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