

Developing A Fund-Raising Plan

- A) All Campaigns begin with, "We need to raise \$ _____." (The goal--target--objective)
- B) Planning for fund-raising and achieving consensus
 - 1) Plans: Strategic, general development, specific campaigns
- C) Funding sources
 - 1) Target Board of Trustees and other sources to assess relative potential
- D) Factors which could motivate and lead individuals to contribute to your organization
 - 1) Philanthropic nature, citizenship, mandated, benefits employees, example setting
- E) When prospects will give money to you
 - 1) When they are asked---give them the opportunity to give
 - 2) When the "best" volunteers do the asking
 - 3) When they benefit from your programs and services
 - 4) When you meet their needs
- F) What you must do in the case of all prospective donors
 - 1) Rate and evaluate their ability to give to their maximum potential
 - 2) Provide them with a suggested gift amount in every instance
- G) Match donors to campaigns and to requests they will most likely favor
 - 1) Operations, endowment, capital, sponsorship, underwriting, in-kind, unrestricted
 - a) Cash and securities, pledges, multi-year, challenge and matching grants
- H) Prioritize annual, endowment, capital, sponsorship and underwriting campaigns
- I) Developing your campaign plan
 - 1) Establish a fund-raising budget
 - 2) Settle on an achievable goal
 - 3) Develop a case for support
 - 4) Prepare a campaign funding projection
 - 5) Decide what forms of solicitation to use
 - 6) Develop a campaign calendar
 - 7) Define the volunteer positions needed by type and number with job descriptions
 - 8) Prepare a publicity plan
- J) Preparing for a campaign: assembling the people and the tools
 - 1) Recruiting campaign leadership and solicitors
 - 2) Solicitation kits: support materials and information for the solicitors and prospects
- K) Managing a campaign: the what, when and how
 - 1) Assignments of prospects to the solicitors
 - 2) Progress: reports, meetings, and sharing information
 - 3) Mid-course corrections and problem solving
 - 4) Tracking gifts, collecting the money and providing acknowledgements
 - 5) Announcing results, giving recognition and saying "thank you"
 - 6) Assessment and review: what was accomplished and what was learned
- L) Developing the development team---the facilitators to make the plan work