

# WORKSHOP: FUNDRAISING PLANS

August 18, 2011 2:00-5:00pm  
Renton City Hall, Room 726

A workshop for agencies serving Renton.



Sponsored by the South King Council of Human Services  
and the City of Renton.

Presented by Nathan Phillips, SKCHS Director

# AGENDA

- ① Purpose of a Fundraising Plan
- ① Types of Fundraising
- ① Elements of a Good Fundraising Plan
- ① Tracking Progress
- ① Samples Plans and Documents

# WHY WRITE A FUNDRAISING PLAN?

- ③ Fundraising plans:
  - ③ document an organization's revenue mix, and
  - ③ show who will be doing what when.



# WHY WRITE A FUNDRAISING PLAN?

- ③ A Fundraising Plan is a tool for Boards and Management Teams
- ③ Provides a Funding Overview
- ③ Snapshot, To-Do List, Work Plan, Schedule, Map

# TYPES OF FUNDRAISING

- ◎ Special Events and Fundraisers
- ◎ Private Foundations / Grant Writing
- ◎ Public Support (Federal, State, Local)
- ◎ Corporate Support
- ◎ Earned Income / Social Ventures
- ◎ Individual Donors
- ◎ Planned Giving

# TYPES OF FUNDRAISING: SPECIAL EVENTS

- © Special Events and Fundraisers

# TYPES OF FUNDRAISING: PRIVATE FOUNDATIONS

- © Private Foundations / Grant Writing

# TYPES OF FUNDRAISING: PUBLIC SUPPORT

- © Public Support (Federal, State, Local)

# TYPES OF FUNDRAISING: CORPORATE SUPPORT

- © Corporate Support

# TYPES OF FUNDRAISING: EARNED INCOME

- © Earned Income / Social Ventures

# TYPES OF FUNDRAISING: INDIVIDUAL DONORS

- © Individual Donors

# TYPES OF FUNDRAISING: PLANNED GIVING

- © Planned Giving

# ELEMENTS OF A GOOD FUNDRAISING PLAN

- ⊙ Mix of Revenue, with a strategy and rationale for each element.
- ⊙ Timetable and deadlines
- ⊙ Staff Time, Volunteer Needs, Board Responsibilities
- ⊙ Direct Costs
- ⊙ Projected Income
- ⊙ Updates and Progress

# PROGRAM PLANS VS. AGENCY PLANS

- ⊙ Agency Fundraising Plans
  - ⊙ More comprehensive
  - ⊙ For Boards, Executive Staff, and Management
- ⊙ Program Fundraising Plans
  - ⊙ Tailored for the Program Manager
  - ⊙ Useful for coordinating Agency Resources
  - ⊙ Should be more detailed, emphasize roles & responsibilities



# TRACKING PROGRESS

- ◎ To be an effective tool, fundraising plans should demonstrate how the work is going.
  - ◎ Report out on the good news and bad
  - ◎ Not just dollars raised, but also time spent and costs
  - ◎ What new leadership and resources were uncovered?
  - ◎ A tool for mutual accountability
  - ◎ Recommendations for the future

# SAMPLE FUNDRAISING PLANS

- ⊙ A guide to fundraising basics:
  - ⊙ <http://www.ncstac.org/content/materials/FundraisingBasics.pdf>
- ⊙ Sample fundraising plan for smaller projects:
  - ⊙ <http://www.arts.state.tx.us/toolkit/fundraising/templates/fundplan.asp>
- ⊙ Simple fundraising plans:
  - ⊙ <http://www.rivernetwork.org/rn/fundraisingguide/fundraisingplanning/sampletwo>
  - ⊙ <http://www.rivernetwork.org/rn/fundraisingguide/fundraisingplanning/sampleone>

# CONSIDER HIRING OUTSIDE HELP

- ◎ Puget Sound Grantwriters Association is a good place to start (<http://www.grantwriters.org/>)
- ◎ PSGA's freelancers list includes a guide for how to go about hiring a professional:  
<http://web.memberclicks.com/mc/page.do?sitePageId=92353&orgId=psga>
- ◎ Instead of hiring an outside professional, consider asking a peer organization that you respect if you can hire their development staff to work on a project for you.

# CONSIDER HIRING OUTSIDE HELP

- ◎ Find a list of all the capacity builders in the state at: <http://evans.washington.edu/research/centers/nancy-bell-evans/nonprofit-and-philanthropy-resources/support-and-training>
- ◎ United Way trainings that will be available this fall: <http://www.uwkc.org/partner-with-us/nonprofits/trainings/>
- ◎ A searchable directory of consultants and professional services: <http://501commons.org/directory#>. It is still being populated, but the listings have all been vetted.



# FUNDING TRENDS

- ⊙ Terrible time to apply for new foundation funding or public support.
- ⊙ Great time to begin building relationships with grant makers and to develop new funding areas.
- ⊙ Consider fundraising innovations, like social venture projects, or joint fundraising events.
- ⊙ Network with other fundraisers who are doing what you want to do.

# FURTHER ASSISTANCE

- ⊙ Technical Assistance at SKCHS
- ⊙ Volunteer Readers at SKCHS
- ⊙ RANU (Renton Area Nonprofits Unite)
- ⊙ Nathan Phillips, Director  
South King Council of Human Services  
(206) 462-6643  
[nathan@skchs.org](mailto:nathan@skchs.org)
- ⊙ ***THANK YOU!***