

Virtual | June 11 - 13



The Importance of Diversified Funding

Presenters



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Agenda

What eggs are in your basket?



- Importance of Diversified Fundraising
- Types of Fundraising
- SA&D Resources - Training Calendar & Budgeting Template
- Success from the Field

Importance of Diversified Fundraising



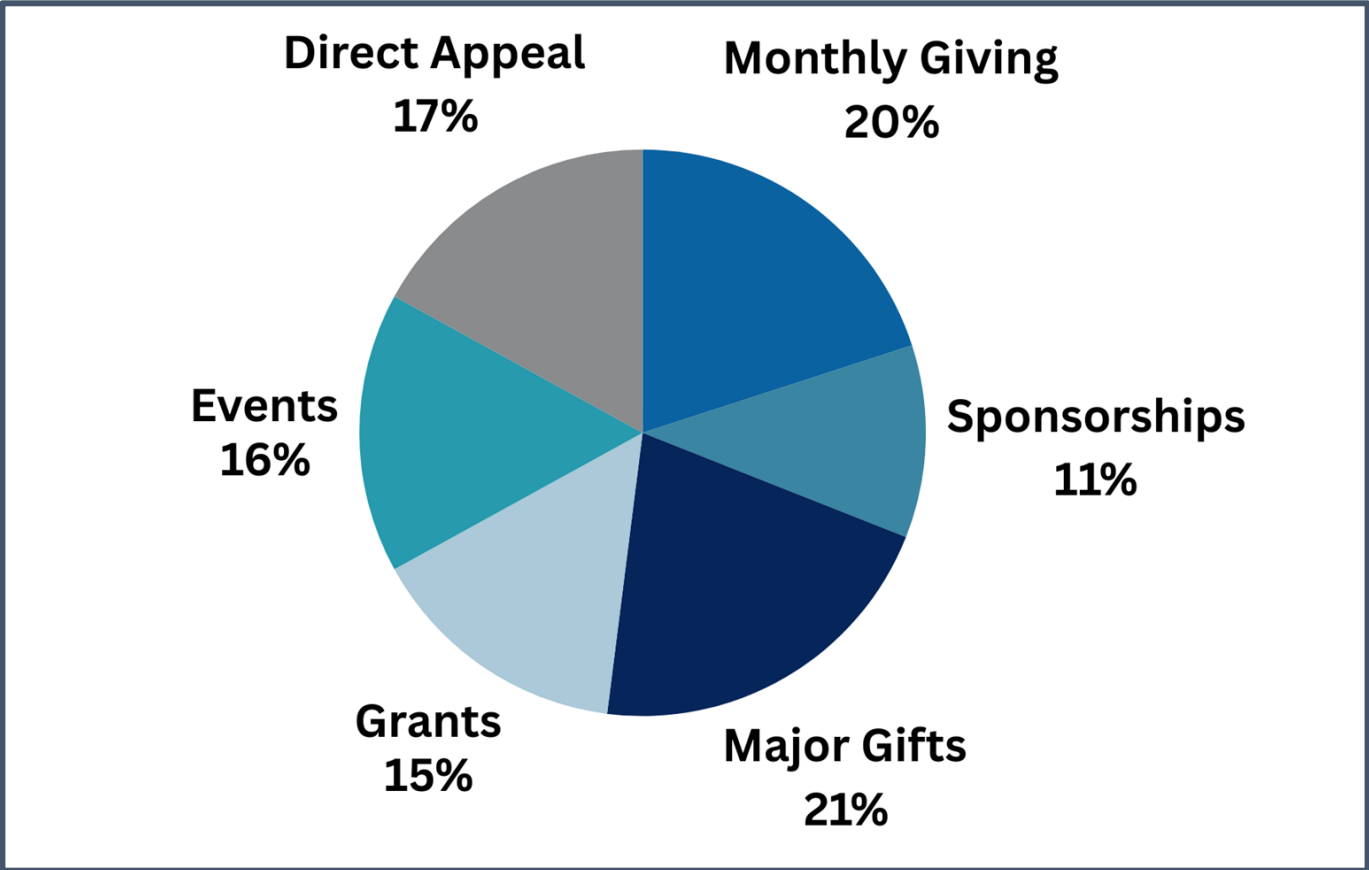
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Don't put all your eggs in one basket...

- Development planning takes time.
 - You need to think ahead - there may be specific timelines.
- Your development plan? Focus on your needs & abilities.
 - Staff capacity. Donor database. Trends in your market.
- Be intentional.
 - Look at your current portfolio. Assess needs and gaps. Discuss with your board for support.

Balancing Your Baskets



Source: Get Fully Funded

Balancing Your Baskets



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10

1000

Types of Fundraising

- Grants
- Corporate Giving
- Individual Giving
- Legacy/Planned Giving
- Special Events
- NAMIWalks
- NAMI Do-It-Your-Way



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Grants

An investment of local, corporate, community, state, or federal dollars for a specific purpose

At-a-Glance:

- Funding that can come from private, corporate, or community foundations or from a local, state, tribal, or federal government source.
- Funds are usually for a specific-purpose and are time-bound.
- Require written applications, strict management, and thorough follow-up on how funds were used.



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Pros:

- Can fund large projects
- Can provide long-term relationship and funding

Cons:

- Restricted funding
- Labor intensive
- May be a long time before award is given

Corporate Giving

Philanthropic funds from a large or small company or corporation located in your community

At-a-Glance:

- Strategic priorities (funding decisions) often fall in line with Corporate-Social Responsibility (CSR) or Environmental, Social, and Governance (ESG) efforts, or HR initiatives like workplace mental health.
- Early partnerships are also often formed through Employee Resource Groups (ERGs) or special interest employee groups



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Pros:

- Can build awareness in a large group of people at once
- Can provide long-term relationships and funding
- Can build in sponsorships for Walks or other events

Cons:

- Programming can be confused with EAPs

Worth Noting:

- Many companies will request impact data to make a business case for the funding

Corporate Giving

Philanthropic funds from a large or small company or corporation located in your community

At-a-Glance:

- StigmaFree Workplace is a great entry point for many companies - large and small
 - Can also detail support for ERGs and smaller employee interest groups (Parents, LGBTQIA+, Cultural Communities)
 - Build in sponsorships for Walks or other events as employee engagement opportunities
- Partnerships can be built around other programmatic support
 - Support groups, education initiatives, expansion of community outreach
 - Levels of partnership can be customized to each company's goals, interests, and finances



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Individual Giving

Philanthropic gifts by people & families that support the mission of your organization

At-a-Glance:

- Annual gifts (Asking vs. Nurturing)
 - Frequently asked; frequently given
 - From discretionary income (usually cash)
 - Transactional - mail, email, social media
- Recurring gifts
 - Infrequently asked
 - Loyal, committed donors
 - Could be “major” donor who breaks gift into smaller amounts

Pros:

- Can reach donors at all levels
- Usually unrestricted gifts
- After 3-5 years, have data for revenue projections and pipeline development

Cons:

- Can be expensive, especially mail
- Crowded market, need to be consistent and creative



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Individual Giving

Philanthropic gifts by people & families that support the mission of your organization

At-a-Glance:

- Major gifts (Nurturing vs. Asking)
 - Infrequently asked; infrequently given (1x/year or less)
 - Investment-minded approach to the gift (often given through a DAF, securities)
 - Can be restricted or unrestricted
 - 10-25x annual gift
 - “Major” gift levels differ for each organization



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Pros:

- Relationships with people who care deeply about the mission
- Larger gifts

Cons:

- Takes time and focus for intentional donor care & feeding - ongoing process
- 6-24 months before a gift

Legacy or Planned Giving

Intended future gift made through an estate plan

At-a-Glance:

- Considered the ultimate gift
- Most planned gifts are wills; others are beneficiary designations (IRA, Trusts, etc.)
 - People update their plans every 4-5 years



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Pros:

- Being treated like family
- Easy to advertise

Cons:

- Need a plan and a way to track & acknowledge people who let you know their intentions

Special Events

Fundraising activities that bring people together for a specific occasion to raise money and awareness for cause

At-a-Glance:

- Internally hosted fundraising activities that revolve around a physical event or activity
- Numerous types of activities that can vary by region: golf tournaments, galas, luncheons, cycling events, runs, concerts, sporting events, bingo, auctions, etc.
- Great tool for not only raising funds, but raising awareness and community buy-in to your mission



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Pros:

- Create sense of community
- Help identify potential major donors/corporate funders
- More engaging for supporters as they are social interactive

Cons:

- Very staff intensive
- Higher expense ratio than other forms of fundraising

NAMIWalks

Official branded walk fundraiser for NAMI that engages the community to fundraise

At-a-Glance:

- Largest, most vibrant mental health event series in the country
- Invites participants to share their stories, build community, and walk together to achieve Mental Health for All
- NAMI State Organizations and Affiliates can opt-in to participate in the branded NAMIWalks program and utilize a suite of tools and resources.



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Pros:

- Builds awareness in your local community
- Opportunity for strong corporate engagement
- Easily engage a larger donor network

Cons:

- Time-intensive for NAMI Staff and/or Volunteers
- Have a higher expense ratio than other forms of fundraising

NAMI

Do-It-Your-Way

*Official branded
DIY fundraising
program for NAMI
(third-party)*

At-a-Glance:

- Third-party fundraising that allows supporters to start a campaign of their choice for NAMI
- Ownership of the fundraising lies with the supporter
- NAMIs can opt-in to participate in the branded NAMI Do-It-Your-Way program and utilize a suite of tools and resources
- Customizable - can be “set it and forget it” or can be really marketed and coached



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Pros:

- Less staff-intensive for NAMI as the supporters plan and execute the fundraising campaigns
- Very little cost to run the program

Cons:

- NAMI doesn't have as much control over these fundraisers

SA&D Hosted Trainings

Training opportunities on specific topics



National Alliance on Mental Illness

2025 Strategic Alliances & Development Training Calendar

All sessions are subject to change. Read Field News for updates and registration information.

Monthly Topic Trainings and Open House Office Hours

MARCH 2025

Wednesday, March 26

How to Build (or Strengthen) a Grants Program

1 p.m. ET / 12 p.m. CT / 11 a.m. MT / 10 a.m. PT

90 minutes

SEPTEMBER 2025

Wednesday, September 24

Writing a Strong Annual Appeal

1 p.m. ET / 12 p.m. CT / 11 a.m. MT / 10 a.m. PT

90 minutes

JUNE 2025

Monday, June 2

Mission Matching: A Grant Seeker's Guide to Efficient Prospect Research and Effective Proposal Preparation

1 p.m. ET / 12 p.m. CT / 11 a.m. MT / 10 a.m. PT

90 minutes

OCTOBER 2025

Wednesday, October 22

Open House - Topic To Be Determined

1 p.m. ET / 12 p.m. CT / 11 a.m. MT / 10 a.m. PT

90 minutes

Tuesday, June 10

Alliance Day: The Importance of Diversified Fundraising

12:30-4:30 p.m. ET (Repeated Twice)

75 minutes

NOVEMBER 2025

Wednesday, November 12

Implementing a Major Gifts Program

1 p.m. ET / 12 p.m. CT / 11 a.m. MT / 10 a.m. PT

90 minutes

JULY 2025

Wednesday, July 23

Development Planning

1 p.m. ET / 12 p.m. CT / 11 a.m. MT / 10 a.m. PT

90 minutes

DECEMBER 2025

Wednesday, December 10

Open House - Topic To Be Determined

1 p.m. ET / 12 p.m. CT / 11 a.m. MT / 10 a.m. PT

90 minutes

AUGUST 2025

Wednesday, August 27

Open House - Topic To Be Determined

1 p.m. ET / 12 p.m. CT / 11 a.m. MT / 10 a.m. PT

90 minutes



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Budgeting Template

Assess your fundraising to set goals for your development plan



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National Alliance on Mental Illness

Guide to using this template

This budget template can be helpful for ensuring a diversified funding stream, revenue projections, and tracking actuals.

Input financial data into tabs 2022, 2023, 2024, 2025. Add new tabs for previous and/or subsequent years' data

Under **Individual Giving**, input data for Annual giving, Major gifts, etc. A formula is set to summarize into Individual Giving

Under **Special Events**, input data for NAMIWalks and add other events your group hosts (gala, golf tournament, etc). A formula is set to summarize into Special Events

2026 tab is pre-set with a formula

If you have no data, and you want to start fundraising in that line, you can override the formula. Suggestion: make a conservative estimate, based on your knowledge. Rule of thumb: will need 5 potential donors to reach 1 donor

The **Rollup tab** is set to capture data from the other tabs

On the **Rollup tab** you can create goals/projections for future years (5% increase in abc, 3% decrease in xyz) to help visualize various models of growth.

2026 Goal defaults to 10% + budgeted amount; however the formula can be adjusted

Of note: Your budgeted amount and your goals are not the same. Budget is based on actuals from previous years. Goals can (and should be) higher!

Helpful Tool: Fundraising Gift Range Calculator <https://www.societ.com/free-tools/calculators/fundraising-gift-range-calculator/>

Success from the Field



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Rebecca Kiessling
Executive Director
NAMI Northern Virginia





THANK YOU!



Ask the Experts

Fundraising Team Q&A



- Summer Parrish, National Director, Development
- Mary Sorensen, Director, Field Resource Development
- Kate Kennedy-Lynch, Director, External Relations
- Jeremy Writt, Senior Manager, Institutional Giving
- Morgan Sills, Senior Manager, FRD - NAMIWalks
- Leandra Clovis, Senior Manager, FRD - NAMI Do-It-Your-Way