

Introduction

At a time of uncertain economic conditions and reductions in government funding for many nonprofits, strategic responses and adaptation are crucial for their future viability. Launched in 2013, the *Helena Development Initiative* provides a model for expanding local philanthropic resources while presenting sustainable, community-based professional development in fundraising skills. But in these challenging times, simply increasing fundraising skills is not enough.

The well-being of Helena area nonprofits is intimately linked to increasing the local philanthropic resources they can access. To help create a more promising future, the *Helena Development Initiative* employs diverse strategies to increase local funding resources. Key priorities include helping build permanent endowments that sustainably expand grantmaking to area nonprofits and helping nonprofits build their own endowments to become more sustainable.

BSI's mission extends throughout Montana, but we understand the value of starting locally, testing ideas, refining our approach, and having success before taking an important initiative to scale. A pilot in our headquarters community where we know the landscape best is affording BSI an excellent opportunity to perfect a comprehensive approach that will be adapted to other communities.

Program Description

The *Helena Development Initiative* includes program components for four priority audiences as well as the entire Helena nonprofit community.

Helena Development Roundtable Launched in 2013

The initiative's first operational component, **Helena Development Roundtable** (HDR) is a very successful informal network of executive directors, development directors, and fundraising staff who meet monthly. HDR provides important opportunities for collegial networking and relationship building. HDR participants pick fundraising topics, such as monthly giving programs and on-line fundraising, and share knowledge and resources. For staff who are new to Helena, HDR provides ready access to a talented and supportive peer network.

Access Helena! Launched in 2014

Access Helena! gives a comprehensive introduction to the community and highlights fundraising in a small community; realities of local and statewide foundation resources; opportunities for networking; programs and services of the

Montana Nonprofit Association; workplace funding programs; and other community resources. One priority audience is newcomers to Helena who are executive directors with fundraising responsibilities or development staff who have moved to Helena to assume their new positions.

Fundamentals for New Fundraisers Launched in 2014

Another key audience is individuals relatively new to fundraising. This track provides basic skill training so that these individuals can succeed with organizational fundraising activities that may be new to them or lie outside their current job descriptions. The training regime will increase their value to their employers and help position staff for advancement. Training topics include donor cultivation and solicitation, researching grant opportunities, grantwriting, event planning, membership recruitment and retention, and developing annual fundraising and communications plans.

Advanced Skills for Experienced Fundraisers · Planned for 2016

The third audience is executive directors and development staff who already have broad knowledge, skill, and experience with fundraising fundamentals. This track will advance their existing skills and expand skills where their experience is more limited. There will be eight monthly sessions, from September through November, and January through May. A program planning committee will develop an annual slate of possible session topics and survey local nonprofits to determine top priorities.

Training for Board Members and Volunteers Planned for 2016

The fourth audience includes nonprofit board members and other volunteers to whom nonprofits look for fundraising assistance. This track will prepare them for these responsibilities. From *Getting Over the Fear of Asking for Money* to *Fundamentals for Successful Event Planning*, this track has many opportunities to help motivated community members succeed in their fundraising commitments.

Helena Development Initiative

Professional Development for Excellence in Fundraising

Excellence in Nonprofit Communications Grant Award · Re-launched in 2014

BSI worked with Allegra Marketing | Print | Mail and its business sector partners to incorporate the *Excellence in Nonprofit Communications Grant Award* (ENC) into the *Helena Development Initiative*. Simply put, effective communications is a foundational building block for successful fundraising. Using a case study approach, this component coordinates fundraising activities with a nonprofit's messaging and communications tools. The ENC grant leverages more than \$30,000 of *pro bono* services for the nonprofit awardee.

The nonprofit works with the project partners to undertake a set of services customized to its specific needs and priorities. Areas of assistance focus on strategic communications plan development, and include such elements as appeals, brochures, commercials, copywriting, event materials, fundraising programs, logo redesign or refresh, newsletters, press releases, signs, tag lines, vehicle graphics, and website development or re-design/enhancement. The case study of each completed project is shared with all nonprofits involved with the *Helena Development Initiative* to give them real life examples of how they can use communications planning and associated tools to advance their fundraising. The 2014 awardee was Family Promise of Greater Helena.

Expanding Local Philanthropic Resources: #Giving Tuesday · Launched in 2014

#Giving Tuesday is a national/international movement to promote contributing to nonprofits on the first Tuesday in December. BSI anchored **#Giving Tuesday - Helena** in response to area nonprofits' desire to lift up this fundraising opportunity locally. Forty-four nonprofits shared the costs of full-page color ads in the *Helena Independent Record*, secured a mayoral proclamation and the support of the city commissioners, launched a Facebook page, and carried out other promotional activities. Nearly \$23,000 was raised for the participating nonprofits, and planning is underway to double that amount in 2015.

Endowment Development for Nonprofit Sustainability · New in 2015

The Montana Endowment Tax Credit provides our state's nonprofits with a powerful and compelling tool for endowment development that is the envy of development staff across the country. But is underutilized by Montana nonprofits both large and small. BSI will conduct a comprehensive survey of Helena area nonprofits regarding the status of endowment development in their organizations, constraints that limit endowment

development, and specific needs for training, coaching and technical assistance. The survey findings will guide the HDI Steering Committee and BSI in designing seminars on endowment development to begin in the fall of 2015.

Helena Celebrates Community Philanthropy Fall of 2015

The *Helena Development Initiative* will work with area nonprofits, donors, business partners, and civic leaders to hold Helena's first-ever sector-wide event to celebrate the importance of community philanthropy. Planned for mid-November to coincide with National Philanthropy Day sponsored by the Association of Fundraising Professionals, **Helena Celebrates Community Philanthropy** will recognize those who do the fundraising, as well as those who do the giving.

Helena Celebrates Community Philanthropy activities will center on a reception and gathering featuring a noteworthy speaker and awards to recognize and celebrate philanthropic accomplishments and honor great role models who exemplify the very best qualities of community philanthropists. The event will elevate the fundraising profession and recognize its vital importance to the well-being of nonprofits. The program will advance the twin notions that everyone can be a philanthropist and that a robust culture of community philanthropy is a foundation for community vitality.

Steering Committee

The following individuals are serving on the Steering Committee for the *Helena Development Initiative* and helping shape and guide this growing program:

- **Nikki Andersen**
Executive Director, ExplorationWorks
- **Russ Cargo Ph.D.**
Adjunct Professor of Nonprofit Management, Carroll College
- **Matthew Dale**
Director, Office of Consumer Protection and Victim Services, Montana Department of Justice
- **Heather Greene**
Development Director, Prickly Pear Land Trust
- **Sarah Shepard CFRE**
Director of Development, Montana Wilderness Association
- **Jenifer Gursky**
Development Director, Helena Food Share

BSI's Mike Schechtman and Bill Pratt work collaboratively with the Steering Committee and staff the initiative.