

Fundraising Planning: Part 2

Tuesday, April 13, 2021

Today's Facilitators



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Pronouns: she/her



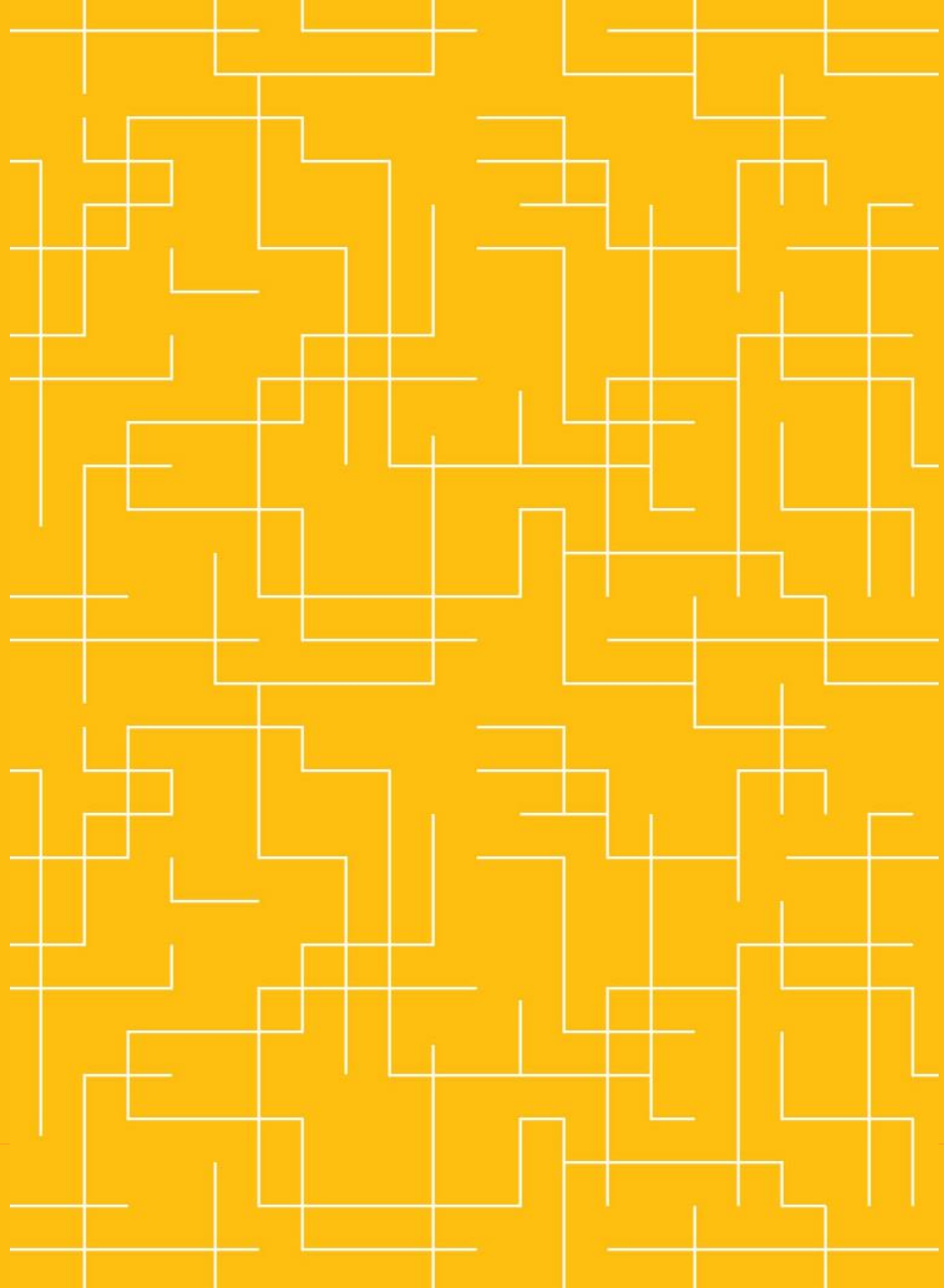
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Warm Up

Given everything that is going on in the world right now... what is giving you strength and/or hope?



From last week:

- Burning questions?
- Insights?

Upon completion of this training, you should be able to:

- Explain the basic steps for developing a fundraising plan
- Identify your organization's assets
- Develop a case statement
- Set your fundraising goals
- Draft a fundraising plan

Six steps for developing a fundraising plan

1. Identify your assets
2. Develop a case statement
3. Set your goals
4. Create an action plan
5. Implement your plan
6. Evaluate your plan



1. Identify your assets

What are your current organizational strengths?

Examples:

Compelling mission

Large public base of support

Name recognition

Well-connected staff and board

Great facility

High traffic website

1. Identify your assets

Use a SWOT analysis

Strengths

Weaknesses

Opportunities

Threats

2. Develop a case statement

Why does your organization need and merit support?

Components:

Mission and values

Programs and services

Accomplishments

Plans for the future

Budget needs

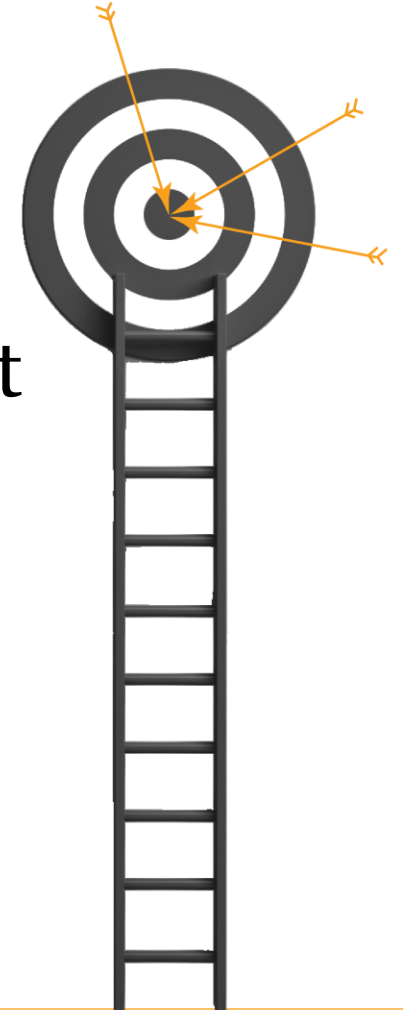
3. Set your goals

Start where you are

Who are your current funding partners?

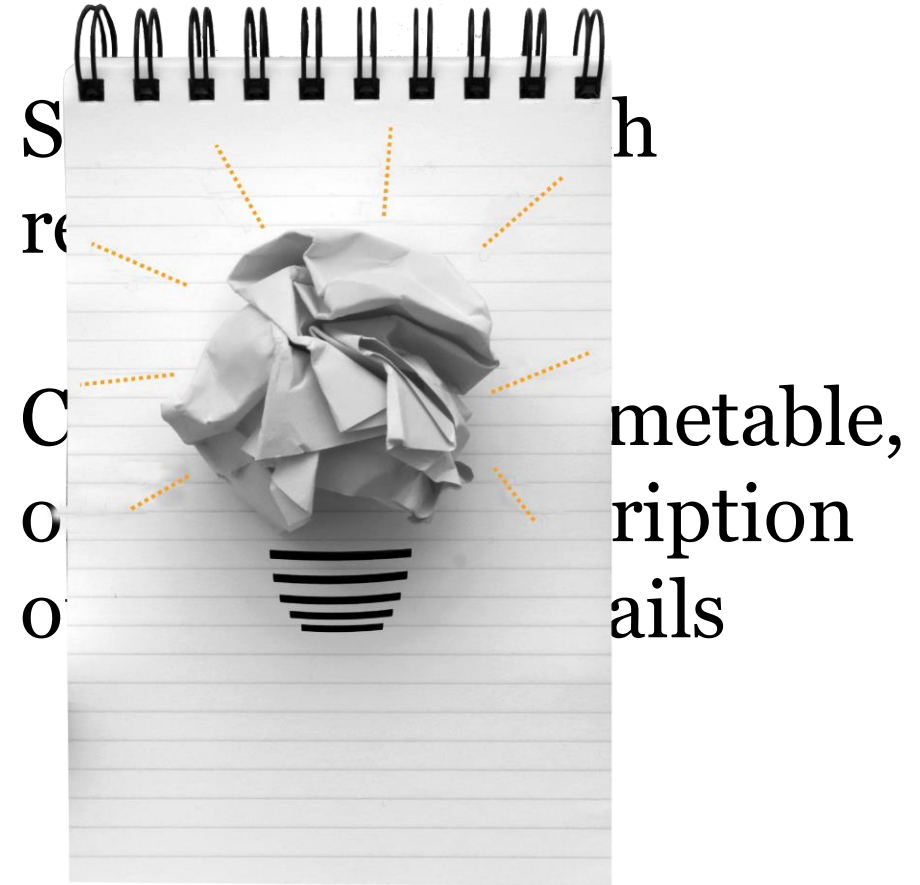
Who are your largest funders?

Where could you strengthen your funding base?



4. Create an action plan

What strategies
will you use?



Sample Plan Strategy

Goal: Raise \$10,000 from new and occasional donors by June 30, 2021

Strategy: Launch a virtual fundraising campaign

Action steps:

- Development staff will research potential prospects and design virtual campaign. **Timeline: March - April**
- Board and staff will review prospects to see if any connections.
Timeline: April
- Development staff will review and update GuideStar Profile.
Timeline: April
- Development staff will launch virtual campaign to engage and solicit prospects. **Timeline: May – June**

Your turn!

**Use the handout to
draft a sample strategy
for your org this year.**



5. Implement your plan

Check in regularly to make sure you're on track

6. Evaluate your plan

What worked?

What could be better?

Was the money raised worth the time and effort?

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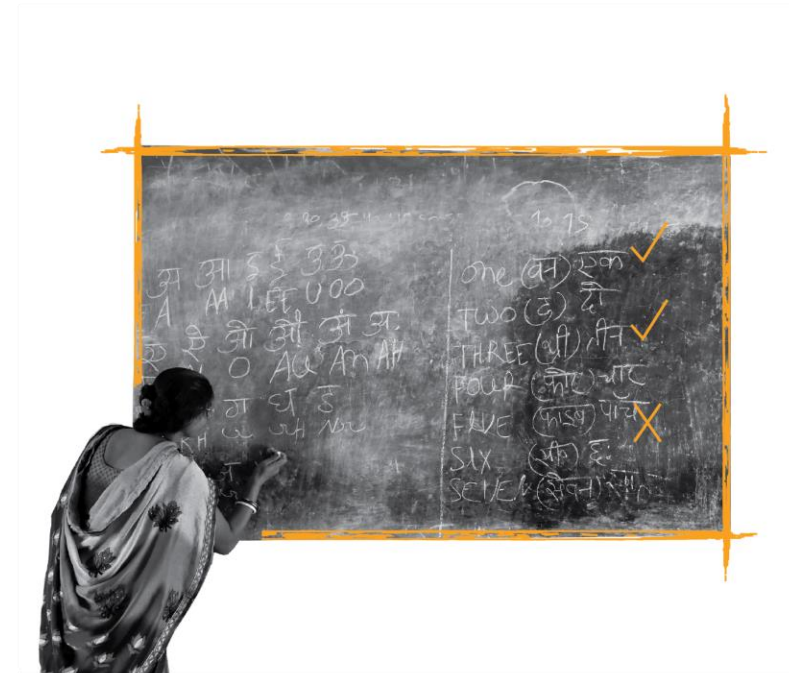
Key takeaways

Know where you're starting and where you need to go

Diversify your funding streams

Set realistic goals

Evaluate your plan and revise as needed



Questions?

FREE Workshop 4/30

Avoid Common Mistakes on your 990

Friday, April 30, 2021

9:30 am – 11:00 am PT

Special guests:

Maga Kisriev and Jacob Yau from Hood & Strong LLP

[Register here](#)

Thank you

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