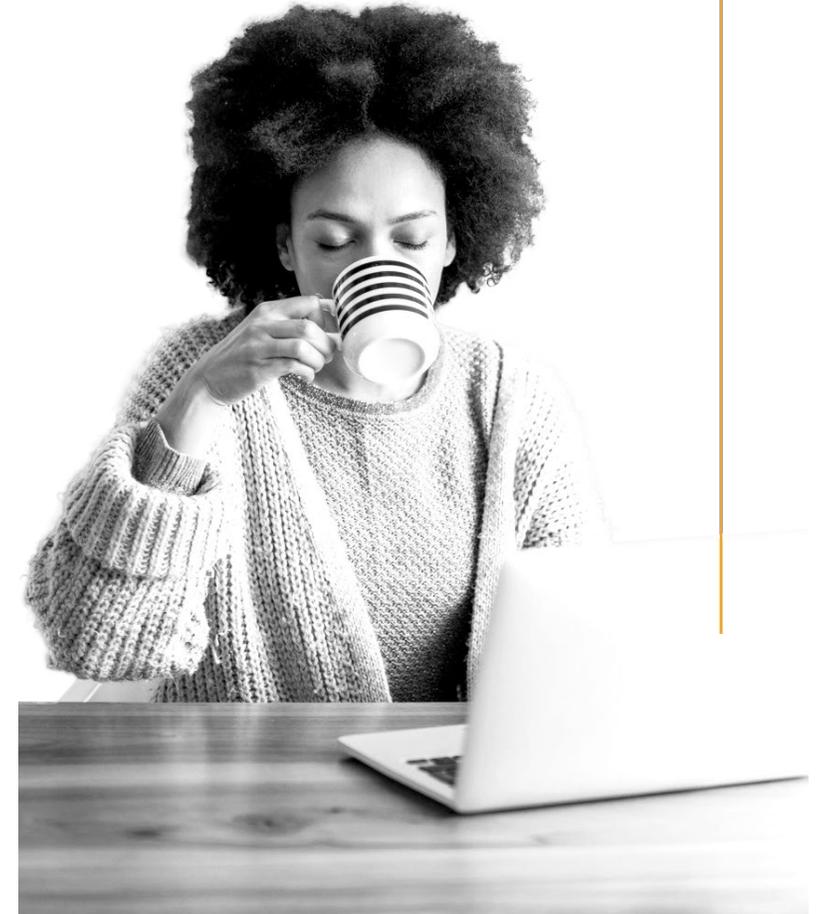


Welcome

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 1

Thursday, May 12, 2022

Presenters



Dave Holmes

Network Engagement Manager
he/him/his



Erin Ruszaj

Network Engagement Assistant
she/her/hers

Candid.

Every year, millions of nonprofits spend trillions of dollars around the world. Candid finds out where that money comes from, where it goes, and why it matters. Through research, collaboration, and training, Candid gets you the information you need to do good.



Candid.



Candid value

We're curious.

We listen, collaborate, and
innovate.



Our response to global events

Thank you for being a part of Candid's learning community. We recognize that this may be a challenging time for many. Candid has shifted its key learning opportunities to a virtual format, and you can check them out at bit.ly/CandidLearningOnline. We've also invested in providing the social sector with the resources they need to make informed decisions about today's most pressing issues:

Learn more about COVID-19 resources here:

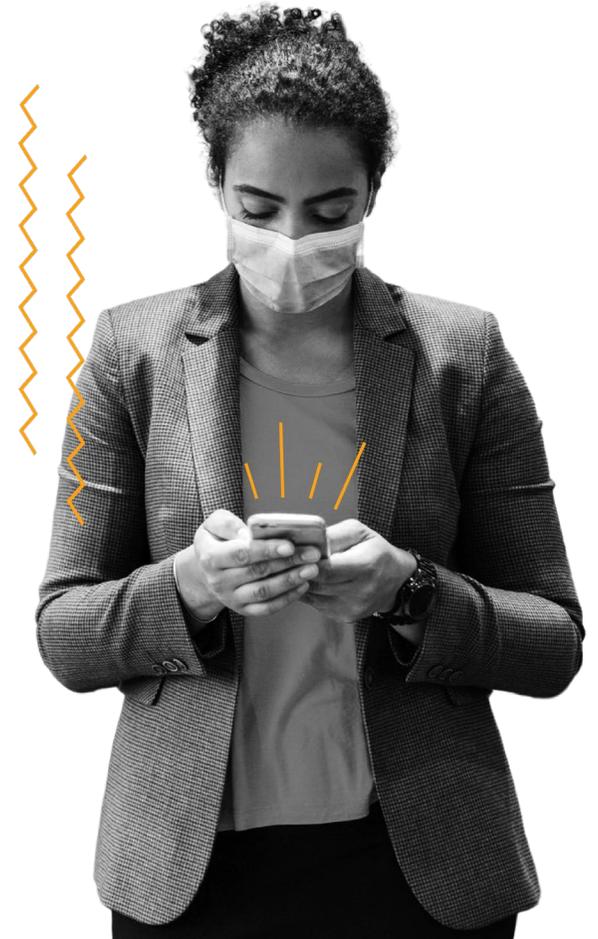
bit.ly/CandidResourcesCOVID19

Learn more about racial equity resources here:

bit.ly/CandidRacialEquity

Learn more about Ukraine resources here:

bit.ly/CandidResourcesUkraine



Thank you!

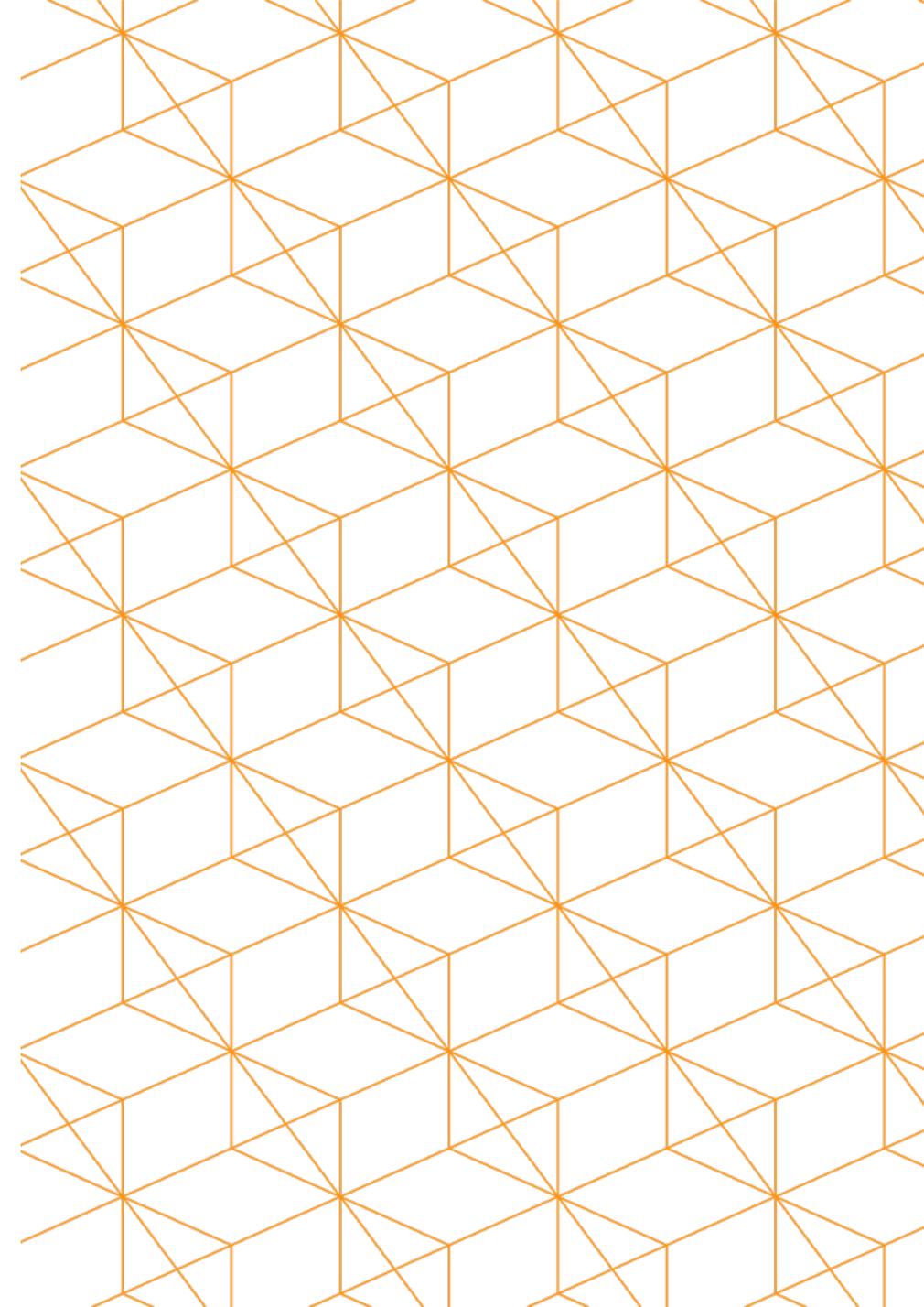
Thanks to San Manuel Band of Mission Indians!

Today's session

Upon completion of this two-part 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



What is a fundraising plan?

A living document which lays out specific fundraising tasks and strategies, including who will be responsible for completing them and the timeframe of when they need to be accomplished.

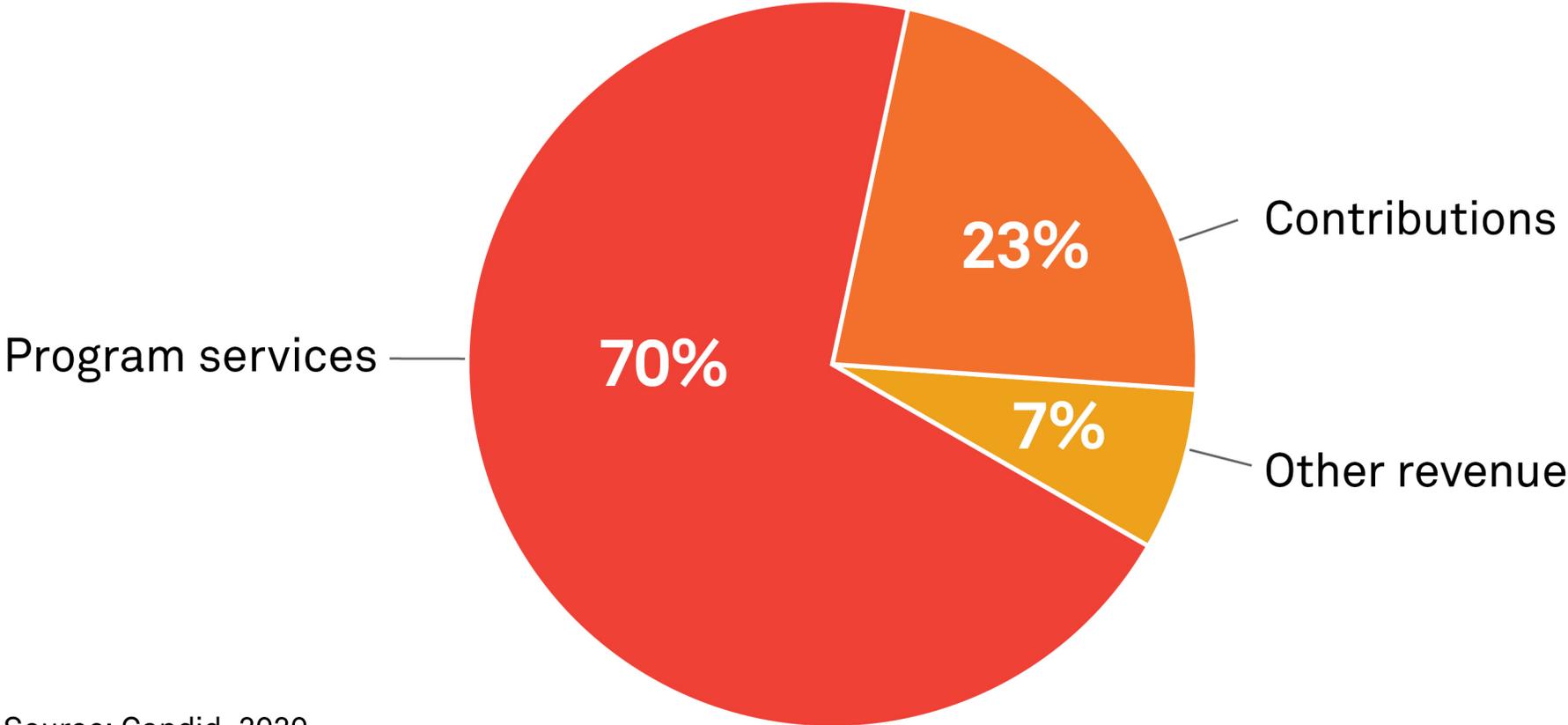


Six steps for developing a fundraising plan

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



Nonprofit revenue

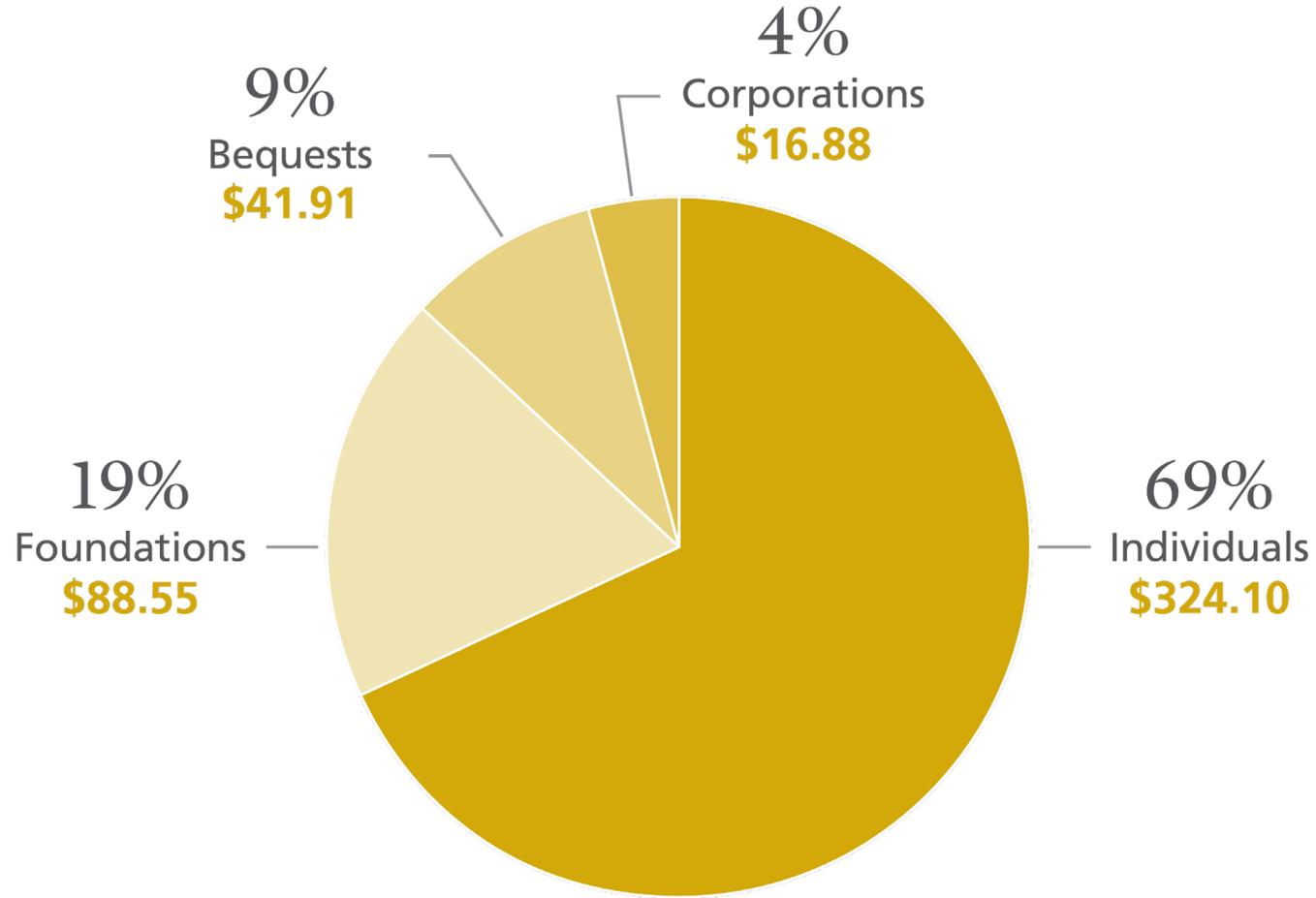


Source: Candid, 2020



2020 contributions: \$471.44 billion by source of contributions

(in billions of dollars - all figures are rounded)



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 – SWOT

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

Case statement activity

Answer the following questions (1 sentence)...



Case statement activity:

1. What are your mission/values?
2. What are your main programs?
3. What have you accomplished?
4. What do you want to do in the future?
5. What kind of budget will you need?



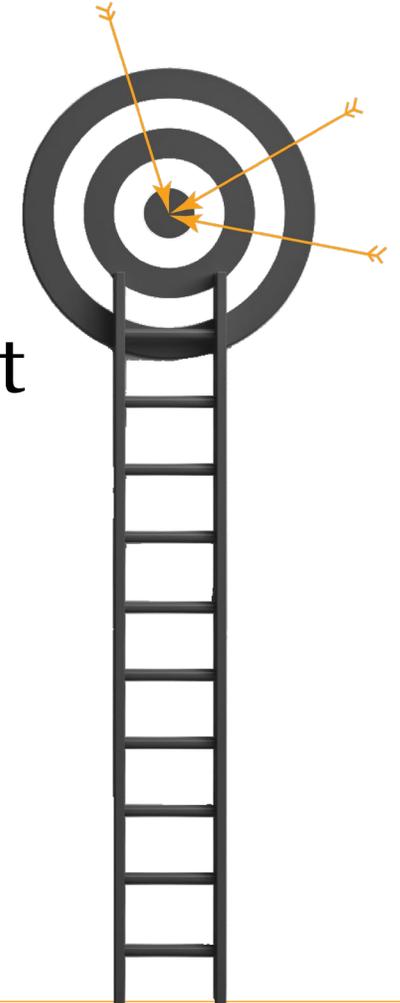
3. Set your goals

Start where you are

Who are your current funding partners?

Who are your largest funders?

Where could you strengthen your funding base?



Creating stability



Creating stability

Which funders could provide you with the most long-term security?

Which additional funders/streams might you be able to add to your funding mix?

How much time and money will it take to secure additional funding partners?

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



Homework

Complete the strategies worksheet



What's next

Live Session

Introduction to Fundraising Planning Part 2

Thursday, May 19

10 AM – 11:30 AM PST

Questions?

Email david.holmes@candid.org

Thank you

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

