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# Building A Fundraising Plan

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CONNOR YAKAITIS - JUNE 27TH 2024



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# Why do we need a fundraising plan?

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# Why do we need a fundraising plan?

- Provides measurable goals to track throughout the year
  - Serves as the rationale for the budget
  - Annual part of the broader strategic plan
  - Sets a timeline to achieve goals
  - Identifies areas of strength and room for growth
  - Assigns roles within the organization - everyone plays a role in fundraising!!!
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# Who is our audience?

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- Fundraising plans should largely be internal documents
  - Guiding document for staff, especially Executive Director and fundraising staff
  - Should be shared with the board and created with board input (esp. Development Committee)
  - You can also seek input from a few top donors (major donors love insider access)
  - You should share parts of the plan with institutional funders to show how their grant will play a role in the broader mission of your organization
  - Communicate the goals of your plan with donors (your gift today helps achieve A, B & C)
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## Components of a Fundraising Plan

- Narrative (2-3 pages)
  - Mission
  - Goals
  - Resources
  - Timeline
- Table of Gifts
- Budget



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# Mission

- Every organization must have a mission statement
  - Mission statements should be made and approved by the board
  - Begin your narrative with the mission statement and build off of it
  - Your mission is what you are “selling” to donors
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# Goals & Objectives

- How will we achieve our mission?
- Start broadly with 2-3 big goals
- Each goal should have a number of objectives to achieve success

Example:

Mission - Ensure clean waterways in our community.

Goals - Increase public awareness on health of waterways & secure funding to keep them clean

Objectives - Host community education events and river cleanups & campaign city council to take action

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# Resources

- Outline current staff & roles - how will they achieve the goals set out?
  - What role will the board play?
  - What staff/resources do we not currently have that is needed?
  - What is our current donor/support base look like?
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# Table of Gifts

- This can help create your budget
  - Identify ALL current donors at each level (major, middle and low) and have a separate table for each
  - Identify how many new donors are needed at each level to achieve goal
  - Rule of 3 - If we need one \$1,000 donor, we should identify at least three prospects
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# Sample Table of Gifts

- Fundraising Goal: \$10,000

1 Donor	\$5,000
2 Donors	\$2,000
5 Donors	\$200

\$5,000	Prospect 1	Prospect 2	Prospect 3
\$2,000	Donor 1	Prospect 2	Prospect 3
\$2,000	Donor 2	Prospect 4	Prospect 5
\$500	Donor 1	Prospect 3	Prospect 8
\$500	Donor 2	Prospect 4	Prospect 9
\$500	Donor 3	Prospect 5	Prospect 10
\$500	Prospect 1	Prospect 6	Prospect 11
\$500	Prospect 2	Prospect 7	Prospect 12



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# Budget

- Drafted by Executive Director with input from Development staff
  - Identify main sources of income
    - Grants
    - Major Donors
    - Middle - Low Donors
    - Board giving
    - Events
  - Budget is then submitted to board for approval (fiduciary responsibility!)
  - Annual budget is almost ALWAYS required when applying for a grant
  - Be sure to review budget throughout the year and make adjustments to projections as needed
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# Questions?

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