Create an Effective Fundraising Plan
CompassPoint Nonprofit Services

Presenter: Steve Lew
For the Greater New Orleans Foundation
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).

Stevel@Compasspoint.org

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

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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
- Developing your mission & case statements
- Identifying funding opportunities
- The role of a fundraising team in enacting the plan
- Setting realistic development goals
- Preparing your development plan & calendar

Why Plan?

- Limit crisis fundraising
- Diversity builds in 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. Donations from individuals consistently make up the largest share of contributions- more than foundations and corporations combined.

2012 Contributions: $316.23 billion by source of contributions (in billions of dollars - all figures are rounded)

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>
</table>
| **Public**            | ➢ Will provide “base support” for ongoing services and some projects in community  
                        ➢ Can be more consistent funding than foundations, often multi year       | ➢ Expect to see quantifiable service outcomes, all costs unitized per # of services negotiated in contracts; typically an insufficient “indirect rate” to cover admin costs.  
                        ➢ Need line of credit or cash reserve to withstand cash flow problems.   |                                                                                       |
| **Foundation**        | ➢ Will support infrastructure investments in projects (such as capitol, administration, and fund development).  
                        ➢ Make 2-4 year “investments” in organizations and community causes.     | ➢ Unless you reach ‘institutional status” do not expect annual funding for continuing programs.  
                        ➢ Community Foundations often “seed” promising organizations and projects. | ➢ Winning a new foundation grant can take more than a year to cultivate, propose, and be awarded.  
                        ➢ Each foundation is ‘uniquely personal’.                              |                                                                                       |
| **Corporate Giving and Public Affairs** | ➢ Will give money for events that can typically be used as unrestricted support.  
                        ➢ Will underwrite certain costs of a project (i.e., computers)          | ➢ Need to demonstrate a base of support or reaching an audience that matches corporate marketing goals.  
                        ➢ Sponsorship gifts are usually below $5,000 unless you are a major institution.  
                        ➢ Donation cycles can be erratic.                                   |                                                                                       |
| **Individual donors** | ➢ Typically unrestricted support                                           | ➢ Requires ongoing training of staff and board members for solicitations  
                        ➢ Can provide sustaining gifts at increasingly larger amounts           | ➢ Requires significant investment of time and $ to cultivate strong donor base.  
                                                                                                                               | ➢ Major donors need to see track record.                                   |                                                                                       |
| **Annual events**     | ➢ When successful, they bring in significant amount of unrestricted $  
                        ➢ Excellent opportunity for identifying and cultivating prospective donors  
                        ➢ Volunteer opportunity                                                  | ➢ Can often make minimal profit (should have a business plan)             
                                                                                                                               | ➢ Highly staff and volunteer intensive                                    | ➢ May undercut the gift levels of some donors.                                   |
| **Earned Income**     | ➢ Can become a steady ongoing revenue source  
                        ➢ Often strengthens fundraising position with other sources.             | ➢ May require extensive business planning                                
                        ➢ Can strengthen client and donor relationship with organization         | ➢ May overtake the mission or primary programs of the organization        | ➢ Usually requires up-front commitment of capital, and staff time.             |
2013 eNonprofit Benchmarks Study

We analyzed the results of 1.6 billion email messages sent to over 45 million subscribers; 6.5 million online gifts totaling $438 million raised; and 7.3 million advocacy actions.

**Email Fundraising**
- Drop in email fundraising response rates:
  - Open rate: 13%
  - Click-through rate: 0.42%
  - Response rate: 0.07%

**Email Advocacy**
- Drop in email advocacy response rates:
  - Open rate: 14%
  - Click-through rate: 3.7%
  - Response rate: 3.5%

**Email List Growth**
- 15%

**Email List Churn**
- 16%

**Online Revenue**
- Increased by 21%
  - Driven by a 20% increase in number of gifts.

**Average Gift Amount**
- Monthly: $19
- One-time: $60
- One-time, international: $163

**International Groups**
- Saw a -12% decline in online revenue.

**Environmental Groups**
- Saw a +34% increase in online revenue.

**Emails Sent Per Month, Per Subscriber**
- Health: 27
- Rights: 23
- International: 4.0
- Wildlife and Animal Welfare: 4.1
- Environmental: 4.9

For every 1,000 email subscribers, nonprofits have...
- Facebook fans: 149
- Twitter followers: 53
- Mobile subscribers: 29

**Annual Growth**
- Facebook fans: 46%
- Twitter followers: 264%

Photo posts had the highest virality (generating likes, shares, and comments). Link and share posts received the most link clicks.

For the full report, visit www.e-benchmarksstudy.com
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 fund opportunities
4. Evaluate fundraising strategies
5. Set financial and fundraising goals
6. Calendar and write it up!

Your Fund Development Team

Why do you need a team for planning? For fundraising?

• __________________________________________
• __________________________________________
• __________________________________________
• __________________________________________
• __________________________________________

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? __________________________________________
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
  o 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

Other Roles (Volunteers, Consultants)

Why would you want “outsiders” involved?
• Community buy-in
• Good ideas
• Money follows involvement
• _____________________________
• _____________________________
• _____________________________
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 Statement

The Case Statement Is:
• A compelling argument to support your organization/program(s)
• An internal document.
  o 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>
</tr>
</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. Next, brainstorm new ideas - All ideas are listed – no editing yet!
4. Finally, prioritize which efforts will have the best payoff
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?
- How much are you coming up short?
- Is it realistic to expect larger amounts from the current sources?
- How diversified is your base?
- Are enough new sources identified to make up the difference?
- Are your new ideas truly new, or “more of the same”?

Use the Funding Source Matrix to

Not simply a list of the 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

Prioritizing Ideas

Your time and resources are limited, and there is simply no way you can pursue absolutely everything. So, 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

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

<table>
<thead>
<tr>
<th>In Use</th>
<th>Possibility</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td>↔</td>
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<tr>
<td></td>
<td>↓</td>
</tr>
</tbody>
</table>

### Individuals
- Memberships
- Direct mail campaign
- Events
- Cultivating major donors
- Planned giving
- Volunteer opportunities
- Board all gives
- Other: ___________________________
- Other: ___________________________

### Foundations
- Large/national foundations
- Regional foundations
- Family and community foundations
- Corporate-based foundations
- Donor Advised Funds
- Other: ___________________________

### Corporate / Business
- Corporate giving (grants) programs
<table>
<thead>
<tr>
<th>In-kind gifts programs</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsorships</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retail</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other: ___________________________</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other: ___________________________</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Government**

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

**Other/Miscellaneous**

| Earned income (specify): ____________________ |   |   |   |
| Religious institutions |   |   |   |
| United Way & other federated |   |   |   |
| Kiwanis, Lions, Professional groups |   |   |   |
| Labor unions |   |   |   |
| Other: ___________________________ |   |   |   |
| Other: ___________________________ |   |   |   |
| Other: ___________________________ |   |   |   |
| Other: ___________________________ |   |   |   |
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.
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.
Segment Your Donors

Your fund development activities, information systems segment donors in important ways:

1. Newly acquired donors
2. Annual donors
3. Frequent donors
4. Give through events
5. Other donor preferences

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>50 k</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>25 k</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>15 k</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>20 k</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</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>
</tbody>
</table>
Set Your Goals

- 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 of grant</th>
<th>Status</th>
<th>Request</th>
<th>Likelihood</th>
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Set Goals for Donor Development

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<tr>
<td>Acquire new donors</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Renew current donors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Upgrade donors</td>
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<td></td>
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</tr>
<tr>
<td>Other</td>
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</tr>
</tbody>
</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</td>
<td>$57,000</td>
<td>Major gifts</td>
<td>$35,000</td>
<td>24 staff hours</td>
<td>$30,390</td>
<td>Jan - Feb</td>
<td>8 Board members</td>
<td>Done</td>
</tr>
<tr>
<td></td>
<td>1. Provide materials</td>
<td>from 30 donors</td>
<td>22 donors</td>
<td></td>
<td>$28,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Set up call</td>
<td>&gt;$500</td>
<td></td>
<td></td>
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<td></td>
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</tr>
<tr>
<td></td>
<td>3. Check-in calls</td>
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</tr>
<tr>
<td></td>
<td>4. Celebration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Donor newsletter</td>
<td>Cultivation,</td>
<td>$1,000</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>
<td>$0</td>
<td>22 staff hours</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Contact mail house and print shop (500 +)</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Appeal to 2010 event attendees that didn’t give</td>
<td>$1,200</td>
<td>$200</td>
<td>$1,500</td>
<td>$800 from 10 people</td>
<td>July</td>
<td>MV</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1. Write letter, insert</td>
<td>4 staff hours</td>
<td>from 20 people</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Do mailing (75 +)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fall Open House</td>
<td>$2,000</td>
<td>$150</td>
<td>$2,300</td>
<td>Late September</td>
<td>MV volunteers</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1. Invite 50 new people</td>
<td>5 staff hours</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fall appeal to current donors and new prospects that we identify for general support 1. Write letter, inserts 2. Do mailing (600+) 3. Make calls (200+)</td>
<td>$16,000 from 160 donors</td>
<td>$550 30 staff hours</td>
<td>$14,716 from 143 people</td>
<td>Late Nov.</td>
<td>All staff and board</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-newsletter subscribers 1. Write e-appeal series 2. Change website</td>
<td>$3,000</td>
<td>Minimal 8 staff hours</td>
<td>$1,660 from 23 people</td>
<td>December</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Annual Gala $70,000

<table>
<thead>
<tr>
<th>Individual donors – 250 tickets 1. Host committee formed 2. Location secured 3. 10 table captains 4. Invites sent 5. Program set</th>
<th>$25,000</th>
<th>$18,000 50 staff hours</th>
<th>$35,686 pledged from 150 people</th>
<th>April - June</th>
<th>Event Comm.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funders, businesses, organizations – sponsorships 1. Sponsor packets 2. Ad book sales 3. In kind list and requests</td>
<td>$40,000</td>
<td>30 staff hours</td>
<td>$57,500 pledged from 40 groups, $2,500 pledged in-kind</td>
<td>Jan-June</td>
<td>Event Comm.</td>
</tr>
<tr>
<td>NYC House party – pre-gala event</td>
<td>$5,000</td>
<td>$800 8 staff hours</td>
<td>$6,500 from 50 people</td>
<td>$6,768 from 52 people</td>
<td>March</td>
</tr>
</tbody>
</table>

### Foundation Grants $175,000

<table>
<thead>
<tr>
<th>Akonadi Foundation</th>
<th>$25,000</th>
<th>6 staff hrs</th>
<th>HK Still talking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anschutz Family Foundation</td>
<td>$50,000</td>
<td>$500 travel 12 staff hrs</td>
<td>March</td>
</tr>
<tr>
<td>Babcock Foundation</td>
<td>$100,000</td>
<td>8 staff hrs</td>
<td>$10,000</td>
</tr>
</tbody>
</table>

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>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<tr>
<td>May</td>
<td>Jun</td>
<td>Jul</td>
<td>Aug</td>
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<tr>
<td>Sep</td>
<td>Oct</td>
<td>Nov</td>
<td>Dec</td>
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<td></td>
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<td></td>
</tr>
</tbody>
</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**

- Establishing Your Team
- The Planning Retreat
  - Assets Inventory & Mapping exercises
  - Identify New Opportunities: Sustainability & Diversity
- Prioritize: Select strategies
- Writing the Case Statement
  - Including a dynamic Mission Statement
- Setting Realistic Goals
  - Long-term goals and sustainability
- Keeping the Team Involved
- Using the Calendar
  - Assigning responsibilities & dates
  - Integrating program calendar and plans
- Writing the Plan
- Working the Plan
**Fundraising Resources**

**Online**

*Grassroots Fundraising Journal, Grassroots Institute for Fundraising Training*

[www.grassrootsfundraising.org](http://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](http://www.norfolkfoundation.org/nonprofits/resource_kit.asp)

**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)