Planning for
Mission Focused Fundraising
Review of Plan Components

• Strategic Plans identify service needs and set direction

• Business Plans identify organizational qualifications and strategies

• Development plans identify how funds will be raised
Why create a development plan?

• Identify HOW strategic plan initiatives will be funded

• Understand opportunities and select options

• Engage board and staff

• Connect the work and the resources in a continuum, creating a culture of fundraising
Essential Development Plan Components

• Revenue plan by sector
• Development activities
• Donor recognition and communication
• Action item assignments and timeline
Tying Action to Mission

• State your organization’s mission

• Executive Directors: Name one thing you did today to help meet the mission

• Board Members: Name one thing you did this month to meet the mission
Getting to Action Plans

Strategic Plan
- Mission
- Goals
- Strategies
- Strategic Action Plan

Fund Development Plan
- Fund Needs
- Sources
- FR Activities
- Funding Action Plan
Mission

To sustain a viable, fiscally responsible organization that serves our region with recreation and enrichment opportunities.
Goal

Increase offerings through partnerships and improved collaborations
Strategy

Increase access to natural resources
Strategic Action Plan

• Hold Board work session to develop outline of issues and desirable sites for public access
• Engage appropriate property owners and managers, and potential partners
• Initiate semi-annual summits
• Negotiate and enter into appropriate agreements
Funding Needs (year one)

• 42 hours of existing staff time
• $4,000 for facilitator, rooms and refreshments
Revenue Sources

• Unrestricted funds from individual donors
Fundraising Activities

• Mail campaign
Funding Action Plan

- Develop compelling story and language for campaign focus
- Identify potential donors and develop campaign appeal materials
- Prepare and send mail requests for funding
- Send electronic follow-up reminder
- Make follow-up calls
# Strategic Action Plan

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Timeline</th>
<th>Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hold Board work session to develop outline of issues and desirable sites for public access</td>
<td>April 2012</td>
<td>Board and Executive Director</td>
</tr>
<tr>
<td>Engage appropriate property owners and managers, and potential partners</td>
<td>April-May 2012</td>
<td>Jeff, Peggy and Mike (Board) and Tom (Project Manager)</td>
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<tr>
<td>Initiate semi-annual summits</td>
<td>May 2012</td>
<td>Joan (Executive Director)</td>
</tr>
<tr>
<td>Negotiate and enter into appropriate agreements</td>
<td>Summer 2012</td>
<td>Joan, Tom and Board</td>
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# Funding Action Plan

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Timeline</th>
<th>Assignment</th>
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</thead>
<tbody>
<tr>
<td>Develop compelling story and language for campaign focus</td>
<td>August 2011</td>
<td>Marketing Committee and Development Director</td>
</tr>
<tr>
<td>Identify potential donors and develop campaign appeal materials</td>
<td>September 2011</td>
<td>Board members and all staff</td>
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<tr>
<td>Prepare and send mail requests for funding</td>
<td>October 2011</td>
<td>Development staff</td>
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<tr>
<td>Send electronic follow-up reminder</td>
<td>November 2011</td>
<td>Development staff</td>
</tr>
<tr>
<td>Make follow-up calls</td>
<td>Nov. – Dec. 2011</td>
<td>Board members and all staff</td>
</tr>
<tr>
<td>Sign thank you letters</td>
<td>Nov. 2011 – Jan. 2012</td>
<td>Board members and all staff</td>
</tr>
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Tying Action to Mission

• Select a mission
• Develop a goal to help meet the mission
• Create a strategy to help meet the goal
• Write an action plan to implement the strategy
• Determine the cost to implement the plan
• Identify the revenue source
• Plan the activity to target the source
• Write a funding plan
Meeting Mission Every Day

Action plans inform staff work plans and board meeting agendas.
Tips to Create a Culture of Fundraising

• Put the focus on the program or project
• Encourage staff to provide early input
• Invite key staff to decision-making retreats
• Focus retreat activities on making decisions together
• Identify ways for everyone to be involved
• Provide ongoing training
• Set involvement expectations that meet individuals where they are
• Make it fun and part of everyday activities