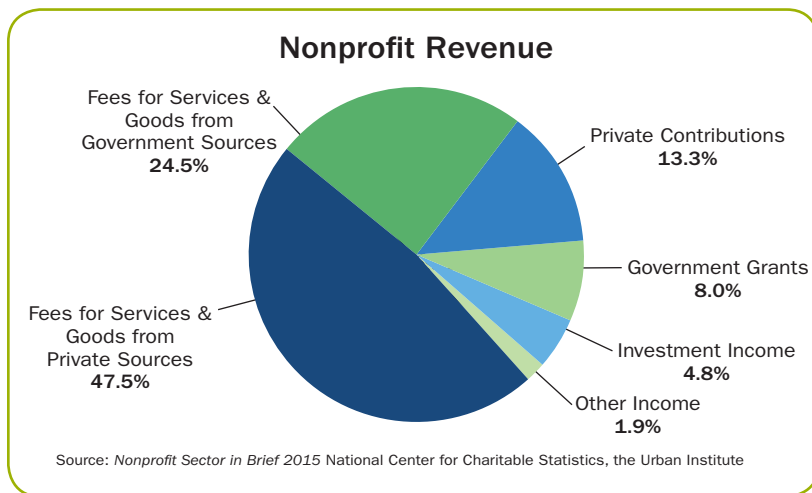


INTRODUCTION TO FUNDRAISING PLANNING



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

What is a Fundraising Plan?

A fundraising plan is 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.

Most fundraising plans fall into a fiscal or calendar year and take months to put together. Your plan should be formulated and approved several months prior to the start of the plan.

Why is it Important?

- ◆ Planning focuses an organization by setting fundraising priorities and helps give staff, board, and volunteers an understanding of the big picture—with a plan on how to get there.
- ◆ Board involvement is critical to fundraising success. Having an agreed-upon plan strengthens board commitment and involvement with the program's fundraising goals.
- ◆ A diversified fundraising plan prevents an organization from becoming over-dependent on one source.

6 Steps for Developing a Fundraising Plan

1 IDENTIFY YOUR ASSETS

What are your current organizational strengths?

2 DEVELOP A CASE STATEMENT

Why does your organization need and merit support?

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?
- ◆ 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?

5 IMPLEMENT YOUR PLAN

Check in regularly to make sure you're on track.

6 EVALUATE YOUR PLAN

What worked? What didn't?

Conduct a SWOT analysis.

STRENGTHS

S

WEAKNESSES

W

O

OPPORTUNITIES

T

THREATS

Creating Stability

FOUNDATIONS

INDIVIDUAL DONORS

GOVERNMENT FUNDING

Was the money raised worth the time and effort?

NEXT STEPS

Check Out These Classes:

- ◆ Introduction to Proposal Writing
- ◆ Introduction to Project Budgets
- ◆ Proposal Writing Workshop
- ◆ Proposal Writing Boot Camp

Visit us at foundationcenter.org and grantspace.org for more information.



ACCESSING YOUR FUNDRAISING STRATEGIES

This worksheet is designed to help you identify your strongest potential supporters and select prospective funding partners by accessing your organization's current fundraising strategies.

Begin by checking 'very good,' 'possible,' 'unlikely,' or 'unknown' for each source: individuals, foundations, businesses and corporations, government, federated fundraising organizations, and earned income.

When you have finished assessing each area of support, pick one category and describe possible strategies to add to or strengthen this funding source. Next, come up with at least three specific action steps that will help you implement your strategies. (Don't forget to add who will do what and when.)

Source	Assessing Chances of Support			
	Very Good	Possible	Unlikely	Unknown
Individuals				
New Donors				
Renewing Donors				
Upgrading Donors				

Possible Strategies:

Action Steps:

Source	Assessing Chances of Support			
	Very Good	Possible	Unlikely	Unknown
Foundations				
Local Foundations				
National Foundations				

Possible Strategies:

Action Steps:

Source	Assessing Chances of Support			
	Very Good	Possible	Unlikely	Unknown
Businesses and Corporations				
Neighborhood businesses				
Corporations with headquarters, stores, or facilities in your community				
Corporate Foundations				

Possible Strategies:

Action Steps:

Source	Assessing Chances of Support			
	Very Good	Possible	Unlikely	Unknown
Government (grants and contracts)				
Local government				
State government				
Federal government				

Possible Strategies:

Action Steps:

Source	Assessing Chances of Support			
	Very Good	Possible	Unlikely	Unknown
Federated Fundraising Organizations				
United Way				
Other community chests				

Possible Strategies:

Action Steps:

Source	Assessing Chances of Support			
	Very Good	Possible	Unlikely	Unknown
Earned Income				
Products				
Fees for services				

Possible Strategies:

Action Steps: