

FUNDRAISING TOOLKIT

For Local Housing Non-profits



May 2023



CENTER FOR HOUSING OPPORTUNITY

LITCHFIELD COUNTY

Our mission is to facilitate a coordinated, regional response to address housing affordability in Litchfield County, aligning and delivering critical resources, data, and technical assistance to municipalities and non-profit housing organizations.

OUR WORK

- ▶ Shared project management support for volunteer led housing non-profits
- ▶ Community engagement, education, and advocacy
- ▶ Project feasibility funding and technical assistance
- ▶ Capacity building support for local housing organizations and municipal committees; and
- ▶ Housing plan development and implementation assistance

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FUNDRAISING TOOLKIT

INTRODUCTION

As a housing non-profit you likely have a mission to both create new affordable housing options and preserve and maintain the ones you have already created. Foundational to this work is a healthy, functioning organization- with an annual budget, bookkeeping activities, Directors and Officers insurance, annual tax filings, among many other operational activities. All of this, as you well know, costs money on top of your project specific expenses.

This toolkit is intended to help you identify funding sources and strategies to meet your specific funding needs. For the purposes of this toolkit we've separated out two types of funding needs:

1. PROJECT RELATED FUNDING NEEDS

This includes pre-development, acquisition, infrastructure, and construction/renovation funding for new projects as well as maintenance needs or renovation costs on existing projects that are not covered by rental income or capital reserves.

2. OPERATIONS AND OTHER LOCAL FUNDING NEEDS

This includes things like bookkeeping, insurance, tax prep, communications (newsletters, website, etc.), and fundraising tools/platforms. There will also always be some portion of project related costs that have to be raised locally to show local support for the project.

Much of this toolkit provides a **menu of options for meeting these funding needs.**

1. PROJECT FUNDRAISING

When you have a funding need that is project specific- either a new housing development or upgrades/major repairs to an existing housing development, there are many state, federal, and regional affordable housing programs that can help. Some of these programs are outlined on the next page, but they are constantly in flux and are difficult to understand if you are not experienced with them.

For smaller, volunteer led housing non-profits it is essential to hire a housing development consultant who deals with these affordable housing programs every day. Most of the non-profits in Litchfield County work with [Housing Enterprises, Inc.](#) ([Visit for more information](#))

It is important to get your housing development consultant on board as soon as a project is conceived – they can help guide you to make sure that the project has the ingredients that will make it competitive for these state and federal funding sources and make sure you don't miss a funding round.

The other thing to know about state and federal funding is that it often takes a long time between when you apply and when have access to the funding. Also, your project will likely need funding from 3-6 different funding programs to get all the funding you will need to start construction. Patience, trust, and regular communication with your housing development consultant is key.

LIST OF PROJECT FUNDING PROGRAMS *

Source: www.pschousing.org

1. Small Cities/CDBG Program
FMI: Visit DOH's [CDBG page](#).
2. HOME Investment Partnerships
FMI: See DOH's website [here](#).
3. Housing Trust Fund
FMI: See DOH's website [here](#).
4. Connecticut Affordable Housing Program (FLEX)
FMI: Visit the DOH website's [FLEX page](#).
5. State Housing Tax Credit Contribution Program (HTCC)
FMI: Visit CHFA's website [here](#).
6. Federal Low-Income Housing Tax Credit (LIHTC)
FMI: CHFA's website [here](#) and [here](#).
7. State Sponsored Housing Portfolio (SSHP) Funding
Basic information on the SSHP program is available on DOH's website [here](#).
8. Federal Home Loan Bank of Boston's Affordable Housing Program (AHP).
FMI: See FHLBank's website [here](#).
9. Other Lenders that specialize in assisting affordable housing developers include:
 - ▶ [CT Housing Finance Authority \(CHFA\)](#)
 - ▶ [Housing Development Fund \(HDF\)](#)
 - ▶ [Local Initiatives Support Corporation \(LISC\)](#)
 - ▶ [Capital for Change \(C4C\)](#)

*Note: **DOH** = CT Department of Housing. To gain access to most of the DOH managed funding sources listed above your project will need to be submitted through the Development Engagement Process (DEP) process and invited to apply to a specific source.*

**These are subject to change; talk to your housing development consultant for the latest information and the sources most relevant to your project.*

5 TYPES OF PROJECT FUNDING & POSSIBLE SOURCES

Below we describe five types of project funding that you may need and some possible sources for each. Please contact LC-CHO and/or your housing consultant to determine what the best sources of funding for your specific project might be.

1. Feasibility Seed Funding

When a new project is identified you will need to have quick access to this type of funding to determine whether a project is feasible or gain control of the site (through an option to purchase or lease the property). This could include things like doing a survey, environmental and soil testing, option costs, consultant fees, and initial architectural and engineering work. You will need to raise enough funding to get you through site control and Planning & Zoning Commission approvals. This can cost between \$20,000 and \$200,000 depending on the level of complexity of the project.

Sources: This will have to come from “local” fundraising utilizing some of the strategies in this toolkit; also non-profits can apply to LC-CHO for our seed funding revolving loan fund. If you got a “developer fee” from your last project, you can use it to invest in this stage of your next project.

2. Acquisition

Land or buildings that are donated or leased long term at no cost to the non-profit would be great but often our non-profits have to purchase sites or buildings. As long as the cost is reasonable and supported by an appraisal it can be built into the permanent financing for the building. Permanent financing from the sources on the list above often takes longer than a seller is willing to wait. An acquisition “bridge” loan for up to 3 years could be provided through lenders like HDF, LISC, or C4C.

3. Pre-development

This funding needs to be sufficient to take the project from the feasibility stage to the stage where you are ready to apply for construction and permanent financing from the sources above. This will include the majority of the architectural and engineering work to define the site and building construction details and determine the total cost of the project, legal fees, market studies, environmental reports, and housing development consultant fees.

Sources: The CT Dept of Housing has provided pre-development loans. Interested non-profits should respond to the DOH’s Development Engagement Process (DEP). These loans may also be attained through lenders like HDF, LISC, or C4C but they can be harder to access for less experienced non-profit housing organizations, and the interest rate is typically higher than loans through the DOH.

4. Construction and Permanent Financing

This typically comes from a mix of the State, Federal, and regional sources above. These sources will also want to see as much of a “local” contribution to the project as possible. This could be through the strategies listed in the rest of this guide and/or through contributions like town owned land, reduced or no town permit fees, and contributed developer fees.

5. Capital Needs (Renovation/Upgrades)

Every project you own no matter how well built or maintained is eventually going to need a new roof, HVAC system, windows, etc. These all have lifespans. You should do a regular "capital needs assessment" to keep a list of when these major improvements will need to be made and what the estimated costs will be. A development may need a major investment every 15-30 years that often cannot be covered by regular operating reserves for affordable housing developments if you want to keep rents affordable.

Sources: Common sources for major renovations that are needed to preserve your housing units as affordable and make sure the tenants have safe, energy efficient homes include Small Cities/CDBG (which must come through the town) and SSHP if your development is already part of that portfolio. Other sources from the list above can also be utilized. Funding to prepare or update a Capital Needs Assessment and to prepare an application for these funding sources, may have to come from the local fundraising strategies detailed in the remainder of this toolkit.

OPERATIONS AND OTHER LOCAL FUNDRAISING

FOUNDATIONAL STRATEGIES

Fundraising strategies that all affordable housing organizations should consider.

WHAT	WHY	HOW
Enable online donations and drive donors to your website	<p>A donate page on your website &/or a donate button on the Home Page let's supporters know how to easily support you.</p> <p>People who use online fundraising tools raise between 40% to 50% more than people who don't use online fundraising strategies. Also, online donations typically bring in double the amount of money given versus donations made via check.</p>	<p>Paypal - See How to set up a nonprofit account with paypal for details</p> <p>Venmo - Not strongly recommended</p> <p>- Lots of suggestions on the Internet for nonprofits to avoid using Venmo for donations</p> <p>When you are ready for a donor platform: - Classy is a giving platform that enables nonprofits to connect supporters with the causes they care about. - GiveButter.com.</p>
(E)newsletters with donation button	<p>Drive every donor/ possible donor back to website.</p> <p>Every e-newsletter - no matter the topic - should have donate button at the end of the newsletter</p>	<p>Not using email marketing yet? Use MailChimp - it's free for nonprofits - See page 4 - 5 of the Communications Plan for guidance.</p> <p>Email with restraint</p> <p>In this age of do-not-call lists and Internet spam, it is important that you exhibit a degree of restraint. Avoid sending cold call and blanket email solicitations to strangers and e-lists of people you do not know. It is acceptable, however, to participate in "chaperoning", in which someone you know prefaces your solicitation with an endorsement and sends it to people they know.</p>
Social Media	<p>Everyone is doing it! Start with Facebook; then Instagram</p>	<p>Have link to donation page in the "About" section on Facebook</p> <p>Good for short term campaign post: "We need to raise \$__X__ by X date in order to receive a matching gift from __X__ to go towards purchasing X or building X" (putting parameters around a short-term effort helps donors know their impact is needed and immediate)</p> <p>Good for promoting upcoming events - use the "Create an Event" feature on FB. See page 12 of the Communications Plan for guidance</p>
Provide Donors with giving options	<p>\$\$\$ isn't the only way to make an impactful contribution to a nonprofit organization.</p>	<p>Planned Giving Program</p> <p>Recurring Donations</p> <p>Info on who to contact re: Major gifts</p> <ol style="list-style-type: none"> 1. Donation or less than market rate sale of land 2. Stock 3. Building materials (if this applies to your nonprofit) 4. Donation or low-cost purchase of a building (transfer of title) 5. iGive.com (Amazon Smile is no longer in use)
Annual Appeal Letters	<p>An inspiring, clear and compelling letter is at the heart of a successful letter-writing campaign.</p>	<p>Annual - most often these are done at year end; but can also be done at fiscal year-end if you don't have a calendar-based fiscal year.</p> <p>Great appeal letters always tell a personal story and express the need that you are filling by raising funds and participating in affordable housing projects.</p>

EVENTS

A menu of event-based fundraising strategies.

WHAT	HOW	WHEN
Community Champion	<p>Honor a donor, a volunteer, a founder, a family who gives back after becoming the recipient of an affordable house, etc.</p> <p>Falls Village Housing Trust example:</p> <p>Held a “Community Champion” event in which they honored a local person with a party. Cost to attend: \$25. Music, food, and raffle prizes were donated. Last year they made \$8,000!</p> <p>See Page 15 for a timeline to execute an annual “Honors” Award fundraiser provided by the Nonprofit Center of the Berkshires. Note: this is different than the event the Falls Village Housing Trust did called Community Champion but this timeline has many helpful tips for executing a successful Awards event.</p>	Anniversary or Other Milestone in the Organizations History
Night of 1,000 pies	<p>Kent Affordable Housing’s Night of 1,000 Pies has been a successful annual event for 14 years. We’re not suggesting you do exactly the same thing, but Virginia Bush Suttman has provided a detailed description of how they have done this that can be instructive for others – see page 13.</p>	Annual
What can you give right now!	<p>We’ve seen this work extremely well at a fundraising event (it could be used at a dinner party - see next idea below):</p> <ul style="list-style-type: none"> ▶ Have index cards/pens on the table ▶ Ask people write down on the card something of value that they are skilled in doing or an amount they could donate. ▶ Could be a free therapy session, a free massage, pro bono accounting/legal session; maybe they are a baker (offer a free cake), a gardener (an afternoon of weeding), etc ▶ Collect the index cards and, in real time, auction off that service. <p>We saw an afternoon of gardening go for over \$300 – that’s \$\$ straight in the pocket of the nonprofit organization – on the spot!</p>	Anytime!
Dinner Party	<p>Host a dinner party at your house and ask for a minimum contribution from the guests. Do a short presentation between courses. See if local shops can donate items, such as desserts or drinks.</p>	Might be good for a Capital Campaign
Concerts	<p>If you know musicians or other performers (or if you are one), you could create and produce a benefit performance. Or attach yourself to a music event or other performance that is already scheduled. Ask if a band you know would be willing to collect donations at the door or by passing a hat, and allow you to speak on stage in between sets.</p>	Summer
Benefit Classes	<p>Ask a yoga teacher, dance teacher, boot camp fitness instructor, etc., to create a benefit class that is at a special time, in a special location and perhaps longer than their normal class. Sometimes people gather a group of teachers to teach an exciting class together. Ask that all or a portion of the class fee be donated to your organization.</p>	Winter – good for indoor activity
A-thons	<p>Big athletic events are a great way to piggyback fundraising with your athletic interests. If you’re a runner, cyclist, swimmer, hiker or any type of athlete, you can solicit sponsorship for an upcoming event. Ask friends, family and people you know through work, church and civic groups to donate based on your accomplishments, such as running a marathon, cycling or swimming a certain distance, or hiking a mountain.</p>	Anytime
Taste Of...	<p>Round up 25 chefs and each one has a table with hors d’oeuvre-sized plates. Charge \$75 to attend. Food ideas: everything from duck confit to Indian food to BBQ to flourless chocolate cake. It’s great fun. Use the event to get sponsors, add a raffle, solicit donations at the event itself, etc.</p>	Winter – when restaurants aren’t as busy and can afford to have staff off-site.

CAMPAIGNS

Options for different campaigns that can be going on in the background without much effort once set up.

WHAT	HOW	WHEN
In-restaurant promotions	Table top cards with QR code to send donations directly to your organization. Promote a project with a short description and tell people exactly what their donation will go to. "\$5 from every purchase of ____ (special appetizer, dinner special, drink order, dessert, etc) during the month of ____ will benefit our mission to _____."	Rotate through different area restaurants over the course of a season. Anything longer and people tire of the promotion.
Travelers Championship – Birdies for Charity	Earn 15% with every donation from their partnership with Webster Bank. Birdies for Charity provides every 501(c)(3) in Connecticut an opportunity to raise awareness for its cause. The program is simply a giving platform that utilizes the excitement around the tournament to help nonprofits across the region raise awareness and funds to support their missions. The Travelers Championship sends 100% of collected donations to participating charities. Learn more here.	Annual = January through the Travelers Championship in June
"Give Local" Community Foundation campaign	The Connecticut Community Foundation (CCF) which covers part of Litchfield County hosts an annual "Give Local Greater Waterbury and Litchfield Hills" even which is a 36-hour online give-a-thon. Click here to see CCF's service area and learn more about this. The Northwest CT Community Foundation has run a similar crowd-funding program called Northwest Corner Gives. Click here for more information about this.	For CCF- Register your non-profit in mid-January. Event in April.

BANKS, TOWNS AND COMMUNITY FOUNDATIONS

Options for approaching local banks for funding/loans, through your town to establish a municipal housing fund and from local community foundations through their donor advised funds.

WHAT	WHY	WHEN
Local banks	All the local banks and utility companies have a CRA (Community Reinvestment Act) requirement. Many have established Foundations and you can apply directly on their website. Housing is a priority funding area for many banks. Examples in our area include: Northwest Community Bank (Litchfield Bancorp) Salisbury Bank & Trust (soon to be NBT Bank) Torrington Saving Bank	Anytime!
Town Housing Fund	Any town can create a fund to help with creating affordable housing. The Towns of Salisbury and Washington have such funds and others in the region are considering them. See the sidebar below for more information.	Anytime! See Table below
Community foundations	Here are some of the community foundations that serve our area, visit their websites for information on grant funding: Foundation for Community Health Northwest Connecticut Community Foundation Berkshire Taconic Community Foundation	Anytime!

LOCAL BANKS EXAMPLE - NORTHWEST COMMUNITY BANK

The [Northwest Community Bank Foundation](#) was funded and organized on January 1, 2022 by Northwest Community Bank and its Divisions, Collinsville Bank and Litchfield Bancorp, as a separate non-profit entity. The Foundation extends the Bank's contributions to non-profit agencies and organizations working to address the needs of the communities the bank serves.

Examples of giving: Funds to other Litchfield County Affordable Housing Organizations:

- ▶ Falls Village Housing Trust – \$5,000 – Support of new 16-unit affordable housing development
- ▶ Habitat for Humanity of NWCT – \$25,000 – Support for newly built safe and affordable single-family homes in North Canaan & Torrington
- ▶ Goshen Housing Trust – \$4,000 – Support of drinking water quality improvement project

TOWN HOUSING FUNDS

Towns that choose to set up a town housing fund can utilize the funds for activities like:

- ▶ Providing **down-payment assistance*** for income eligible first-time homebuyers (in the form of a loan or a grant)
- ▶ Providing a loan or grant for income eligible households, including seniors to make **accessibility modifications or repairs*** to keep them in their homes
- ▶ Providing seed funding to the town's non-profit housing organizations. to identify new projects and assess their feasibility
- ▶ Providing **rehabilitation*** funding to preserve the town's existing affordable housing
- ▶ Providing funding to create an **accessory apartment** (homeowner and/or renter need to be income eligible)
- ▶ Providing funding support for the **construction or renovation of new affordable homes**
- ▶ Providing **acquisition** funding to allow eligible non-profit organizations or the town to purchase property that could be used for affordable homes

*For these three uses there are some existing programs such as:

- ▶ [CHFA](#) (CT Housing Finance Authority), [HDF](#) (Housing Development Fund) and [FHLB](#) (Federal Home Loan Bank of Boston) provide down-payment assistance for income eligible first-time homebuyers and free first-time homebuyer education classes.
- ▶ Many towns have Small Cities/CDBG funded Housing Rehabilitation programs for income eligible homeowners to make repairs or accessibility modifications that would keep them safely and affordably in their homes. This is a 0% interest loan that does not need to be repaid until the home is sold or transferred to a new owner.

How can "Housing Trust Funds" be funded?

- ▶ Private donations from residents
- ▶ Establishing a new building permit fee or inclusionary zoning fee
- ▶ Utilizing a portion of the conveyance fee that the town already collects
- ▶ Establishing a line item in the town budget

SEE PAGE 18 FOR: [Examples from other towns in Connecticut](#)

BUILDING RELATIONSHIPS, AKA FRIEND-RAISING (THE LONG GAME)

Strategies for building long-term relationships that can lead to both donations and importantly community support for your next project and your organization’s mission

As you are fundraising, keep in mind the big picture of all the ways people can be engaged in your mission. These ideas are ways to spread awareness and open the door for people contribute to this work. Of course, you can use these ideas to raise money, too!

WHAT	HOW	WHEN
Speaking Presentations	Ask your friends and neighbors if you can make a presentation to their group – churches, civic organizations, clubs, classes, etc. Build your presentation around your current project or your own slideshow or video about affordable housing (see LC-CHO website for 2 great videos). Share your pitch with the group – the reason you are giving your own time [and money] to this project, and what inspires you about the mission. Collect as many donations on the spot as you can and have cards/flyers available with your organization’s website & contact info. As with events, have a sign-in sheet and follow up to thank people.	Anytime! May be especially useful when a new project is starting.
Community Newsletters	Use your company, organization, church or community newsletter to publicize your project. Offer to write a series of articles about your Affordable Housing Organization, your Board/volunteers, past project as well as the current one. Ask for financial support in the articles you write, and direct people how to give. Remember – you’ll always get more when you ask.	Quarterly
In Person Asks	An in-person fundraising ask is the single best way to raise the most money. It is 10 times more effective than mail and five times more effective than a phone call.	See Page 19
Local companies, civic organizations, and churches	Don’t forget to ask local businesses that you patronize, civic clubs such as Rotary, and local churches. Find ways they can support you, from allowing you to leave a change jar near the cash register at the coffee shop to making an extra offering on a Sunday at church.	Based on the meetings schedules of these groups – get on their calendar
Coffee!	Have coffee with as many philanthropic residents as possible and encourage them to make private donations.	Anytime!
Media	Use whatever forms of local media are available to get the word out about your organization, next project, or event. Newspapers, television and radio stations, and community bulletin boards are a few traditional media outlets. In our area these include: The Lakeville Journal newspaper Republican American newspaper Robinhood Radio	
Donor Call Script	Telephone asks have similar elements to meetings and require the same preparation. They are typically shorter and more to the point. They do not provide as good results as in person, but are a very valuable strategy for asking people you know. Tell them why you are calling. What is their connection to you, the organization’s mission, etc? Why would they be interested? Build your case. Explain why you joined ___ and what is most exciting or inspiring to you about ___. How will their donation directly support a family that could not otherwise afford a decent home? Make a specific ask and then be quiet and let the donor respond. If the person is interested in contributing, ask how they would prefer to donate and then provide instructions on how to do that. Thank them for their time and consideration. If they make a gift, be sure to follow up with a personal thank-you note	

SOME FINAL WORDS OF ADVICE

Are you overwhelmed by all the fundraising options listed above? Please don't be. This is just a menu of options- all of the options are completely scale-able based on your capacity. We would suggest your organization's board decide on a few things from the list you would like to try this year and then build on it from there.

If you have any questions about these strategies or need some support to help implement them, reach out to LC-CHO, **we're here to help!** Good luck!

ADDITIONAL RESOURCES & MORE INFO

NIGHT OF 1,000 PIES

From Virginia Bush Suttman – March 8, 2023, based on 14 years' experience with Kent Affordable Housing's Night of 1,000 Pies

The Goal and Purpose

What will the funds be used for? Specific goals can be very effective. KAH raised \$10K for solar installation on Phase II, and about \$10K for rent subsidies at the start of the Pandemic. If the goal is general activities, review recent accomplishments of the nonprofit.

The Audience, and Involvement of Community

Will this target one town, or a wider geographic area? KAH has regularly raised 10s of thousands in Kent with 1,000 Pies. Housatonic Valley Association and Women's Support Services have raised several thousand from wider areas—but these involve celebrity figureheads and upscale locations, and paid staffs.

Underwriting

Local banks and businesses should be asked months ahead for funds to cover printing and advertising, "so that all the proceeds can go to the cause".

The Theme and Structure

For community involvement the theme should be something that the community can enjoy, and ideally something people can see, or even use for themselves: like homemade pies, artisan creations, or local services, library or land trust programs. HVA and WSS have also had trips and entertainment events for purchase or prize.

Would this be a one time event, over a couple of hours, or a couple of days? Would this be simple attendance, shopping, sipping and eating, auction bidding, or taking chances on prizes? Learning from lectures, workshops, or lessons? Entertainment?

Over 14 years of its life 1,000 Pies concentrated on the sale of homemade (or professional kitchen made) pies, but added and subtracted some other features. At first dinners in private homes were offered, and raised good money—until most of the cooks aged out of that effort. For one or two years dancing in the evening after the Saturday sale featured professional bands, but people tended to prefer more leisurely dinners and dancing was eliminated. We served lunch for a couple of years.

After maybe 5-7 years locally handmade items, and local services, were included for sale, or silent auction. For the last 4 or so years of the event, there was a preview party for people who paid to do early shopping for pies and handmades. For a couple of years we also had pie making workshops, with supplies provided.

People participating, in the non-profit and outside it.

All directors or committee members should commit to help the project, according to their expertise and availability. People outside the non-profit should be enlisted as much as possible, to expand and vary the offerings. In Kent the schools have been significant participants.

Leadership and chairs of responsibility

Lines of authority should be clear so that each aspect of the project has one person to lead, guide and account for it. The overall head(s) of the project (no more than two or three) should be able to know what each area is doing, and whether they are on time.

Publicity

Newspapers, social media, posters, street signs, and the like should be put out in a timely manner – not only after the fact. Texts for these can be written and edited within the committee, or interviews can be offered. Both will help get the word out and help keep it accurate.

Nothing wrong with committee members urging, or organizing, their friends to participate.

Mailing list

The mailing list of the non-profit's members and donors should receive information about the event (and the organization) in advance. KAH invitations go by Postal Patron to everyone with a mail receptacle or PO Box in Kent, reservations need to include spaced for full mailing addresses and emails, which are added to the list, which has grown over the years to about 1,000. People who have worked on development teams, building or managing properties are also included.

The town Assessor can supply a complete list of all property owners, sortable by date of acquisition—to catch new people. This list and includes out of town addresses for those not receiving mail in town, who are sent by first class mail.

Cash, checks and charges

Very important: if an event those who cannot attend should be encouraged to send financial contributions by check. Credit cards, Pay Pal, and such should be available for purchases, and contributions.

One person should be responsible for obtaining start up cash, keeping tabs on cash at the event, and night deposit of cash afterwards.

Record keeping and acknowledgements

All contributions, of funds, merchandise, refreshments, space, and staffing must be recorded and acknowledged with receipts and thanks—the major ones in the media. This needs to be done as the event shapes up, as well as afterwards, until everyone who helped is contacted in writing. All new contacts should be added to the mailing list for future use.

Local authorities

Depending on the form of the project, all relevant authorities and regulations need to be informed and satisfied.

- ▶ Torrington Area Health District – If food is served, or especially sold, TAHD has strict regulations about how it is made, kept and served. They must be informed well in advance, and will inspect the premises just before the opening.
- ▶ If a raffle is planned, Connecticut regulations on those must be followed. Ask at the Kent Memorial Library how to find the exact specifications and how to follow them. Auctions (silent or live) are probably simpler to do, but any regulations should be checked out as well.
- ▶ Depending on the venue, the local trooper should be notified in advance about traffic.
- ▶ Parking and restroom facilities need to be considered.

HONOR AWARDS

Graciously provided by [Nonprofit Center of the Berkshires](#): Check out their Honor Awards webpage [by clicking here](#).

If you are hosting an event honoring a local person(s) with awards, they use the following as their planning timeline:

Step 1:

Initial planning phase: January. Date, location, event length and content. Try to confirm basic details right away so preparation for the announcement can begin.

2nd year and beyond: Review last year’s event and decide on any major changes during this time frame.

Step 2:

Create materials (nomination forms, sponsor solicitation, and promotional assets) and website in preparation for making the announcement of the event with a save the date and nominate push. Usually announce the event in January. Nominations solicited either through February AND/or March. Judging selections made either March or April. Event held in May.

Sample Awards Categories:

- ▶ Board Leadership
- ▶ Executive Leadership
- ▶ Youth Leadership

- ▶ Rock Star
- ▶ Unsung Hero
- ▶ Lifetime Achievement

Step 3:

Solicit nominations: Draft and calendar out social media posts to encourage nominations. Add the event to community calendars. Place ads - typically in Lakeville Journal, Berkshire Eagle, Berkshire Trade and Commerce, Shopper's Guide for nominations. Share templated email text and/or social posts with board members and ask them to share with their networks to help spread the word.

Schedule several emails via Mailchimp to announce the event and solicit nominations - include reminders in as many emails as possible during the nomination period. Many nominations will arrive on or near the deadline.

2nd year and beyond: Email the previous year's nominators that were not selected as honorees and ask if they would like to resubmit their nominations. Those that would like to resubmit will likely need assistance in updating their materials or will want to simply resubmit the same materials if nothing has changed. Encourage them to add letters of support if they have none.

[Executive Director/Development Director and the] Board will be handling direct solicitations for sponsorship. Mailings have been sent to businesses in the past, but direct solicitation is most effective.

Step 4:

Prepare nominations for the judging panel. Nominations can be submitted via Google Forms. These submissions are exported from an Excel spreadsheet and merged into a template in Word via a mail merge. Make sure to scan through each category after performing the mail merge as occasionally there will be errors in the data transfer from Excel and you need to manually copy and paste the text into the merged document. Once nominations are reviewed, the Word document is exported as a PDF for the judges.

2nd year and beyond: Last year's mail merge templates can be duplicated for use. In the meantime, appoint someone to solicit a panel of judges and ask them to save the date for the selection meeting. In person is usually at lunch with catering. Via Zoom is usually in the morning.

Step 5:

Selection Meeting with judging panel. A week (or ideally two weeks) prior to the meeting, nominations, letters of support and judging packets for each category are provided via email to the coordinating judges. Judging packets can be created by duplicating the previous year's and making the appropriate updates. Usually, a simple Powerpoint presentation is prepared for the meeting to keep the process on track. This includes a brief description of each category, the nominees within each category, and any additional considerations that need to be discussed at the end of the meeting to ensure a diverse group of honorees has

been selected. The judges will need several reminders to review the packets, letters and nominations prior to the meeting. They should also be encouraged to meet as groups/pairs by category to prepare their selection/recommendation of their categories' honoree prior to the meeting so the conversation can run smoothly when the full panel is gathered.

Step 6:

Announce honorees. Firstly, share the good news with the nominators of the honorees and the honorees themselves via email. Then, the press release and email announcement via Mailchimp are released. Gather headshot, basic information, testimonials and optional photos in action from honorees via Google Forms to use for event promotion. Specific honoree posts are created for social media. These social posts are by far our most popular of the year. People like to see individuals they know highlighted in this way.

Step 7:

OPTIONAL: Spring Appeal in conjunction with Awards event.

Step 8:

Event promotion to encourage RSVPs. Advertising created and placed in Lakeville Journal, Berkshire Eagle, Berkshire Trade and Commerce, Shopper's Guide, etc. Create and send multiple Mailchimp emails to encourage RSVPs. 2nd year and beyond: Use previous year's as templates - highlighting different aspects of the event in each email. Create and post lots of social media to spread the word and encourage attendance.

Step 9:

Event production varies greatly depending on in-person vs. virtual. Our event producer since going virtual in 2020 has been PJ Moynihan with Digital Eyes Film. Production meetings typically begin in mid-February and increase in occurrences as the event nears. PJ appreciates having the event "run of show" in a very detailed spreadsheet so we can easily and efficiently track our progress as a team. There are a number of media assets collected and created in advance. The majority of the content is recorded at the Berkshire Innovation Center over the course of two days, then aired several weeks later as a live Zoom event, and also on public access television stations.

Step 10:

Event Thank You and report issued to all sponsors and donors. Thank you ad in local paper.

TOWN HOUSING FUNDS

See page 11 for more information on municipal housing funds. This provides some examples of towns who have created such funds:

Salisbury, CT – Ordinance 112 “Establishment of an Affordable Housing Fund”

- ▶ Ordinance 112 was passed in 2010
- ▶ Guidelines for use of fund can be found on the town website [here](#).
- ▶ The Salisbury Affordable Housing Commission (appointed by the Board of Selectmen) helps to administer this fund
- ▶ The town allocates funding to its Affordable Housing Fund each year during the annual budgeting process. Typically, it budgets \$25,000 annually to support the town’s Housing Commission (this pays for part time staff) and \$10,000 annually for the town’s Affordable Housing Fund.

Washington, CT

- ▶ Washington established a Housing Commission in 2005; one of their duties is to make recommendations to the Board of Selectmen for expenditures from the Affordable Housing Fund. You can find the ordinance [here](#).
- ▶ Here is information on their [down payment assistance program](#) funded through their Affordable Housing Fund.
- ▶ The town allocates funding to its Affordable Housing Fund each year during the annual budgeting process. The town’s Housing Commission requests this annual allocation. Last year the town allocated \$25,000 to this Fund. As of February 2022 the town had \$210,000 in the Fund.

Goshen, CT

- ▶ Land acquisition fund was passed in 2006 (attached)
- ▶ This can be used to acquire land for open space, recreation, or housing.
- ▶ Note: this can only be used for the town to acquire land for these purposes. It has been suggested that this ordinance be amended to allow local non-profits including the Goshen Housing Trust and the Goshen Land Trust to request funding from this fund for those entities to acquire land rather than the town and that the Board of Selectmen be able to approve funding requests under a certain threshold.

Greenwich, CT

- ▶ This website explains their [Affordable Housing Trust Fund](#).

Fairfield, CT

- ▶ In 2018, Fairfield created a [Housing Trust Fund](#) and the Town Plan and Zoning Commission enacted an inclusionary zoning fee as part of any zoning permit. The Fund also provides a place to deposit additional moneys from grants and other sources to help support the creation and maintenance of affordable housing units.

IN PERSON ASKS

An in-person ask is the single best way to raise the most money.

- ▶ It is 10 times more effective than snail mail and five times more effective than a phone call.
- ▶ Try to ask in person when you are asking a group (such as your church or a local civic club), when you are asking a company or business for sponsorship, or when you are asking for what you would consider a larger gift (for some people this is \$500; for others this is \$5,000).
- ▶ Most people are initially uncomfortable with an in-person request for money. The best way to mitigate that fear and discomfort is to prepare and practice!

To prepare

- ▶ Have clear talking points on your mission, vision, and the specifics of the project.
- ▶ Be able to speak about your personal interest in or passion for the mission
- ▶ Be clear about what you are asking for. It should be a concrete step that can be answered yes or no.
- ▶ Gather background on the potential donor. Who are they, and do you have a sense of what or how much you should ask for? What else do they give to? What are their passions? What other resources do they have that you need? (see page ___ for compiling your list of names)
- ▶ Practice your pitch. You can role-play it with a friend or family member. And be prepared for some unexpected donations from friends and family members with whom you practice your pitch. If you are inspired, they will be, too.

Before the meeting

Before you schedule the meeting, prepare the donor that you will be asking for something. Potential donors do not like to be surprised by solicitations that they were not expecting. On the phone it is as simple as, "Hi, Bill. I think you might be interested in supporting ___ (name of org) as we begin work on _____ (project) in _____ (town) and I'd like to meet with you to tell you more about it."

The meeting

- ▶ Introduction. Tell the person that you appreciate them for making time for the visit.
- ▶ Small talk. Be friendly, but also respect the donor's time.
- ▶ Explain why you are coming to them. If the donor has a connection to your organization, mention that connection and acknowledge them for their work/commitment to the mission. If not, why do you think they could be interested? It could be an interest in affordable housing issues, an interest in the town of _____ or an interest in supporting your passions. Think about what will resonate most for them.
- ▶ Build your case. Include the need for your organization's work in affordable housing in _____, of your organizations impact to date and why that inspires you. How are you helping to support the mission and why does this move you?

- ▶ Explain how they can help and how their help will make a difference.
- ▶ Ask for a specific dollar amount or range, or other specific support if you are not asking for money.
- ▶ Be quiet. Let the donor absorb the information presented.
- ▶ Thank the donor for their time, regardless of whether they said yes or no.
- ▶ If they said yes, try to collect a check before you leave. If that isn't possible, give the donor instructions on how to give online or via the phone.
- ▶ If the donor needs time to think it over, set a clear time to follow up.
- ▶ Follow up with any additional material you promised.

After the meeting

- ▶ Assess what worked and what did not.
- ▶ Within 48 hours, send a personal thank-you note to the person for their time and consideration – or a note thanking them for their gift.

Other tips for asking in person

- ▶ Try to be attentive, thoughtful, responsive, and respectful of the needs of the donor. Do not interrupt or disagree/argue with the donor, even if they express objections.
- ▶ Be prepared for questions and objections. Imagine the issues the donor might raise and be prepared to answer them.
- ▶ When asking, make sure you ask a specific question. Saying, "I hope you will consider giving" is not as effective ask. Saying, "Would you be willing to give \$500?" is an effective ask.
- ▶ If the donor is not receptive to the request, gently find out why. Is it the timing? Is the project not a match for them? Is the amount of the request too high?
- ▶ Bring a card with instructions on how they can donate online, via phone or by sending a check. If possible, collect a check during the meeting.

MAKE YOUR LISTS

MAJOR DONORS (those who you believe have the capacity to give \$1,000 or more)

Name: _____ Connection: _____

Contact Info: _____

Name: _____ Connection: _____

Contact Info: _____

Thoughts about total dollars you might shoot for in this category? _____

OTHER DONORS (those who you believe have the capacity to give between \$250 – \$1,000)

Name: _____ Connection: _____

Contact Info: _____

Name: _____ Connection: _____

Contact Info: _____

Thoughts about total dollars you might shoot for in this category? _____

CORPORATE CONNECTIONS

Here we'd like you to ride through your rolodex to look not only at your business contacts but personal ones as well. Who do you know who works for a company with a generous track record? Are there companies that come to mind? They might overlap with a company on someone else's list.

Name: _____ Connection: _____

Contact Info: _____

Name: _____ Connection: _____

Contact Info: _____

Thoughts about total dollars you might shoot for in this category? _____

ANNUAL BOARD FUNDRAISING PLAN WORKSHEET:

Send this out 3 months before your annual meeting so Board members have time to complete it:

Board Member: _____

Fiscal Year: _____

Annual Give/Get (if applicable) _____

Fundraising "Commitment": \$ _____

Each year, ask board members to devote some serious time to the exercise of planning how s/he will reach a fundraising "commitment" that comes with board service to your organization.

What is its purpose?

- ▶ It provides a board member with a way to take what can seem an overwhelming responsibility and break it down into manageable components.
- ▶ When compiled, it gives the organization a sense of the fundraising firepower of the board.
- ▶ It provides your board fundraising committee with a mechanism for peer tracking and accountability.
- ▶ Most importantly, it is a DISCUSSION GUIDE for a conversation with the Board chair and fundraising committee.

ELEVATOR PITCH CHEAT SHEET

You can be one of your organization's lead ambassadors, a champion for the work of your organization. Ambassadors represent an organization in all settings.

YOU MUST BE A GOOD STORYTELLER TO BE A GOOD AMBASSADOR. You have to be "on message" and able to, in any situation, tell folks about your housing organization, why it's important to the community and why it is important to you.

When you are asked WHAT DOES YOUR ORGANIZATION DO? Be prepared to nail it by filling in the template below and practicing a 2-minute pitch.

TEMPLATE:

My nonprofit _____ (name of nonprofit)

Is _____ (a defined offering)

to help _____ (a defined audience)

In _____ (location)

To _____ (solve a problem)

By _____ (uniqueness of your nonprofit)

DOs AND DON'Ts FOR A 2 MINUTE ELEVATOR PITCH

DON'T

- ▶ Assume they know. You know so much more about your organization than your audience. Imagine you were telling a 10-year-old about the work you do.
- ▶ Provide a list of tasks. People need to understand the big picture - holistically. For example, a direct service organization that supports the elderly in NYC might approach the variety of services this way: "We are all about the elderly in Upper Manhattan - the elderly who value and deserve their independence and with services ranging from X to Y to Z, we ..."

DO

- ▶ Change the Question. From "What does your organization do?" to TELL ME ABOUT YOUR ORG. The latter gives you running room. The former leads you to a list of stuff.
- ▶ Bring Your Organization to Life. You may not have time for a whole story but remember the work is about housing people; programs are a vehicle.
- ▶ Ask a Question of Your Own That You Can Answer For Them. "Did you know that the median sales price in our town increased by \$---- over the last 5 years?"
- ▶ Be Passionate - It's Contagious. Something like: "I love this organization - I began as a donor and today I am a board member. The work of this organization inspires me. Let me tell you why..."

DEVELOPING A COMMUNICATIONS PLAN

Communication with residents of your town and supporters of your organization regularly and intentionally is a critical part of relationship building and fundraising. Below is the description of a “communications guide” developed by Hannah Pouler, Communications Consultant for the Salisbury Affordable Housing Commission (SAHC). To see the whole communications plan and a webinar of Hannah presenting this information, [CLICK HERE](#).

"The communications guide is divided into two main sections

- 1) *situational communications*, which promote a specific event, vote, or public hearing, and
- 2) *regular communications*, which consist of a monthly and end of year newsletter. Whenever possible, all “situational” events should be included in the prior month’s newsletter. The SAHC compiles upcoming situational events during regular monthly meetings - the monthly newsletter is sent out one week after each Commission meeting, so that these events can be incorporated.

Some of the included channels of communication are specific to Salisbury - for example, we recommend outreach to our local State representative, our local newspaper, and our local Facebook pages. However, it should not be too difficult to replace these channels with ones specific to other towns.

The plan also includes templates that I’ve created on MailChimp - each template is clearly marked in quotation marks in the plan (e.g. “One Month Vote” template to all subscribers). If a Town chooses to use MailChimp or a similar platform for email communications, I highly recommend creating your own templates. Templates make it quick and easy to plug in information, and they allow for more uniform emails, which is especially useful for items like newsletters.

In terms of content/tone guidance for written communications, I found immense value in this affordable housing communications report “[The Way Forward](#)” commissioned by Fairfield County’s Center for Housing Opportunity. I’d recommend reading it cover to cover!

Finally, none of these dates should be considered “hard” deadlines. In a perfect world, we’d know about every upcoming event 1+ month out, but that is not the reality! If you learn of a situational event late, or miss a newsletter date, do not panic - just press ahead with the next logical step. Some communication is far better than no communication at all 😊

Please feel free to contact me (Hannah Pouler) if you have any questions."

