



Successful Fundraising With a Staff of One

Developing a Fundraising Plan with
the Resources at Hand



Overview

I. The Basics

- I. Importance of fundraising
- II. Review some fundraising basics

II. Setup

- I. Get organized
- II. Evaluate current fundraising
- III. Create and follow a fundraising plan

III. Activity

- I. Keep the donors you have
- II. Ask for money
- III. Have the tools you need
- IV. Set goals, track progress, evaluate



I. The Basics

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A Case for Support

Why – Your Case

- All organizations must tell their story
- A logical argument for eliciting support
- Describes who you are, what you do, what you will do
- Includes an overview of all programs
- A necessary tool to recruit volunteers, solicit gifts, and educate others about the organization

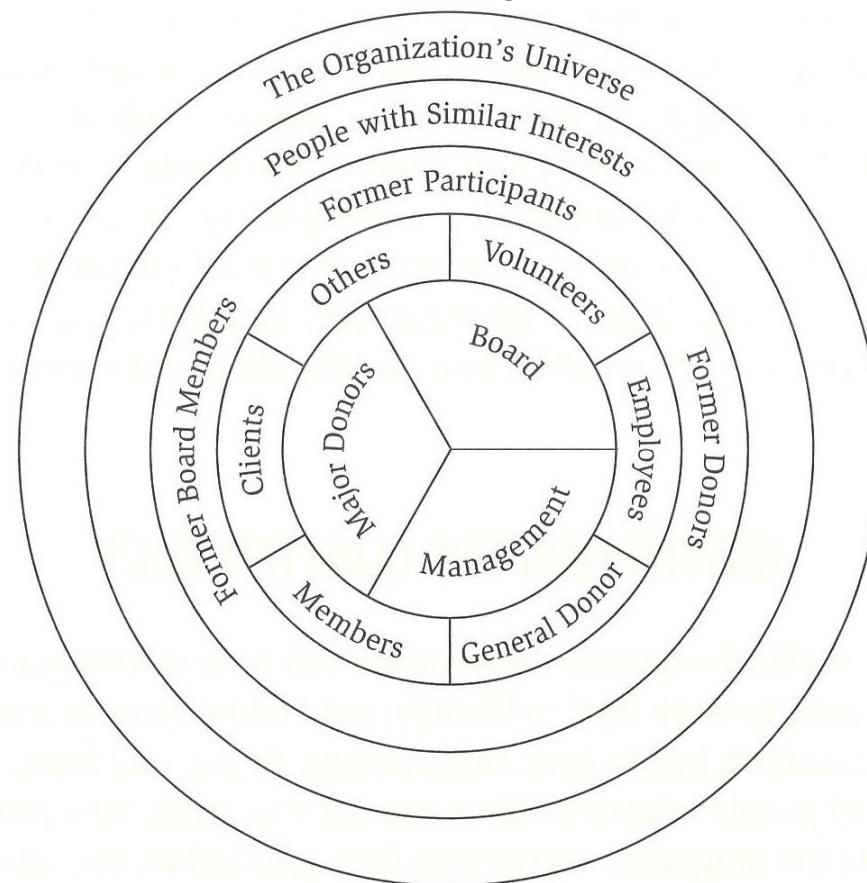


Your Best Prospects

Who – Your Donors

- **Current donors make the best prospects**
- **Top – down approach**
 - Best prospects first
 - Largest donors first
 - Best donors by constituency
- **Inside – out approach**
 - Closest friends first
 - Board members
 - Volunteers
 - Current donors
 - Past donors
 - General public

The Constituency Model



Source: Hank Rosso - *Achieving Excellence in Fundraising*



Methods of Solicitation

How – Methods of Solicitation

- **Renewable giving program**
 - Direct mail
 - Online giving
 - Profitable event(s)
- **Major gifts program**
- **Corporate and foundation program**
- **Planned giving program**

Balance and integration is the key to success!



II. Setup

- I. Get organized
- II. Evaluate current fundraising
- III. Create and follow a fundraising plan



Get Organized

- **Fundraising must be an institutional priority**
- **Invest in staff and resources**
 - Have at least one full-time fundraising professional
- **It takes money to raise money**
 - \$0.13 – 0.18/\$1 across the network (up to \$0.20 is acceptable)
 - Less developed programs will be naturally less efficient
 - Early investment is necessary



What did we do? = **Results**

What worked and what didn't and why? =
Analysis

What could we have done differently? =
Opportunities/Challenges



Purpose of evaluation:

1. Identify what is being done well
2. Identify where improvement is possible and desirable
3. Develop future plans, objectives and standards

Questions to ask:

1. What is working?
2. Is your fundraising balanced?
3. Is your program growing?
4. Are you meeting the need?



What do we need? = **Goals**

How will we get it? = **Objectives**

What work is required? = **Actions**

Who will do it and when? = **Assignments/Timeline**



TIPS!

- Fundraising plan should have its origins in the organization's overall strategic plan
- Requires active participation from decision makers and implementers.
- Develop a 2-4 year plan
- Break it down to 30/60/90-day/ 1-year action steps
- Review and consult the plan often



III. Activity

- I. Keep the donors you have
- II. Ask for money
- III. Have the tools you need
- IV. Set goals, track progress, evaluate



- Current donors are your best prospects
- Keep your donors informed and thanked
- Place importance on **active stewardship**
- Move donors up the donor pyramid through cultivation



- Focus on where the greatest potential exists
 - Identify your best prospects
- Next, focus on effective methods
- Use your plan as a guide
- Always ask, “Is this raising money?”



Have the Tools You Need

- **Brochures**
- **Collateral information**
- **Giving mechanisms**



Set goals, track progress, evaluate

Set goals that are

- Short-term and long-term
 - Specific
 - Measurable
 - Realistic (be within 15% either way)
- Activity and monetary based
- Based on organizational need and your plan



Resources

- Giving USA
- *Fund Raising & Marketing in the One-Person Shop*, Diane L. Hodiak & Michael J. Henley
- *Small Nonprofits: Strategies for Fundraising Success*, Mary Louise Mussoline
- *The Nonprofit Handbook: Fundraising*, James M. Greenfield
- *Achieving Excellence in Fundraising*, Henry A. Rosso & Associates