

Module 5.0 Non-Profit Resource and Fund Development

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5.1 Types of Fund Development

- Fundraising letter
- Host a walk-a-thon, dance-a-thon, or other participatory event.
- Write some grants
- Fundraising e-mail to your mailing list
- Individual gifts from supporter
- Start a viral fundraising campaign
- Launch a board giving campaign
- Recruit volunteers to raise money
- Seek out major donor to fund project

5.2 Six Simple Steps to Start a Successful Fundraising Plan

- Develop your fundraising goals.
 - You should have goals for the amount of money you need to raise, plus what the money will be used for.
 - Will you use it for overhead expenses? To fund an ongoing or new program? To build a new facility? To develop an emergency fund for a future rainy day? To close a deficit?
 - You will likely have a number of goals. If so, develop a fundraising plan for each one. Goals should be developed with your board of directors, and have the board's sign-off.
 - Getting your board involved will also set the stage for their active help with fundraising.
- Write down your fundraising plan.
 - It is important not just to fly from one fundraising scheme to the next. Develop a written plan that states how much you need to raise, from what sources, and how you will do it.
 - Don't worry, you can revise the plan as you go along. Not all of your ideas will work out, or you may find new sources along the way.
 - Start with your current programs and funding. Is that amount of money covered or is there a gap? Do you want to do more but lack the funds?
 - This preliminary financial accounting will help you arrive at what your monetary goal should be for your fundraising.
- Estimate how much your fundraising program will cost.

- Include costs such as postage, creating your website, running special events, the cost of staff dedicated to fundraising, and the personnel costs of managing the volunteers who will help you raise funds.
- Be realistic when estimating costs, but plan to use cost-efficient methods so that costs don't eat up all your fundraising proceeds.
- Most experts recommend that fundraising and overall administrative costs not exceed 25 percent of your overall operating budget.
- In other words, three-quarters of your expenses should be spent on doing what you were founded to do.
- Develop a timeline for your fundraising plan.
 - Fill in a year's calendar with specific activities, and identify who will be the lead for each of those projects.
 - Go further by developing timelines for each fundraising activity, such as the annual fundraising campaign, the Giving Day you've chosen, or the special event.
 - The timeline will surely change during the year, but having one to start with will ensure that you get something accomplished.
- Identify funding sources.
 - Can current sources be leveraged to produce more income?
 - Are there audiences you are not tapping? Have you considered government or foundation grants? Civic groups, churches or universities?
 - How about employee matching gifts or sources of earned income? Are you making the most of your online fundraising? Do you have a monthly giving program? How do you retain your donors once you have them.
 - Evaluate your fundraising plan during the year.
 - Evaluation will improve your results. Plan to evaluate what you are doing every few months.
 - Develop what criteria you will use, such as the amount of money raised, the number of new donors, how many contacts you've made with foundations, and improvement in donor cultivation activities.
 - What accounted for the biggest successes? What were the biggest challenges? What should you change, drop, or add?
 - Once your organization gets the hang of raising funds for a year's operation, you'll want to move on to multi-year plans, higher goals, more sophisticated strategies, and newer techniques.

5.3 Event Planning Fundamentals

- Develop Event Goal and Objectives - The very first step is to establish a tangible goal and objectives. (e.g., why are you organizing this event and what do you hope to achieve?)
- Organize a Team - Any event takes a concerted team effort to handle all of the details. Consider identifying one key Event Manager as well as staff or subcommittees to help with specific parts of the event, such as:
- venue management;

- speakers;
- entertainment;
- publicity;
- sponsors;
- volunteer management
- Set a Date - The date might already be pre-set for a reoccurring event, but if this is a new event, be sure to consider the following before firming up your date:
 - Give yourself enough time! Ideally, you should have 4-6 months to plan (depending on the nature of your event)
 - Be aware of holidays
 - Avoid school holiday time periods (e.g., winter, spring and summer holidays)
 - Check dates with key participants – e.g., speakers, presenters, VIP guests, etc.
- Brand Your Event - If you want your event to stand out, you need to choose a timely and compelling theme that sets you apart from your competition. This means that you need to come up with a dynamic overall theme and you need to take great care with the actual name – since it can be a key attention-getter, especially in online media.
 - Brainstorm names: When you are brainstorming the event name, think about:
 - How is your event different from other events in your sector?
 - What are you hoping to convey through this event?
 - Create a Tagline: Once you've come up with a name, also try to craft a tagline – a short, memorable branding slogan that describes the event.
 - Design a Logo: The final step will be having a logo created to represent your event. A logo can be an effective branding tool – offering immediate recognition of your event in all of your publicity and promo items (e.g., T-shirts, water bottles, bags, etc.)
- Create a Master Plan - This plan should encompass all aspects of the event, including:
 - Venue, logistics & catering management (contracts, permits, insurance, etc.)
 - Speakers/presenters (identifying, confirming, logistics & management)
 - Activities/entertainment
 - Publicity/promotion (online & off-line, e.g.,: web page & online promotion; events calendars; printed programs; media relations; signage; social media, etc.)
 - Registration (online sign-up, payment and tracking; on-site sign-in, etc.)
 - Sponsor/partner management
 - Volunteer management
- Determine Administrative Processes - In other words, how are you going to keep track of your planning, registration, budget, guest and speakers lists, etc.?
- Identify and Establish Partnerships & Sponsors - Are there organizations that you could partner with or call on for sponsorships to defray the costs and increase potential participation? When you involve other people or groups in your event, they have a stake in helping spread the word and making the event a success.
 - You might want to consider:

- Seeking corporate sponsors to fund a portion of the event. This can range from national organizations that might want to sponsor a dinner, offer a door prize or a key silent auction item, to local businesses that might be able to provide goods or services, such as flowers for the tables, gift bag items, etc.
 - Partnering with community organizations who might be able to offer a venue and/or assistance with organizing or staffing an event
- Create a Publicity Plan - Even with the most amazing speaker or entertainment line-up, you need publicity to get people in the door.
 - Event promotion starts with the initial notice or page on your website, note in your newsletter or email to save the date, and then builds to include online and off-line publicity, media relations and on-going outreach to encourage registration.
 - And no plan is complete without the post-event thank-you's, sponsor acknowledgements and articles about the event's key messages or fundraising success.
- Establish a Budget - Your budget should incorporate estimates for all of the key items identified on your Event Master Plan. Don't forget to include any travel or accommodation costs for speakers, presenters, etc.
- Determine Evaluation Process - How will you determine if your event is a success? Do you measure success by the number of registrants or attendees or is it dependent on you breaking even or raising a target amount in donations?
 - When you set your initial event goals and objectives, you should also consider how you will evaluate the event to determine your success. If your event involves tracking, for example, a silent auction, then you'll need to put some processes in place to identify goods offered in kind and funds raised at the event.
 - By the same token, if the objective of your event is to raise awareness, you'll have to benchmark and gather data on online social media activity/mentions etc. and offline publicity – again based on your initial goals.