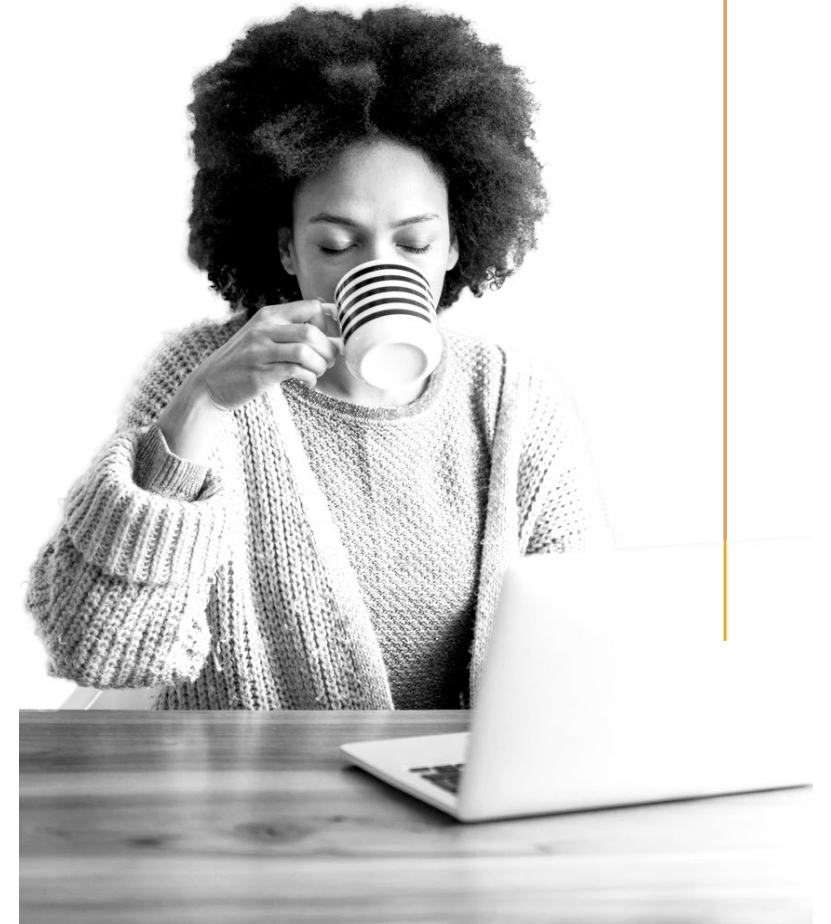


Welcome

We'll be getting started momentarily.

In the meantime, please share in the chat where you are joining from today!

Get comfortable
and ready to learn!



Yes, we are recording today's presentation.

You will receive a link to the recording via email in the next 48 hours.



Introduction to fundraising planning, part 2

Thursday, May 19, 2022

Presenters



Dave Holmes

Network Engagement Manager
he/him/his



Erin Ruszaj

Network Engagement Assistant
she/her/hers

Thank you!

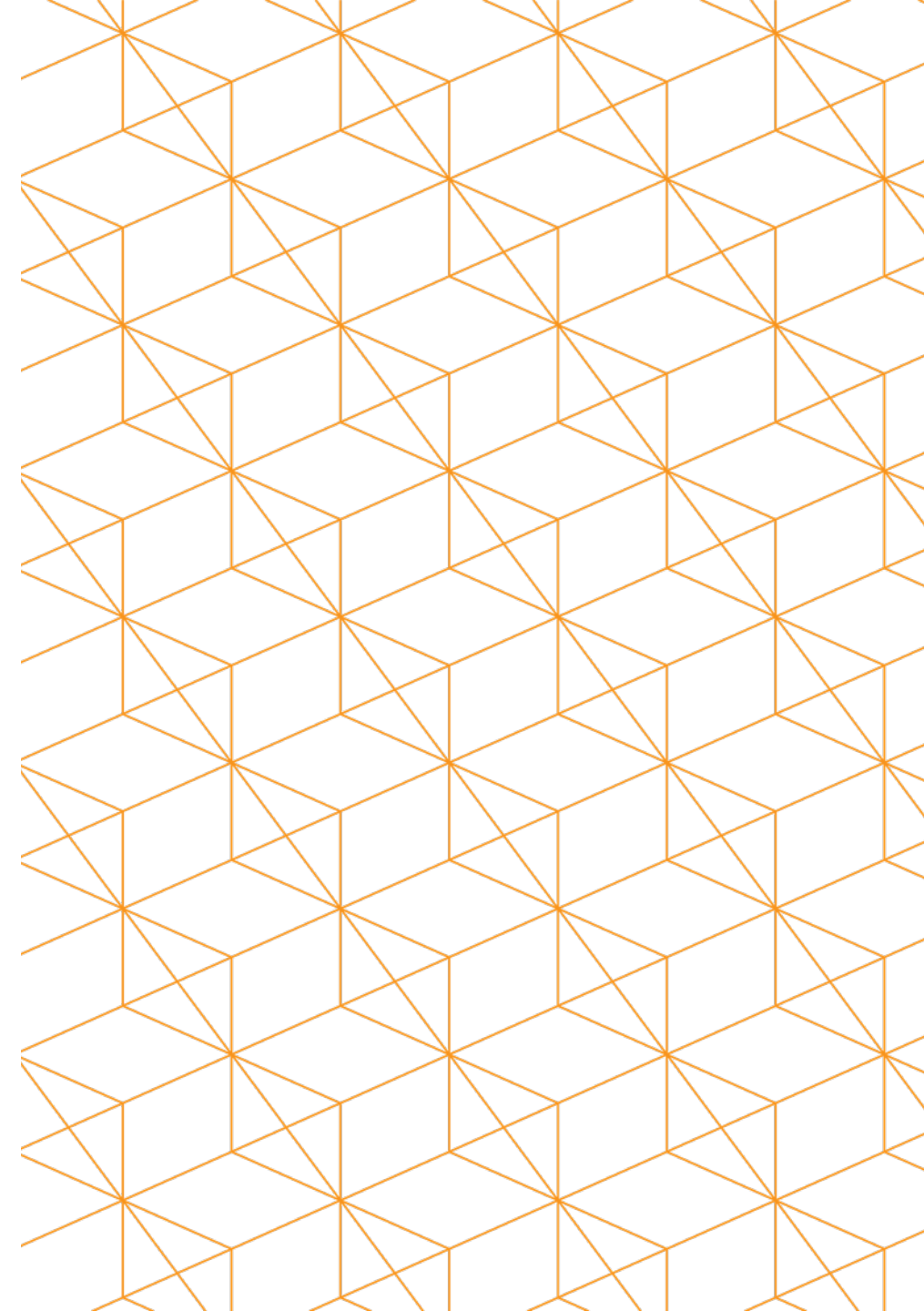
Thanks to San Manuel Band of Mission Indians!

Today's session

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**

Grounding moment



Recap

- 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



Did you complete the strategies worksheet?



Recap: 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



4. Create an action plan

What strategies will you use?



Set a goal for each revenue strategy

Create a chart, timetable, or narrative description outlining the details

Sample Plan Strategy

Goal: Raise \$10,000 from new and occasional donors by June 30, 2022

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**

Development Plan Spreadsheet

Organization XYZ

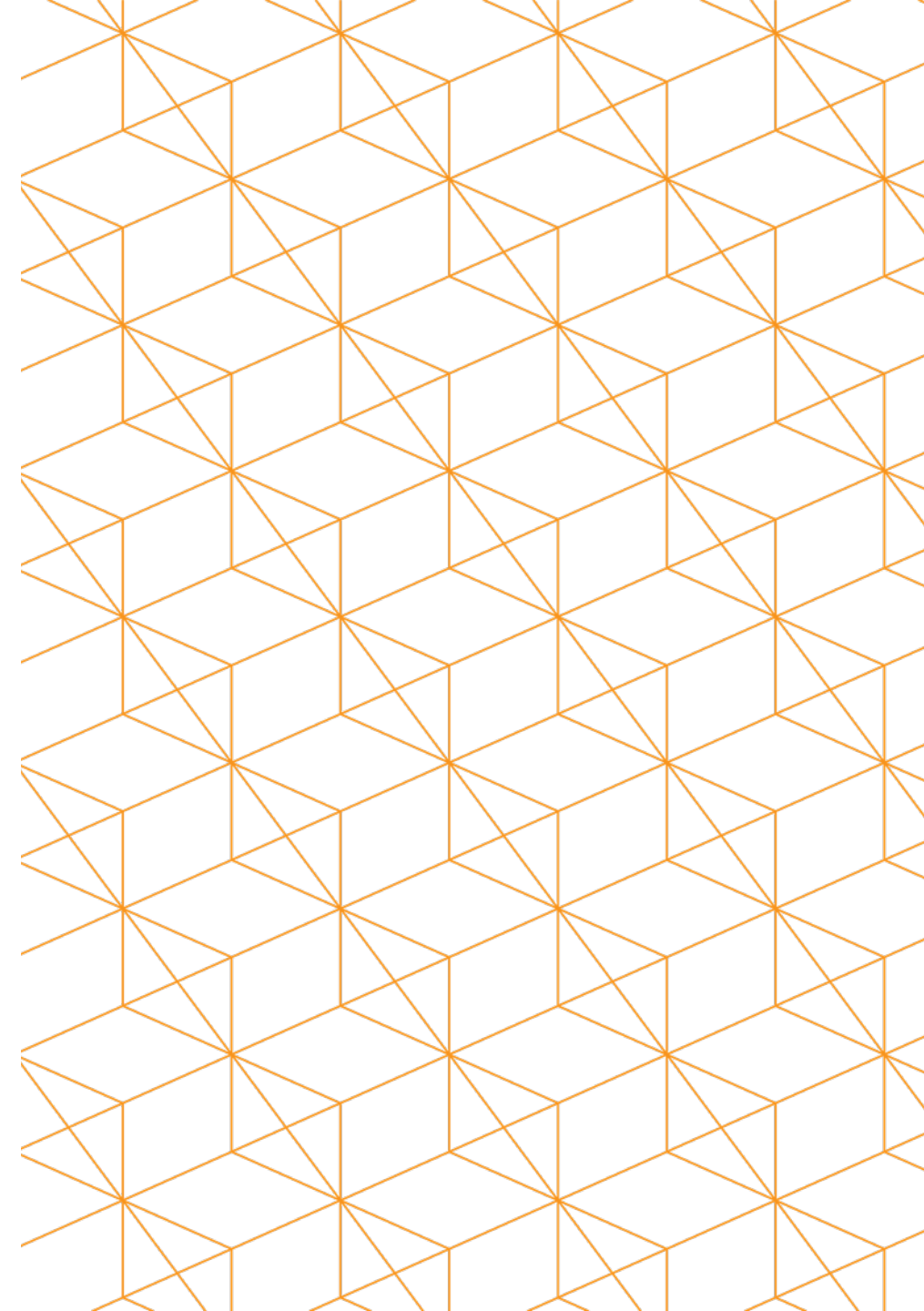
Sample Development Plan

SUMMARY PAGE						
						compared to last year
	<u>budget</u>	<u>actual YTD*</u>	<u>left to raise</u>			<u>budget</u> <u>actual</u>
	2021	2021	2021			2020 2020
Board	\$40,000	\$24,250	\$15,750			\$35,000 \$36,600
Individuals	\$70,000	\$17,009	\$52,991			\$70,000 \$69,837
Corporations	\$12,000	\$5,000	\$7,000			\$5,000 \$13,545
Foundations	\$63,000	\$22,000	\$41,000			\$70,000 \$62,150
Government	\$90,000	\$90,000	\$0			\$60,000 \$90,000
TOTAL	\$277,021	\$160,280	\$116,741			\$242,020 \$272,132

**TIP: keep on track by asking for this number from your finance person/bookkeeper periodically*

Access the Spreadsheet Here: <https://bit.ly/DevelopmentPlanSpreadsheet>

Questions Waterfall



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?

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



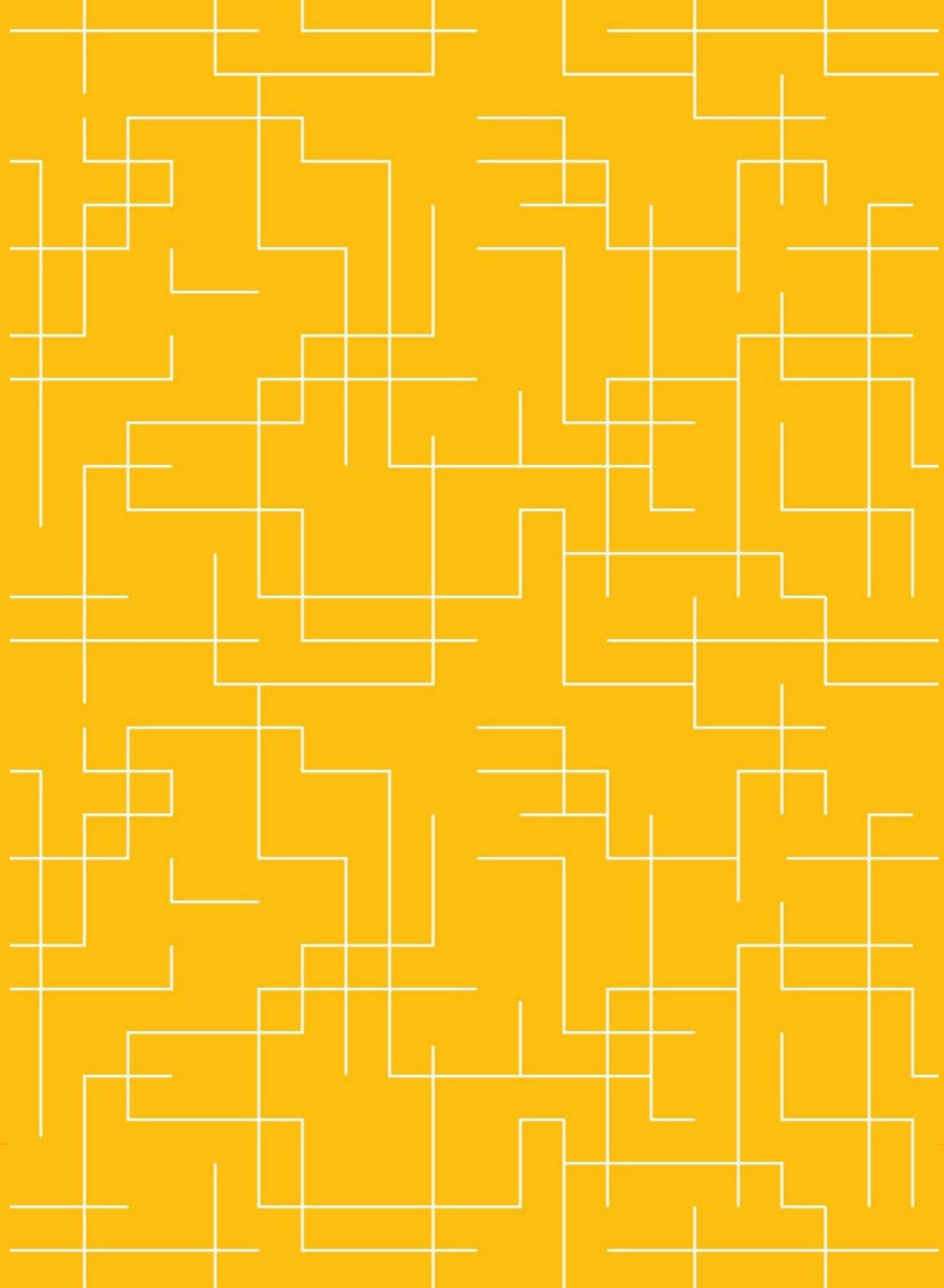
Poll

Have you claimed your
nonprofit's Candid profile?

Yes

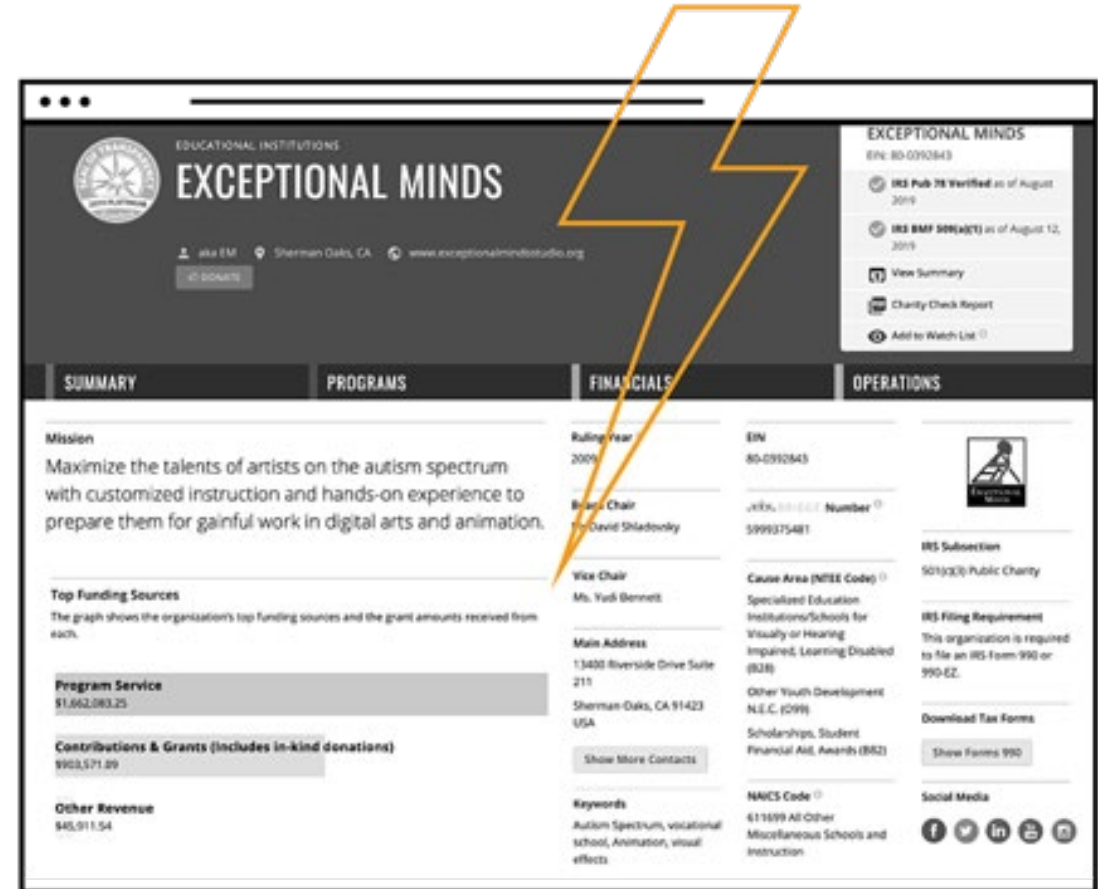
No

What's a Candid profile?!



Candid Nonprofit Profiles

- Goes beyond IRS data
- Insights on millions of nonprofits
- Meaningful data to move beyond
- Information from nonprofits themselves, 990s, and other 3rd party sources



EXCEPTIONAL MINDS
EDUCATIONAL INSTITUTIONS
aka EM | Sherman Oaks, CA | www.exceptionalmindsstudio.org

EXCEPTIONAL MINDS
EIN: 80-0910843
IRS Pub 78 Verified as of August 2019
IRS 990 (990-E) as of August 12, 2019
View Summary
Charity Check Report
Add to Watch List

SUMMARY | PROGRAMS | FINANCIALS | OPERATIONS

Mission
Maximize the talents of artists on the autism spectrum with customized instruction and hands-on experience to prepare them for gainful work in digital arts and animation.

Top Funding Sources
The graph shows the organization's top funding sources and the grant amounts received from each.

Program Service
\$1,662,083.25

Contributions & Grants (Includes in-kind donations)
\$923,571.09

Other Revenue
\$45,011.54

Board Chair
David Shleidenky

Vice Chair
Ms. Yuki Bennett

Main Address
13400 Riverside Drive Suite 211
Sherman Oaks, CA 91423
USA
Show More Contacts

Keywords
Autism Spectrum, vocational school, Animation, visual effects

Rolling Year
2009

EIN
80-0910843

IRS Subsection
501(c)(3) Public Charity

Cause Area (NTEE Code)
Specialized Education Institutions/Schools for Visually or Hearing Impaired, Learning Disabled (828)
Other Youth Development N.E.C. (099)
Scholarships, Student Financial Aid, Awards (862)

IRS Filing Requirement
This organization is required to file an IRS Form 990 or 990-EZ.

Download Tax Forms
Show Forms 990

NAICS Code
611099 All Other Miscellaneous Schools and Instruction

Social Media
f t in

The 2022 Seals of Transparency



Basic contact and mission info

so donors can find you



Programs and brand info

so you can say what you do



Financial and people info

so you can grow trust and gain support



Strategy and metrics

so you can highlight your impact

Benefits to earning a Seal

- Build a trusted identity online for FREE
- Increase your visibility on guidestar.candid.org and our 200+ partners
- Save time — all your most critical information in one place

The screenshot shows the National Wildlife Federation's profile on GuideStar. At the top left is the 'Animal related' category and the 'Platinum Seal of Transparency 2021' logo. The main header features the organization's name, 'National Wildlife Federation', with an 'HQ' tag, and its mission statement: 'Uniting all Americans to ensure wildlife thrive in a rapidly changing world'. Below this is the address 'Reston, VA' and the website 'http://www.nwf.org', accompanied by a yellow 'Donate' button. On the right side, a 'GuideStar Charity Check' box displays several accreditation badges: 'Contributions tax deductible as of July 2020', 'IRS BMF 509(a)(1) as of July 13, 2020', and options to 'View summary', 'Charity Check report', and 'Add to Watch List'. A navigation bar below the header includes links for 'Summary', 'Programs + Results', 'Financials', and 'Operations'. The 'Mission' section is prominently displayed, followed by a grid of key information: 'Ruling year' (1943), 'President and CEO' (Mr. Collin O'Mara), 'Main address' (11100 Wildlife Center Drive, Reston, VA 20190 USA), 'Cause area' (Wildlife Preservation/Protection (D30)), 'NAICS code' (813312 Environment, Conservation and Wildlife Organizations), 'EIN' (53-0204616), and 'Cause area (NTEE code)' (Wildlife Preservation/Protection (D30)). The 'IRS subsection' is listed as 501(c)(3) Public Charity. The National Wildlife Federation logo is visible in the bottom right corner of the profile.

Candid data partner network

Social Media & Tech



Giving Platforms



Financial Institutions



Grants Management



Media & Researchers



Other



3 easy steps to claim and update

Claim your free Candid profile and share your story

- Showcase your programs and your impact
- Send fresh information to 200+ charitable sites, including **AmazonSmile, Facebook, and Network for Good**
- Use your profile as the perfect handout in funder meetings
- Celebrate your diversity and share your staff & board's demographics
- And much more

Get started now



Have questions? Go to our Help Center

Go to help.guidestar.org for

- Guides on how to claim your profile
- Guides for how to earn a Seal

Go for Gold promotion for small nonprofits

For small nonprofits:
<\$1M in annual revenue or
expenses

If you earn a **2022 Gold Seal**
of Transparency this year

You can get a code for a **FREE**
1-year subscription to
Foundation Directory
Essential to search for
potential funders. To get code
email goforgold@candid.org



* For qualifying nonprofits



Learn more at bit.ly/goforgold2022

What's next

Save the date

**Stories + Numbers: Updating
your nonprofit profile on
GuideStar**

(pts. 1 & 2)

September 2022

Questions?

Email David.Holmes@candid.org

How did we do?

Your feedback is important to us! Please take a moment to fill out our course survey:

<https://forms.office.com/r/vk8DoavvBu>

Thank you

Stay connected and never miss a virtual training by subscribing to our Candid Learning newsletter
bit.ly/CandidLearningNewsletter

