



# How to Build a Fundraising Plan

Rachael McDavid | June 10, 2024



# Indigenous Land Acknowledgement

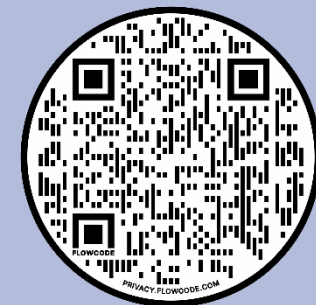
- We respectfully acknowledge that we live and work in territories where indigenous nations and tribal groups are traditional stewards of the land. Our California office resides in Tongva territory.
- Please join us in supporting efforts to affirm tribal sovereignty across what is now known as California and in displaying respect, honor, and gratitude for all indigenous people.

## Whose land are you on?

Option 1: Text your ZIP code to 1-907-312-5085

Option 2: Enter your location at [Native Land CA](#)

Option 3: Access Native Land website via QR Code



# Community Agreements

- Be present and be an active listener.
- Remember: One mic, one voice.
- Practice inclusivity.
- Honor pronouns and gender identity.
- Show respect. (This may look different for each person.)
- Allow conflicting perspectives to exist.
- Assume best intentions.
- Take space, make space.
- Share what you are comfortable sharing.
- Protect individual privacy.
- Practice self-care.
- Encourage growth of self and for others.
- Support resource sharing.



# Rachael McDavid

Rachael McDavid is a senior program manager with Advocates for Human Potential, Inc. (AHP) and a Grantee Coach with PWI/EPOC. She holds a master's degree in organization development and has over 15 years of nonprofit management experience. One of her career highlights was leading a capital campaign for a private school in Tampico, Mexico.



# Objectives

- Understand the benefit of creating a fundraising plan.
- See how a fundraising plan plays a larger role in the organization.
- Familiarize yourself with the steps to creating a fundraising plan.
- Learn how to create accountability for a fundraising team.
- Receive an electronic version of a Fundraising Plan Workbook.





# Follow Up from Learning Collaborative

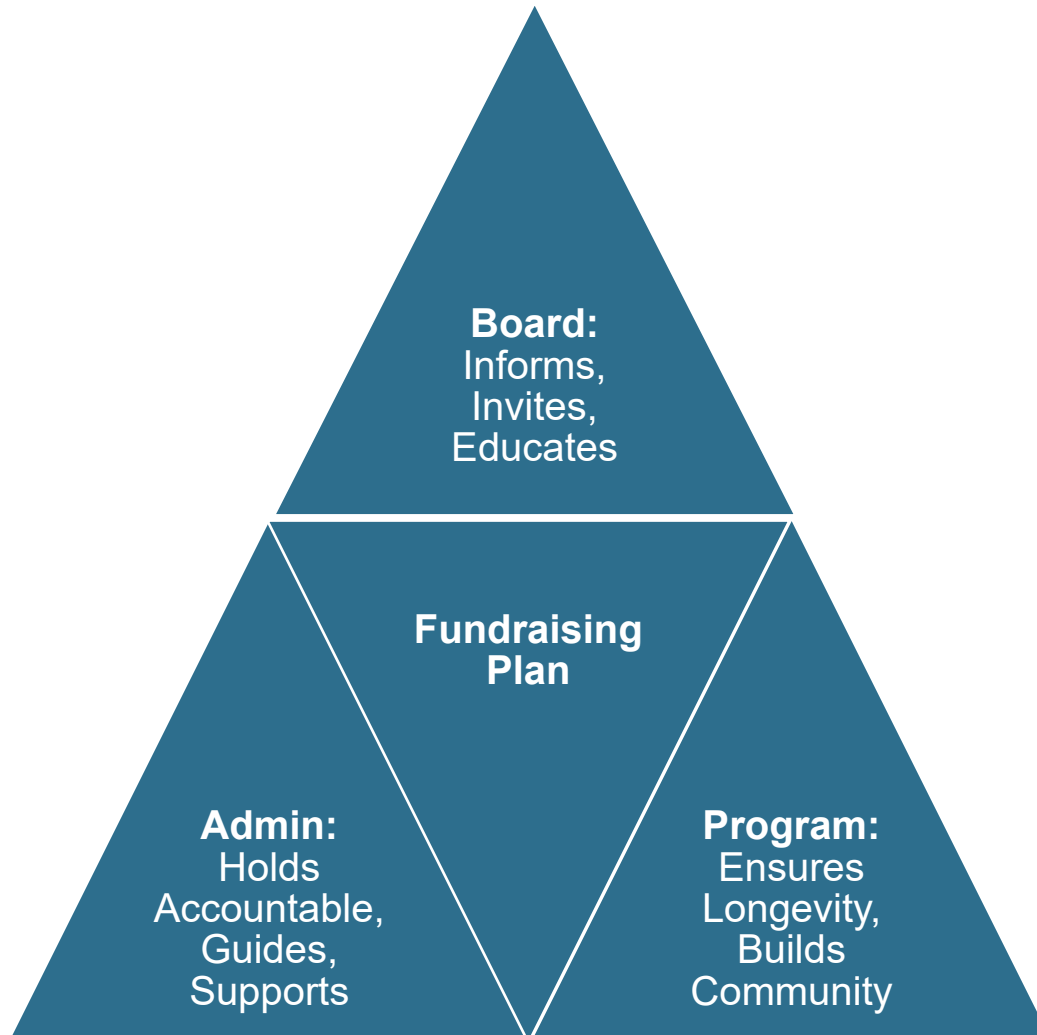
- Recap from Fund Development Learning Collaborative, 1/31/24:
  - ✓ Gain an understanding of the different forms of fund development and effective practices for each.
  - ✓ Identify areas of growth for your organization's fund development toward the long-term goal of peer program sustainability.
- Please share:
  - ☐ What steps, if any, have you taken since the Fund Development Learning Collaborative?
  - ☐ In what areas do you need more guidance or resources?

# Benefits of a Fundraising Plan

- Identifies pathway to becoming financially sustainable.
- Supports open communication and accountability.
- Allows for assessment and evaluation of donor relations.
- Informs the board of needed activities and areas for involvement.
- Creates clear collaboration with marketing.
- Brings peace of mind for leadership.



# Fundraising Plan's Role in Organization





# Steps to a Fundraising Plan

1. Set a goal.
2. Determine activities.
3. Conduct an environmental scan.
4. Review targeted donor demographics.
5. Match donors to strategy.
6. Create a development calendar.
7. Assess your organization's resources.
8. Manage the plan.
9. Create an action plan.



# Set a Goal

- Your fundraising goal should be determined by your budget.
- Ensure your budget is balanced or netting income.
- Consider increasing your goal to support a reserve (recommended: 3 months).
- Be realistic, with consideration of previous years.
- Create buy-in with the board and team.



# Determine Activities

Individual/Corporate Donors

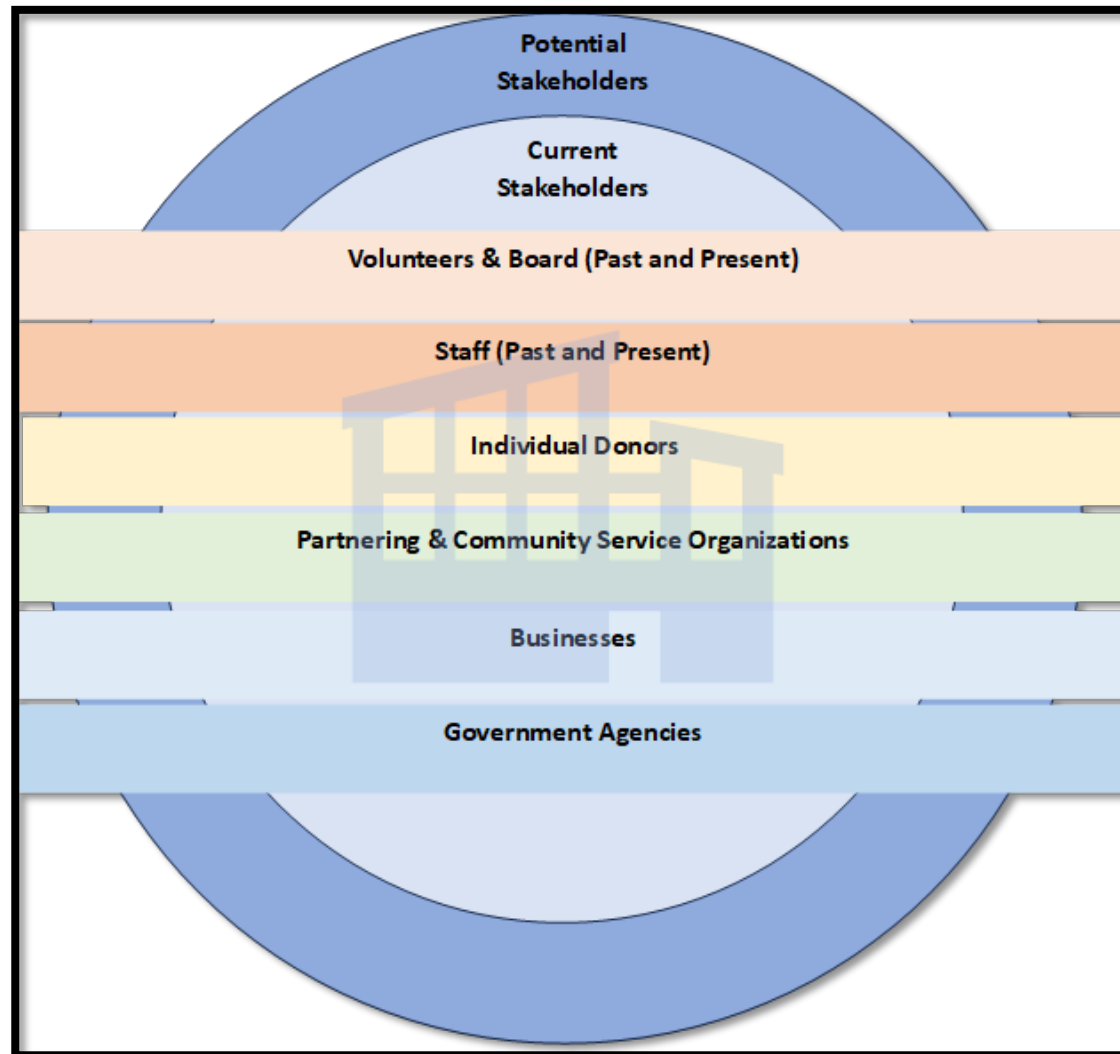
Grants

Campaign

Events

Other

# Conduct a Stakeholder Environmental Scan



# Review Targeted Donor Demographics

Generation	Need for Connection	Resources	Best Outreach Methods
<b>The Lost Generation</b> 1883-1910	Retired. May be living alone or with family.	May have time to volunteer and be financially stable enough to give.	Mailings, phone
<b>The Greatest Generation</b> 1901-1927	Retired. May be living alone or with family.	May have time to volunteer and be financially stable enough to give.	Mailings, phone
<b>The Silent Generation</b> 1928-1945	May be working, living alone or with family.	May have time to volunteer and be financially stable enough to give.	Mailings, phone
<b>Baby Boomers</b> 1946-1964	May be working, children may be living at home.	May not have time due to family, may be financially stable but supporting children.	Facebook, mailings, phone
<b>Generation X</b> 1965-1980	Most likely working, caring for children.	Likely does not have time to volunteer, may be financially stable.	Social media, email
<b>Millennials</b> 1981-1996	Most likely working, in college, and/or caring for children.	Likely does not have time to volunteer, may be financially stable.	Social media, text
<b>Generation Z</b> 1997-2010	Most likely in school, starting career, has strong friendship ties.	Less likely to be financially stable, less likely to have time to give unless it supports their career goals.	Social media, text



# Match Donors to Strategy

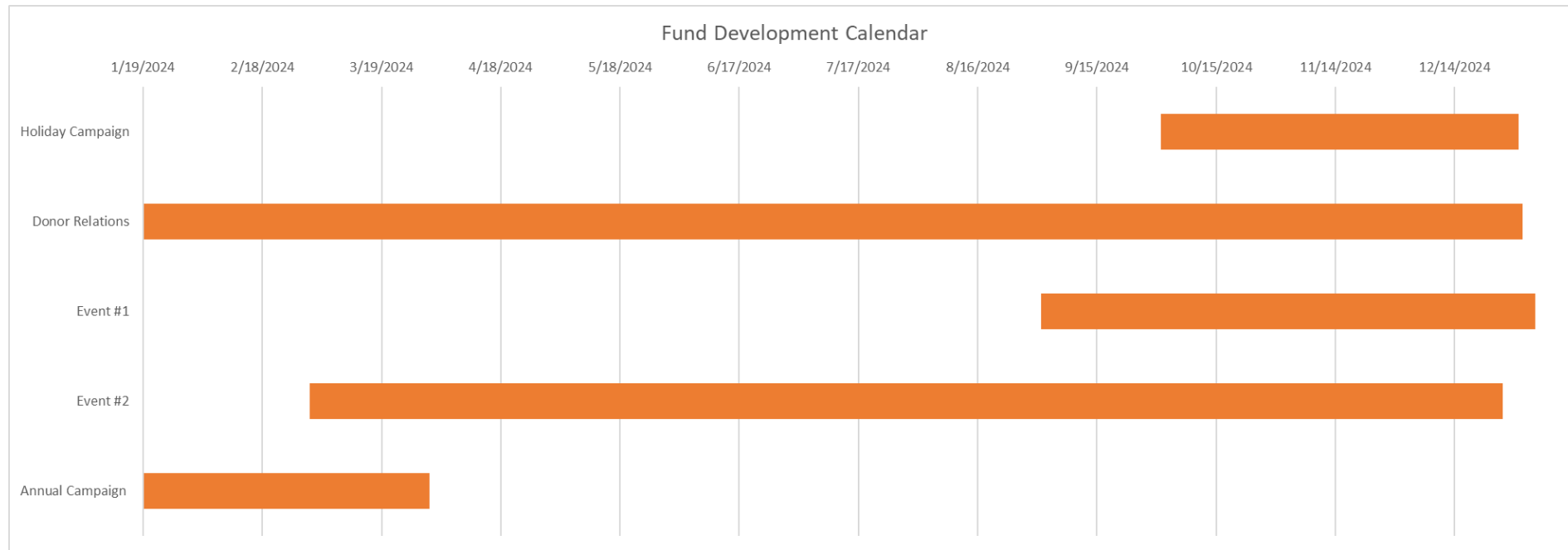
1. Based on goal and chosen activity, determine # of donors per level.
2. Review list of current and potential donors.
3. Identify which donors could fit each level.
4. Create a donor prospect list for each board/staff member to make the ask.

Level	# of Prospects	# of Donors	Total
\$25-\$100	60	30	\$ 1,600.00
\$100-\$200	48	24	\$ 2,400.00
\$200-\$500	32	16	\$ 5,000.00
\$500-\$1,000	24	12	\$ 6,000.00
\$1,000-\$2,000	16	8	\$ 8,000.00
\$2,500-\$5,000	12	6	\$ 15,000.00
\$5,000-\$10,000	8	4	\$ 20,000.00
\$10,000-\$20,000	4	2	\$ 20,000.00
		Total:	\$ 78,000.00

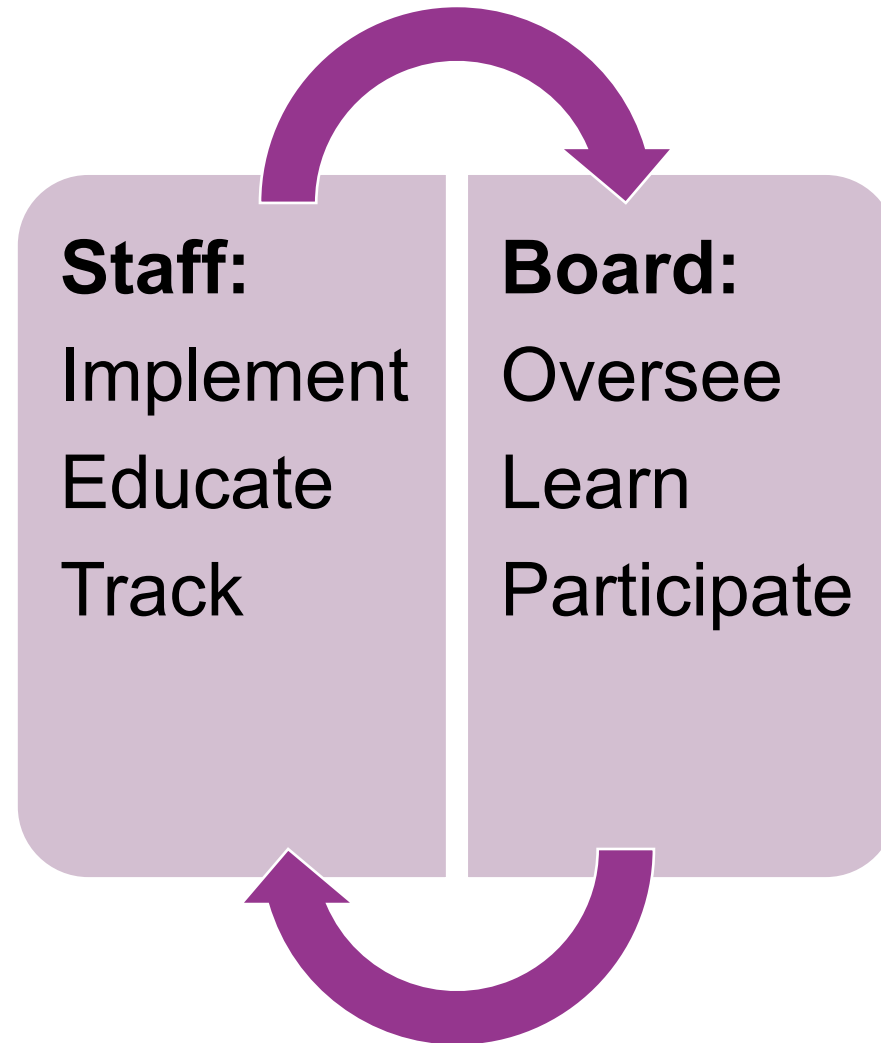
Donor Prospect List						
Solicitor:						
Name	Contact Info	Solicitor	Ask Amount	Previous Gift	Date Contacted	Outcome
			\$ -			
			\$ -			
			\$ -			
			\$ -			
			\$ -			
			\$ -			
			\$ -			
			\$ -			
			\$ -			
		Total:	\$ -			

# Create a Development Calendar

A development calendar reflects when you expect focused activity for your team with fundraising efforts. You want to show which months each fundraising activity will require action. This will help you plan additional activities without overwhelming your staff. An example is provided below.



# Manage the Plan



# Create Accountability Through an Action Plan

Action	By Whom	By When	Resources Needed	Status

# Accountability Beyond the Plan

1. Schedule regular meetings, ideally fundraising committee meetings and internal staff meetings.
2. Allow for learning and growth among staff, board, and volunteers.
3. Keep in mind, board members are volunteers.
4. Identify the go-to staff for fundraising.
5. Encourage calls for support at each level.
6. Model accountability and transparency.
7. Update the board at each board meeting.





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# Q&A





**Please fill out the attendance form and feedback survey in the chat to meet your requirements for today's event!**



**Thank You**