

WELCOME



October 22, 2020

SARTAC Zoom

A National Self Advocacy Meeting.

**Hosted by Self Advocacy Resource
and technical Assistance Center**

**This meeting is open to self-
advocates and allies.**

2 [HTTPS://SELFADVOCACYINFO.ORG/](https://selfadvocacyinfo.org/)

Our website has resources made by and for self-advocates



FYI: A Fundraising Resource on the SARTAC Website

GETTING YOUR BOARD TO RAISE MONEY



In this webinar Andy Robinson discuss the reasons why it is important for your board members to raise money. He outlines strategies to get things going.

<https://selfadvocacyinfo.org/resource/getting-board-raise-money-2/>

FYI: A Fundraising Resource on the SARTAC Website

CREATING A 12-WEEK MAJOR GIFTS CAMPAIGN



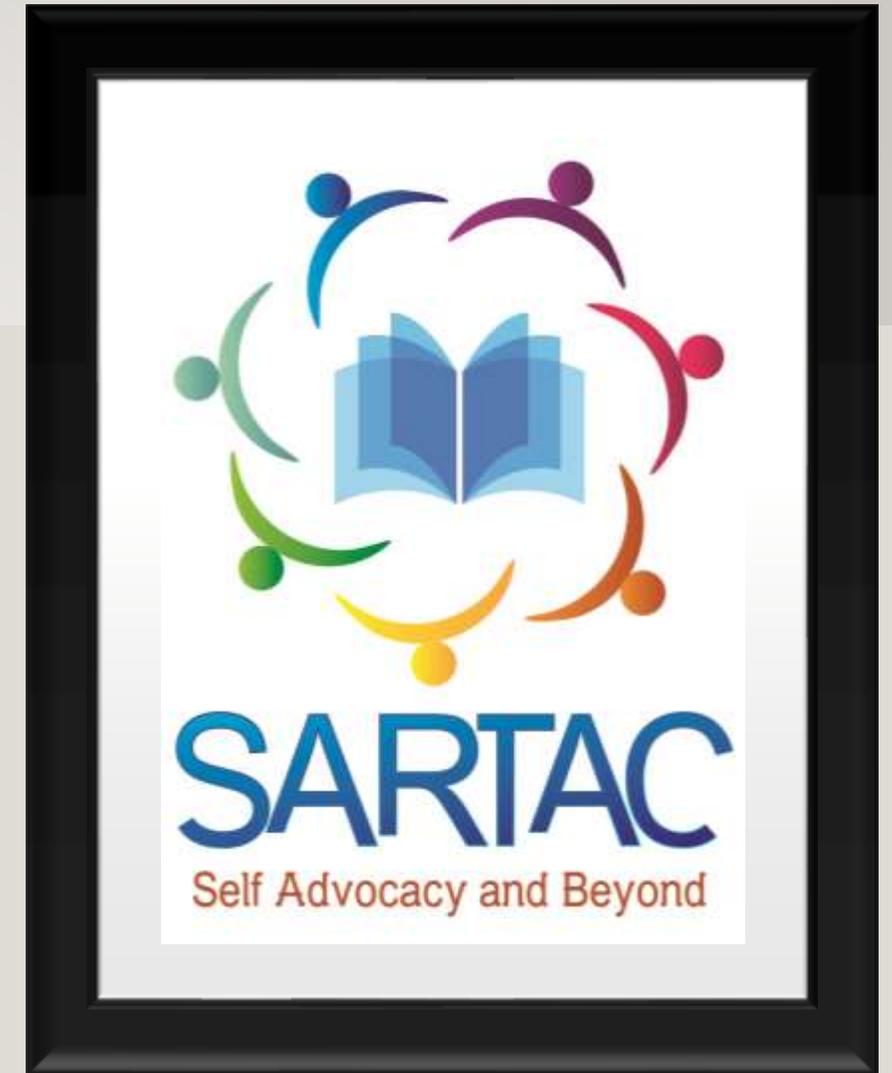
Watch this webinar by Andy Robinson if you want to build a major donor program from scratch. Andy walks you through planning, implementation and evaluation, step by step. There are also helpful handouts.

<https://selfadvocacyinfo.org/resource/creating-12-week-major-gifts-donor-program-campaign-2/>

TODAY'S PRESENTATION

SARTAC FELLOWS:

Advancing
Self Advocacy
through
Leadership and Policy



SUSTAINABILITY PLANNING FOR SELF-ADVOCACY GROUP NETWORKS

CHRISTINNE RUDD

SARTAC FELLOW

FL SAND HOST ORGANIZATION



THE SURVEY

- Conducted Self-Advocacy Network survey of networks across the country
- Found out streams of funding vary widely
- Also conducted field research to learn about board transition and ideas for sustainability

WHAT IS FUNDRAISING?

Fundraising is the organized activity of raising money for a cause or organization.

WHY IS FUNDRAISING IMPORTANT TO SELF-ADVOCACY NETWORKS?

Fundraising is important to self-advocacy networks/groups so that if the state and or federal funding is no longer available, they can continue operating with little or no disruption to what they're working on from day to day.

TYPES OF FUNDING OPTIONS

- Public Funding
- Grants
- Fees for goods and services
- Major gift Fundraising



WHO TO ASK FOR A MAJOR GIFT

- Board Members
- Businesses
- Vendors
- Individuals who have family members with a disability

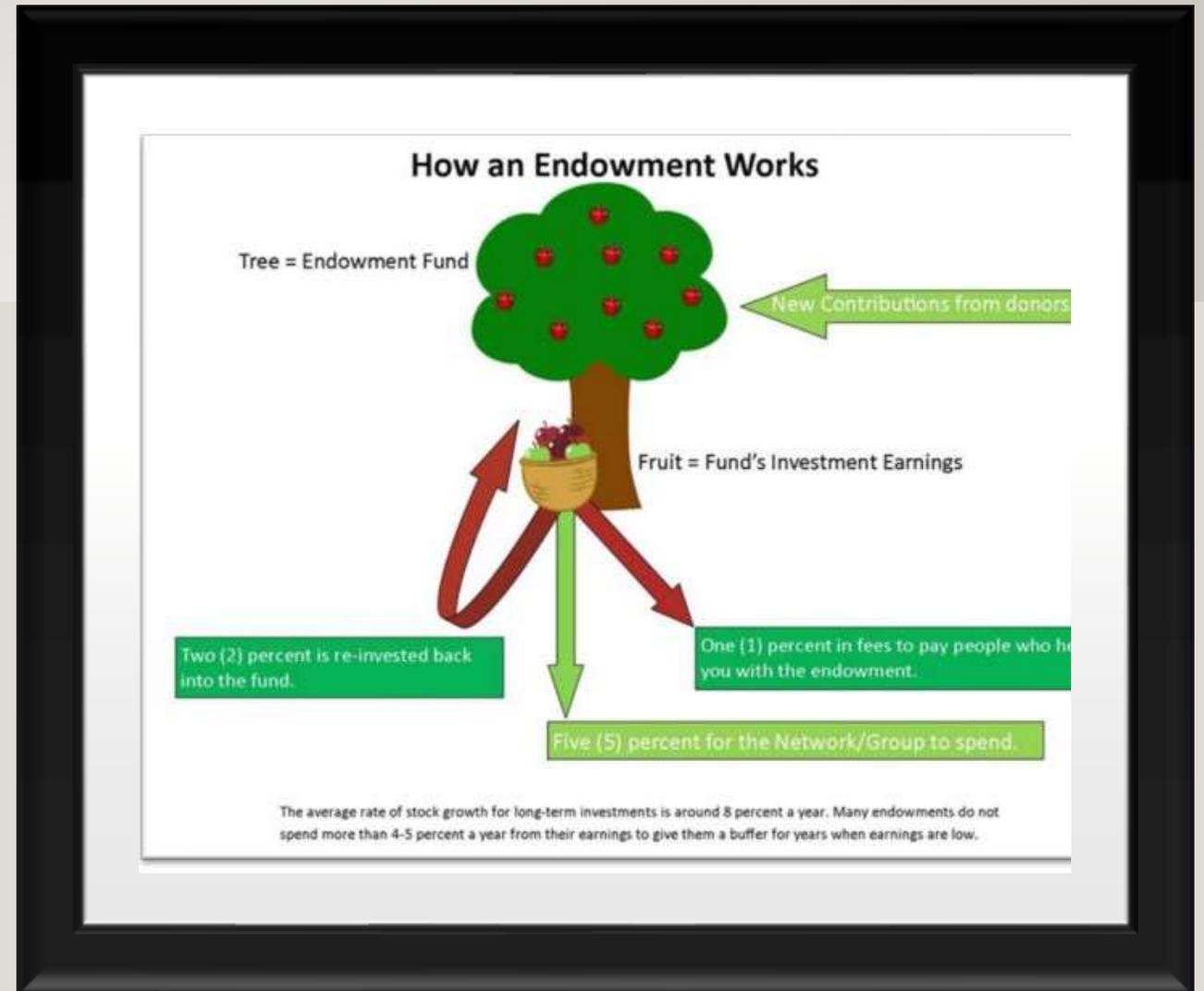


PLANNED GIVING

Planned giving programs involve major gifts that are carefully considered by the donor in light of estate or long-term financial plans.

ENDOWMENTS

An endowment is a special fund donors can contribute to that will be invested with the intention that only earnings from the fund will be spent.



MANAGING ENDOWMENTS

Endowment funds require people with specific skills to help set them up and manage their investments and reports. There are two primary options available to help organizations manage an endowment.

COMMUNITY FOUNDATIONS

- A community foundation is a tax-exempt charitable organization that provides support from funds that it raises, maintains, and administers on behalf of multiple organizations in a local or regional community.
- Community foundations will manage the investment of a local nonprofit's endowment fund and give a portion of the fund's year-end value back to the organization at least annually. A community foundation will charge a fee for maintaining the endowment.

MANAGE ENDOWMENT ON THEIR OWN

If you decide to manage the endowment, the program should be totally integrated into your network/group's development and finance functions. This may be a good option for networks/groups that have allies willing to donate legal, accounting, and fund management services.

COMMON MAJOR GIFT FUNDING ACTIVITIES

Special Events

Annual Giving

DIGITAL TOOLS

- Utilizing your website
- Social Media
- Amazon Smile

BEST PRACTICES

- Safeguards are very important to have in place to protect your funds. These safeguards are often called financial controls
- best practices and are necessary to make sure that the network/group's funds are properly managed
- If safeguards are not in place, your group or network will risk cash shortages, fraudulent activities, or bankruptcy

DIVIDING RESPONSIBILITY

- Splitting up the responsibility for handling the money between more than one person is the second broad financial control of any organization.
- just one person should never have control of any financial product or process.
- A strong organization should have rules that provide checks and balances for everything from physical products to digital resources such as passwords, bank account numbers, and credit card numbers.
- Networks and groups should write rules based on how they raise and manage money.

AUDIT

A financial audit is an objective review of the bank statements of an organization to make sure that its records were kept properly and that all the money that was received and spent honestly and according to the organization's rules and state and federal laws.

AUDIT

- The audit can be done internally by employees of the organization or externally by an outside Certified Public Accountant (CPA) firm.
- Think of an audit as a year-end report card that tells how well you handled your money and if you followed all the rules.
- A clean bill of health from an auditor shows the world that you're keeping your books in a responsible manner.

AUDIT

- Independent audits are mandatory for some nonprofits.
- The IRS does not require nonprofits to obtain audits, but other government agencies do.

CONCLUSION

- We have only scratched the surface of all the assistance available to your network or group in raising large amounts of money to help you become financially independent and secure.
- We encourage you to pay special attention to the tips for finding out more information, especially to take advantage of the resources at your group's disposal via the wonderful knowledge and talents of allies such as nonprofit directors, development directors, attorneys, and financial advisors.



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The Self Advocacy Resource and Technical Assistance Center (SARTAC) seeks to strengthen the self-advocacy movement by supporting self advocacy organizations to grow in diversity and leadership. The resource center is a project of Self Advocates Becoming Empowered (SABE), the oldest national self-advocacy organization in the country. SARTAC is a Developmental Disabilities Project of National Significance, funded by the Administration For Community Living – Administration on Intellectual and Developmental Disabilities (AIDD). The information in this product was written to provide guidance for self-advocates and their allies to assist in understanding policy issues affecting their lives. It is not to be used to determine a person's legal rights or an organization's legal responsibilities under Section 504 of the Rehabilitation Act of 1973, as amended; the Americans with Disability Act of 1990, as amended or any other federal, state or local laws written to protect the rights of people with disabilities.