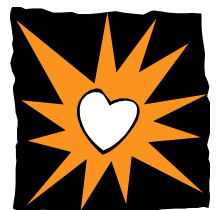


Program Management Guide
for *Faith in Action* Programs
Embedded in an Umbrella Organization



FAITH
IN ACTION



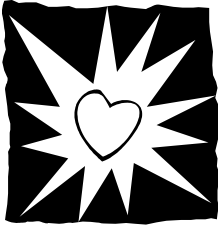
**Faith in Action National Office
Wake Forest University School of Medicine
Medical Center Boulevard
Winston-Salem, N.C. 27157-1204**

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Faith in Action® is a nationwide interfaith volunteer caregiving program of The Robert Wood Johnson Foundation®. Faith in Action brings together volunteers of many faiths to provide care for their neighbors who are frail or who have long-term illnesses or disabilities. Since 1984, the Foundation's support has resulted in establishing hundreds of *Faith in Action* programs across the country.

**FAITH
IN ACTION**

The *Faith in Action* National Office is located at Wake Forest University School of Medicine. The five essential elements of a *Faith in Action* program include an **interfaith** coalition that mobilizes **volunteers** to provide informal **caregiving** to help people with **long-term health needs** in their **homes**.

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Contents

Introduction

Acknowledgments

Lessons Learned by Experienced *Faith in Action* Program Directors and Suggested Strategies

- Lesson 1: Cultivating Leadership: *How to create effective leadership in an existing structure*
- Lesson 2: Developing Identity: *A closer look at creating individual program identity for your Faith in Action program*
- Lesson 3: Creating Financial Sustainability: *Developing a financial plan for program sustainability and the role of the parent organization in long-term support*

INTRODUCTION

Some *Faith in Action* programs are part of larger umbrella agencies such as hospitals, hospices, community service organizations and universities. This resource was designed to provide *Faith in Action* program directors with strategies and techniques related to program management within a larger organization. We have asked several *Faith in Action* program directors that are part of larger organizations to share with the *Faith in Action* network their stories of success and struggles.

As we learned from experienced program directors, several benchmarks emerged as vital for successful program management and sustainability.

- ❖ Working effectively within the parent organization's existing structure
- ❖ Developing an individual program identity in an existing infrastructure
- ❖ Establishing fiscal stability for the *Faith in Action* program

This resource was created with these benchmarks in mind and includes examples of tools that will help you achieve them.

The *Faith in Action* national office salutes all of your hard work as you diligently develop relationships between volunteers of all faiths and the neighbors you serve with long term health needs. Our hope is that you can share this resource, its tools and information with the staff of your *Faith in Action* program, staff of the parent organization and board and advisory committee members.

ACKNOWLEDGMENTS

We would like to express our appreciation to the many experienced *Faith in Action* program directors who have graciously shared their knowledge of *Faith in Action* programs within umbrella agencies. We have learned much from you about the advantages and challenges of program management of an interfaith volunteer caregiving program embedded in a parent organization. A special thank you to the following mentors, PEERS facilitators (Peers Encouraging Each other to Reach Success) and program directors for their contributions and guidance in developing this resource:

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San Diego, Calif.

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Faith in Action Silver City
Silver City, N.M.

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Finally, we wish to extend our sincere appreciation to the The Robert Wood Johnson Foundation in Princeton, New Jersey, for its support of *Faith in Action* that made this publication possible. The staff of the national office appreciates the ongoing support and guidance of Judith Stavisky, Ann Pomphrey and Joy Neath.



FAITH
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Lessons Learned by Experienced *Faith in Action* Program Directors



Lesson 1: Cultivating Leadership How to Create Effective Leadership in an Existing Infrastructure

Faith in Action programs within larger organizations are generally overseen either directly by the board of directors of the parent organization or are guided by advisory committees that report back to the board. The more programs an umbrella agency has or the farther removed *Faith in Action* is from the organization's primary mission, the more likely it is to be overseen by an advisory or oversight committee. Thus, the choice depends on factors such as:

- *How does Faith in Action fit in the larger organization?*
- *Are there too many programs for the board of directors to oversee directly?*
- *How many programs does the umbrella agency have?*
- *Is Faith in Action slightly removed from the organization's primary mission and work?*

Public/Private Ventures (P/PV) has conducted several studies on sustainable *Faith in Action* programs and identified *three key leadership* elements: 1) the program director, 2) the board of directors and/or an advisory committee and 3) the interfaith coalition. In this section, we will concentrate on two of those, the program director and the oversight committee, which can either be the organization's board of directors or an advisory committee. The *Faith in Action* program director keeps the oversight committee informed about the development, successes and potential problems of the program and the oversight committee provides guidance and leadership to the program director. This section will present different leadership models that programs should consider, along with the advantages and disadvantages of each. But first, it is worth noting the differences between a board of directors and an advisory committee, as well as characteristics of an effective and successful committee chairperson.

What is a board of directors and what is its role?

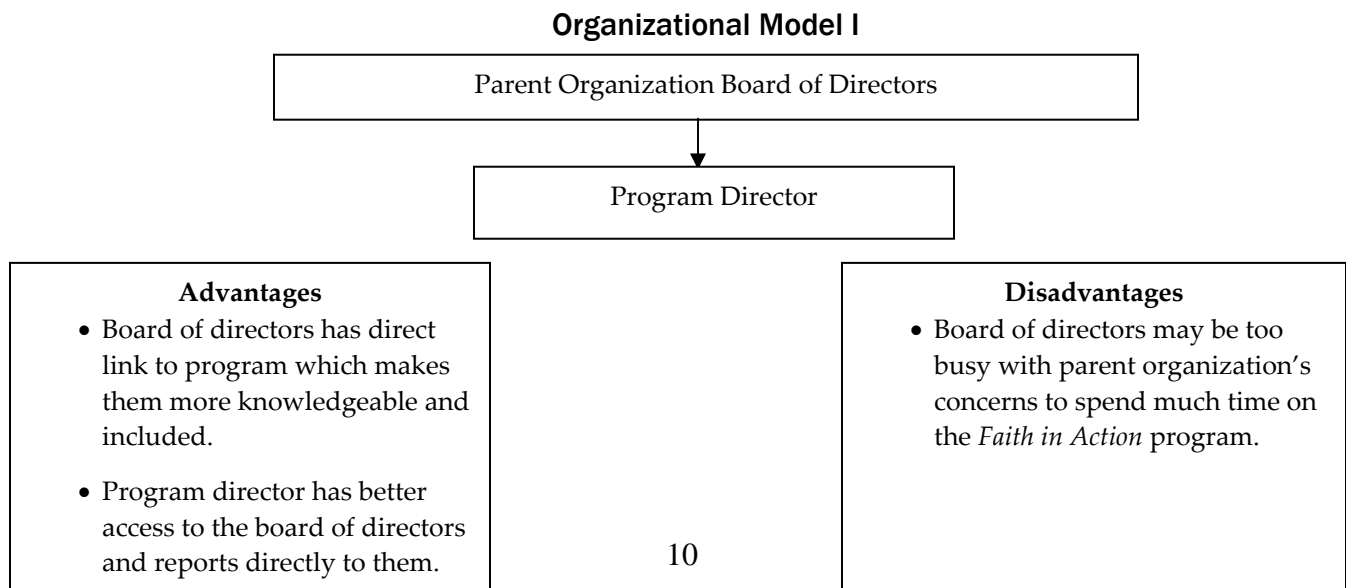
Many *Faith in Action* programs are embedded in existing nonprofit organizations that have governing boards of directors, whose members are generally elected with staggered terms. Every board of directors has a legal and ethical responsibility that cannot be delegated. Adapted from an online resource, BoardSource (www.boardsource.org), the responsibilities of the board fall into the following categories:

- **Legal and fiduciary** - The board is responsible for ensuring that the organization meets legal requirements and that it is operating in accordance with its mission for the purpose for which it was granted tax-exemption. As safeguards of public trust, board members are responsible for protecting the organization's assets.
- **Oversight** - The board is responsible for ensuring that the organization is run well. It moderates power of management and has the power to hire and remove the executive officer or president. The board must assist in developing the annual budget and ensuring that proper financial controls are in place.
- **Fund raising** - As part of the fiduciary responsibility, board members should be actively involved in assuring that the organization has the necessary funds needed to operate. This may include board members making personal contributions, organizing a special event, hosting a benefit or serving as an advocate with foundations, corporations or government.

An example of a *Faith in Action* program governed by the parent organization's board of directors is below.

Organizational Model I

In this model the program director reports directly to the parent organization's board of directors. The board of directors is the governing body for the *Faith in Action* program. It is important for the program director to keep open lines of communication with the board, through inter-office newsletters, monthly meetings with a board representative, e-mails and/or attendance at board meetings.



What is an advisory/oversight committee and what is its role?

An advisory committee provides leadership and guidance to the *Faith in Action* program director and assists in ensuring that the mission of the program is met. Provides input related to volunteer recruitment and recognition, public awareness, community need and other areas of program management. An effective advisory committee has three major roles and these differ from those of a board. They are:

- ***To advise*** - The advisory committee assesses specific areas of the program and makes suggestions and recommendations for improvement. The advisory committee provides leadership in helping the *Faith in Action* program achieve its mission. The committee should be heavily involved in strategic planning and subcommittee work to advise the program director on priorities and effective strategies for achieving program goals.
- ***To assist*** - The advisory committee helps the program director carry out specific activities. These activities may include marketing, volunteer recruitment, recognition activities and fund raising. Members may assist with special event fund-raisers and speak on behalf of *Faith in Action*.
- ***To support and advocate*** - The advisory committee members promote local program efforts in the community and serve as ambassadors for the program. Members may establish a speaker's bureau to assist in reaching out to civic groups, congregations and the business community. In addition, committee members help promote and publicize the *Faith in Action* program through their existing personal and professional networks in the community.

Organizational Model II

In this model the parent organization's board of directors appoints a board member to chair the *Faith in Action* advisory committee and recruits community members to serve on that advisory committee. It is also important to point out that this is only one example of an advisory committee; there are some advisory committees that do not have a board member chairing or participating in this committee.

Organizational Model II



Advantages	Disadvantages
<ul style="list-style-type: none"> • Regular communication with parent organization board of directors through committee chair. • Advisory members with special talents and connection can benefit the program. • The program director recommends candidates for advisory committee members. 	<ul style="list-style-type: none"> • Program director does not have direct communication with parent organization board of directors. • Programming decisions may need to go through two levels of communication.

Let's review a table that summarizes the differences between a board of directors and an advisory committee.

<u>Board of Directors</u>	<u>Advisory Committee</u>
Meets legal requirements and responsible for protecting the organization's assets	Advises program director on effective strategies for program management
Develops annual budget and ensures that proper financial controls are in place	Assists program director with specific activities
Assures program has continued funding	Supports and advocates for the program

As noted previously, there are differences and similarities with a board of directors and an advisory committee. Also discussed in these models are the roles that the governing body and program director should consider when working on creating a sustainable *Faith in Action* program. There is a plethora of information to remember when establishing and working with a board or an advisory/oversight committee. Review the “preferred practices” below:

“Preferred Practices” when working with board or advisory committees

- ***Meet at least quarterly, preferably 8-10 times a year.*** P/PV research suggests that the board of directors or advisory committees for a *Faith in Action* program should meet at least quarterly. Committee members that feel connected to the program and its mission are more likely to assist with fund raising and volunteer recruitment and will also be efficient and effective as committee members.
- ***Recruit people with special talents.*** Your committee members should embrace diverse skills and talents that can help further the mission of the program. You may want to consider recruiting an attorney who can help with establishing by-laws and governing procedures, an accountant to assist in maintaining accurate financial records or a marketing professional to assist with developing a communications plan.
- ***Create a board of director/advisory committee notebook.*** Each member should be provided a notebook. Include a copy of the program’s mission and by-laws, officer and committee member job descriptions, list of subcommittees, roster of advisory committee members including contact information and copies of advisory committee meeting minutes. The board of directors or advisory committee should have developed detailed roles and responsibilities for each member. The chairperson and program director should also have a clear understanding of their roles and responsibilities. Provide all members, regardless of past experience, with an orientation session covering organizational and governing structure of the *Faith in Action* program. (see Figure 1)

Effective boards of directors and advisory committees need strong leadership from the committee chairpersons. The chairperson is critical to the success of the committee because he or she sets the tone for the committee and guides its efforts in working with the program director. There are three major characteristics of an effective and successful chairperson:

- ***Keeps the program mission in mind*** - The major objective of the chairperson is to keep the program mission and vision a priority. Program decisions should be mission driven and the chairperson helps guide the objectives of the program's mission. The chair needs to clearly understand the role of the *Faith in Action* program within the larger organization and be an advocate for it as well.
- ***Cultivates a cohesive working relationship*** - The development of a cohesive working relationship between the program director and advisory or board members is essential in creating opportunities for positive program outcomes. The chairperson needs to mobilize the collective work of committee members and utilize the talents and enthusiasm of its members.
- ***Well organized*** - Well organized meetings add to the committee's success and effectiveness. Busy committee members are more likely to remain involved when their time is used well. Meetings should be scheduled in advance and start and end on time.

We have discussed the role of an effective advisory committee and characteristics of a successful chairperson. In order to work effectively with the advisory committee, the program director should be mindful of the following:

- ***Accept recommendations.*** The program director must be willing to accept the leadership of the board or advisory committee and act on the committee's advice.
- ***Recognize outstanding committee members.*** Committee members are a very important resource for the success of your program. Acknowledgement and public recognition encourage attendance and involvement and also attract the attention of potential candidates for new committee members. The following list illustrates ways to recognize committee members.
 - Issue press releases announcing new member appointments.
 - Invite advisory committee members to visit the program to see the results of their recommendations and diligent service.
 - Hold a banquet in honor of the committee and present certificates of appreciation. (see Figure 2)

- Send letters of appreciation or thank-you notes to committee members thanking them for their support. (see Figure 3)



Sample Statement of Understanding For Board of Directors

As a member of _____, I understand that my duties and responsibilities include the following:

1. I am fiscally responsible, with the other board members, for this *Faith in Action* program. It is my duty to be familiar with the budget and active in planning that budget and in fund raising to meet that budget.
2. I am legally responsible, along with the other board members, for this *Faith in Action* program. I am responsible to know and approve all policies and programs, and to oversee the implementation of policies and programs. I know that if I fail in my tasks, and if the organization becomes the subject of a suit from a private person, or from the Federal or state government, I may be held personally liable for the debts incurred.
3. I am morally responsible for the health and well being of this organization. As a member of the board, I have pledged myself to help realize the mission of this organization.
4. I will give what is for me a significant donation. I may give this as a one-time donation each year, or I may pledge to give a certain amount several times during the year.
5. I will actively engage in fund raising for this organization, in whatever ways are best suited for me. These may include individual solicitation, doing special events, writing mail appeals and the like. There is no set amount of money that I must raise because I am making a good faith agreement to do my best, and bring in as much money as I can.
6. I will attend a minimum of eight board meetings every year, and be available for phone consultation. I understand that commitment to this board will most likely involve a good deal of time, and will probably involve not less than ___ hours per month.
7. I understand that no quotas have been set, that no rigid standards of measurement and achievement have been established. I commit to carry out this agreement to the best of my ability and to support the other members in their

efforts to do the same. In the event I fail to act in good faith, I will resign, or someone from the board may ask me to resign.

In turn, (name of *Faith in Action* program) is responsible to me in a number of ways:

1. I will be sent, without request, quarterly financial reports and board meeting minutes that allow me to meet the prudent person section of the law.
2. I can call on the paid staff to discuss program policies, goals and objectives.
3. Board members and staff will respond in a straightforward and thorough fashion to any questions I have that I feel are necessary to carry out my fiscal, legal or moral responsibilities to this organization.



Board of Directors or Advisory Committee Descriptions

The descriptions below represent the various committees/subcommittees that *Faith in Action* programs have found effective. Please consider your program's needs and the resources of your board or advisory members to determine an appropriate committee or subcommittee structure for your governing board or advisory committee.

Personnel and Program Committee

- Recruits and evaluates program director
- Reviews, evaluates, and recommends policies for program direction
- Makes recommendations to the board regarding personnel and program goals and policies

Long-Range Planning and Evaluation Committee

- Reviews and evaluates program operations and maintains standards of program performance
- Establishes and/or revises strategic plan for program development, coalition building, and fund raising
- Engages other board committees in planning process and gets approval for future direction of the program

Finance/Fund Raising Committee

- Ensures accountability, integrity, and trust of program's fiscal operations
- Approves and monitors budget and finances
- Formulates fund-raising goals and action plans
- Makes recommendations to the board regarding fiscal operations and planning

Public Relations Committee

- Advocates and promotes program's mission, services, and value to the community
- Establishes events or campaigns that increase visibility and inspire confidence in the program
- Cultivates and strengthens relationships with coalition members

Volunteer Management Committee

- Establishes plan for volunteer recruitment

- Evaluates and make recommendations to the board for volunteer training policies
- Plans and supports efforts to recognize volunteers

Nominating Committee

- Recruits new candidates for board membership and makes recommendations for election/appointment
- Monitors and assesses board member performance
- Makes recommendations to the board regarding board member policies
- Conducts ongoing training and professional development for new and incumbent board members



Board of Directors or Advisory Committee Member Job Description

Purpose of Position:

Each board or advisory committee member is responsible for ensuring effective and fiscally sound programs and operations by providing good leadership, advice, and direction to the staff and volunteers of the *Faith in Action* program.

Duties and Responsibilities:

- Prepare for monthly meetings by reading materials distributed prior to the meeting
- Attend monthly meetings and participate in the proceedings
- Serve on at least one committee or sub committee and actively participate in the proceedings
- Maintain knowledge of current programs and staff of the organization
- Assist with fund raising efforts by participating in special events and soliciting the financial support of others including employers and friends
- Share resources, expertise, and talents with the organization
- Review and approve policies, program goals and budget
- Monitor and evaluate effectiveness of program against goals and plans
- Ensure adequate funding to achieve programming goals through additional fund-raising efforts. **Note: Board members are also responsible for fiscal management and budget oversight.**
- Advise, support, and encourage the program staff and volunteers

- Serve as an advocate of the organization to various constituent groups



FAITH
IN ACTION

Certificate of Appreciation

Presented to

(Insert Committee Member Name)

On behalf of

(Name of Faith in Action Program)

Thank you for your continued support, dedication and leadership on the advisory committee.

Chairperson

Date

Program Director

Date

Figure 3: Letter of Appreciation



**Insert Parent
Organization
Logo**

January 1, 2004

Mr. Don Johnson
123 Any Street
Anywhere, USA 12345

Dear Mr. Johnson,

Thank you for your dedicated service on the (name of program) Advisory Committee. This program’s effectiveness depends upon the support, dedication and leadership that you have so freely given.

With your help and recommendations, we have developed a better program that will continue to assist (name of area served) residents remain independent in their homes through the (describe program services).

Please accept my sincere appreciation for all of your hard work and efforts.

Sincerely yours,

John Doe
Program Director
(Name of program)



Lesson 2: Developing Individual Program Identity

Though *Faith in Action* programs that are part of larger organizations experience challenges such as difficulty fund raising, many also experience challenges with marketing and developing their individual program identities. However, many *Faith in Action* programs find that being part of larger organization is an advantage. They have learned how to affiliate with the larger parent organization and benefit from this relationship by using the organization's reputation to help build a strong *Faith in Action* program. This chapter will highlight how *Faith in Action* program directors have created strong program identities under the umbrella of a larger organization.

Develop a Marketing Plan

The key strategy program directors use to achieve a strong program identity is the development of a sound communications and marketing plan. It is very important that program directors or designated staff actively promote the *Faith in Action* program. By actively promoting your program, you encourage the community to “buy” into your mission and attract volunteers, care receivers, donors and coalition members who can help you fulfill the goals of the program. A strong program identity is a necessary tool in the development of community awareness. The use of media outlets and resources from the *Faith in Action* national office are helpful and allow programs to disseminate information, tell caregiving stories and highlight the services your program provides and the people that you serve. When developing a communications and marketing plan, you may want to consider the market you are attempting to reach, the message you want to convey and the results you expect from your efforts, which will help you determine the best marketing method for your particular needs.

Within the marketing plan you may want to consider including different types of media outreach such as presentations, community education, newsletters, special events and tailored media outreach to your marketing plan. To help achieve a strong communications and marketing plan that aids in developing individual identity, here are a few “preferred practices” recommended by program directors. You will notice many of the “preferred practices” would also apply to a free-standing *Faith in Action* program but we present them here to emphasize that these practices are just as important for a program that is within a larger agency.

- ***Presentations.*** Presentations are great opportunities to provide information to community organizations and agencies, auxiliaries, congregations and businesses about your *Faith in Action* program and its relationship with the parent agency. Presentations are helpful in attracting new coalition members and volunteers.
- ***Community education.*** Community education provides congregations, caregivers and organizations with information about specific content areas. Program directors should make presentations on the services and resources available through the local *Faith in Action* program and its relationship with the parent agency as a way to educate and bring awareness to congregations and community agencies.
- ***Plan a friend- and fund-raiser.*** A special event is not only a fund-raiser for your *Faith in Action* program, it is a great way to increase community awareness and involve the community in your program efforts.
- ***Recognize the power of the media.*** Having a tailored media outreach plan is essential in creating program identity. Exposure in radio, television and print (newspaper and magazine) can effectively tell the story of your program. Consider creating a *Faith in Action* one-page newsletter that may be inserted into the parent organization's monthly or quarterly publication.
- ***Have the support of your faith community.*** Consider making presentations to existing and potential coalition members. Many *Faith in Action* programs that are embedded in larger organizations have been successful through the development of solid coalitions. Increasing the size of your coalition will assist your program in developing community ownership. According to a study on the sustainability of *Faith in Action* programs, those with larger coalitions are able to recruit more volunteers and receive greater financial support from coalition members. Assistance from coalition members helps programs achieve volunteer retention and financial sustainability. Consider using the attached Memorandum of Understanding with coalition members. A memorandum of understanding solidifies the partnership between the faith congregation and the *Faith in Action* program. (see Figure 4)
- ***Be mission-driven.*** Your organization's mission and vision statements should be the cornerstones of your communications plan, which drives

your media activities. Share your mission and vision statements with staff, board members, advisory committees and other internal decision makers. You may want to develop a *Faith in Action* “one-pager” that highlights your mission and also the mission of the larger organization. The “one-pager” (see Figure 5) at the end of this section may be helpful to *Faith in Action* programs in tailoring their outreach efforts.

- ***Use the Faith in Action logo on printed materials.*** The *Faith in Action* logo should be used as a “branding tool” for your program. The logo should be added to printed materials to create awareness in the community about your program. Co-branding is also a good method for developing identity. While using the *Faith in Action* logo on printed materials, consider also using the parent organization logo on letterhead, business cards or other printed correspondence (see Figure 6).
- ***Keep Faith in Action records separate from those of the parent organization.*** Program directors have found that maintaining separate records is helpful in achieving individual identity and future financial sustainability. Consider keeping financial records, volunteer and care receiver files and other *Faith in Action* information separate from that of the parent organization. This will prove helpful when seeking to raise funds through additional grants or from individual donors. Many *Faith in Action* program directors have found that maintaining separate records of itemized donations and expenditures is helpful in projecting potential income from future donors and funders. To help identify donations to your program, remind donors to write “for the *Faith in Action* program” in the memo section of the check. This helpful tip from a local program director keeps her program’s individual donations separate from other contributions to the parent organization.
- ***Follow up on news releases.*** After sending news releases to media outlets, follow up with section editors or writers. This may assist you in developing relationships with key individuals who can promote your program in the community.
- ***Communicate internally.*** Newsletters provide opportunities for regular communication between the *Faith in Action* program and the parent organization. While communicating with the public is important to program sustainability, it also is important to communicate with staff of the larger parent organization. Keep the parent organization abreast of

your programming efforts. Consider an internal newsletter that may be used to highlight volunteer and care receiver stories. By doing so you improve program relationships and increase the opportunity for referrals from the larger organization. Improving internal communication with the larger organization is key to your program's overall effectiveness.



*Insert Parent
Organization
Logo Here*

Memorandum of Understanding Between (*Faith in Action* program) And (Community Congregation**)**

This agreement between *Faith in Action* and (**Community Congregation**) seeks to solidify the collaborative partnership between the two organizations. This agreement also seeks to outline the responsibilities of each organization in the hopes of ensuring a sound working relationship between *Faith in Action* and (**Community Congregation**). This agreement is to be reviewed and renewed yearly.

***Faith in Action* agrees:**

1. To promote the partnership between (**Community Congregation**) and *Faith in Action*, which may include listing (**Community Congregation**) in brochures, flyers, pamphlets, news articles, or media announcements. *Faith in Action* will make available to (**Community Congregation**) such materials.
2. To accept volunteer candidates from (**Community Congregation**). All volunteers will undergo a screening process to determine if the volunteer program is appropriate for them. Volunteers and (**Community Congregation**) agree that proselytizing activities will not be permitted.
3. To train, supervise and support all volunteers. Unless noted in volunteer materials, all expenses related to volunteer training will be assumed by *Faith in Action*.

Community Congregation agrees:

1. To promote the partnership between (**Community Congregation**) and *Faith in Action*. This may include listing *Faith in Action* in brochures, flyers, news articles, or media announcements. Should (**Community Congregation**) design any materials highlighting its partnership with *Faith in Action*, (**Community Congregation**) will provide said materials to *Faith in Action*.

2. To recruit volunteers for the *Faith in Action* program. **(Community Coalition)** will strive to provide a minimum of five active volunteers throughout the year.

3. To provide, if able, a meeting space for the recruitment and training of volunteers. Space will be provided as an in-kind donation to *Faith in Action*.

4. To pledge an initial financial contribution of \$_____ to *Faith in Action* in order to support program operations and activities and followed, if possible, by annual contributions through budget allocations and fund-raising projects.

Date: _____

Faith in Action Program Director

Parent Organization

Date: _____

Congregational Leader



Sample One-Pager

*Insert Parent
Organization
Logo Here*

Include a brief but powerful story about a care receiver and volunteer from your program. Describe briefly the benefits of your program for both the care receiver and volunteer. Then describe your program and the parent organization.

Describe your *Faith in Action* program:

- *Faith in Action* is an interfaith volunteer caregiving program which provides the residents of (*area your program serves*) with non-medical services to help them remain independent in their own homes.
- *Faith in Action* encourages all faith communities to work together to serve the people of (*county or area you serve*).
- (Add more bullets that highlight your *Faith in Action* program. Include the mission of your *Faith in Action* program.)

Describe the parent organization:

- In this section, program directors should describe the parent organization with a few important key points.
- Discuss the community or population served by the parent organization.
- Describe the relationship between the parent organization and your *Faith in Action* program.

Include your name, address, phone number, e-mail address and other pertinent information on your one-pager.

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915 Santa Rita Street
Silver City, NM 88062

Phone: 505-388-2988
Email:
volunteers@newmexico.com

MISSION

*To mobilize and
utilize the
volunteer
human resources
in
Grant County in
the best and most
efficient way to
meet the needs of
individuals, non-
profit and
government
agencies.*

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Lesson 3: Creating Financial Sustainability **Developing a financial plan and the role of the** **parent organization in long-term support**

Faith in Action programs within larger organizations usually have stricter guidelines related to fund raising than free standing programs do. Some programs are unable to raise funds under the parent organization, while others are able to fundraise through friend-raising events such as open houses and volunteer recognition events. Experienced program directors who have successfully addressed fund-raising concerns under an umbrella agency suggest that all key individuals in the parent organization should be aware of the program and recognize the benefits of the services provided. Let's review a few of their recommendations:

- ***Get to know key staff.*** Many *Faith in Action* program directors have shared that it is important for key staff of the parent organization, especially the executive director and/or development director, to know the funding needs of your program.
- ***Different accounting codes for Faith in Action.*** Many *Faith in Action* program directors in umbrella organizations suggest that a program embedded in a larger organization needs to have a separate chart of accounts from those of the parent organization. This process allows the *Faith in Action* program and the parent organization to keep accurate records of all income and expenditures of the program.
- ***Learn the budget process for your organization.*** It is important for *Faith in Action* program directors to know the budget processes of the parent organization and the *Faith in Action* program and be an integral part of the budget discussions. Program directors also need to know the budget proposed for the program and make sure that they are adhering to the bottom line.

Not only is it important to have the support of key staff of the parent organization when seeking additional funds, but it is also important to remember the data from P/PV, which suggest that *Faith in Action* programs should raise funds annually to replace the original *Faith in Action* grant through varied fund-raising efforts. The original *Faith in Action* grant should be replaced by funding from at least three different funding sources and P/PV data suggest

that this is a strong predictor of sustainability. Consider these practices and implement them with the parent organization board of directors.

- ***Concentrate on individuals.*** Individuals give more to non-profit agencies than corporations and foundations. Consider placing donation envelopes in your monthly or quarterly newsletters or letters mailed to potential and current donors.
- ***Embrace creative fund-raising techniques.*** Place a “donate now” button on your Web site; form a strategic partnership with a business that shares your organization’s mission; include coalition members in fund-raising efforts and continually seek in-kind donations and gifts from manufacturers and retailers.
- ***Seek grants from foundations and government agencies.*** *Faith in Action* program directors and key staff from the parent organization need to keep in mind the reporting requirements of funding agencies and the terms of the grants that need to be followed.
- ***Seek gifts and bequests.*** Many *Faith in Action* programs receive gifts and bequests from former care receivers. *Faith in Action* program directors and key staff need to know the intended uses of these gifts and make sure that they are being used in the manner specified.
- ***Place your eggs in different baskets.*** *Faith in Action* programs have a better chance at sustainability if the fund-raising efforts are diversified. In developing a sustainable fund-raising plan, consider donations from individuals, coalition and board members and corporations and foundations.
- ***Know your donor and make it a long-term relationship.*** People give for many reasons at different levels. Research potential donors’ interests and giving trends and establish a policy that between solicitations, donors are always recognized for past gifts (see Figure 7). Make sure that donors are also on your mailing list and receive general information about the *Faith in Action* program.
- ***Keep meticulous records.*** Be sure that every fund-raising campaign is well documented, especially for legal and fiduciary reasons. Documentation should include itemized expenses, donation amounts,

date donations were received, portion of donations that are tax deductible and donors' contact information.

- ***Be knowledgeable of the budget process.*** Program directors should know the budget processes of the parent organizations and those responsible for the budgets, which entities have authority over the budget, and clearly identified budget categories. By being informed about these processes *Faith in Action* program directors can know who advocates for the program in the parent organization.
- ***Be knowledgeable of Faith in Action revenue and expenses.*** Request monthly reports and compare actual expenses to budgeted expenses. Also, request fund-raising reports which should reflect anticipated and actual funds raised.
- ***Learn about agency-wide fund-raising efforts.*** Program directors must know about the parent organization's policies on fund raising and agency-wide fund-raisers. Does the *Faith in Action* program receive a portion of the proceeds? Consider volunteering in the planning and execution of agency-wide fund-raisers.



January 1, 2005

John Smith
1234 USA Main Street
Any town, ST 00000

Dear John,

Thank you for your recent donation of \$500.00 to *Faith in Action*. In compliance with the Omnibus Revenue Reconciliation Act of 1993, please note: no goods or services were provided by *Faith in Action* in exchange for this donation.

The kindness of your gift will touch many lives as it allows us to coordinate assistance to people who are elderly or have disabilities and others in need through the shared ministry of our faith communities. Your generosity allows our staff and volunteers to continue serving those in need in our community.

Thank you again for your gift.

Sincerely,

Jane Brown
Executive Director

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Many *Faith in Action* programs are part of larger umbrella agencies such as hospitals, hospices, community service organizations and universities. This resource was designed to provide *Faith in Action* program directors with strategies and techniques related to program management in a larger organization. Many of the strategies shared in this resource are from *Faith in Action* program directors which have experienced success in an umbrella organization.

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