

IN THE *Know*



The Fundraising Plan

*How to Sustain and Grow
Your Organization*

Cindy Grubenhoff, Fundraising Strategist

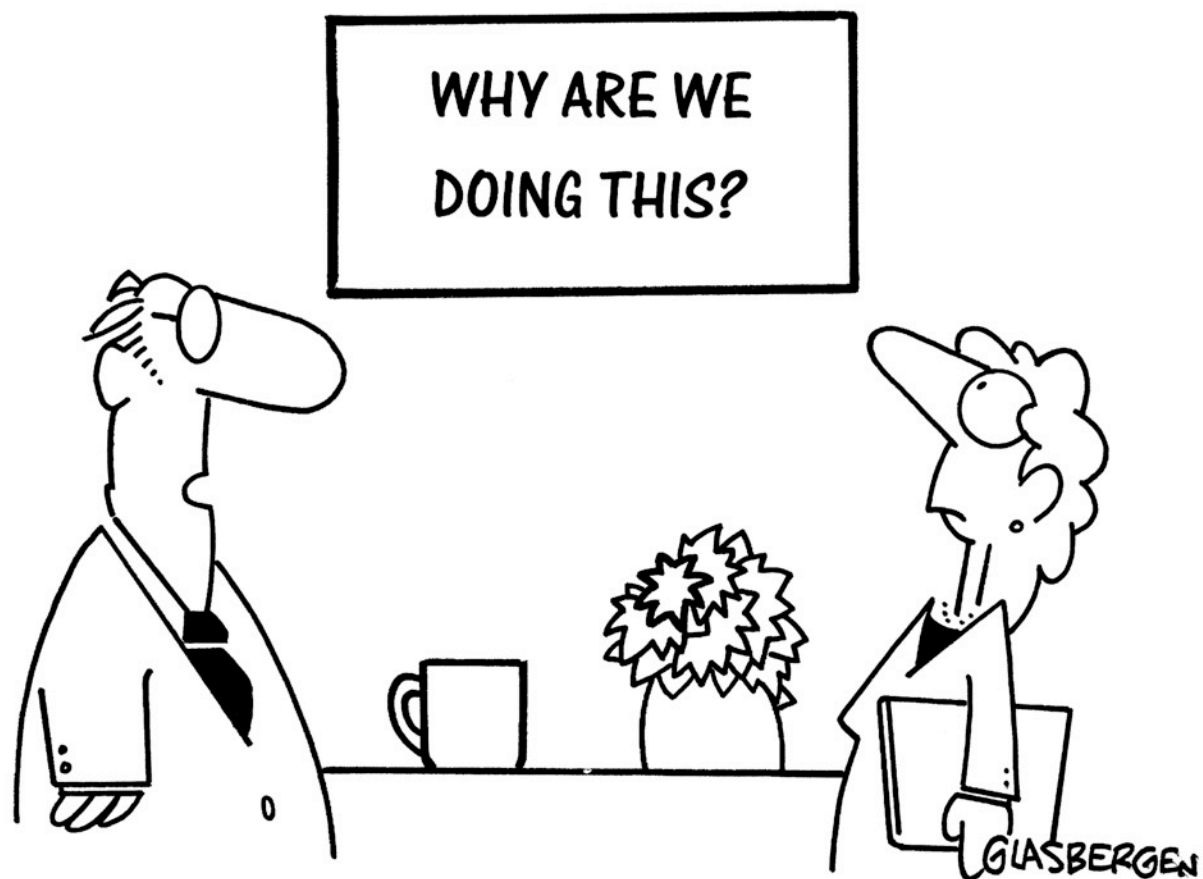
December 18, 2015

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





**“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



Brain Injury Alliance of CO

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



Image source: <http://www.health.state.mn.us/divs/opi/qi/toolbox/swot.html>

SWOT Examples:

Strength: Successful fundraising event

Weakness: Not enough staff

Opportunity: Collaboration with Org X

Threat: Our building might be sold



Current Fundraising Activities:



<http://www.forbes.com/sites/ashleaebeling/2014/12/17/charity-tax-breaks-extended-through-2014-only/>



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

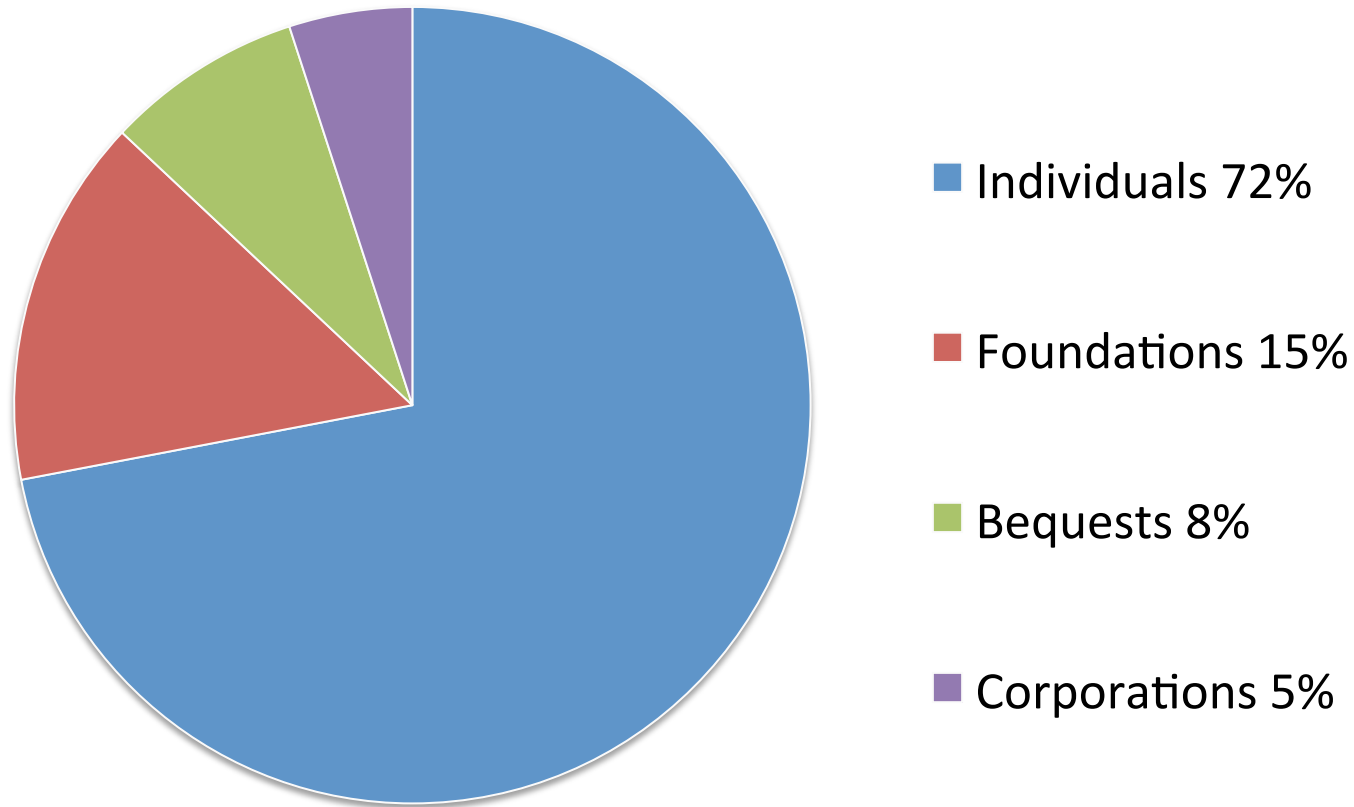


Step 3: Where We're Going



<http://sites.austincc.edu/success/goals/>

Giving USA - Total Giving 2014



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



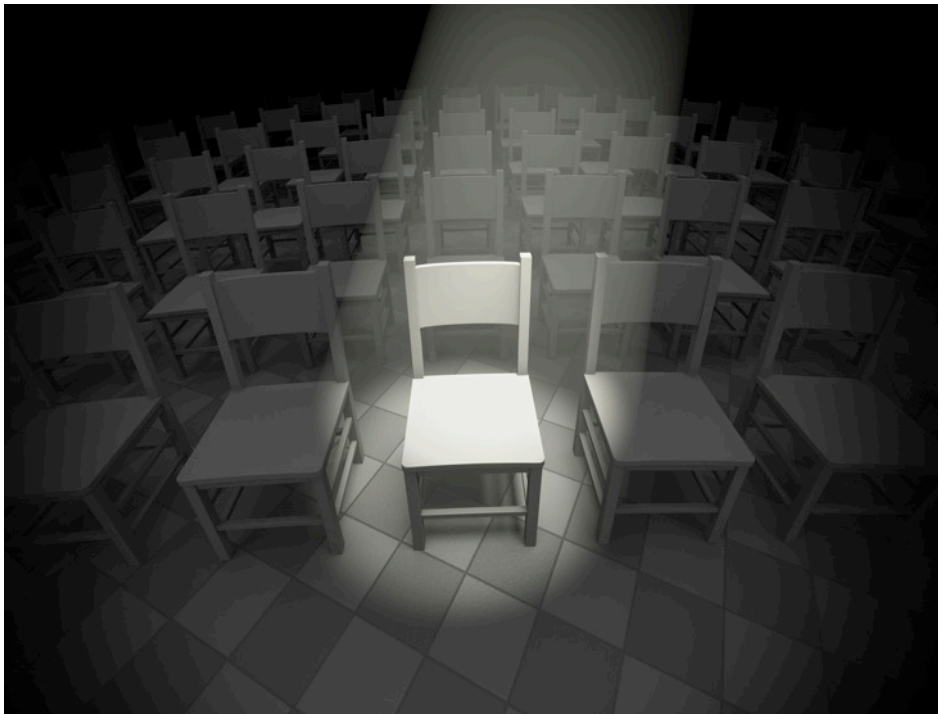
Example Objectives:

- 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





GOAL: Securing 100% participation and a 25% increase in donations from Board Members						
Action	Person Responsible	Goal Date	Completion Date	Resources Needed	Notes	Done
Ask board president to make a leadership gift	Executive Dir.	2/1/15		\$40	Lunch on Wednesdays are best	X
Thank board members individually for their commitment	Executive Dir.	2/15/15		\$80	Coffee, lunch, phone calls	X
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	Executive Dir. and Board Pres.	Q1			ED – Bob, Jill, Beth, Ted and Teresa BP – Jeff, Tom, Sally and Joe	
Discuss with each board member how they can be a part of the foundation's growth with time and financial resources	Executive Dir. and Board Pres.	Q1			ED – Bob, Jill, Beth, Ted and Teresa BP – Jeff, Tom, Sally and Joe	
Recruit two additional board members who can add value	Sally Smith	Q2			Sally is chair of Nominations	
Promote 100% participation in donations from board members to grantors and other donors	Development Dir.	Q2-4				



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





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“Nope, our financial report doesn’t look any better in 3D.”



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Thank you!
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