

Jan McGowan  
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*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

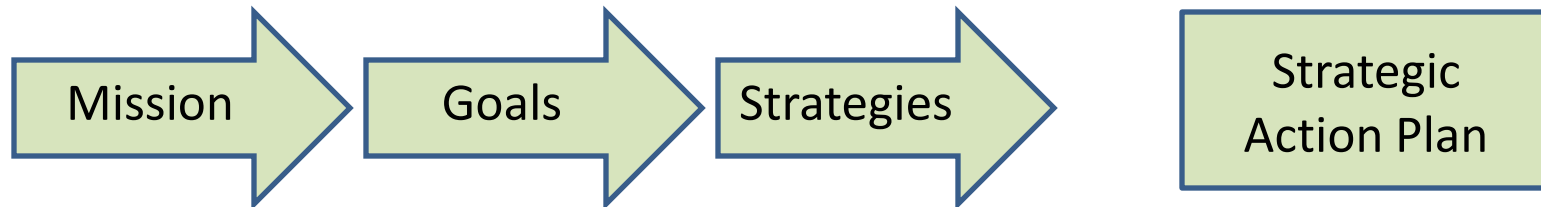
## *Tying Action to Mission*

- 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

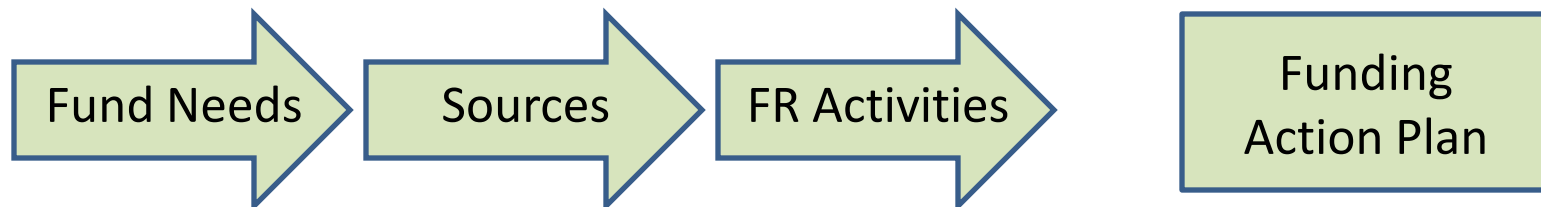


## *Getting to Action Plans*

### Strategic Plan



### Fund Development Plan



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## Mission

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

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## Goal

Increase offerings through partnerships and improved collaborations



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## 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

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## Funding Needs (year one)

- 42 hours of existing staff time
- \$4,000 for facilitator, rooms and refreshments

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## Revenue Sources

- Unrestricted funds from individual donors

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## 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

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

## Funding Action Plan

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



## *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



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## *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