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:

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<th>Strategy/long range planning</th>
<th>Timeline</th>
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<td>Potential Donors</td>
<td>State &amp; City monies</td>
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<td>Who writes grants</td>
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<td>Who could chair fund drive</td>
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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