

Fundraising for the Future

TREC

*Training Resources for the
Environmental Community*

Fundraising for the Future

Creating and Implementing Fundraising Plans

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Special thanks to...

**National Conservation
System Foundation**

Special thanks to...

Scott Jones NCSF



Scott Jones NCSF

Danielle Sandsted NCSF



Danielle Sandsted NCSF

Julie Thibodeau NCSF



Julie Thibodeau NCSF

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Mike Satter Board President Grand Staircase Escalante Partners

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Friends of the Agua Fria National Monument

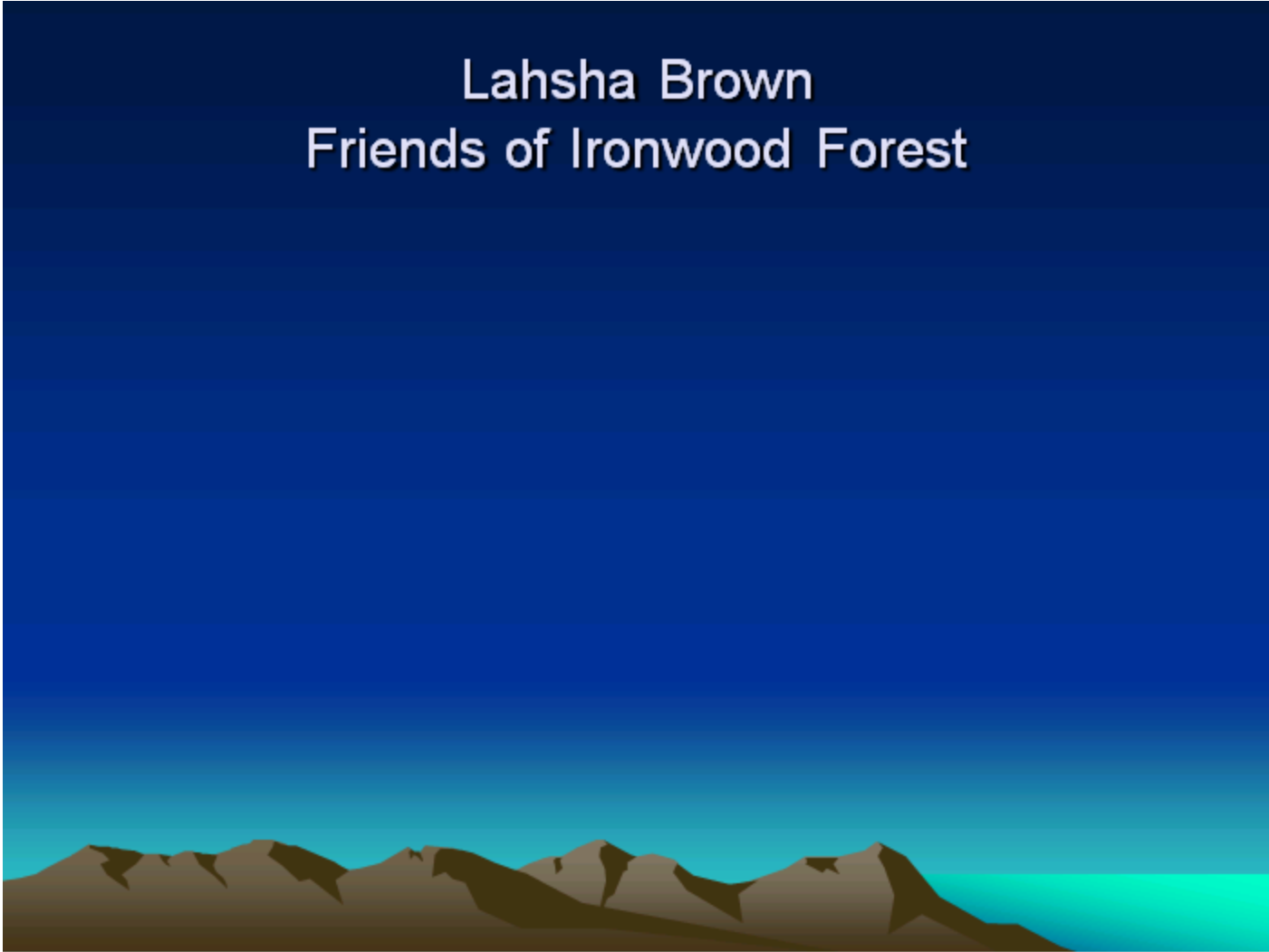


Peggy Biegler Outreach Coordinator Friends of the Agua Fria National Monument

Matthew Ebert
Executive Director
Friends of Black Rock High Rock



Matthew Ebert Executive Director Friends of Black Rock High Rock



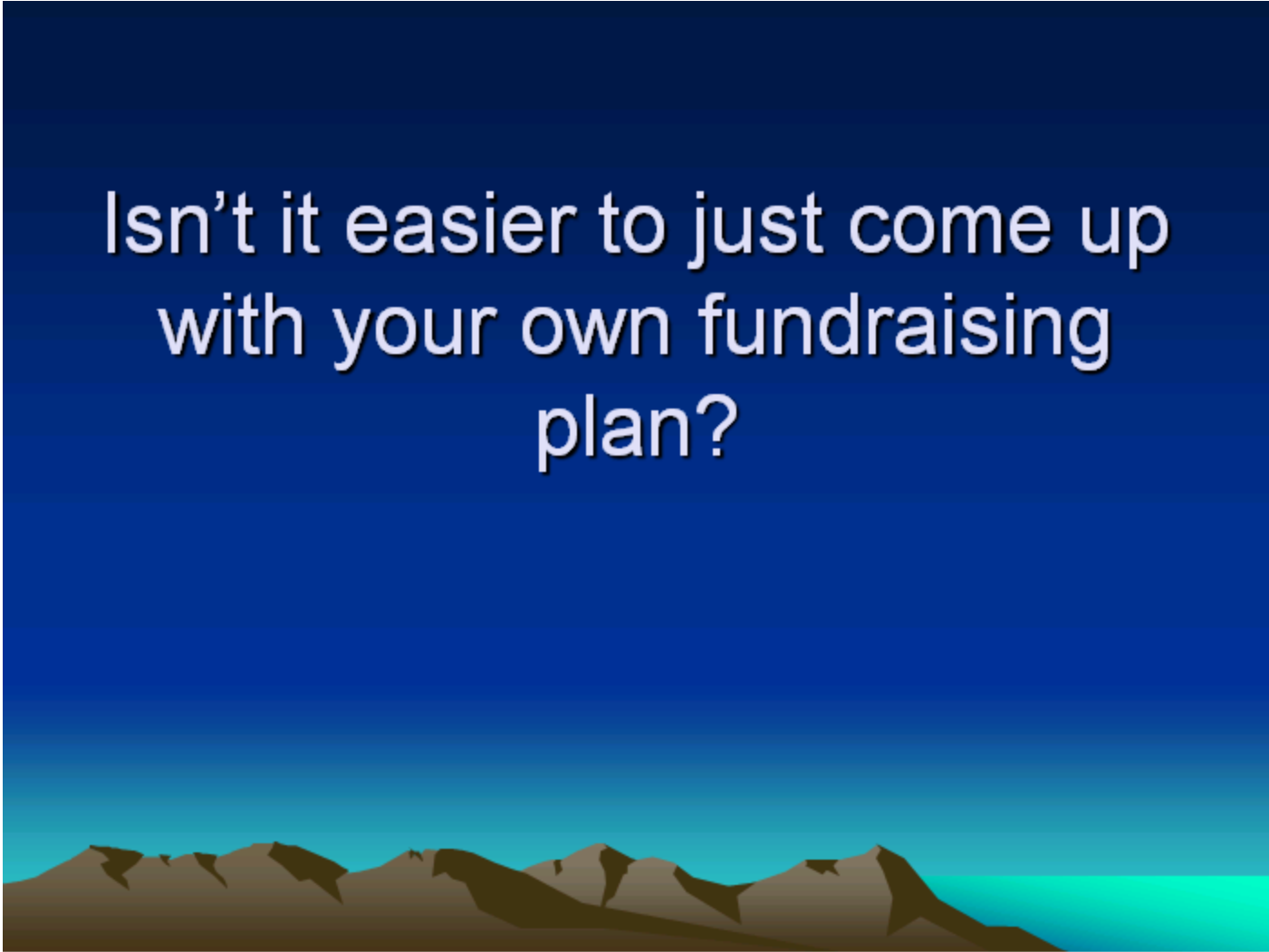
Lahsha Brown
Friends of Ironwood Forest

Lahsha Brown Friends of Ironwood Forest

Agenda

- The Fundraising Planning Team
- Setting a Goal
- Picking Strategies and Setting Projections
- Enlisting Help Implementing the Plan
- Making a Calendar
- Managing Your Time
- Discussion: Obstacles?

Agenda



Isn't it easier to just come up
with your own fundraising
plan?

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Reasons to develop a fundraising planning team



- New ideas from fresh eyes
- Integration with program plans
- Increase shared understanding of fundraising
- Buy-in to the plan
- Recruit helpers

Reasons to develop a fundraising planning team

Developing a Planning Team

- Board Members
 - Entire Board
 - Fundraising Committee
- Staff
 - Development and Executive
 - Program
- Volunteers



Developing a Planning Team

Set the Goal

WEAK METHOD: Expense Budget + Surplus =
Goal

BETTER METHOD: Raised Last Year – Unusual
Gifts + Reasonable Improvement = Goal



Set the Goal

Pick a few key strategies

- Proven successful
 - Based on your organization's history
 - Based on general fundraising trends
- Integrate well with organizational mission and program opportunities
- Take advantage of people assets
- Diversify

Pick a few key strategies

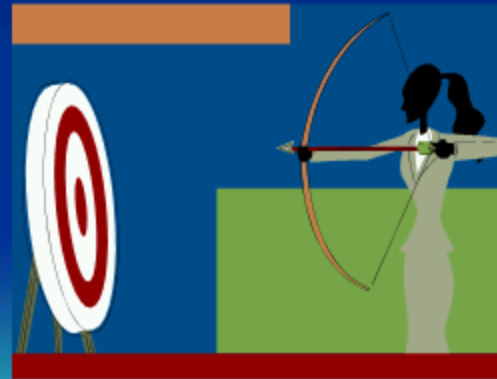
Pick the most effective approach:

• Impersonal phone call	7	3 - 5%, \$
• Fundraising event	8	
• Face-to-face, team of 2 askers	1	25 - 50%
• Impersonal direct mail	6	.5 - 2%
• Media/advertising	10	
• Personal letter on personal stationary	3	15 - 33%
• Door-to-door canvassing	9	
• Personalized form letter (with hand-signed note)	5	10 - 25%
• Face-to-face request, one asker	2	25 - 50%
• Personal telephone call	4	15 - 33%

Pick the most effective approach:

Set Income Projections

- Based on prior years
- Build up from performance rates
- Sum of individual donor targets times fulfillment rate
- Be conservative



Set Income Projections

Calculate Costs



- Based on prior years
- Based on cost research
- Be conservative

Calculate Costs

Identify and recruit people to help implement the plan



- Identify people assets
- Brainstorm helpers
- Consider how to integrate fundraising into work they are already doing
- Assign helpers to tasks

Identify and recruit people to help implement the plan

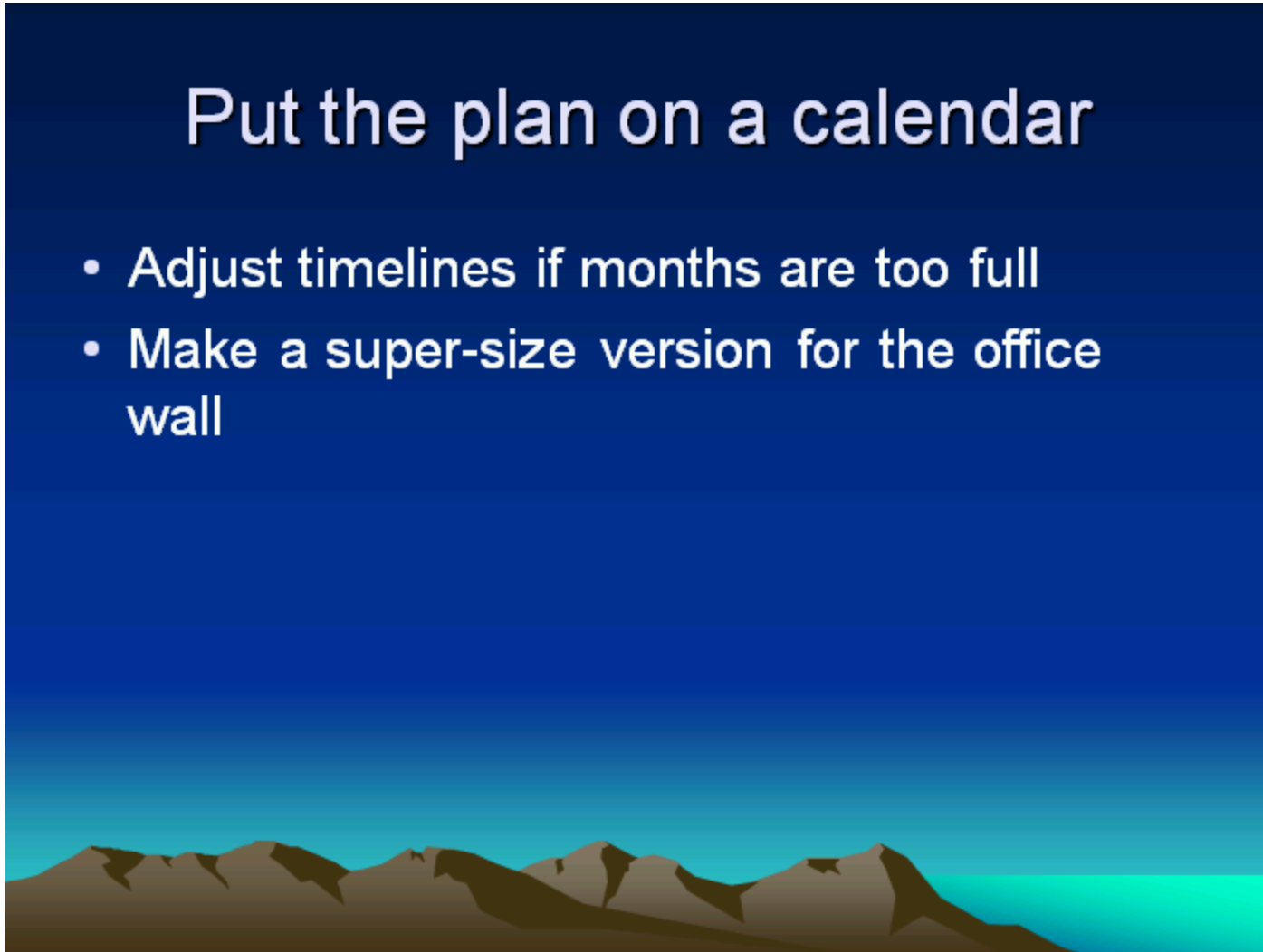
Compiling the plan

Fundraising Plan: Sample Organization				Date:	Jan-Dec 2006
STRATEGY	GOAL	ACTION STEPS	WHO	TIMELINE	Non-Staff COSTS
Monthly Donors	100 New Donors	1. Profile donor in newsletter 2. Add to appeal cards 3. Do special appeal in the fall	Helen Jen Jen	April April Sept	\$0 \$0, with reprint \$850
New Member Acquisition	50 New Members	1. Tabling at Earth Event	Staff/Volunteers	May	\$150
Renewals	200 out of 280 (71%); \$4500	1. Do 4 mailings to current members 2. Call unrenewed members	Jen Board	Jan, Apr, Aug, Oct Dec	\$800 \$100
Special Appeals	\$3,200	1. Do 4 mailings to current members 2. Call members who renewed \$50 - \$200	Jen Board	Jan, Apr, Aug, Oct Dec	\$650 \$100
Major Donors	\$12,000 1 @ \$5,000 4 @ \$1,000 6 @ \$500	1. Research names of potential donors 2. Send letters 3. Call to schedule meetings 4. In-person meetings	Jen Tom Jen Chris & Board	Feb March April May and June	\$250 \$325 \$0 \$150

Compiling the plan

Put the plan on a calendar

- Adjust timelines if months are too full
- Make a super-size version for the office wall



Put the plan on a calendar

Involving the whole organization

- Team sign-off (includes Executive Director)
- Board sign-off
- Input from staff
- Reference regularly during staff and Board meetings
- Calendar on the wall

Involving the whole organization

Revising the plan

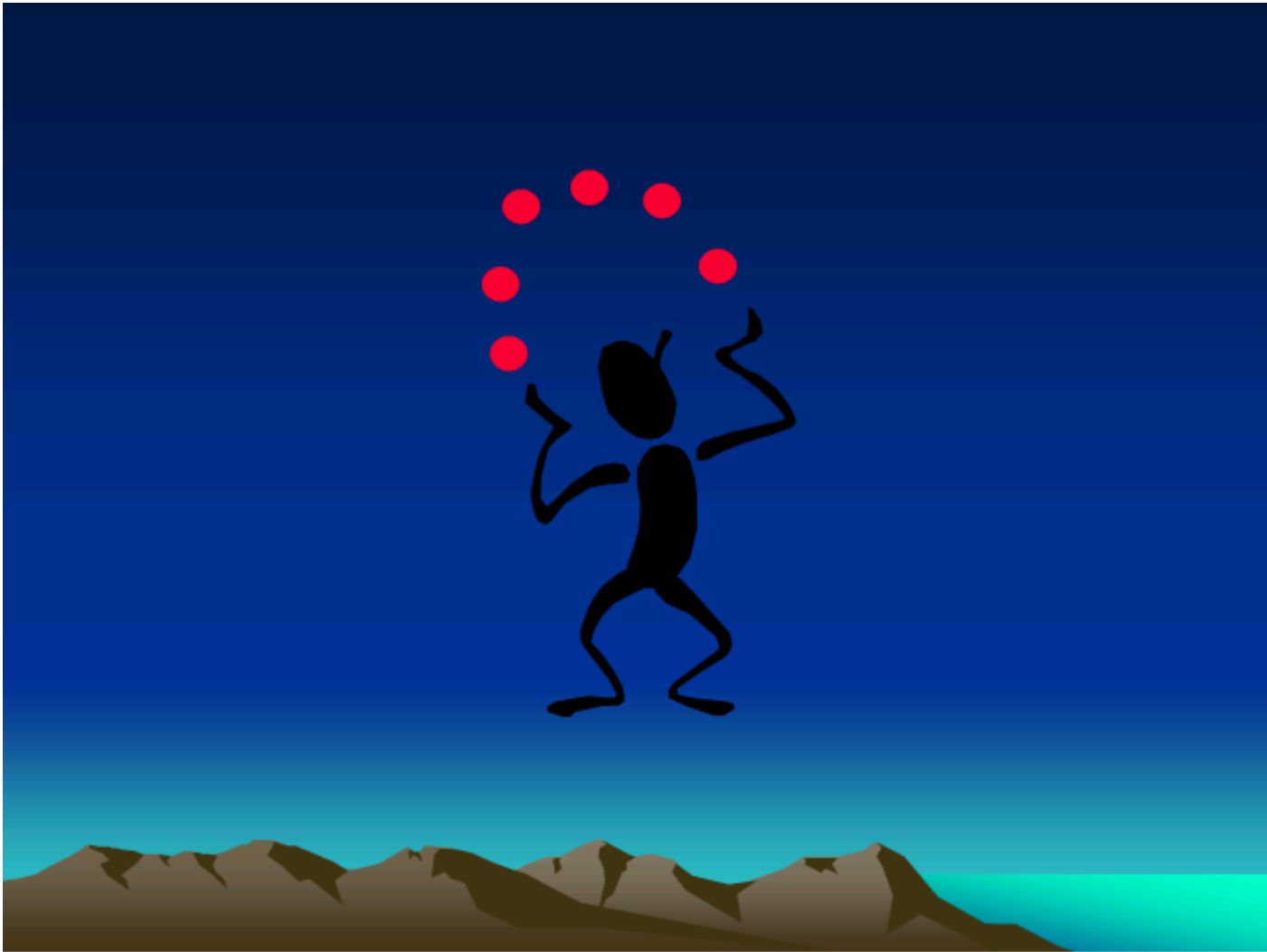
- Formally review actual compared to plan at least quarterly
- Make adjustments to reflect new trends and opportunities

Revising the plan

Managing your time

- Items from fundraising plan calendar go onto monthly task lists
- Add other items to monthly list
- Highlight 2-3 important goals for the month
- From monthly task lists to weekly lists
- From weekly to daily lists
- Keep track of how much time tasks take to compare to your assumptions

Managing your time



Slide 29

Discussion: What goes wrong?

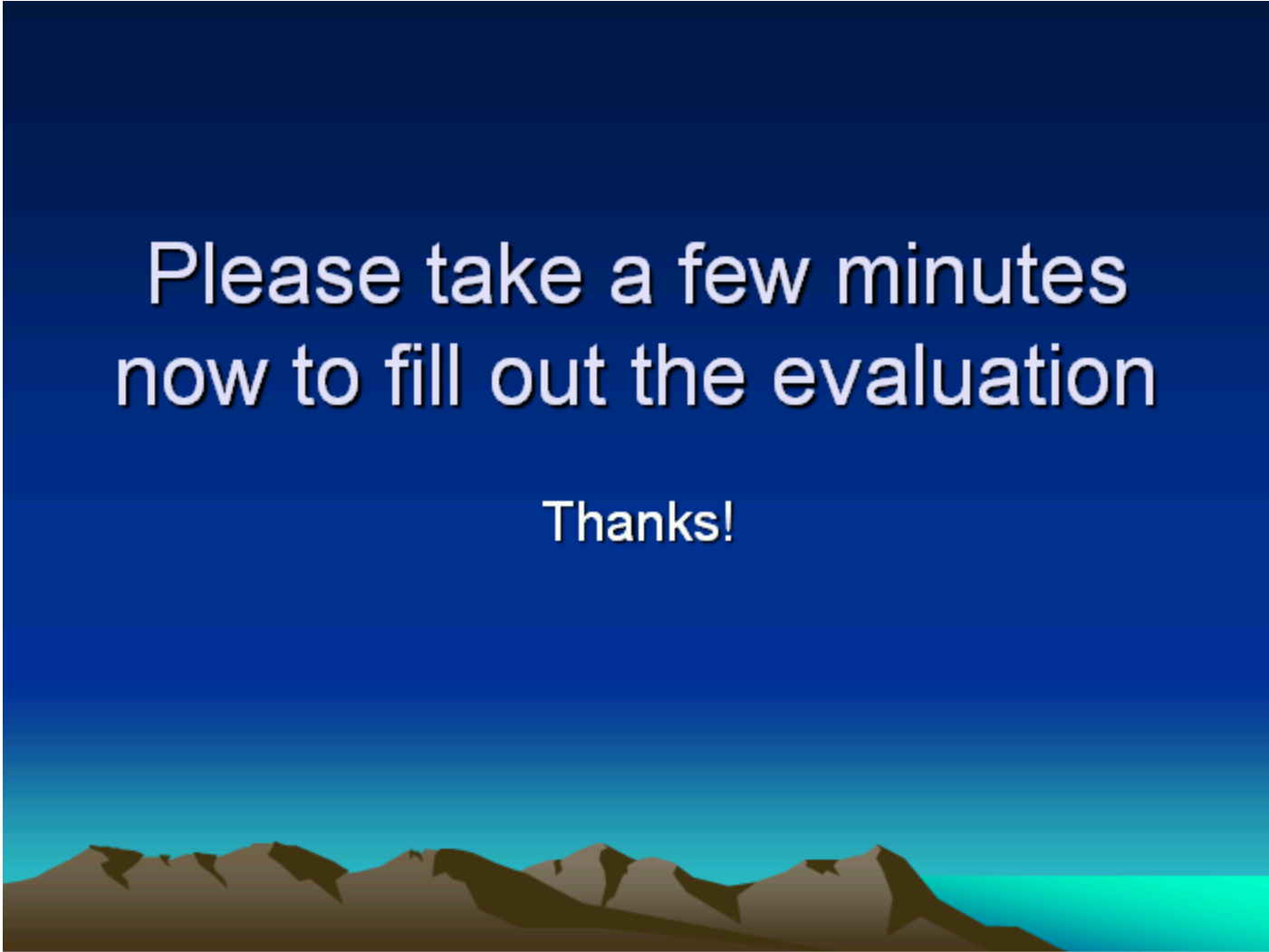


Discussion: What goes wrong?



Homework Assignment: Compile a Fundraising Plan

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Please take a few minutes
now to fill out the evaluation

Thanks!

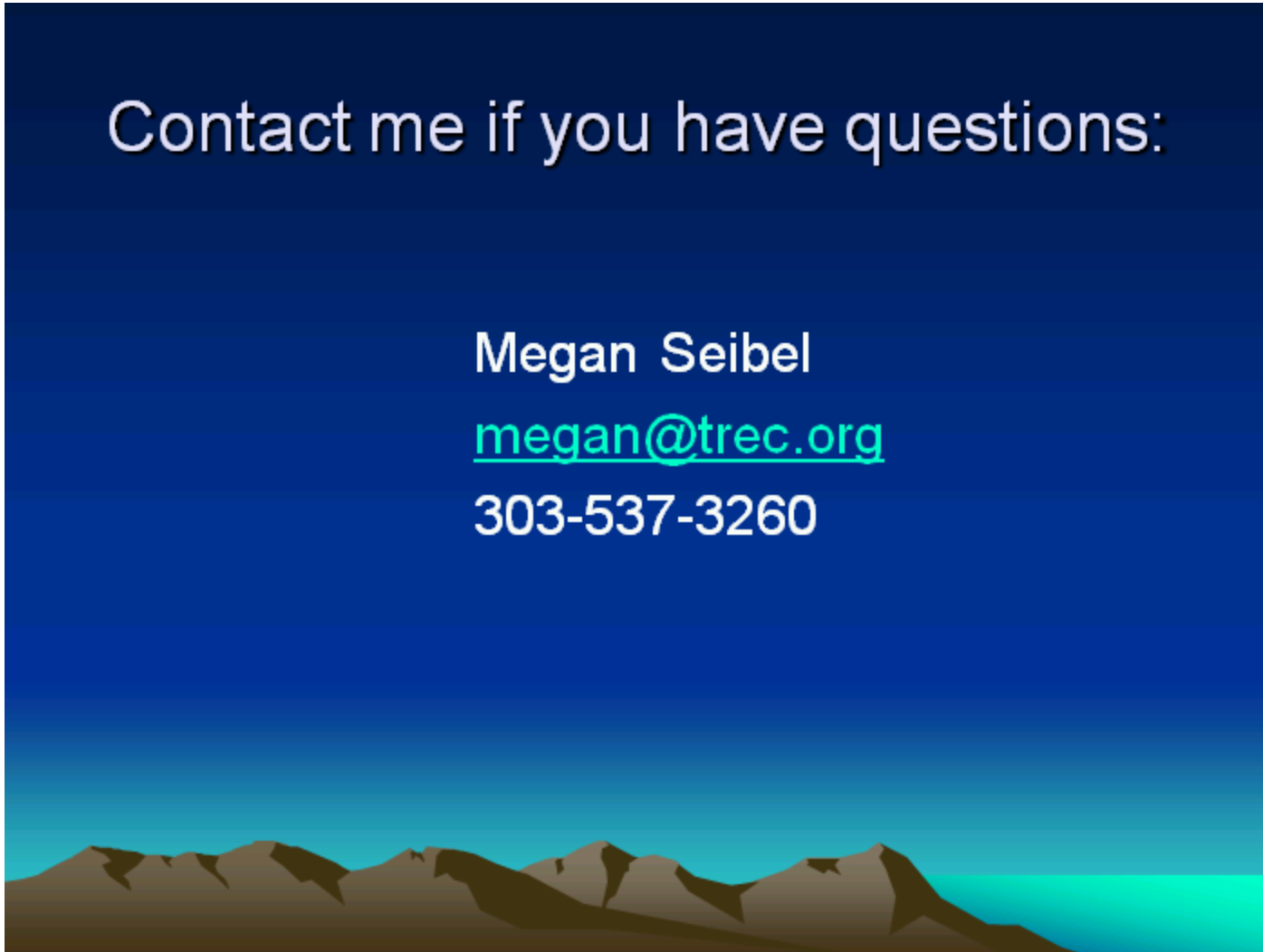
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Contact me if you have questions:

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