



Developing a Fundraising Plan

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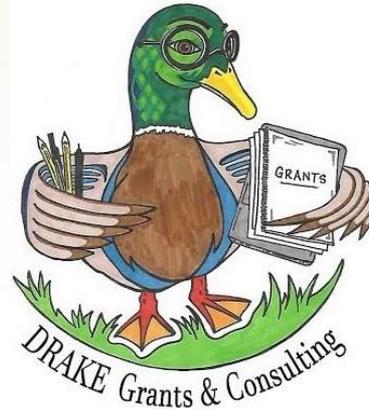
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Developing a Fundraising Plan



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*Learn the basic strategy behind developing
a fundraising plan.*



Webinar Agenda

Developing a Fundraising Plan

- **What?**
- **Why?**
- **Who?**
- **How?**
- **Q&A**



Developing a Fundraising Plan



For many organizations, especially those with limited resources, the dynamic field of fundraising can become an exercise in flying by the seat of our pants.



Developing a Fundraising Plan

What is a fundraising plan?

A roadmap for yearly fundraising activities that includes donation analyses, fundraising strategies, asset maps, cases for support, communications schedules, and organizational goals.



Developing a Fundraising Plan

Your fundraising plan will answer...

- ▶ **How much funding your organization needs to accomplish its goals.**
- ▶ **How different sources of funding will contribute to those goals.**
- ▶ **How fundraising activities will help meet those goals.**
- ▶ **How fundraising goals will enhance your mission and serve your community.**



Developing a Fundraising Plan

Why do you need a fundraising plan?



Without a road map (fundraising plans), it can be easy for an organization to get lost on the way to its destination (fundraising objectives).



Developing a Fundraising Plan

Benefits of Road Maps for Fundraising

- ▶ **Maximize Time/Efficiency**
- ▶ **Remain flexible for detours**
- ▶ **Measure distance to destination**



Developing a Fundraising Plan

Who should be involved in creating a fundraising plan?



**Like a successful road trip,
a successful fundraising plan starts with
having the right people in the car.**



Developing a Fundraising Plan

Lead Car:

- ▶ **Executive Director**
- ▶ **Development Director**
- ▶ **Program Officers**
- ▶ **Board of Directors**



Developing a Fundraising Plan

Caravan:

- ▶ **Grant Writers/Fundraisers**
- ▶ **Program Staff**
- ▶ **Communications Staff**



Developing a Fundraising Plan

- ▶ **Everybody in the car plays their own role and has their respective responsibilities, assets, perspectives, etc.**
- ▶ **Lead Car = Big Picture**
 - ▶ **Analyze donor trends and create achievable goals**
- ▶ **Support Car = Details**
 - ▶ **Suggest ways to meet goals, identify roadblocks, etc.**



Developing a Fundraising Plan

How do you create a fundraising plan?



Start here to learn how to create your own fundraising plan.



Developing a Fundraising Plan

Plot Your Destination

- ▶ **Outline projected organizational expenses and projected revenues**
- ▶ **Account for anomalies**
- ▶ **Incorporate “wish list” or “financial cushion” goals**
- ▶ **Determine “Left to Raise” Amount**
 - ▶ **Total Projected Expenses – Total Expected Income = Left to Raise**



Developing a Fundraising Plan

Types of Revenue Streams

- **Private Grants**
- **Individual Giving**
- **Special Events**
- **Crowdfunding/Peer-to-Peer Fundraising**
- **Matching Campaigns**
- **Bequests**
- **Corporate Sponsorships**
- **Government Grants & Contracts**
- **Endowments**
- **Private Groups**



Developing a Fundraising Plan

Align Your Assets

- ▶ **Analyze past fundraising trends**
 - ▶ **Look at three or more years of past fundraising results**
- ▶ **Determine CDPR & ROI**
 - ▶ **Utilize the most efficient and effective strategies**
- ▶ **Set fundraising goals and related objectives**
 - ▶ **Ensure goals and objectives are data-driven**
- ▶ **Assign Resources & Roles**
 - ▶ **The more detailed plans, the better**



Developing a Fundraising Plan

Analyze Past Fundraising Trends

- ▶ **Don't fly by the seat of your pants**
- ▶ **Utilize donor databases and other tracking mechanisms to develop customized reports**
- ▶ **Totals Raised, Previous Goals, Prior Strategies, Retention Rates, Average Gift Amounts, Lapsed Donors, Acquisition Rates, Etc.**
- ▶ **Account for anomalies in each year, use to create calculated future projections**



Developing a Fundraising Plan

Determine CDPR & ROI

- ▶ **CDPR = Cost Per Dollar Raised**
- ▶ **ROI = Return on Investment**
- ▶ **What worked well in past years and what didn't?**
- ▶ **What costs will need to be expanded this year to raise money?**



Developing a Fundraising Plan

Set Fundraising Goals & Related Objectives

- ▶ **Set realistic goals**
- ▶ **Goals may be beyond dollars raised, indirect actions that build fundraising capacity**
- ▶ **Connect to strategic plan and overall mission**



Developing a Fundraising Plan

Assign Resources & Roles

- **Identify appropriate strategy(ies) for achieving stated goals and objectives**
- **Connect to strategic plan and overall mission**
- **Develop timelines, communications schedules, and calendars**
- **Create case for support**



Developing a Fundraising Plan

Types of Fundraising Strategies

- **Grants – Private & Government**
- **Face-to-Face Meetings**
- **Special Events**
- **Email Marketing Campaigns**
- **Phone Calls**
- **Annual Campaigns**
- **Corporate Sponsorships**
- **Stewardship**
- **Planned Giving**
- **Earned Income**



Developing a Fundraising Plan

Goals Beyond Dollars Raised

- **Grow monthly giving program**
- **Improve newsletter or campaign email open rates**
- **Launch planned giving program**
- **Increase board fundraising participation**
- **Test new direct mail strategies**
- **Implement stewardship solicitations**



Developing a Fundraising Plan

SMART Goals & Objectives

- ▶ **S – Specific (Numbers, Data)**
- ▶ **M – Measurable (Systems Capacity)**
- ▶ **A – Attainable (Resources, Roles)**
- ▶ **R – Relevant (Mission, Programs)**
- ▶ **T – Time-Responsive (Fiscal Year)**



Developing a Fundraising Plan

SMART Goals & Objectives

“We will increase revenue at our annual gala by 10% this year. We will do so by following strategy X, Y, and Z. Staff member A will be responsible for implementing these strategies.”

-The Fundraising Authority-
*Four Ways to Make Your Fundraising Plans for
Next Year Better & More Effective*



Developing a Fundraising Plan

Activity	Goals	Audience	Strategies	Timeframe	Cost
Direct Mail Appeals	\$75,000 200 donors (Incl. 25 new donors)	Lapsed, Current, and Prospects	3 direct mail solicitations; Follow-up by phone calls	March, August, November	\$15,000
Personal Solicitations	\$100,000	Identified # of Major Gift Prospects	Personal cultivation and solicitation by staff & leadership	Entire Fiscal Year	\$25,000
Annual Garden Party	\$60,000	Past Attendees, Major Gift Prospects, Current Donors \$500+	Invitation mailed; Follow-up phone calls; Face-to-face soliciting; Newsletter invitation	January-May	\$10,000

**Adapted from sample – Network for Good, How to Create a Fundraising Plan*



Developing a Fundraising Plan

Grants – Fundraising Plan

Donor	Grant Ask	Proposal Type	Deadline	Anticipated Funds	Notes
First Nations Development Institute - NYCF	\$20,000 – Youth Culture Program	Online Application – Two Phases	May 1, 2018	\$15,000	Attend pre-application webinar
NoVo Foundation	\$100,000 – General Operating	Online LOI	Rolling Deadline	\$80,000	Ask board member to contact program officer
First Nations Development Institute - NAFSI	\$15,000 – Community Garden	Online Application – Two Phases	July 1, 2018	\$15,000	Renewal Application



Developing a Fundraising Plan

Action Plan & Timeline

- ▶ **Assign roles & responsibilities**
- ▶ **Build timeline from “drop date” or deadline**
- ▶ **Build a mini-calendar, set task reminders**
- ▶ **The more details, the better**



Developing a Fundraising Plan

Case for Support

- ▶ **Backbone of your campaigns & asks**
- ▶ **Cohesive, comprehensive summary of reasoning for support**
- ▶ **Include mission/vision, unique characteristics, statement of need, programs/activities, campaign description, call to action**
- ▶ **Can be used by various departments to implement campaign/solicitations**





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Question & Answer Session

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