

## 21 Elements for Creating a Fund Development Plan

### MATCHING THE ORGANIZATION'S CAPACITY AND PHILANTHROPIC CULTURE TO ITS VISION - 7 Elements

### NOTES

#### 1. What are our fundraising expectations and are they reasonable?

- a. Where are we now?
  - i. What's our current budget?
  - ii. What's our reputation in the area/region/city – with other providers, with our donors, with consumers/clients?
- b. Where is the organization heading? Where do we want to be in five years?
- c. What is reasonable growth for our organization?

#### 2. What is our organization's philanthropic culture?

- a. How do we treat donors? Do they feel welcome? How do we show our appreciation to donors at different giving levels?
- b. What is our organization's history with regard to diversified fundraising? Is it appropriate to our geographic location and mission? Think about ranges of donor types, levels of giving, vehicles used to attract support, age, race, gender, class, so forth.
- c. Who do/Who could we invite to help plan, implement and analyze our fundraising and community engagement progress?

#### 3. Is our Development Staff equipped to succeed?

- a. Do we have fundraising staff – how many? What are their roles? How are all of these roles covered? Is staffing adequate to meet expectations?
- b. Does the Executive Director help with fundraising and what does that look like? Is she tied to her desk? Out with donors? A mix of both?

- c. Are development staff members adequately trained to do the work expected of them? Do our fundraisers have access to the board? Are they included as participants at the board meetings?
- d. Do our fundraisers have access to donors? Are they restricted from talking to specific people?
- e. Do our fundraisers have a network to support them?  
(i.e. AFP/mentors/dream team of other fundraisers/consultants/us!?)

**4. Is our Board equipped to succeed?**

- a. Do they give their own personal gift (not just get something from employer)?
- b. Do they ask others to give?
- c. What have been the expectations of the board around fundraising? What was said to them at recruitment?
- d. Are they trained to raise money at their orientation?
- e. What kind of ongoing skill-building do they participate in?
- f. What sort of staffing support do they receive? How is our organization investing in their success at raising money?
- g. How do board members demonstrate their commitment to the organization via attendance/participation/term limits/recruiting/attracting & engaging others?

**5. Do our fundraising goals tie in to our organization's strategic plan and/or our program area's annual work plan?**

- a. Tier one = We need this to accomplish our basic program objectives
- b. Tier two = If we stretch and raise more than our goal, what could be possible?
- c. If we don't meet our goals, what will happen? Do we have the flexibility to fill shortfalls? If we need to add an event or extra mailing, are we prepared? How do we plan for these contingencies?

**6. Will we spend money to raise money?**

- a. Have the funds been allocated/budgeted?
- b. Does our budget match our expectations/goals? (Are we willing to upgrade what we spend in order to elevate our results in a particular campaign/vehicle?)
- c. Are you, as a professional, empowered to lead or make suggestions for growth versus implementing same old strategies? How?
- d. (Examples) MAILING: Printing, design, postage
- e. EVENTS: consultant, venue, etc.

**7. What is the role of Program (staff and consumers) in fundraising?**

- a. Beneficiaries/Consumers/Clients – are we including them as volunteers, welcoming them as donors and providing opportunities for them to be both?
- b. Is fund raising an afterthought/extra burden? Or is it integrated into the work of the program?
- c. What is expected of the staff who deliver programs with regard to fundraising? Has that been clearly communicated to them? Do they understand why their role is important (i.e. their paycheck relies on their participation)? How do they participate: Grant report writing? Donor visits? Pipeline of inspiring stories re: mission?
- d. What is appropriate participation?

**1. What vehicles (methods, strategies) will we use to attract funds?**

- a. What vehicles have we used previously and how have they performed for our organization?
- b. How are our organization's values reflected in how we raise money and whom we solicit?
- c. Do we have a gift acceptance policy and does it offer guidance on how to avoid inappropriate vehicles and gifts? (Example: high school for students in recovery not accepting contributions from liquor distributors)
- d. What vehicles can we use with the staff/volunteer capacity we currently have? How do our vehicles match with the different donor segments? (Example: promoting monthly giving with younger professionals)
- e. Are there new donor constituencies we could reach? What vehicles would be appropriate?

**2. What supplemental activities could support/enhance our current fundraising strategies?**

- a. Where can we experiment with new ideas or adjust to reach new goals? (time e-appeals to support direct mail campaign; add flyers to race bags, etc.)
- b. Are there ways we can demonstrate our expertise in the field that relate to solicitation messages? (share newspaper articles about relevant topics with donors, etc.)
- c. How do we share our expertise with the outside world? What activities can we participate in that would elevate the organization's credibility (i.e. publish an Op Ed piece; become "go-to expert in the field" for donors, foundations, media, etc.; accept invitations to speak about a given topic)?

### **3. How will we lay out the work over a specific timeline?**

- a. What are the dates of our fiscal year?
- b. What is our business cycle? Do we have specific financial needs at certain points of the year?
- c. Do we have to work around any constraints (United Way blackout; key personnel commitments such as working in a legislative session, taking parental leave; holidays or vacations)? Are there certain times of the year when key people will be less productive or available?
- d. Does our organization have a black eye or skeletons in the closet?
- e. What opportunities exist within our organization's work for new strategies or collaborations to raise money (milestone anniversaries, major victories, launching new programs, etc.)?
- f. What internal opportunities present themselves? (Examples: theater company production schedule; advocacy organization's legislative rhythm)
- g. What external opportunities present themselves? (author writes bestseller about our main issue, news item brings attention to our cause, there is a disaster) Do we keep current on relevant issues; look for ways to connect our mission/story to the current dialogue? (i.e. Is there a system in place to review periodicals, Google alerts, etc.?) Do we regularly participate in trainings? Are we members of relevant organizations?

### **4. Have we built benchmarks into our timeline?**

- a. Are we measuring cumulative to year-end progress throughout the timeline?
- b. How do we know if we are on target to achieve goals or whether we will fall short?
- c. Have we provided opportunities for contingencies or mid-stream corrections?

- 5. Who is assigned to do what?** (Refer to staffing grid in PowerPoint)
- a. How are responsibilities for implementing vehicles dispersed? (Committees? In-house staff? Volunteers? Consumer/clients?) Are people clear on what they're expected to accomplish?
  - b. Who leads and who makes decisions?
  - c. How are we building the skill set of the people who are expected to implement the work?
  - d. Do we need additional expertise such as from a consultant or mentor?
  - e. How do we work as a team? How could we do better?
  - f. Are we allocating adequate personnel resources appropriate to our goals?
- 6. What is the state of our donor list?**
- a. Do we have a database and do we have the expertise to use it well?
  - b. Is our data clean? current?
  - c. Can we easily segment our donor lists (i.e. current year, last year, lapsed? Or by demographics or interests?)
  - d. What do we know/need to know about our donors (type? loyalty? motivation? relationships?)
  - e. Do we have the tools to define the capacity of our donors to continue or increase giving?
  - f. Does our team have appropriate access to the information they need? Do volunteers have access to data or is it channeled through a professional?
- 7. What other resources do we need in order to be successful?**
- a. What is our budget for implementing fundraising strategies?
    - i. Create fundraising plan at same time as organization budget
    - ii. Total allocated for implementing fundraising strategies?
    - iii. How is it parsed out across strategies? How will you measure: Gross revenue? Net goal? Fundraising costs? (budget for each vehicle)
  - b. What mission-connected stories do we have to tell to inspire and engage?
  - c. Where are our resource gaps? How can we fill them?

- 1. What are the tangible quantitative goals we want to measure (basic and advanced)? What are the industry standards for an organization of our age, size and/or type?**
  - a. BASIC
    - i. Number of donors
    - ii. Number of prospective donors added/reached
    - iii. Dollars raised
    - iv. Number of volunteers
    - v. Press coverage/hits
    - vi. Number of collaborations
    - vii. Number of consumers/clients served because of funds raised
    - viii. Number of additional funding sources
  - b. ADVANCED
    - i. % lapsed vs. recaptured donors
    - ii. Upgraded gift amounts
    - iii. Frequency of gifts
    - iv. Trends of giving
  - c. What goals can we reach for next year?
- 2. What are the qualitative benefits of our success/progress?**
  - a. Have we been able to add or experiment with new or improved fundraising vehicles (i.e. planned giving program, endowment campaign, impact of social media presence)?
  - b. Are the volunteers or board members more engaged and participating in the fundraising efforts?

- c. How has the public perception/awareness of our mission expanded? Why do we think this expansion was possible?
- d. Are our donors more connected to the purpose of our organization? Did we help them deepen their understanding of why our organization must exist? How?
- e. What stories have come out that we can use to benefit our mission?
- f. How is staff morale/staff burnout?
- g. How is board morale/board burnout?
- h. We achieved success but at what opportunity cost? (Consider this with events.)
- i. Are we receiving support from a diverse audience, and how do we define this (class, age, race, geographic location, average gift size)?
- j. What qualitative measurements matter for next year?

**3. Do we have a method for measuring progress/benchmarks on a regular basis so we can adjust our plan as needed?**

- a. If we didn't achieve a certain result but other good came from the effort, will we try again next year? Do we need to replace with something else?
- b. Did one vehicle fall short and do we need to add another effort to meet the shortfall?
- c. What are we learning as we experiment with new ideas and trends?
- d. Are we building measurement into vehicles (i.e. on-site surveys at events)? Are we still on good terms with venues/contractors/consultants/donors/etc.?
- e. What and when do we need to measure next year?

**4. What are we doing this year that we can build on next year (subsequent plans)?**

- a. How can we improve on our individual abilities to raise funds? (i.e. improved skillsets, more comfortable with new methods, deeper expertise)



- b. How can we improve on our organization's capacity to attract and sustain funds (i.e. image, additional partners, advanced credibility)?
- c. What do we need to add to next year's plan?

**5. [POST IMPLEMENTATION EVALUATION] Did we meet our goals?**

- a. Did we meet our minimum "must raise" goals? If not, why did we fall short?
- b. What did/would stretch our capacity to raise more than our goal?
- c. How does this inform our planning for next year?

**6. [POST IMPLEMENTATION EVALUATION] How did this development plan help the organization advance toward its strategic goals?**

- a. Did we raise the funding necessary to increase services, offer more scholarships, serve more hungry children?
- b. Did we increase visibility of mission? Of the services we offer?
- c. What did we do to increase the awareness that potential donors have of our mission (i.e. media partnership with an industry paper)?
- d. What did we do to increase the awareness that potential consumers/clients have of our services?
- e. What are our follow-up activities to include in the next year's plan?

**7. [POST IMPLEMENTATION EVALUATION] How did we grow the sustainability of the organization?**

- a. Are things better than when we started?
- b. How did we support the advancement of the greater issue/cause?
- c. How did we contribute to the local/regional/national/international dialogue about the issues that concern our consumers and clients?
- d. Have our values or mission evolved over the year?
- e. What are our priorities next year?