

**Fund Development Plan 101**

**”If You Don’t Know Where You Are Going; You Won’t Get There”**

A Presentation Prepared for DCNP by

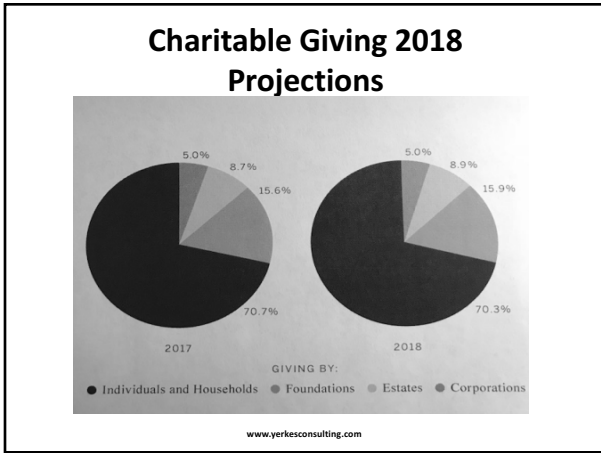
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**Welcome**

- **Why Are You Here?**
- **Does Your Org Have a Strategic Plan?**
- **Does Your Org Have a Fund Development Plan?**
- **What 1 Take Away do you want from the Session?**

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**Projected Giving 2018**

- Total giving is predicted to increase by 3.8% in 2018.
- Giving by American individuals/households is predicted to increase by 3.2% in 2018.
- Giving by foundations is predicted to increase by 6.0% in 2018.

• THE PHILANTHROPY OUTLOOK 2017 & 2018

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**Projected Giving 2018**

- Giving by estates is predicted to increase by 5.2% in 2018.
- Giving by corporations is predicted to increase by 2.7% in 2018.
- Giving to education is predicted to increase by 6.0% in 2018
- Giving to health is predicted to increase by 7.9% in 2018

The Philanthropy Outlook 2017 & 2018

**DeKalb County Non-profit Study\***

- Single greatest concern?
  - 42.9% said, “acquiring new donors”
  - 30.3% said, “obtaining funding in general”
- 88% consider their Board of Directors to be a strong asset
- 69.2% rate their Board average or above average in terms of fundraising performance
- 70.4% of organizations have no “give or get”

DeKalb County Nonprofit Study expected to be published in early 2018

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### The Topic Big Questions

- Why does our NPO need a fund development plan?
- What are essential elements of a plan?
- What role does the board, staff and others play in developing the plan?
- Why do we need to evaluate our fundraising efforts, success and plan progress?
- What are org challenges in plan development?

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### Fund Development

- Fund development makes philanthropy possible by bringing together a particular cause and the prospects and donors who are willing to invest in the cause. The goal is to acquire donors of time and money who stay with the charity. This is done through the process of relationship building.

• (From *Keep Your Donors: The Guide to Better Communications and Stronger Relationships.*)

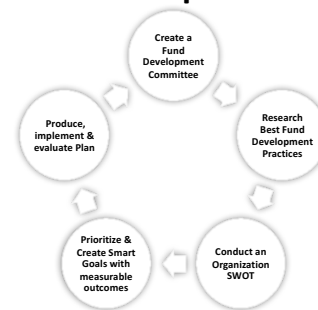
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### Why Plan?

- Limit crisis fundraising
- Diversity builds in flexibility
- Planning for diversity brings in more opportunities
- Increase board & volunteer involvement
- Integrate fund development with other program activities & plans
- Most productive use of everyone's time & \$

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### Fund Development Process Mission Top of Mind



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### Mission

Investments in effective fundraising strategies should be made not despite our need to fund our missions and work, but because of it.

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### Where To Start

- Create a Fund Development Committee
  - Board Members
  - Staff
  - Donors or community members
- Committee Reviews
  - Current Trends & Practices
  - Org Mission in meeting community needs
  - Evaluate success & costs of past activities & projects
  - Review Sample Plans

### Conduct a SWOT

- Evaluating your organizational strengths, weaknesses, and capacity for fundraising is a great place to start with pre-planning.
- Sometimes the simple exercise of collecting and analyzing information can reveal areas where attention is needed.
- What has worked, not worked and ROI.

### Creating S.M.A.R.T. Goals

- Specific
- Measurable
- Attainable
- Realistic
- Timely
- **Who:** Who is involved?
- **What:** What do I want to accomplish?
- **Where:** Identify a location.
- **When:** Establish a time frame.
- **Which:** Identify requirements and constraints.
- **Why:** Specific reasons, purpose or benefits of accomplishing the goal.

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### Smart Goals with Measureable Outcomes

- Specific fundraising goals for your organization
- Projected Cost for ROI
- Your top fundraising strategies for the year
- Your top marketing strategies for the year
- Simple Case for Support
- Customized monthly checklist to stay on track
- Work plans for each strategy
- Assign Board & Staff Leadership Roles & Tasks

### Implement & Evaluate Plan

- Using the Calendar
  - Assigning responsibilities & dates
  - Integrating program calendar and plans
- Track each month's actual revenue to goals  
What adjustments are called for?  
Closing the loop and continuing the process

### Implement & Evaluate Plan

- What new opportunities have appeared?
  - New programmatic initiatives
  - New funding sources available
- Laying the basis for next year's plan
  - Closing the loop and continuing the process
  - Review ROI

### Common Challenges

- Volunteers and staff do not value process.
- Staff does not enable volunteers well.
- Staff does not want volunteers involved in questioning and decision-making.
- Staff perceives they do not have time.
- Board would rather hear information and react to recommendations. Reluctance to ask the cage-rattling questions.

### Take Home Tips

- Fund development is not a quick fix.
  - It is a long-term, system wide activity.
- What can you do now to enhance your fund development program?
  - What do you have to do today to make sure that your addressing future issues and preparing for the future?
- What do you have to do in the future to make future changes?

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- **Make sure this is a plan for today's realities and tomorrow's probabilities**

• Simone P. Joyaux, ACFRE, Joyaux Associates, RI, USA

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**“Board & Fund Development,  
Collaborative Planning,  
Presentations and Outcomes Assessment ”**

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