Chapter Fundraising Plan

1. **The Goal**

The best starting point for your plan is with the end point in mind: what is your overall fundraising goal? (Even better: what is your overall fundraising goal for this year, and for each of the next four years?). This number should not be drawn out of thin air. It should be based on the needs of the organization. How much money will your Chapter need to raise in order to carry out the activities that you want to carry out?

2. **The Mission / Your Message**

If the goal answers the question, “How much money do you need?” then the mission answers the question, “Why do you need it?” What is your organization’s mission? What do you plan to do with the money you raise? What is your operating budget, and why is it the amount it is?

3. **The Tactics**

Once you know how much you need to raise and why you need to raise it, you need to figure out how you are going to raise the full amount. What tactics will you use to raise your goal amount this year? Next year? The year after? Go into detail here, and figure out a goal for each of the tactics that adds up to your total goal. (For example, if you need to raise $5,000 you may say that you will raise $3,000 through a major donor group and $2,000 through an event). Some common tactics include:

1. Individual Giving – Asking major donors to make gifts to your organization.

2. Major Donor Groups – May include board giving, a finance or development committee, etc.

3. Events – Both large and small.

4. Direct Mail

5. Online and E-Giving

7. Grants – Foundations, Corporate, Government

8. Corporate Giving Programs

9. United Way Fundraising

10. Minor Donor Groups – Yes, they do exist!

11. Participatory Fundraising – Like walk-a-thons and chili cook-offs

12. Annual Giving and Multi-Year Giving Campaign

When it comes to tactics, there are no shortage of ways to raise money, only a limited amount of staff and volunteer resources to implement your ideas. Try to include a good mix of fundraising tactics, and be willing to nix ideas that end up not working, and make up the lost revenue elsewhere.

**Step 1: Gather the Numbers**

1. What are your projected total expenses for the coming year?.................................$\_\_\_\_\_\_\_\_\_\_\_
2. How much income, in total, is already committed

toward your expenses? (Include only support that is already

promised – Individual donor pledges that have been made as

well as government, corporate or foundation grants that you are assured of……… $\_\_\_\_\_\_\_\_\_\_\_

1. Subtract “B” from “A” for total amount to be raised ……………………………………………$\_\_\_\_\_\_\_\_\_\_\_
2. Fill out the following chart with your results from last year’s fundraising activities, your current year-to-date figures, and projections for the coming year. There will likely be some parts of the chart that you’ll leave blank at this stage in your planning process until you’ve completed more of this worksheet and can come back to them. The “sources” listed are examples only. Add ones that are relevant to your organization, such as house parties, online appeals etc. In the “expense” column for each activity, include in the cost of raising the money not only materials and other expenses but also staff and volunteer time.

Fundraising activities, current year-to-date figures, and projections for the coming year:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **SOURCE** | **LAST YEAR’S INCOME** | **LAST YEAR’S EXPENSE** | **CURRENT YEAR’S INCOME** | **CURRENT YEARS EXPENSE** | **NEXT YEAR’S INCOME** | **NEXT YEARS EXPENSE** |
| **Individual donors** |  |  |  |  |  |  |
| **Total** |  |  |  |  |  |  |
| * Membership dues |  |  |  |  |  |  |
| * Events |  |  |  |  |  |  |
| * Major gifts |  |  |  |  |  |  |
| * Mail solicitation |  |  |  |  |  |  |
| * Other |  |  |  |  |  |  |
| **Other sources:** |  |  |  |  |  |  |
| * Government |  |  |  |  |  |  |
| * Foundations |  |  |  |  |  |  |
| * Corporations |  |  |  |  |  |  |
| **TOTALS** |  |  |  |  |  |  |

**Step 2: Analyze Past Fundraising Efforts**   
(Use separate sheets of paper for the following questions for each SOURCE.)

* For each SOURCE of income, note briefly what has worked well to bring in money that you want to do again
* What hasn’t worked? How can you improve or modify these strategies to make them work?
* What are new opportunities coming up that you want to take advantage of, such as a special anniversary, a large organizing campaign, a new executive director?

**Step 3: Determine Your Available Resources**

Resources for fundraising include the people who will be involved in carrying out various fundraising tasks as well as money you’ll need to spend on staff time and materials. The expenses were included in Step 1. The following chart will help you brainstorm who you can recruit to your fundraising team.

|  |  |  |
| --- | --- | --- |
| **WHO?** | **HOW MANY?** | **WHAT COULD THEY DO?** |
| Board members |  |  |
| Staff |  |  |
| Volunteers (including former board and staff, members, supporters) |  |  |
| Who else? |  |  |
|  |  |  |
|  |  |  |

**Step 4: Strategies – What will you do?**

Now think about the fundraising strategies you’ll use to build support from individual donors – and in some cases, from small businesses or corporations – from the point of view of getting new donors, renewing current donors and upgrading current donors

**Acquire new donors** – List all the activities you will engage in to bring in new donors, such as direct mail appeals, e-mail outreach, fundraising events and individual donor asks:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Renew current donors** – List the activities you’ll engage in to ask your current supporters to give again. Typically, these include mail appeals, e-mail solicitations and follow up phone calls. They also include personal solicitation for larger gifts. Special events are also activities that donors often come to year after year.

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Upgrade current donors** – Getting donors to consider larger gifts usually requires a more personal approach. The size of a major gift depends on your donor base. For a Chapter with few or no donors, a major gift might be $100. For a Chapter with several hundred donors or more who give varying amounts, $250, $500 or $1,000 may be the threshold for a major gift.

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Step 5: Hammer out the details**

For each fundraising strategy that you plan to use, fill out a separate page with following information:

**Strategy**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Projected Income (gross): $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total cost (use worksheet below): $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Net income: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other goals that this strategy will meet (such as new donors, generate publicity, involve board members in fundraising): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Number of staff and volunteers needed to carry out this strategy: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Expenses to complete this strategy:**

|  |  |  |
| --- | --- | --- |
| **Expense** | **$ Amount** | **Notes** |
| Staff time |  |  |
| Consultant/Services |  |  |
| Design |  |  |
| Printing |  |  |
| Postage |  |  |
| Travel/Transportation |  |  |
| Food |  |  |
| Other: |  |  |
| Other: |  |  |

Activities/Steps to complete this strategy:

|  |  |  |
| --- | --- | --- |
| **Date** | **Task (s)** | **Who** |
|  |  |  |
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**Step 6: Put it all Together**

Finally, you can pull together all your fundraising planning in one chart that will show what fundraising activities you are doing, how much you intend to raise, from who, when, who will do what and how much it will cost. The following worksheet starts with a couple of sample activities to give you an idea of how to fill it out.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **STRATEGY** | **GOALS (DOLLAR AMOUNT AND RESPONSE)** | **TARGET AUDIENCE** | **DESCRIPTION** | **WHEN** | **WHO** | **COST** |
| House Parties (total of 3) | $3,000  45 new donors | Friends and family of board members | Small events in homes of board members (or other supporters) | March, May, October | **Staff**: Help recruit hosts, help create invitations, thank yous, logistical support  **Board:** Host, part, invite own contacts provide refreshments | $200 per party |
| Major Gift Campaign | $20,000 | Current doors,  $100 & up | Personal solicitation: phone or in-person | October 15- November 30 | **Staff:** Prepare materials, identify prospects, draft letter, conduct solicitations  **Board/Volunteers:** Identify prospect, conduct solicitations | *Minimal –* some postage and meeting costs |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| Total Income | $ |  |  |  | Total Expense: | $ |