The Fundraising Plan
How to Sustain and Grow Your Organization

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Cindy Grubenhoff

I specialize in empowering nonprofit professionals with the perfect fundraising strategy so they focus on their organization’s mission impact.

• One on One Coaching
• Strategic Planning Facilitation
• Extend Your Fundraising Team
WHY ARE WE DOING THIS?

“It’s not a great mission statement, but we’ll revise it if things get better.”
Share with your Neighbor:

• Your Name, Title
• Organization Name
• One thing you want to gain from today’s session
Five Reasons You Need an Annual Fundraising Plan
So Why do I Need a Plan?

• Think Strategically
• Set Realistic but Challenging Goals
• Value New and Existing Individual Donors
• Analyze Existing Tactics Beyond Rev/Exp
• Spread Out Responsibility
I’m Convinced! Now what...?

Step 1: What We Know
Step 2: What We Can Improve
Step 3: Where We’re Going
Step 4: How We’ll Do It
Step 5: Who Will Do It and When
Step 6: Implement the Plan
Step 1: What We Know

Vision
Mission
&
Values
Vision, Mission & Values

**Vision** - Big picture statement, ultimate goal, why the organization started (WHY)

**Mission** - What your organization does (HOW)

**Values** - The belief system that guides your approach
Vision  - That all persons with a brain injury thrive in their community.

Mission  - Through guidance, resources, support and education, we seek to facilitate lifelong growth of Coloradans affected by an injury to the brain.

Values  - Collaboration, Compassion, Fiscally responsible, Forward-Thinking, Integrity, Respect
SWOT Analysis

**SWOT Examples:**

**Strength:** Successful fundraising event

**Weakness:** Not enough staff

**Opportunity:** Collaboration with Org X

**Threat:** Our building might be sold
Current Fundraising Activities:

Step 2: What We Can Improve

Analysis of Current Strategies

Acquisition - Finding new donors

Retention - Keeping existing donors

Upgrade - Building relationships with existing Donors so they want to give more
Analysis of Special Events
Cost Benefit Analysis:

- Revenue/Expense - essential
- How much staff time?
- How many new donors?
- Vendors: positive or negative impact?
- Successful marketing and branding?
- Did we reach our target audience?
Resources Available
Step 3: Where We’re Going

http://sites.austincc.edu/success/goals/
Giving USA - Total Giving 2014

- Individuals 72%
- Foundations 15%
- Bequests 8%
- Corporations 5%
Development Diversity:

- Individual Donors
- Corporate Gifts
- Grant Income
- Special Events
- Marketing and Public Relations
- Board and Volunteers
- Development Infrastructure
- Earned Income
Develop Fundraising Goals

Specific as possible, measurable where appropriate, for example:

• Raise 25% more than last year at our annual fundraiser

• Secure 100% participation and a 25% increase in board member donations
Step 4: How We’ll Do It

Each fundraising goal is now broken down into objectives, for example:

Goal: Raise 25% more than last year at our annual fundraiser
Example Objectives:

• Improve attendance by sending out Save the Date postcard and asking board members to host a table
• Add 5 members to the planning committee
• Recruit 2 more Gold sponsors, 4 more Silver sponsors, and 6 more Bronze sponsors
• Include a Young Professionals Only post-party
• Hire an auction company to assist with check-in and check-out so the lines are shorter
Step 5: Who Will Do It & When

• Identify WHO is responsible, by WHEN (and what resources they need)
Step 6: Implement the Plan

- FAST (Fundraising Action Steps) Report ©
  - Page one: Summary steps 1-3
  - Page two
    - This month
    - Next 3 months
    - Next 12 months

- Review FAST Report monthly and move objectives up as necessary
<table>
<thead>
<tr>
<th>Action</th>
<th>Person Responsible</th>
<th>Goal Date</th>
<th>Completion Date</th>
<th>Resources Needed</th>
<th>Notes</th>
<th>Done</th>
</tr>
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<tbody>
<tr>
<td>Ask board president to make a leadership gift</td>
<td>Executive Dir.</td>
<td>2/1/15</td>
<td></td>
<td>$40</td>
<td>Lunch on Wednesdays are best</td>
<td>X</td>
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<tr>
<td>Thank board members individually for their commitment</td>
<td>Executive Dir.</td>
<td>2/15/15</td>
<td></td>
<td>$80</td>
<td>Coffee, lunch, phone calls</td>
<td>X</td>
</tr>
<tr>
<td>Ask all board members to make a personal donation to the organization, and to commit to doing so each year they are a board member</td>
<td>Executive Dir. and Board Pres.</td>
<td>Q1</td>
<td></td>
<td></td>
<td>ED – Bob, Jill, Beth, Ted and Teresa BP – Jeff, Tom, Sally and Joe</td>
<td></td>
</tr>
<tr>
<td>Discuss with each board member how they can be a part of the foundation’s growth with time and financial resources</td>
<td>Executive Dir. and Board Pres.</td>
<td>Q1</td>
<td></td>
<td></td>
<td>ED – Bob, Jill, Beth, Ted and Teresa BP – Jeff, Tom, Sally and Joe</td>
<td></td>
</tr>
<tr>
<td>Recruit two additional board members who can add value</td>
<td>Sally Smith</td>
<td>Q2</td>
<td></td>
<td></td>
<td>Sally is chair of Nominations</td>
<td></td>
</tr>
<tr>
<td>Promote 100% participation in donations from board members to grantors and other donors</td>
<td>Development Dir.</td>
<td>Q2-4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Next Steps

- Starting at the beginning, type a summary of this information into one document
- Staff and Board members work together to finalize the plan and gain buy-in from those who didn’t participate in process
- Final plan and implementation!
- Do this again next year
“Nope, our financial report doesn’t look any better in 3D.”
Thank you!

www.IntheKnowLLC.com

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