

# Fundraising and Development for Lake Organizations

# What we'll cover:

- Fundraising v. Development
- The Development plan
- Donor stewardship

“So...you want to raise some money?”

# Initial Questions to Ask

- Who are we?
- For what purpose are we raising funds?
- Who's responsible for raising funds?

# Fundraising v. Development



# What's the difference?

## FUNDRAISING

### Often single event based

- Item sales (baked goods, pizzas, candy)
- Car washes
- Golf outings/Charity Runs
- Individual requests for donations with no plan for future solicitation

### Types of donations

- Generally small
- One-off
- Potentially small ROI
- Quick turn around

## DEVELOPMENT

### Multi-faceted

- Plan-based--Fundraising is only part of the process
- Includes multiple types of events and communication
- Relationship-based
- Long term strategy
- Slower turnaround
- Potentially large ROI
- Potential for multiple, increasing donations

“Can my organization ‘do’ development rather than just fundraise?”

---


**YES!**



# What should you focus on?

---

Several things to consider:

- Organizational capacity
  - Human capacity
  - Financial needs
  - Financial resources
  - Expertise
- 



Two main components to donor development:

---

- Having a plan
  - Building relationships
- 

# The Development Plan

---

# Budget v. Development Plan

## Budget:

- Overall financial plan for organization
- Includes all projected revenue and expenses for organization in a given time period

## Development plan:

- Overall contributed income plan for the organization
- Includes only revenue generated from contributed sources
- Can include non-revenue items like marketing and communications efforts
- Development plan NOT BUILT AROUND BUDGET

# Do's and Don'ts for Development Plans

---

## DO

- Build your plan based around your organization's capabilities
- Include items that are non-revenue generating but support your revenue generating efforts
- Include dates and assignments
- Keep them flexible to accommodate change

## DON'T

- Build your plan based on a budgetary need
- Include non-contributed income activities
- Plan beyond your organization's capabilities

# Building Your Plan

Things to consider:

- Resources
- Time
- History
- Need

# Resources

- Human
  - Staff
  - Board
  - Volunteers
  - Network
- Financial
- Prospects
  - How big is your donor list? Mailing?
  - How connected are your supporters to your organization?
  - Volunteers?

# Time

- How much do you have?
- How much does your staff/board have?
- How much will it take to complete your plan?

# History

- How long have you been soliciting donations? Memberships?
- What types of solicitations have you done?
- How many current donors do you have?
- Board giving?
- Visibility in the community?



# Need

- What are your organizational needs?
  - Project funds?
  - Specific organizational activities?
  - General funds?
  - Volunteers?

“We got the check! Now what...?”

# Donor Stewardship

What is donor stewardship?

*The management, acknowledgement, and recognition of a donor's gift; and the continued communication with the donor on the impact of their gift on your organization and it's work.*

OR

*The key to turning single donations into multiple donations.*

# Donor Stewardship

The stewardship process:

- Accepting and managing a donor's gift
- Thanking the donor for their gift
- Recognizing the donor for their gift
- Reporting to the donor the impact of their gift

# Donor Stewardship

- Accepting and managing a donor's gift
  - Have a process in place to record donor gifts (database, etc.)
  - Record donor contact information completely
  - Donor record system should be one from which you can get information on donor gifts easily

# Donor Stewardship

- Thanking the donor for their gift
  - Thank you letters to donors should go out in a timely manner
  - Whenever possible, they should be hand signed and noted
  - They should include the date and amount of the gift
  - They can double as tax receipts

# Donor Stewardship

- Recognizing the donor for their gift
  - Can include donor recognition in annual reports and newsletters
  - Can keep a list of current donors on organizational website
  - If someone donates to a specific event, they should be recognized at that event
  - Donor wishes regarding their name and information should always be honored

# Donor Stewardship

- Reporting to the donor the impact of their gift
  - Many ways to do this:
    - Direct communication with the donor
    - Periodic newsletters and e-newsletters
    - Donor-only emails from organization
    - Grant and donation reports
    - Annual reports
    - Website updates



Questions?

# Development Plan Examples

Basic

## FUNDRAISING PLAN

Organization \_\_\_\_\_ Year 2013

Strategy	Action Steps	Who	When/How Much
1. New Members Goal:			
2. Member Renewals Goal:			
3. Special Appeals Goal:			
4. Major Donations Goal:			
5. Board Giving Goal:			
6. Events Goal:			
7. Business & Civic Goal:			
8. Foundations Goal:			
9. Government Goal:			
10. Earned Income Goal:			
11. Interest Goal:			
Totals:			

# Development Plan Examples

Advanced

## Fundraising Planning Calendar\*

Organization \_\_\_\_\_ Year \_\_\_\_\_ Total FR goal: \$ \_\_\_\_\_

Action steps by month: *(Include person responsible)*

Fundraising Strategy	Goal (\$/ Description)	Month 1 (Action/Who/By When)	Month 2 (Action/Who/By When)	Month 3 (Action/Who/By When)	Month 4 (Action/Who/By When)	Month 5 (Action/Who/By When)	Month 6 (Action/Who/By When)
1. Membership Renewals							
2. New Members: Individuals							
3. New Members: Business & Civic Groups							
4. Major Donors							
5. Memorial Gifts (i.e. Bequests)							
6. Special Appeals							

