

How to Create a Fundraising Plan: Save Time & Money by Planning Ahead

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Welcome...

How many of you have a
fundraising plan now?

Why am I here again...

What are the benefits of having a fundraising plan?

Who to involve in the planning process...

Ten Steps To Creating Your Fund Development Plan

Step one: Gather info on past fundraising

Source	Year Before Last's Income	Year Before Last's Expense	Last Year's Income	Last Year's Expense	Current Year's Income	Current Year's Expense	Next Year's Income	Next Year's Expense
Ind. donors								
-- Total donor \$								
-- Direct mail								
-- Events								
-- "Major" gifts								
-- Membership								
-- Online								
-- _____								
Bequests								
Earned income								
Government								
Corporations								
Foundations								
TOTALS								

Step two: Analyze past efforts

Look at your current strategies. Consider...

- What generates the largest share of revenue?
- Which sources are most reliable?
- Where is the most potential for growth?
- Which areas are not producing?
- Where can you use more volunteers/board?

Step three: Evaluate current climate

Internal Factors	External Factors

Step four: Who's on your team?

Who?	How many?	How could they help?
Board members		
Staff		
Volunteers		
Key donors		
Org. allies		
Who else?		

Step five: Set your goals

Two types of goals

- Strategic – non-monetary goals related to fundraising
- Financial

Step six: Decide on your activities

	Financial/ Solicitation	Donor Relations
Acquire		
Renew		
Upgrade		

Step seven: Create a timeline

	Financial/Solicitation		Donor Relations		
	One-Time	Year Round	One-Time	Year Round	
Jan					
Feb					
March					
April					
May					
June*					
July*					
August*					
Sept					
Oct					
Nov					
Dec					

Step eight: Fill in the details

Strategy: _____

Projected income (gross): _____

Total cost / expenses: _____

Net income after expenses: _____

Other goals that this strategy will meet: _____

Number of staff/volunteers needed to carry out strategy: _____

Step eight: Fill in the details

Deadline	Task/s	Who's Responsible?

Step eight: Fill in the details

Expense	Amount/ Cost	Notes
Staff time		
Consultant/Services		
Design		
Printing		
Postage		
Travel/Transportation		
Food		
Other:		
TOTAL		

Step nine: Put it all together

Strategy	Goal/s	Audience	Description	When	Who	Cost
End-of-year appeal	\$5,000	Current donors, allies from partner orgs	Direct mail appeal with phone calls 1-2 weeks after.	Letter hits end of Oct; calls begin of Nov.	Staff writes letter, does mailing. Board assists with calls.	\$650 for postage & printing
House parties	\$10,000 from 5 parties (approx. \$2k each)	Current prospects, active donors, contacts of host	Series of house parties hosted by board members or donors	Throughout the year	Staff finds hosts, provides support, monitors donations, does thank yous. Host sends invites, does turnout, get food. Board attends.	Minimal
TOTAL GOAL:		Projected Net Income = Goal minus Cost			TOTAL COST:	

Step ten: Decide what to evaluate

Aside from how much money you raise, how do you measure your success?

How can you measure the success of your donor relations?

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TEN STEPS TO CREATING YOUR FUND DEVELOPMENT PLAN

While not a guaranteed roadmap to success, a development plan sets goals that promote growth and create ownership among the whole fundraising team. Fundraising plans also prevent the need for crisis fundraising. They enable you to track your progress and identify problems as they arise. You will always know where you stand related to where you want to be. And, you will be able to proactively set and balance your priorities and avoid competing timelines.

This worksheet will walk you through how to create a development plan for your organization...

Step One: Gather information on your past fundraising efforts

Fill out the following chart* with information from last year's fundraising, current year-to-date figures, and your projections for next year. Ideally, go back two years to analyze your fundraising. This will give you a better sense of how things fluctuate from year to year.

The sources listed are only examples. You should use ones best suited to your organization. In the expense column, include the cost of materials, other expenses and staff time, if possible. Don't worry if you can't fill in all this information the first time you do a plan like this. You'll have a better idea of things to keep track of for future planning.

Source	Year Before Last's Income	Year Before Last's Expense	Last Year's Income	Last Year's Expense	Current Year's Income	Current Year's Expense	Next Year's Income	Next Year's Expense
Individual donors								
-- Total donor \$5								
-- Direct mail								
-- Events								
-- "Major" gifts								
-- Memberships								
-- Online								
Bequests								
Earned income								
Government								
Corporations								
Foundations								
TOTALS								

* A larger version of this chart is on the last sheet in this packet.

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