the situation in the future?*

You may remove those costs from the federal or required non-federal share of the grant and charge those costs to Excess.

28. *May project staff volunteer their own time, off hours, to engage in fund raising?*

No. Project staff cannot avoid the limitation on organized fund raising by donating “off duty” time.

29. *We are a non-Corporation funded Senior Corps project and receive no federal funds. Are we subject to the same restrictions on fund raising by staff?*

No. The OMB circulars on allowable costs do not apply projects that do not receive federal funds. However, sponsors should be sure that support that they receive from state and local sources are not “subgrants” of federal funds. Subgrants financed under a federal grant program may be subject to the OMB Cost Principles.

30. *May we use federal funds to respond to reporting requirements of other grants supporting Senior Corps programs?*

Yes. This reporting of grant progress is not considered organized fund raising.

31. *May we join other project directors in a consortium specifically to solicit funds for a grant?*

Yes. However, time spent on this activity cannot be charged to federal or required non-federal share.

32. *May Senior Corps Associations fund raise for projects?*

Yes. However, time spent on this activity cannot be charged to federal or required non-federal share.

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