Creating an Effective Fundraising Plan

Presenter: Steve Lew
About Steve Lew
Steve Lew is a Senior Projects Director for CompassPoint Nonprofit Services and has worked with nonprofit organizations as a consultant, trainer and fundraising coach over the last eleven years. Steve is director of the Fundraising Academy for Communities of Color, and has directed other key capacity building initiatives for CompassPoint. He has previously led and managed nonprofit organizations as an Executive Director of the Asian & Pacific Islander Wellness Center in San Francisco, and as Development Director of CompassPoint. Steve recently served as Board Chair of the Grassroots Institute for Fundraising Training (GIFT).

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About CompassPoint
CompassPoint intensifies the impact of fellow nonprofit leaders, organizations, and networks as we achieve social equity together.

We believe that nonprofit organizations and leaders need relevant support that builds on their strengths, experiences, and achievements and that those individuals and organizations that invest in increasing their leadership and management capacities are better poised to achieve progress.

web: www.compasspoint.org
Introduction

Goals: What You Will Learn

This is an introductory course for those who are new to nonprofits or new to the development function. It is ideal for board members and volunteers as well as staff or those interested in a new career in fundraising or nonprofits.

By the end of the day, you should have an understanding of:

- The importance of a diversified funding base
- Conducting an assets inventory
- Identifying funding opportunities
- The role of a fundraising team in creating the plan
- Setting realistic development goals
- Preparing your development plan & calendar

Why Plan?

- Limit crisis fundraising, increases flexibility
- Planning for diversity brings in more opportunities
- Increase board & volunteer involvement
- Integrate fund development with other program activities & plans
- Most productive use of everyone’s time
**Where’s the Money?**

Contributed income from corporations, foundations and individuals comprises approximately 20% of all income in the nonprofit sector. Of that 20%, donations from individuals consistently make up the largest share of contributions - more than foundations and corporations combined.

2014 contributions: $358.38 billion by source  
(in billions of dollars - all figures are rounded)

- **Corporations**: $17.77 (5%)
- **Foundations**: $53.97 (15%)
- **Bequests**: $28.13 (8%)
- **Individuals**: $258.51 (72%)

**Other Sources of Nonprofit Income:**

- Government Contracts 30%
- Earned Income 30%
- Unrelated Business Income 20%
## Where is the Money? How does the Money come?

<table>
<thead>
<tr>
<th>Sources</th>
<th>Benefits</th>
<th>“But”….</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Public</strong></td>
<td>✓ Will provide “base support” for ongoing services and some projects in community&lt;br&gt; ✓ Can be more consistent funding than foundations, often multi year</td>
<td>✓ Expect to see quantifiable service outcomes, all costs unitized per # of services negotiated in contracts; typically an insufficient “indirect rate” to cover admin costs.&lt;br&gt; ✓ Need line of credit or cash reserve to withstand cash flow problems</td>
</tr>
<tr>
<td><strong>Foundation</strong></td>
<td>✓ Will support infrastructure investments in projects (such as capital, administration, and fund development).&lt;br&gt; ✓ Make 2-4 year “investments” in organizations and community causes.&lt;br&gt; ✓ Community Foundations often “seed” promising organizations and projects.</td>
<td>✓ Unless you reach “institutional status” do not expect annual funding for continuing programs.&lt;br&gt; ✓ Winning a new foundation grant can take more than a year to cultivate, propose, and be awarded.&lt;br&gt; ✓ Each foundation is ‘uniquely personal’.&lt;</td>
</tr>
<tr>
<td><strong>Corporate Giving and Public Affairs</strong></td>
<td>✓ Will give money for events that can typically be used as unrestricted support.&lt;br&gt; ✓ Will underwrite certain costs of a project (i.e., computers)</td>
<td>✓ Need to demonstrate a base of support or reaching an audience that matches corporate marketing goals.&lt;br&gt; ✓ Sponsorship gifts are usually below $5,000 unless you are a major institution.&lt;br&gt; ✓ Donation cycles can be erratic</td>
</tr>
<tr>
<td><strong>Individual donors</strong></td>
<td>✓ Typically unrestricted support&lt;br&gt; ✓ Can provide sustaining gifts at increasingly larger amounts</td>
<td>✓ Requires ongoing training of staff and board members for solicitations&lt;br&gt; ✓ Requires significant investment of time and $ to cultivate strong donor base&lt;br&gt; ✓ Major donors need to see track record.</td>
</tr>
<tr>
<td><strong>Annual events</strong></td>
<td>✓ When successful, they bring in significant amount of unrestricted $&lt;br&gt; ✓ Excellent opportunity for identifying and cultivating prospective donors&lt;br&gt; ✓ Volunteer opportunity</td>
<td>✓ Can often make minimal profit (should have a business plan)&lt;br&gt; ✓ Highly staff and volunteer intensive&lt;br&gt; ✓ May undercut the gift levels of some donors.</td>
</tr>
<tr>
<td><strong>Earned Income</strong></td>
<td>✓ Can become a steady ongoing revenue source&lt;br&gt; ✓ Often strengthens fundraising position with other sources.&lt;br&gt; ✓ Can strengthen client and donor relationship with organization</td>
<td>✓ May require extensive business planning&lt;br&gt; ✓ May overtake the mission or primary programs of the organization&lt;br&gt; ✓ Usually requires up-front commitment of capital, and staff time.</td>
</tr>
</tbody>
</table>

S. Lew, CompassPoint Nonprofit Services, 2014
Recap: Why Diversify?

- Reduces dependency on single source
- Allows for continuation of services when the economy or other circumstances closes off or reduces one type of funding
- Funders like to see a diversified base
- Increases opportunities
- Sustainability

“Diversity means that you have as many people as you can coordinate, raising money from as many sources as you can manage”. - Kim Klein

How many types of income does your organization have?

Who else and what else would you need in order to pursue a new type of income?
Steps to Creating the Fundraising Plan

1. Assemble a planning team
2. Identify the assets and strengths
3. Brainstorm, then prioritize funding opportunities
4. Evaluate fundraising strategies
5. Set financial and fundraising goals
6. Calendar and write it up!

Your Fund Development Team

Who do you need on your team for planning?

- 
- 
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- 
- 

Who Else Should Be Involved?

- Executive Director
- Development Director
- Board Chair or President
- Board Fund Development Committee
- Program staff
- Outside volunteers with experience or connections
- Other? ____________________________
Your Assets Inventory

What Do We Mean by Assets?

- Evidence of your organization’s skills, experience, and expertise
  - Background of your staff & board
  - Track record of your success
  - Trust of the community and community leaders
- What attributes make your agency attractive to funders?
  - Actions/services only you provide, communities/clients only you reach
  - History of providing service in the community
  - Innovative ideas or new approaches

Finding Your Assets

With your Fund Development Team, assess the strengths of your:

- Program(s)
- Staff
- Board of Directors
- Volunteers
  - Money follows involvement: 90% of volunteers give
- Organizational structure and administration
- Funding base
- Community connections
- Clients/customers/audience
- Media accessibility and reputation
- Other? (site, publications, name, etc.) ____________________________
List Your Organizational Assets:

- ______________________________________________
- ______________________________________________
- ______________________________________________
- ______________________________________________
- ______________________________________________
- ______________________________________________
- ______________________________________________
- ______________________________________________
- ______________________________________________
- ______________________________________________

Several of these assets will help strengthen your case for support
Your Case for Support Statement

The Case Statement Is:
- A compelling argument to support your organization/program(s)
- An internal document.
  - Cut and paste from case statement in writing proposals, speeches, publicity, etc.
- 2-10 pages long.
- Written with passion and sense of importance that you bring to the issue

Elements of the Case Statement (From Fundraising for Social Change, Kim Klein)

<table>
<thead>
<tr>
<th>Section</th>
<th>It Establishes...</th>
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</thead>
<tbody>
<tr>
<td>Mission</td>
<td>Why your group exists</td>
</tr>
<tr>
<td>Goals</td>
<td>What it will do about why it exists</td>
</tr>
<tr>
<td>Objectives</td>
<td>How it will accomplish the goals</td>
</tr>
<tr>
<td>History</td>
<td>Its credibility, showing which objectives have been accomplished already</td>
</tr>
<tr>
<td>Structure</td>
<td>Who is involved, aligning the personnel with the goals</td>
</tr>
<tr>
<td>Fundraising Plan</td>
<td>That the organization has a number of appropriate income streams that will enable it to fulfill the mission</td>
</tr>
<tr>
<td>Budget</td>
<td>That salaries, benefits, rent and other costs are consistent with the mission and that the group knows how much it will cost to do the job it has set out to do.</td>
</tr>
</tbody>
</table>

The ‘elevator pitch’

“We believe that...”

“We address this by...“

Does your organization have a case statement and ‘elevator pitch’?

- 15 Tips for an Excellent Problem Statement - Grassroots Fundraising Journal, article archive
- Polishing Up Your Case Statement and Putting It to Use — Grassroots Fundraising Journal, article archive
A World of Funding Opportunities

Mapping The Known Universe

- Gather your Fund Development Team
- Supplies:
  - Room with large white board or chalk board
  - Supply of different color markers
- Procedure:
  - Place your organization at the center of the map
  - First, identify where your funding has been coming from
    - Start with broad areas, then move out to specifics
  - Next, brainstorm new ideas
    - All ideas are listed – no editing yet!
  - Finally, prioritize which efforts will have the best payoff

The map that you will create will end up looking something like this:

Ken Goldstein, Goldstein Consulting
Exercise: Map Out Your Funding Opportunities

1. Place your organization at the center of the map

2. First, identify where your funding has been coming from- start with income type (foundation, gov’t, sales, individuals, corporations, etc) then move out to specific sources

3. Now mark which specific sources will continue with certainty, which need to be renewed, and which sources will go away (by when). It’s best to have this information ready and mapped out for your first team meeting.
Discuss the Map Together

Identifying Gaps
- Attach dollar amounts to the current funders
- Are those amounts meeting current needs?
- Will they continue to meet your needs in the future?
- Is it realistic to expect larger amounts from the current sources?
- What do you know is changing (going away, needing renewal)?

Brainstorm
- What were our biggest successes?
- What were our biggest challenges?
- What can we do to build upon success?
- What’s a really different approach or perspective?

Prioritizing Ideas
What criteria will you use to make your choices? Here are a few ideas to start with:
- Potential payoff, financially
- Potential to build new relationships
- Investment required (staff, volunteers, and money)
- Targeted audience
- Matching to your needs

Use the Funding Source Matrix to
Not simply a list of all the funding sources, but a chart to guide you making the best decisions
- List the largest funding categories first
- List each of the specific ideas under the proper category
- Put a mark by those items already in use
- Use a rating system to evaluate which ideas to pursue

The next pages demonstrate a stripped down sample matrix: Just like with the map, your matrix will be different than this example.
## Matrix for Funding Source Planning

<table>
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<tr>
<th>In Use</th>
<th>Possibility</th>
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### Individuals

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<tr>
<td>Memberships</td>
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<td>Direct mail campaign</td>
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<td>Events</td>
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<tr>
<td>Cultivating major donors</td>
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<td>Planned giving</td>
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<tr>
<td>Volunteer opportunities</td>
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<tr>
<td>Board Giving</td>
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<td>Other: ___________________________</td>
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<td>Other: ___________________________</td>
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### Foundations

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<td>Large/national foundations</td>
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<td>Regional foundations</td>
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<tr>
<td>Family and community foundations</td>
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<td>Corporate-based foundations</td>
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<td>Donor Advised Funds</td>
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<td>Other: ___________________________</td>
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### Corporate / Business

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<td>Corporate giving (grants) programs</td>
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<td><strong>In-kind gifts programs</strong></td>
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<tr>
<td><strong>Sponsorships</strong></td>
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<td><strong>Retail</strong></td>
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<td><strong>Other: _______________________</strong></td>
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<td><strong>Other: _______________________</strong></td>
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**Government**

<table>
<thead>
<tr>
<th><strong>Federal grants</strong></th>
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<tbody>
<tr>
<td><strong>State grants</strong></td>
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<tr>
<td><strong>Local grants</strong></td>
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<tr>
<td><strong>Contracts</strong></td>
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</table>

**Other/Miscellaneous**

<table>
<thead>
<tr>
<th><strong>Earned income (specify): _______________________</strong></th>
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<tbody>
<tr>
<td><strong>Religious institutions</strong></td>
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<tr>
<td><strong>United Way &amp; other federated</strong></td>
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<tr>
<td><strong>Kiwanis, Lions, Professional groups</strong></td>
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<tr>
<td><strong>Labor unions</strong></td>
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<td><strong>Other: _______________________</strong></td>
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<td><strong>Other: _______________________</strong></td>
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<td><strong>Other: _______________________</strong></td>
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<tr>
<td><strong>Other: _______________________</strong></td>
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</tbody>
</table>
Who is Included in a Broad Base of Support?

1. How many *staff and board* members do you have? _____
2. How many *volunteers* do you work with? _____
3. On average, how many personal contacts will each person be able to submit email or mail information to your cultivation/asking list? _____
4. **Add #1 & #2, and multiply this total by #3** _____

You can reach many prospective donors by creating and updating your list each year. It takes time and education to source names and contact information each year–name this as an activity in your plan.

Other ways of generating new names are mounting fundraising pages, creating online petitions, trading mailing lists, holding contests or raffles that motivate people to share their information and consent to receive a follow up communication.
Identifying Prospects: Where to Begin?

1. Putting you, your staff and board members in circle 1, friends, family and colleagues in circle 2, name other “types” who should be reached in circles 3,4 & 5.
WHO is in the Fundraising Plan?

**Staff Roles in Fundraising**
- Supplies names, contact info of prospective supporters
- Conducts the research on foundations, groups, individuals
- Prepares fundraising materials, proposal
- Manages the timelines
- Produces thank you letters, grant reports

**Board Roles in Fundraising**
- Supplying names, contact info of prospective supporters
- Cultivates and asks an agreed upon number of people
- Volunteers for events
- Opens doors to business and foundations
  - Making sure the agency is solvent and sustainable is a major responsibility of the board of directors: It’s part of governance

**Having a Board Fund Development Committee:**
- Organizes the board members on board specific duties
- Helps staff to maintain board participation and accountability
- Keeps the fundraising work on the board radar: marks success & challenges
The Development Cycle & Annual Fundraising

Your fund development activities will have distinct objectives and outcomes for:

1. Newly acquired donors – welcome & introduce – retain 20–35%, lose 80-65%
2. Annual donors – engage & renew – retain 50–75%, lose 50–25%
3. Frequent donors – involve and ask for additional gifts
4. Give through events- encourage sponsorship & table captains
5. Other donor preferences- note and honor requests

Retention rates from: 2014 Fundraising Effectiveness Project; Blackbaud white paper 2013
Response rates for different strategies (recent benchmarks)

- Direct mail to acquire new donors bulk: 0.5 – 1%
- Email fundraising message: 0.05- 0.10%
- Direct mail to renew an annual gift from current donors: 6 – 12%
- Multi channel to renew annual gift from current donors: 15 – 20%
- Personal calling: 25%
- Face to face asking: 50%

Source: Grassroots Fundraising Journal, NTEN/M+R Benchmark study 2015.
For loads more stats and cool infographics on online giving and advocacy: www.mrbenchmarks.com

Want to get better results?
Track your response rates each ask, each year.

# of gifts / # of people asked = response rate

# of annual donors who gave in 2014 who gave again in 2015 = retention rate

Total dollars raised _____ in 2013 _____ in 2014 _____ in 2015

Average gift amount _____ in 2013 _____ in 2014 _____ in 2015

What if we don’t have a donor management software system?
Setting Goals

Be Realistic!
- Based on your track record of previous years and current trends
- Discount grants applied for by chance of getting
- No across the board increases without data

Set Goals for Foundation funding

<table>
<thead>
<tr>
<th>Foundation</th>
<th>Type</th>
<th>Status</th>
<th>Request</th>
<th>Likelihood</th>
</tr>
</thead>
<tbody>
<tr>
<td>X Community Foundation</td>
<td>Renew general support</td>
<td>Program officer invited at 50k – submitted proposal</td>
<td>50k</td>
<td>90%</td>
</tr>
<tr>
<td>Chinn Family Fund</td>
<td>New program support</td>
<td>We qualify; and they accepted our brief letter of intent</td>
<td>25k</td>
<td>25%</td>
</tr>
<tr>
<td>Corporate Fdn</td>
<td>New program support</td>
<td>Meet their general guidelines, cannot reach anyone</td>
<td>15k</td>
<td>10%</td>
</tr>
<tr>
<td>Fiery Exciting Funder</td>
<td>Capacity building grant</td>
<td>Invited proposal, will be approved at staff level</td>
<td>20k</td>
<td>90%</td>
</tr>
</tbody>
</table>

Set Goals for Donor Development

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Goal</th>
<th>Audience</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquire new donors via 3 house gatherings</td>
<td>45 new donors, $3,000</td>
<td>1 new school network, friends of 2 new board members</td>
<td>Small events hosted by board members- need to invite at least 90 new people</td>
</tr>
<tr>
<td>Renew current donors through two campaigns</td>
<td>350 small gifts $35,000 40 major gifts $40,000</td>
<td>House donor list plus any new lists generated</td>
<td>May appeal and November appeal using mail, email and calling 50% of our list. Volunteer phone bank</td>
</tr>
<tr>
<td>Upgrade donors through monthly sustainer program</td>
<td>33 new sustainers average $300/year = $10,000</td>
<td>Current donors who are giving &gt;$75 for more than 2 years</td>
<td>Special appeal with phone call from Mgmt Team in January</td>
</tr>
<tr>
<td>Acquire younger donors through online campaign</td>
<td>80 new donors average $20 = $1,600</td>
<td>Friends, family of program participants</td>
<td>Create contest among program participants to create pages on FirstGiving with their story and goal to raise $100 +</td>
</tr>
<tr>
<td>Culture of philanthropy &amp; Fundraising: Encourage everyone to support &amp; to invite support from others.</td>
<td>Most people in our organization will reach out to friends, family contacts during two campaigns.</td>
<td>8 current and 2 new board members; 15 staff, 10 volunteers</td>
<td>Train all staff and board along with 10 volunteers to invite their contacts and ask for an annual gift. Each donor will get a thank you call along with the TY letter.</td>
</tr>
</tbody>
</table>
**Set Your Goals**

- Based on your track record of previous years and current communication with source & trends that are relevant to your field.
- Discount grants applied for by chance of getting
- No across the board increases without data

### Set Goals for Foundation funding

<table>
<thead>
<tr>
<th>Foundation</th>
<th>Type of grant</th>
<th>Status</th>
<th>Request</th>
<th>Likelihood</th>
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### Set Goals for Donor Development

<table>
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<tr>
<th>Strategy</th>
<th>Goal</th>
<th>Audience</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>Acquire new donors</td>
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<tr>
<td>Renew current donors</td>
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<td>Upgrade donors</td>
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<td>Other</td>
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</table>
Sample Fundraising Plan – Community Organizing Group

This development plan enables us to gather the resources ($300,000) to build the grassroots fundraising capacity of our years’ work. Our goals:

1. Raise enough money to support programs and operations and improve them.
2. Raise enough money to provide funds for ongoing organizational development, strategic planning, communications and outreach, and professional development.
3. Improve our organizational structure for fundraising, including streamlining processes, increased donor communication, strengthening major donor work, integrating fundraising more with programs, and building a stronger fundraising team which includes increasing board involvement.

<table>
<thead>
<tr>
<th>INCOME CATEGORY</th>
<th>STRATEGY</th>
<th>GOAL</th>
<th>COST</th>
<th>2011 ACTUALS</th>
<th>2010 COMPARE</th>
<th>WHEN</th>
<th>WHO</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual donations $57,000</td>
<td>Major gifts</td>
<td>$35,000 from 30 donors &gt;$500</td>
<td>24 staff hours</td>
<td>$30,390 from 22 donors</td>
<td>$28,000 from 28 donors</td>
<td>Jan - Feb</td>
<td>8 Board members</td>
<td>Done</td>
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<tr>
<td></td>
<td>1. Provide materials</td>
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<td>2. Set up call</td>
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<td>3. Check-in calls</td>
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<td>4. Celebration</td>
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<tr>
<td></td>
<td>Donor newsletter</td>
<td>Cultivation, $0</td>
<td>$1,000 from 22 staff hours</td>
<td>$350 from 8 donors</td>
<td>N/A</td>
<td>March, September</td>
<td>MV</td>
<td>Done</td>
</tr>
<tr>
<td></td>
<td>1. Work on text, photos</td>
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<td></td>
<td>2. Contact mail house and print shop (500 +)</td>
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<td>Appeal to 2010 event attendees that didn’t give</td>
<td>$1,200</td>
<td>$200 from 4 staff hours</td>
<td>$1,500 from 20 people</td>
<td>$800 from 10 people</td>
<td>July</td>
<td>MV</td>
<td></td>
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<tr>
<td></td>
<td>1. Write letter, insert</td>
<td></td>
<td></td>
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<td>2. Do mailing (75 +)</td>
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<td></td>
<td>Fall Open House</td>
<td>$2,000</td>
<td>$150 from 5 staff hours</td>
<td>$2,300</td>
<td>Late September</td>
<td>MV volunteers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event</td>
<td>Description</td>
<td>Cost</td>
<td>Staff Hours</td>
<td>Pledged</td>
<td>Start</td>
<td>Responsible Party</td>
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<tr>
<td><strong>Fall appeal to current donors and new prospects that we identify for general support</strong>&lt;br&gt;1. Write letter, inserts&lt;br&gt;2. Do mailing (600+)&lt;br&gt;3. Make calls (200+)</td>
<td>$16,000 from 160 donors&lt;br&gt;$550 from 30 staff hours&lt;br&gt;$14,716 from 143 people</td>
<td>Late Nov.</td>
<td>All staff and board</td>
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<tr>
<td><strong>E-newsletter subscribers</strong>&lt;br&gt;1. Write e-appeal series&lt;br&gt;2. Change website</td>
<td>$3,000&lt;br&gt;Minimal 8 staff hours&lt;br&gt;$1,660 from 23 people</td>
<td>December</td>
<td></td>
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<tr>
<td><strong>Annual Gala $70,000</strong>&lt;br&gt;Individual donors – 250 tickets&lt;br&gt;1. Host committee formed&lt;br&gt;2. Location secured&lt;br&gt;3. 10 table captains&lt;br&gt;4. Invites sent&lt;br&gt;5. Program set</td>
<td>$25,000&lt;br&gt;$18,000 50 staff hours&lt;br&gt;$35,686 pledged from 150 people</td>
<td>April -June</td>
<td>Event Comm.</td>
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<td><strong>Funders, businesses, organizations – sponsorships</strong>&lt;br&gt;1. Sponsor packets&lt;br&gt;2. Ad book sales&lt;br&gt;3. In kind list and requests</td>
<td>$40,000&lt;br&gt;30 staff hours&lt;br&gt;$57,500 pledged from 40 groups, $2,500 pledged in-kind</td>
<td>Jan-June</td>
<td>Event Comm.</td>
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<td><strong>NYC House party – pre-gala event</strong></td>
<td>$5,000&lt;br&gt;$800 8 staff hours&lt;br&gt;$6,500 from 50 people&lt;br&gt;$6,768 from 52 people</td>
<td>March</td>
<td>NYC comm.</td>
<td>Done</td>
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<tr>
<td><strong>Foundation Grants $175,000</strong>&lt;br&gt;Akonadi Foundation</td>
<td>$25,000&lt;br&gt;6 staff hrs</td>
<td>HK</td>
<td>Still talking</td>
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<tr>
<td>Anschutz Family Foundation</td>
<td>$50,000&lt;br&gt;$500 travel 12 staff hrs</td>
<td>March</td>
<td>PH</td>
<td>Declined</td>
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<tr>
<td>Babcock Foundation</td>
<td>$100,000&lt;br&gt;8 staff hrs&lt;br&gt;$10,000&lt;br&gt;$200,000 two-year grant</td>
<td>Renewal February</td>
<td>PH</td>
<td>secured</td>
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Grassroots Institute for Fundraising Training
For your donor development calendar, think of how activities can build upon each outcome.
## Your Calendar of Donor Development Activities

<table>
<thead>
<tr>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
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<thead>
<tr>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
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<tr>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
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</table>
Analyze Your Fundraising Vehicles

HIGH RESOURCES NEEDED
(Staff time, direct expenses)

HIGH NET

LOW NET

LOW RESOURCES NEEDED

Typical vehicles: grant writing, phone campaign, award event, direct mail, house party, face to face meetings…
Putting It All Together

Being Flexible: Monitor, Evaluate, & Adapt

- Track each month’s actual revenue to goals
  - What adjustments are called for?
  - What’s working? What isn’t?
- What new opportunities have appeared?
  - New programmatic initiatives
  - New funding sources available
- Laying the basis for next year’s plan
  - Closing the loop and continuing the process

Recap and Review

- Establish Your Team
- Plan with the team
  - Assets Inventory & Mapping exercises
  - Identify New Opportunities: Sustainability & Diversity
- Prioritize: Select strategies
- Set Realistic Goals
  - Long-term goals and sustainability
- Keep the Team Involved
- Use the Calendar- Fundraising & Communications
  - Assigning responsibilities & dates
  - Integrate program calendar and plans
- Write the Plan
- Work the Plan
Fundraising Resources

Online
Grassroots Fundraising Journal, Grassroots Institute for Fundraising Training
www.grassrootsfundraising.org

Books
The Accidental Fundraiser by Stephanie Roth
Achieving Excellence in Fund Raising by Henry A. Rosso and Associates
Boards That Love Fundraising by Robert M. Zimmerman and Ann W. Lehman
The Complete Book of Model Fund-Raising Letters by Roland Kuniholm
The Complete Guide to Fundraising Management by Stanley Weinstein
The Complete Guide to Planned Giving by Debra Ashton
Fundraising for Non Profits by Burke Keegan
Fundraising for Social Change by Kim Klein
Planning and Implementing Your Major Gifts Campaign by Suzanne Irwin-Wells
Storytelling for Grantseekers by Cheryl Clarke
Preparing Your Capital Campaign by Marilyn Bancel
Planned Giving Simplified by Robert F. Sharpe, Sr.
Planning Special Events by James Armstrong
Reliable Fundraising in Unreliable Times by Kim Klein
Revolution in the Mailbox by Mal Warwick
Team-Based Fundraising Step by Step by Mim Carlson
The Ask by Laura Fredericks
The Foundation Center’s Guide to Proposal Writing by Jane C. Geever and Patricia McNeill
**Online Fundraising Guides, Samples, and Templates**

- Supporting Advancement.Com – (sample documents) [http://www.supportingadvancement.com/revenue/samples/samples.htm](http://www.supportingadvancement.com/revenue/samples/samples.htm)
- Spanish language tool kit to teach fundraising
  - Comunidades del Futuro: Guía para Facilitadores

**Organizations**

- Association of Fundraising Professionals – [www.afpnet.org](http://www.afpnet.org)
- CompassPoint Nonprofit Services – [www.compasspoint.org](http://www.compasspoint.org)
- Foundation Center – [www.fdncenter.org](http://www.fdncenter.org)

**Periodicals & Websites**

- Alaska Funding Exchange – [www.funding-exchange.org](http://www.funding-exchange.org)
- Blue Avocado  [www.blueavocado.org](http://www.blueavocado.org)
- The Grantsmanship Center – [www.tgci.com](http://www.tgci.com)
- Grassroots Fundraising Journal – [www.grassrootsfundraising.org](http://www.grassrootsfundraising.org)
- Guidestar – [www.guidestar.org](http://www.guidestar.org)
- The NonProfit Times – [www.nptimes.com](http://www.nptimes.com)