

Planning

Provides a road map of :

What will be done

When it will be done

Why it will be done

Who will do it

How it will be done

How much it will cost

- **Defines and prioritizes organizational needs**
- **Defines what the organization will do in bite sized pieces around which grant and/or individual requests can be developed**
- **Creates a context for the request**
- **Protects an organization from the “tyranny of the gift”**
- **Planning makes the giver feel you have your act together and money is well spent**

The Case for giving outlines

- **How our organization serves the community**
- **What our organization has accomplished**
- **How donors benefit and are recognized**
- **How much money needs to be raised**
- **Organizational leadership**
- **Naming opportunities**

Keep the fund drive a secret

- **Start with the board; raise the money from the inside out. This will dramatically kick off campaign**
- **After 75% of goal is reached than go public for bricks, seats, smaller gifts, etc.**
- **75 to 95% of contributions will come from 10-15% of donors (usually 50 to 100 donors). They will usually be solicited by 10-15 individuals. Cultivate prospects with the highest potential first.**
- **Give until it feels good!**

First Do Your Homework

Focus Groups (Bringing major likely prospects inside)

Evaluate your board: Doers, Donors, and Door Openers

Position your organization for effective fundraising:

Board Retreat:

Strategy/long range planning

Potential Donors

Who writes grants

Who could chair fund drive

Architect

Develop a pro forma

Timeline

State & City monies

More property?

Staff involvement?

Costs/budgets

Theme

The role of the board in fundraising

- **To give cash—what is for them an important gift (100% of the board)**
- **To tackle tasks (bite-sized), including:**
 - 1. Ensuring staff and resources are in place**
 - 2. Identifying a core of high potential donors**
 - 3. Updating prospect/donor information**
 - 4. Facilitating interface with government and corporate entities**
 - 5. Cultivating prospects with highest potential**
 - 6. Soliciting gifts in a thoughtful manner**
 - 7. Thanking donors, volunteers, staff, etc.**
 - 8. Being passionate about the organization and the dream!**

The Staff Supports the Fund Drive Leaders with:

- **Background materials**
- **Data on potential donors**
- **Training materials**
- **Individualized solicitation letters**
- **Examples of thank you letters**
- **Their presence on calls**
- **Confirmation calls for appointments**
- **Information on developments and funds raised to date**
- **The calendar of meetings, appointments and follow-up**
- **Agendas for meetings**
- **Meeting spaces, name tags, refreshments, clean-up**
- **Writing grants**

Fundraising

- **The solicitation in asking for money is the last act of a long term strategy**
- **At its very core, all fundraising is built on personal relationships and links between individual people**
- **Individuals give money-whether they are representing themselves, corporations, foundations, or governments**
- **People give to people they trust**
- **People give to people-don't let your request just to arrive on someone's desk**
- **Never ask a stranger for money**
- **Follow-up, follow-up, follow-up**

**47 Reasons why people respond positively to requests
for money**

Job descriptions of volunteers