CRAFTING AN EFFECTIVE GRASSROOTS FUNDRAISING PLAN
SESSION #1
FRAMING

How this training was developed:
- Research, best practices, experience, learning, feedback, coaching and observations

Individual Experience:
- Doctorate in Education from Pepperdine University
- Background in adult education, refugee agency & international development, leadership development programs, volunteer management and curriculum development
- Director of Nonprofit Learning Lab

30 SECOND CHECK IN: SHARE IN ZOOM GROUP CHAT
WHAT IS A FUNDRAISING SUCCESS YOU HAVE HAD THIS MONTH?

info@nonprofitlearninglab.org

WHAT IS A FUNDRAISING SUCCESS YOU HAVE HAD THIS MONTH?
HOW WE CAN LEARN TOGETHER

Recordings, handouts & slides will be emailed to you

Use the Zoom Group Chat: Questions and comments 🤗

Tech support? Connect with “Tech Support”

Breakout rooms: Reflect, Process, Create & Ideate
LEARNING OBJECTIVES

WHAT WE WILL COVER THIS SESSION:

- How to set fundraising goals
- How to create a fundraising plan that works for your team and capacity
- Understand what goes into a plan based on your goals and capacity
- Review unique attributes of grassroots rural fundraising
- Review how to create a fundraising plan that works
- Review sample templates of fundraising plans from grassroots organizations
- How to fundraise in rural communities
What you want to learn

- Improving morale of volunteers
- Key phrases to ask a potential donor for money
- How to manage with lack of time
- Scripts
- How to approach a donor
- How to get comfortable with asking for donations
- How to fundraise when we don’t know who to ask
- How to build your fundraising list
NOW YOU: DO A QUICK POLL

What is your role in the organization?

- Full time staff member
- Volunteer
- Board Member
- Part-time staff member
HOW TO SET FUNDRAISING GOALS FOR YOUR ORGANIZATION
WHY WE SET GOALS

- Get focused
- Accomplish our mission
- Implement programs
- Provide direction
- Know where team are going
HOW TO SET GOALS

▪ Where are you starting from?
▪ Where do you want to go?

▪ Be realistic:
  • Do you personally have experience with the work and tasks?
  • Do your team members or volunteers that have experience?
  • A plan?
  • A base of donors? Members? Operating procedures to do the tasks
GOOD GOALS ARE SMART

**(Specific)** – Trackable towards an intended result

**(Attainable)** – Should be ambitious and remain within the realm of possibility.

**(Measurable)** – Raised $10,000 or $5,000 not subjective.

**(Relevant)** – The goal should be connected to the overall mission and vision of the organization.

**(Time-Based)** – Have a deadline.
EXAMPLE GOALS

▪ Build a seven-person fundraising committee to support our fundraising goals

▪ Write out donor call scripts to use for year end campaign

▪ Have all board members and fundraising committee members review and give input of the fundraising plan by deadline

▪ Raise $2,500 for year end campaign
KNOW WHAT IS ACHIEVABLE

To understand what you can achieve reflect on:

- Knowledge and comfort level in completing the task
- Have you done the task before?
- Time you have to dedicate to the tasks
- Realistic deadline to achieve the goals
- Resources to commit (volunteers, committees, interns, employees,
How do you develop goals in your organization? SELECT ALL THAT APPLY

- At the start of the year
- Through our strategic plan
- At meetings when the topic arises
- Not sure to be honest
HOW TO CREATE A FUNDRAISING PLAN THAT WORKS FOR YOUR TEAM AND CAPACITY
A PLAN

Serves as a roadmap to help organizations achieve fundraising goals.

Keep focus and avoid distractions.

Creation of a fundraising plan creates ownership & accountability among the team.

Fundraising doesn’t happen without implementation by a team that is committed.

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REFLECT ON YOUR GOALS WHEN CREATING YOUR PLAN

Do the fundraising goals contribute to your mission and vision?

Does the fundraising goal relate to your yearly strategy?

What is the return on investment in terms of impact?
WHO TO INVOLVE IN A PLAN

STAFF THAT WILL IMPLEMENT THE PLAN

BOARD MEMBERS

VOLUNTEER COMMITTEES

ADDITIONAL VOLUNTEERS
WORKING TOGETHER: STAFF AND BOARD MEMBERS

- Plan developed by staff or volunteers & board approves
- Fundraising committee (if you have one)
- Create avenues of input: meetings & file share
- Collaborative process increases awareness of fundraising needs
WHAT GOES IN A FUNDRAISING PLAN: FUNDRAISING TECHNIQUES THAT ALIGN WITH YOUR GOALS AND CAPACITY
NOW YOU: DO A QUICK POLL

What is your people power capacity? SELECT ALL THAT APPLY

- We have paid staff (3+ or more)
- We have limited part time staff
- We have active committees led by volunteers
- We have an active board of directors that give of their time and talents
- We feel a bit tapped out right now
Fundraising Fundamentals

• Donor Identification and research: Who will you ask and what will you ask for?
• Cultivation. Building relationships, engaging the prospect and preparing to make the ask.
• Solicitation: Make the ask.
• Stewardship: Recognize and continue to engage donors.
## FUNDRAISING SOURCES

<table>
<thead>
<tr>
<th>Individual Donations</th>
<th>Endowment Campaign</th>
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<tbody>
<tr>
<td>End of the Year Campaign</td>
<td>Annual Donors</td>
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<td>Planned Giving</td>
<td>Major Gift Donors</td>
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<td>Capital Campaign</td>
<td>Board Giving</td>
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<td>Member Dues</td>
<td>Events</td>
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<td>Corporate Sponsors</td>
<td>Foundation Funding</td>
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<td>Government Grants</td>
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Fundraising Strategies

- Individual Donor Cultivation: Referrals & current lists
- Monthly Donors: $5-$10/month & a method to give monthly
- Giving Tuesday & End of Year Campaign: Plan of action and support to implement campaigns
- Major Gift Donors: Capacity to give and cultivation
- Board Giving: Give or Get Required
- Community Events: Advance planning, theme and people to attend
# FUNDRAISING STRATEGIES

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Nonprofits with large email list and social following</th>
<th>Large donor base</th>
<th>donors with capacity &amp; affinity</th>
<th>Large donor base</th>
<th>Specific purpose</th>
<th>A large team</th>
<th>A large team</th>
<th>Requires proof of impact and grant writer</th>
<th>Depends on fit</th>
<th>Takes time to cultivate but do-able!</th>
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<tbody>
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<td>Giving Tuesday</td>
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NOW YOU: DO A QUICK POLL

What fundraising strategies make the most sense for your organization? THAT APPLY

- Community Events
- Individual Donor Cultivation
- Giving Tuesday and End of Year
- Member Dues
- Corporate Sponsors
- Monthly Donors
Responsive Fundraising: The Donor-Centric Framework Helping Today’s Leading Nonprofits Grow Giving

Responsive Fundraising
Gabe Cooper and McKenna Bailey

Fundraising Principles and Practice
Adrian Sargeant, Jen Shang, and Associates

Fundraising for Social Change
Kim Klein

The Ask
Laura Fredricks, JD

Achieving Excellence in Fundraising
Editors: Genevieve G. Shaker, Eugene R. Tempel, Sarah K. Nathan, Bill Stanczykiewicz

Nonprofit Fundraising 101
A Practical Guide
Editors: Genevieve G. Shaker, Eugene R. Tempel, Sarah K. Nathan, Bill Stanczykiewicz

Achieving Excellence in Fundraising
Editors: Eugene R. Tempel, Timothy L. Seiler, Dwight F. Burlingame

Winning Grants Step by Step
The Complete Workbook for Planning, Developing, and Writing Successful Proposals
Editors: Tori O’Neal-McElrath, Lynn Kanter, Lynn English

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How does your organization set goals? What fundraising strategies discussed seem most feasible given your organization’s capacity? How does your leadership team approach approach the fundraising planning process?
FUNDRAISING IN RURAL COMMUNITIES AND IN GRASSROOTS ORGANIZATIONS

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RURAL COMMUNITY FUNDRAISING

- Distance: Physical geography can impact ability to gather
- Sense of urgency & community need: How do you demonstrate the importance of your work to the community?
- Rural communities have a strong sense of place: How do you connect place to your mission?
RURAL COMMUNITY FUNDRAISING

- **Small population**: Many connections which means relationships matter and can be more complex than we realize.

- **History of resource extraction**: Connection to your mission and impact on people’s daily life.

- **Part-time residents**: Limited availability but may be take on honorary roles if asked.
RURAL COMMUNITY FUNDRAISING

Relationship building takes time:

- People are busy or unavailable seasonally
- Unable to travel easily at certain times of the year.
- Expect multiple meetings with a prospect.
- Use initial meetings simply to seek advice, guidance, and feedback.
RURAL COMMUNITY FUNDRAISING

Advisory Councils or Giving Circles

- Cultivate part-time residents with businesses and philanthropic experiences
- Make membership in the group prestigious, exclusive
- Time limited to appeal to those who have valuable experience but little capacity to participate
RURAL COMMUNITY FUNDRAISING

Honor and respect need for privacy:

- Relationship are interconnected in rural communities and asks may occur without your knowledge nor are they always disclosed.

- Meet one-on-one with knowledgeable individuals who are willing to provide confidential feedback and perspective.
NOW YOU: DO A QUICK POLL

Which factors do you identify with in doing fundraising and relationship building? SELECT ALL THAT APPLY.

- Geography and distance
- Our community has a strong sense of place
- History of resource extraction
- Smaller population
- Urgency to make mission connect to community immediate
Questions to explore with your team

- What are the different racial, cultural or ethnic groups in our area?
- For these groups, what is the culture around giving? Giving time, skills and ideas? Do you organize in alignment with the groups?
- What are the common perceptions about who has money in your community?
Questions to explore with your team

- Are there people who have moved out that still feel connected?
- Who naturally has an affinity to your organization?
- Are there volunteers in your organization that have deeper connections to the community that are better able to answer these questions?
Questions to explore with your team

What are the resources we need to support our work, besides just money?

Who are our constituents, and are they donors?

Who shares are values? Which organizations in our county? Community leaders? Companies?
Can you find a screenshot of a Zoom breakout room?
NOW YOU: HEAD TO BREAK OUT

Name

Role & Organization

What are the unique attributes of your organization and how does impact fundraising? What are the resources that you need to support your work? What information related rural community fundraising did you find relevant? How can you take that information and better plan with your team?

9 Minutes

Scribe & Leader

Please be on camera
CREATING A FUNDRAISING PLAN THAT WORKS
NOW YOU: DO A QUICK POLL

The fundraising goals that we have developed...

SELECT ALL THAT APPLY

• Align with our expertise and capacity
• We may still need to develop some goals
• Connect to our current donor base
• Are stretch goals
• Totally unrealistic and I did not set them
FUNDRAISING PLAN

All fundraising strategies require a plan of action!

Fundraising plan serves as a roadmap

What do you include in your plan?

You choose the right strategy
KEY STEPS BEFORE YOU CREATE YOUR PLAN

- Identify challenges: Unsure of?
- Identify successes: Great at?
- What fundraising strategies do you want to explore?
- Where else are your donors contributing?
- Organizational goals for the year?
- Financial projections?
- What is your capacity?
WHAT TO INCLUDE IN THE PLAN

- Fundraising strategies
- Timelines
- Financial goals
- Tasks needed to accomplish to achieve fundraising goals
- Role of executive staff
- Role of board members
- Role of key volunteers
- Fundraising pyramid
- List of potential donors
BUILD YOUR PLAN

Get your plan on paper

Once you have a working plan, continue to brainstorm ways to build your donor base, increase donations and touch points.
Reminders

➢ Don’t compare your organization to an organization with more capacity, staff or that has different circumstances

➢ Fundraising is hard work. Raising funds doesn’t happen without a plan, cultivation and working towards your goals.
Assess

- What is your staff capacity?
- What are your volunteers’ capacity?
- What is the experience of the people involved in your organization?
NOW YOU: DO A QUICK POLL

Who is currently involved in leading or supporting the fundraising plan?
SELECT ALL THAT APPLY

- Staff
- Volunteers
- Committee Members
- Board Members
SAMPLE FUNDRAISING TEMPLATES
FUNDRAISING TEMPLATES

- Create your template as an online document
- Share it so leadership is involved and gives input
- Google Sheets: Keep it simple
- Sample template will be emailed to you
- Monetary goals have to be realistic
- Financial goals added together should be total revenue goals
Activity: Annual Garden Party

Goal: $75,000, 175 guests, 25 new donors

Audience: Prospects (25%), all donor in database with 3+ gifts ~1,000

Strategies: Email invitation, board required to sell 5 tickets, board and leadership committee to past donor with giving history of 5+ gifts or $1000

Timeframe: June – August

Cost: Board member donates venue and supplies. $5,000 for cleaning, valet and event staff

Notes: important but keep brief

% of goal reached: input after activity completed
# Sample Template

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Expenses</th>
<th>Income</th>
<th>Point Person</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Garden Party</td>
<td>$1,000</td>
<td>$15,000</td>
<td>Fundraising Committee</td>
<td>Volunteer led effort Summer event don’t schedule anything within 7 days of this event</td>
</tr>
<tr>
<td>Member Dues</td>
<td>$1000</td>
<td>$5,000</td>
<td>Staff</td>
<td>Direct mail once a year and giving platform</td>
</tr>
</tbody>
</table>
## Sample Revenue Plan for a Real Organization

<table>
<thead>
<tr>
<th>Revenue Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundations</td>
<td>$10,000</td>
</tr>
<tr>
<td>Individual Donors</td>
<td>$5,000</td>
</tr>
<tr>
<td>Silent Auction</td>
<td>$5,000</td>
</tr>
<tr>
<td>Tickets and Registration</td>
<td>$10,000</td>
</tr>
<tr>
<td>Corporate Sponsorships</td>
<td>$25,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$55,000</strong></td>
</tr>
</tbody>
</table>
Strategies to Achieve Fundraising Plan

- Identify target list of potential corporate sponsors and grants that align with our mission
- Assign board members to be liaisons to target organizations based on their network
- Develop “touch plan” to provide structure for how and when to reach out to potential sources of funding
Strategies to Achieve Fundraising Plan

Identify additional board members with a broad range of experience in areas that are relevant to ABC’s mission.

➢ Identify and recruit a parent to the Board
➢ Identify and recruit someone who is active in the sports community to the Board
➢ Identify and recruit someone with fundraising experience to the Board
➢ Identify presentation opportunities or partners that will reach targeted audiences.
HOW TO ORGANIZE YOUR TIME TO ACHIEVE YOUR GOALS
HOW ARE YOU SPENDING YOUR TIME?

Managing board members → Working with existing major donors → Grant funding support

Individual giving manager → Event planner → Database manager → Director of stewardship

Public relations director → Social media manager → Webmaster → ahhhh
NOW YOU: DO A QUICK POLL

Which development tasks do you do as part of your role: SELECT ALL THAT APPLY

- Manage board members and/or major donors
- Website
- Social Media
- Event planning
- Individual giving, monthly giving and year end campaigns
- Grants
HOW TO ORGANIZE TIME TO RAISE MONEY

- Break down large projects into small tasks
- Have a plan to get you focused
- Tasks that you do on a weekly basis should be in the plan

- Prioritize to-do list
- One task at a time
- Delegate tasks among your team
- Bigger tasks first
QUESTIONS?

ASK AWAY!

CLOSING TIME

• What is one thing you learned today that you will try to implement?

Share in Zoom Group Chat
Thank you

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