



Creating Your Fundraising Plan

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Do You Have a Fundraising Plan?

- We have a written fundraising plan
- We do not have a written fundraising plan
- We have a plan but it needs work or is not being implemented



Why Plan

- Set Realistic Goals
- Keep from Getting Sidetracked
- Measure Success



Where is Your Organization Now?

- Birth
- Youth
- Midlife
- Maturity





Key Elements of the Plan

- Level of board commitment
- Technology available or budgeted
- Commitment to professional development
- Community awareness/relationships
- Diversity of funding streams



Fundraising Program

- The integrated development program—don't put all your eggs in one basket





Basic Elements

- Goals
- Objectives
- Strategies
- Action Steps
 - Who is going to do it?
 - How much will it cost/raise?
 - When is it going to be done?



Who Should Be Involved in the Planning Process

- Development Staff
- Non Development Staff
- Board
- Development Committee
- Consultants



Staff Role

- Development Staff
 - Leadership
 - Support Staff
- Non Development Staff
 - CEO
 - CFO
 - Program Staff



The Board's Role in the Development Plan

- The Development Officer and the Board
- Board Recruitment
- The Development Committee





Assessing Current Fundraising Programs

- SWOT Analysis
- Budget
- Development Audit
- Philanthropic Profile Assessment



SWOT Analysis of Your Development Office

- Strengths
- Weaknesses
- Opportunities
- Threats



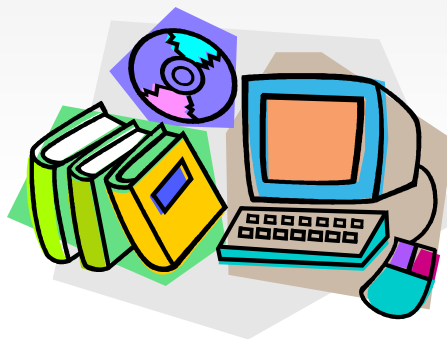


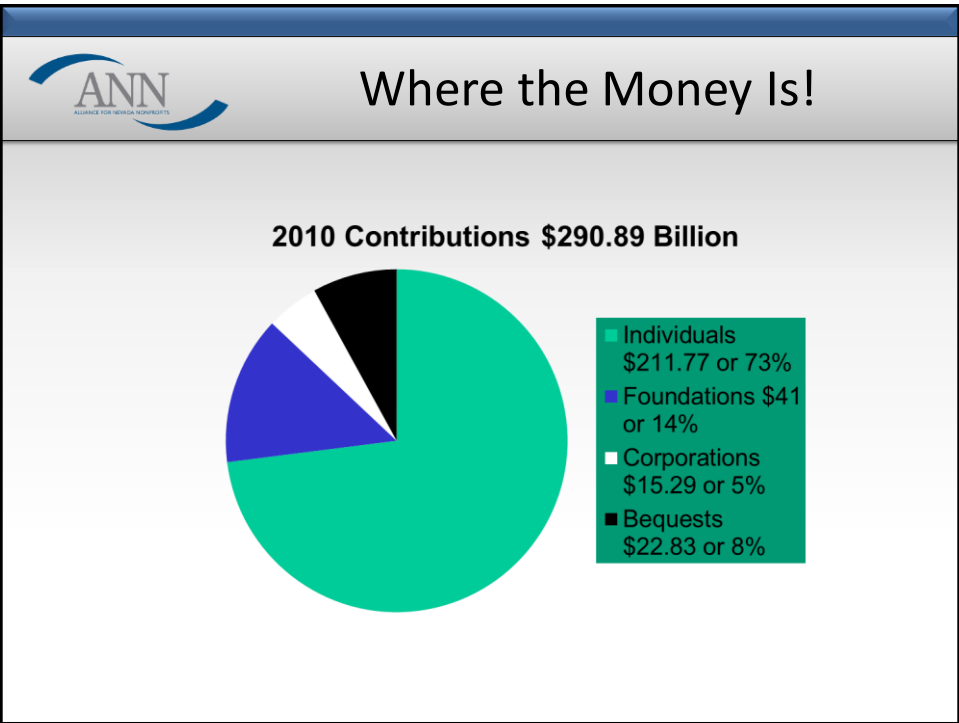
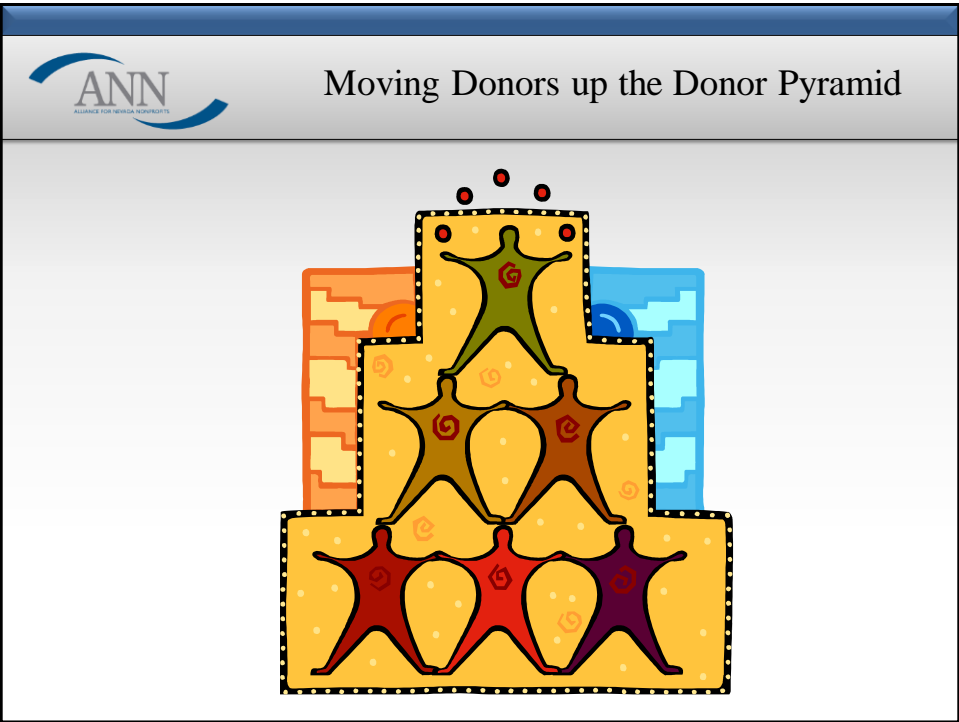
The Process and the Product



Policies & Procedures

- Gift Acceptance Policies
- Investment Policies
- Recognition Policies
- Office Procedures







The 95/5 Rule


- How much time are you spending (or wasting?) on the wrong things?
- How can you re-allocate your time to be more productive?
- How will spending time on the right things bring you better results?



Implementing and Evaluating the Plan


- Taking Ownership
- What Happens When It Falls Apart
- Measuring Success
- Reporting Success






Why is it Important to Evaluate your Development Program?

- Funding sources expect more bang for their buck!
- Boards have greater expectations!
- Organizations often feel development is “dispensable.”





Do Your Program Outcomes Fall Within Acceptable Standards?

• Acquisition Mailings	\$1.25-\$1.50 per \$1 raised
• Direct Mail Renewal	\$.20-.25 per \$1 raised
• Special Events	\$.50 per \$1 raised
• Foundation Proposals	\$.20 per \$1 raised
• Personal Solicitations	\$.10-.20 per \$1 raised



Tools to Help

- Evaluation tool available at www.cvfundraising.com



Remember

- The plan isn't written in stone, but neither should it be written in disappearing ink!





Thank You

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