Introduction to fundraising planning

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Presenters

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Today's session

Upon completion of this training, you'll be able to:

- Explain the basic steps for developing a fundraising plan
- Identify your organization's assets
- Develop a case statement
- Set your fundraising goals
- Draft a fundraising plan

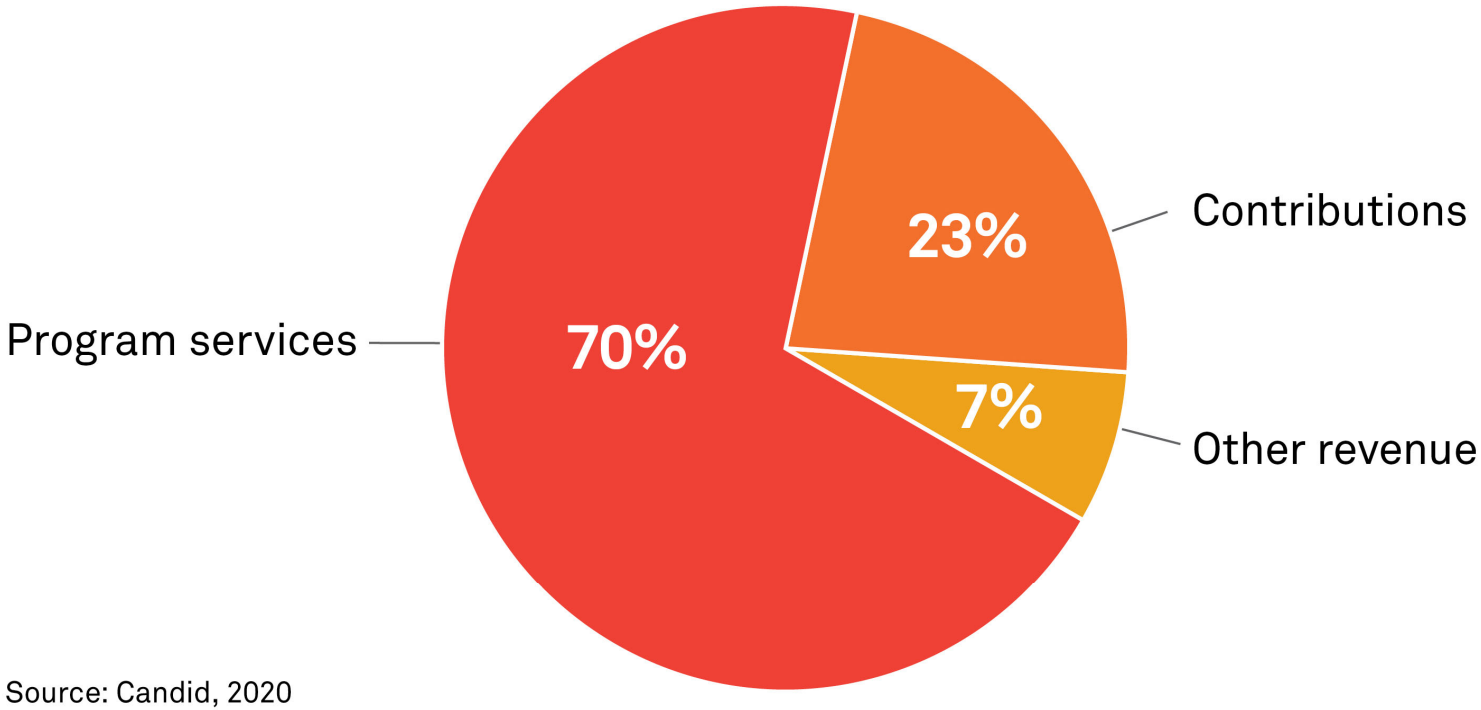
What is a fundraising plan?

A living document which lays out specific fundraising tasks and strategies, including who will be responsible for completing them and the timeframe of when they need to be accomplished.

Six steps for developing a fundraising plan

1. Identify your assets
2. Develop a case statement
3. Set your goals
4. Create an action plan
5. Implement your plan
6. Evaluate your plan

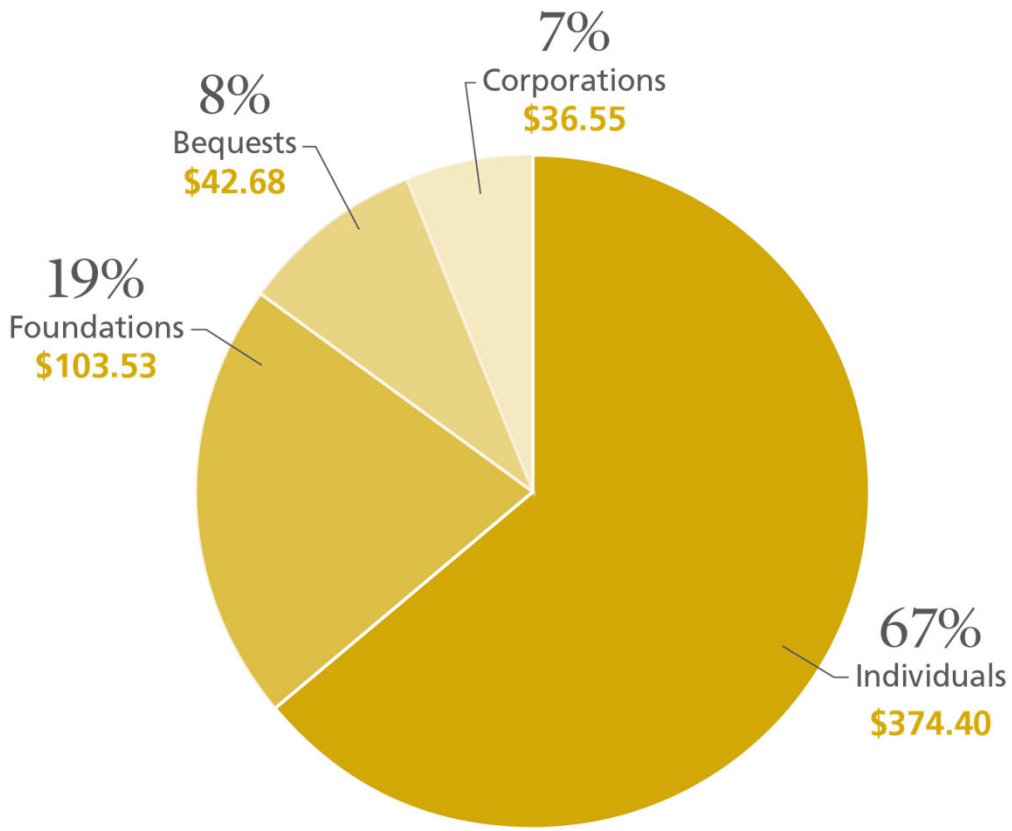
Nonprofit revenue



Source: Candid, 2020

2023 contributions: $557.16 billion by source of contributions

(in billions for dollars – all figures are rounded)



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1) Identify your assets

What are your current organizational strengths?

Examples:

Compelling mission

Large public base of support

Name recognition

Well-connected staff and board

Great facility

High traffic website

1. Identify your assets – SWOT

Use a SWOT analysis

Strengths
Weaknesses
Opportunities
Threats

2. Develop a case statement

Why does your organization need and merit support?

Components:

Mission and values

Programs and services

Accomplishments

Plans for the future

Budget needs

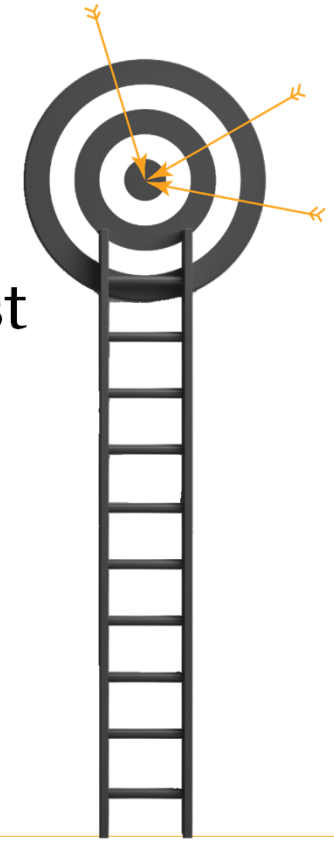
3. Set your goals

Start where you are

Who are your current funding partners?

Who are your largest funders?

Where could you strengthen your funding base?



Creating stability

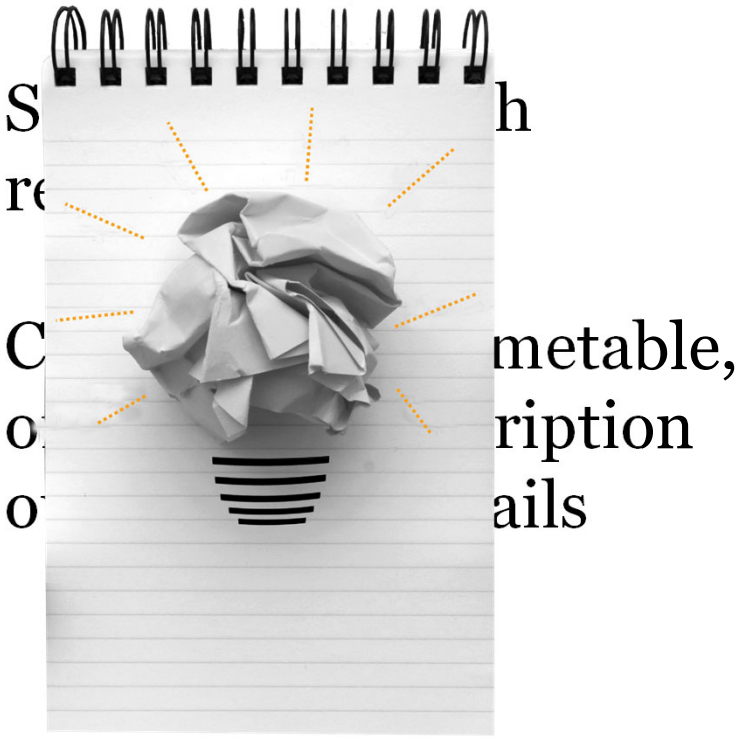
Which funders could provide you with the most long-term security?

Which additional funders/streams might you be able to add to your funding mix?

How much time and money will it take to secure additional funding partners?

4. Create an action plan

What strategies will you use?



Example

Goal: Raise $60,000 in foundation grants by the end of calendar year

- Development staff will research potential prospects and determine goal strategies. **Timeline: January – February**
- Board and staff will review prospects to see if any connections. **Timeline: March**
- Development staff will submit proposals to potential prospects. **Timeline: March - June**

5. Implement your plan

Check in regularly to make sure you're on track

6. Evaluate your plan

What worked?

What didn't?

Was the money raised worth the time and effort?

Example - 2

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- Development staff will submit proposals to potential prospects. **Timeline: March – June**
- Board and staff will review status of pending and confirmed grants. **Deadline: June**
- Revise plan as necessary based on results.

Six steps review

1. Identify your assets
2. Develop a case statement
3. Set your goals
4. Create an action plan
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Key takeaways

Know where you're starting and where you need to go

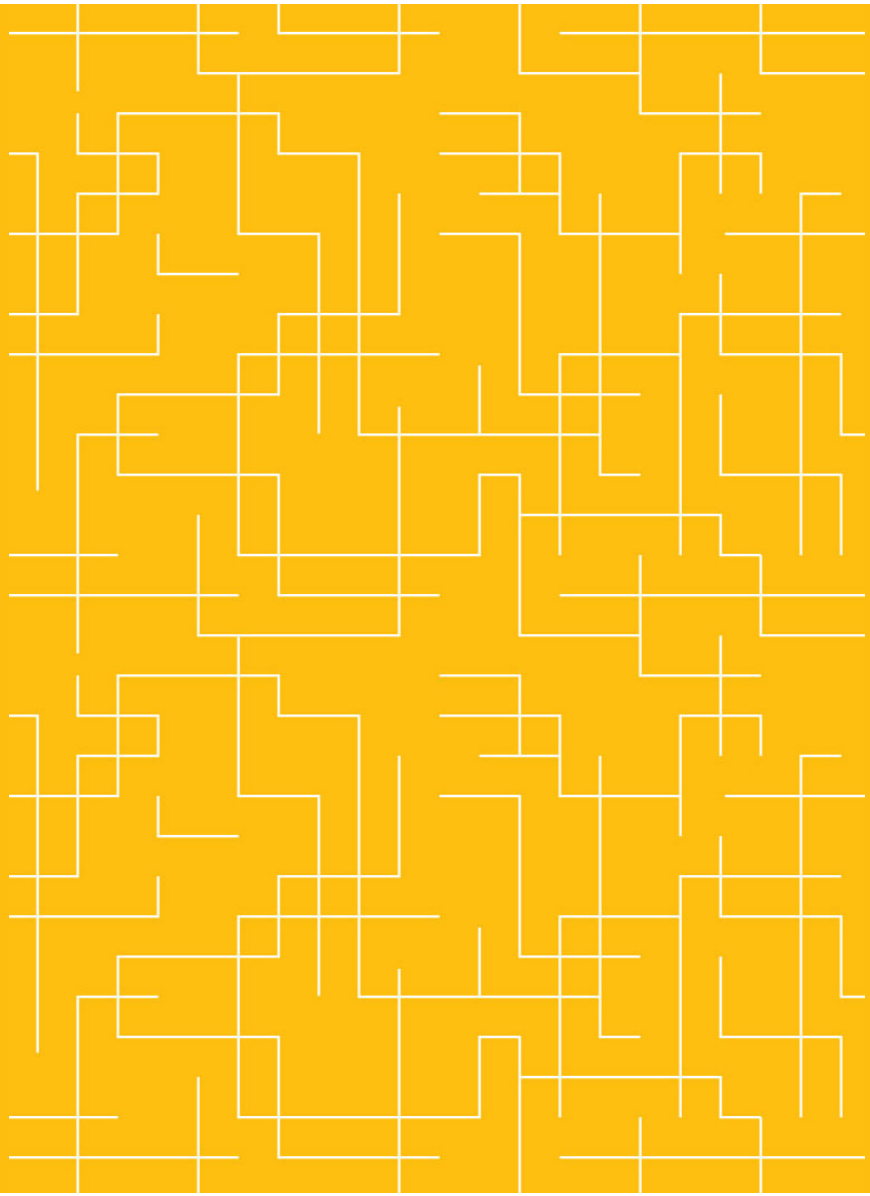
Diversify your funding streams

Set realistic goals

Evaluate your plan and revise as needed

Exercise

Assess your organization's fundraising strategies



What's next

On demand video

Introduction to Individual Giving

Price: Free

bit.ly/IntroIndividualGiving

Live and self-paced training

Introduction to Finding Grants

Price: Free

bit.ly/IntroToFindingGrants

Questions?