

Sustainable Funding Revenues for Non-Profit Partnerships

May 6-8, 2008 Portland, Oregon

Coordinators: **Diane Nelson** (BLM), **Laura Jones** (FWS), **Rich Fedorchak** (NPS)

Instructors: **Helene Aarons** (BLM – Washington DC), **Curt Buchholtz** (Rocky Mountain Nature Assoc), **David Knight** (Fundraising Consultant), **Melinda Loftin** (Director, DOI Ethics Office), **Karen Simms** (BLM-Tucson Office)

Tuesday: Start Time 8:00 am	Wednesday: Start Time 8:00 am	Thursday: Start Time 8:00 am
<p>8:00 – 9:00 (Laura/Rich) <u>Welcome / Housekeeping</u> - introductions and expectations</p> <p>9:00 - 9:30 (Helene/David/Curt) <u>Case Study</u> - Yaquina Lighthouses, a process showcase</p> <p>9:30 - 10:00 (Helene) <u>Common Terms</u> - speaking the same language</p> <p style="text-align: center;">-----BREAK-----</p> <p>10:15 - 11:45 (Curt) <u>Non-Profit World</u> - lifecycle of non-profits - seven stages of non profit development - board and staff relationship, visioning - key elements to make a non-profit succeed</p>	<p>8:00 - 8:30 (Laura & Rich) <u>Review & Non-Profit Jeopardy</u></p> <p>8:30 - 10:00 (Melinda/David) <u>Applied Ethics for Partnerships</u> - federal and non-profit Ethics - DOI donation activity guidelines</p> <p style="text-align: center;">-----BREAK-----</p> <p>10:15 - 10:45 (Laura/ Rich) <u>Donation Cheerleading</u> - what agencies <i>can</i> do in relationship to fundraising</p> <p>10:45 - 11:45 (Curt) <u>Building Blocks for Sustainable Revenue</u> - tool kit overview - identify basic building blocks * exercise *</p>	<p>8:00 - 8:30 (Rich) <u>Non-Profit Jeopardy</u></p> <p>8:30 – 9:15 (David) <u>Fundraising Matrix</u> - discuss outcomes</p> <p>9:15- 10:00 (Curt) <u>Business Plan Basics</u> - thinking process to create a profit</p> <p style="text-align: center;">-----BREAK-----</p> <p>10:15 - 11:45 (Curt) <u>Draft Business Plan</u> - work with teams and draft a business plan for sustainable revenue</p>

LUNCH 1 hour + 15 minutes

<p>1:00 - 2:00 (Helene & Karen) <u>Collaborating for Sustainable Funding Revenue</u> - diversity of people and resources * exercise *</p> <p>2:15 - 3:15 (Helene) <u>S.W.O.T</u> - strengths, weakness, opportunities, threats * exercise *</p> <p style="text-align: center;">-----BREAK-----</p> <p>3:30 – 4:45 (Curt) <u>Strategic Planning</u> - apply SWOT * exercise *</p> <p>4:45 - 5:00 (Laura) <u>Case Study</u> - Blackfoot Challenge video</p>	<p>1:00 – 3:30 <u>Field Trip: Tualatin River NWR</u> - tour facility - review financial structure for sustainability - discussion session with non-profit Director</p> <p>3:30 – 4:30 (David) <u>Fundraising Tools</u> - private funding resources - business management practices</p> <p>Take Home Assignments <u>Fundraising Matrix</u> - Create a list of activities to develop a workable strategy</p> <p><u>Business Plan Basics</u> - Read over notebook materials on developing Business Plans</p>	<p>1:00 - 3:00 (All) <u>Team Reports</u> - deliver to board * exercise *</p> <p style="text-align: center;">-----BREAK-----</p> <p>3:15 - 4:00 (All) <u>Review Panel</u> - Visit Parking Lot - Expectations</p> <p>4:00 - 4:45 (Laura & Rich) <u>Wrap Up</u> - course evaluations</p>
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