

Creating Your Fund Development Plan

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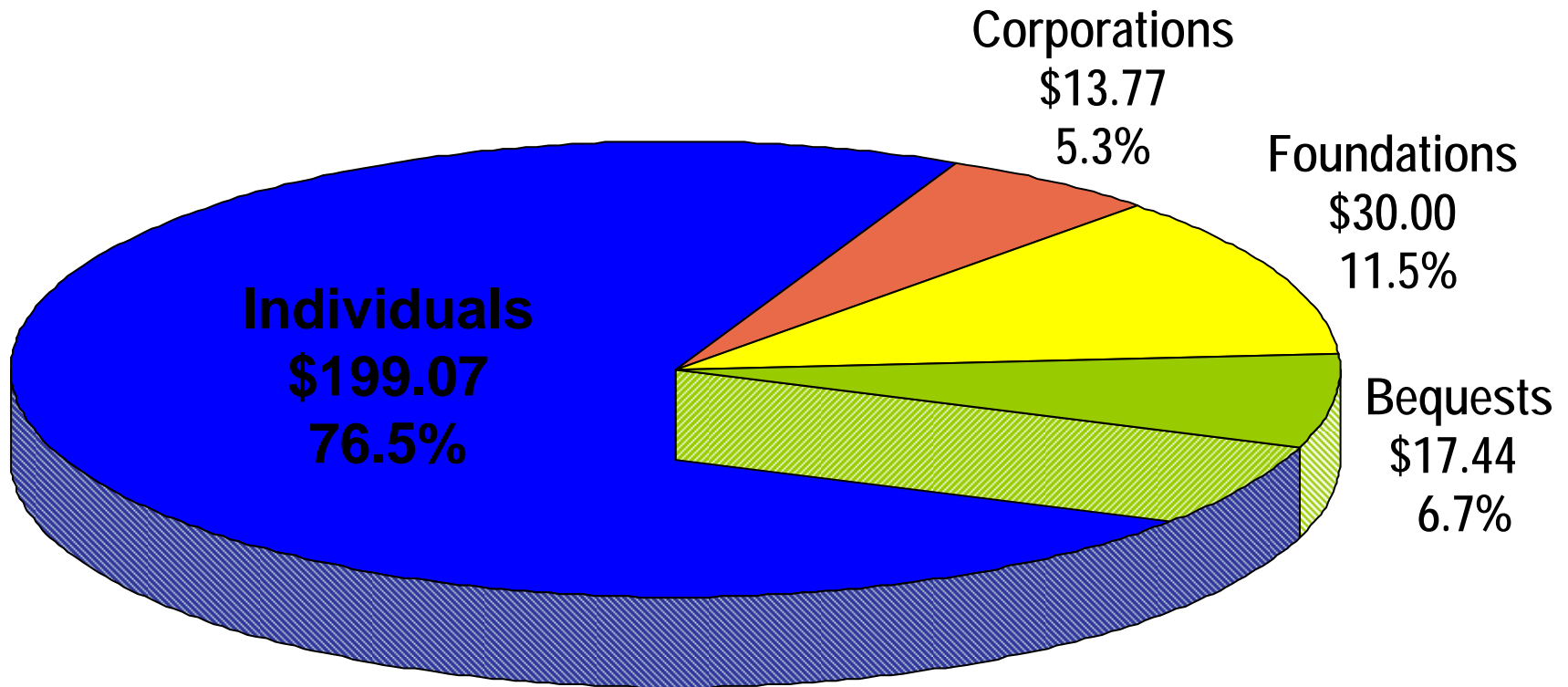
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Who is fundraising important to?

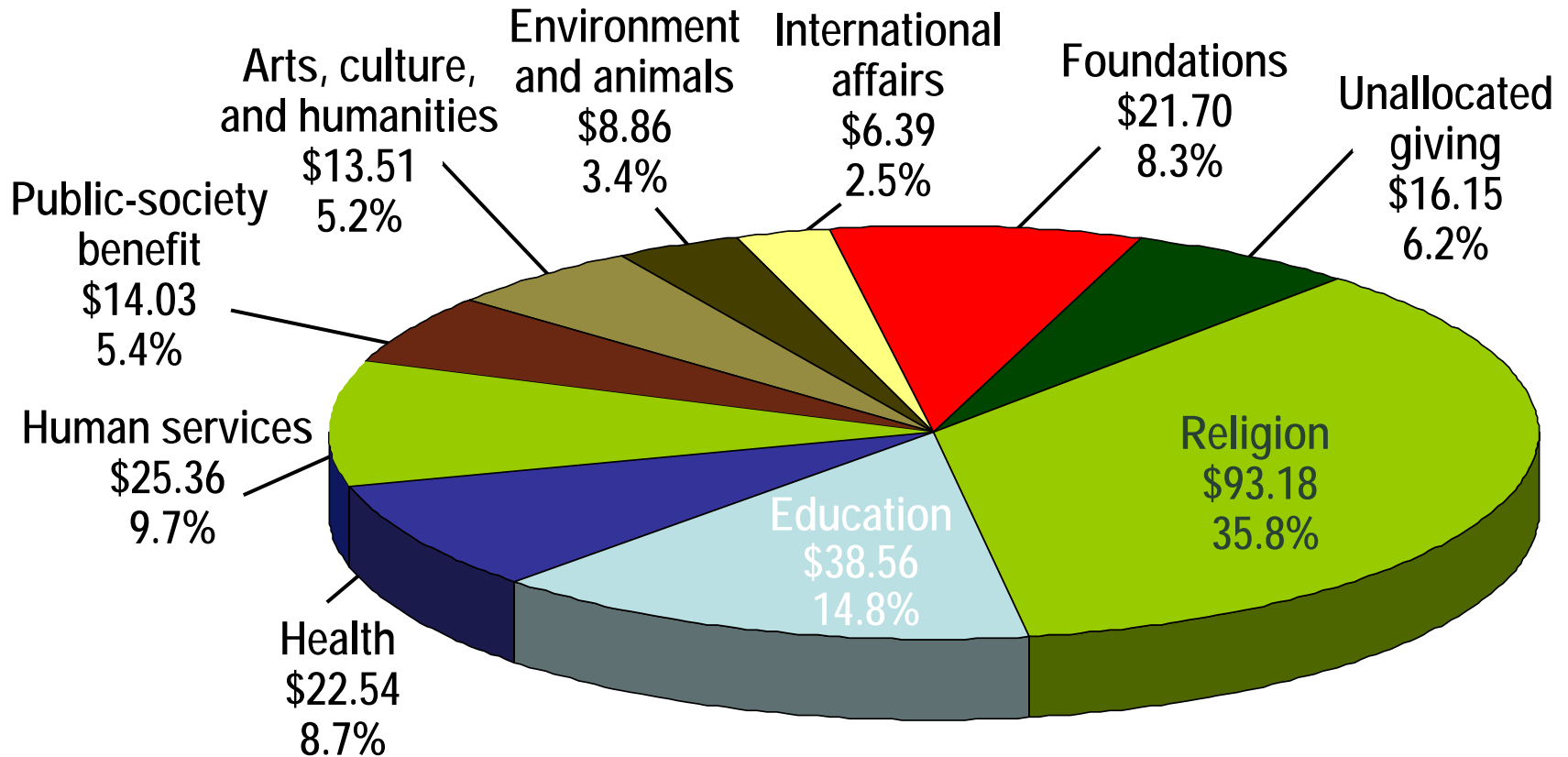
- Animal Control Shelters
 - Government Agencies can set up “Friends of the Shelter” 501C3 organizations
- Humane Societies
- Rescue Groups
- Other Animal Groups (TNR Groups, Advocacy)

Contributions: \$260.28 Billion by Source of Contribution in 2005



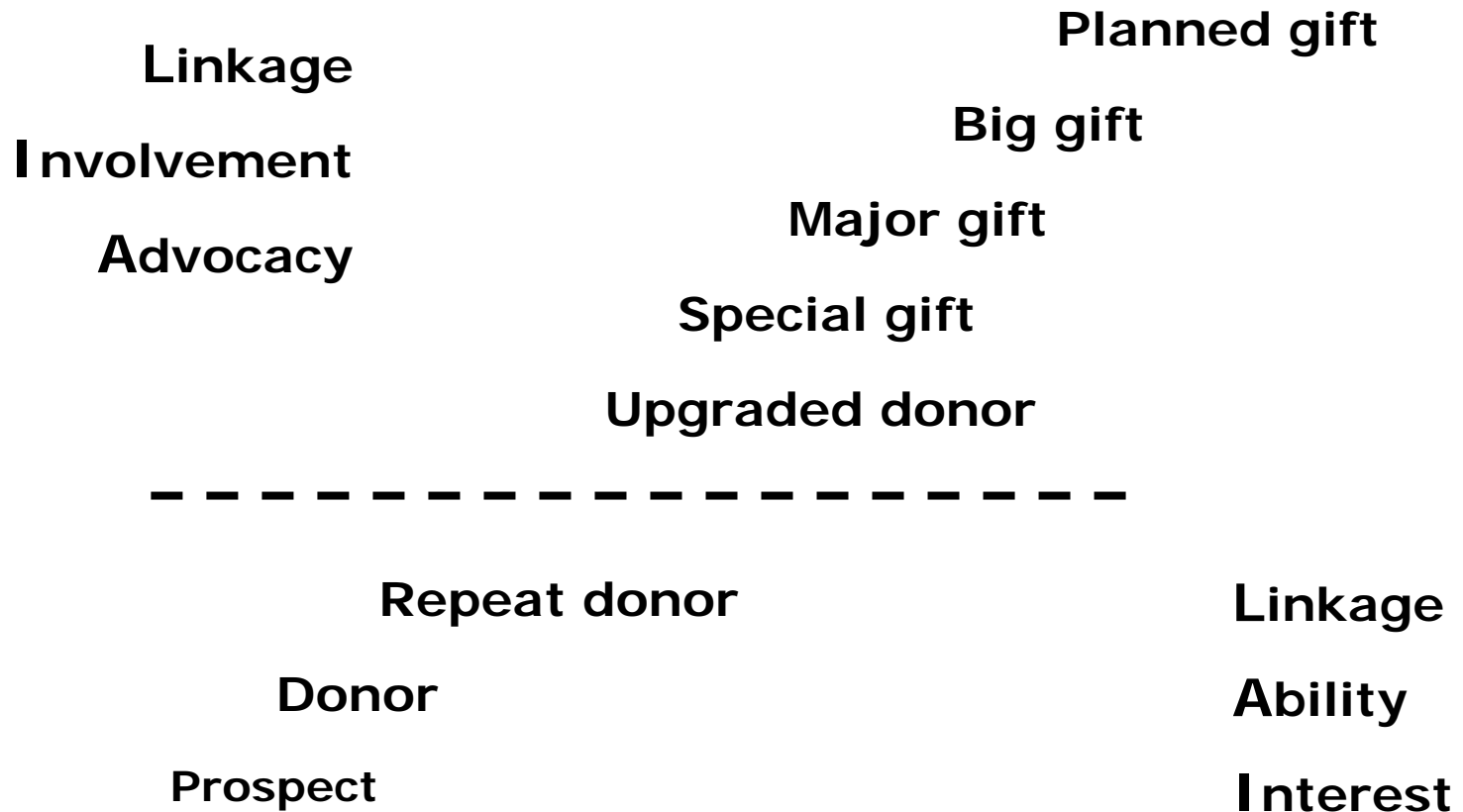
Source: Giving USA Foundation™ / *Giving USA 2006*

2005 Contributions: \$260.28 Billion by Type of Recipient Organization



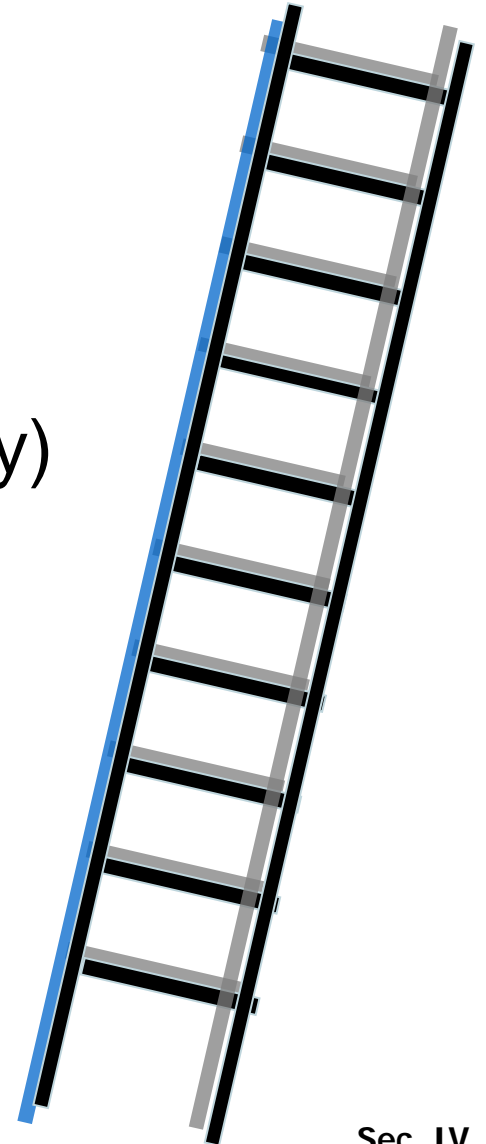
Source: Giving USA Foundation™ / Giving USA 2006

The Development Process



Ladder of Effectiveness

- Personal: face to face
 - Team of two
 - One person
- Personal letter (on personal stationery)
 - With telephone follow-up
 - Without telephone follow-up
- Personal telephone
 - With letter follow-up
 - Without letter follow-up



The Donor Pyramid *Fundraising Strategies*

*Planned
Gift Donor*

Personal
contact only

Capital Donor

Personal contact only

*Special/Major
Gift Donor*

Personal contact/letter/
phone call

*Renewed/Upgraded
Donor*

Personal contact/letter/phone call

First Time Donor

Direct mail/telemarketing/fundraising
benefit/Internet/media/door-to-door

Universe of Prospects

FUNDRAISING IS.....

The right person asking

the right prospect

for the right gift

for the right program

at the right time

in the right way

Planning Sequence For Fundraising

1. Gather facts.
2. Determine and validate needs.
3. Consider/evaluate markets
4. Consider vehicles.
5. List and evaluate resources.
6. Select appropriate vehicles.
7. Determine goals.
8. Prepare plan.
9. Install and use control mechanisms.

Benefits of Planning

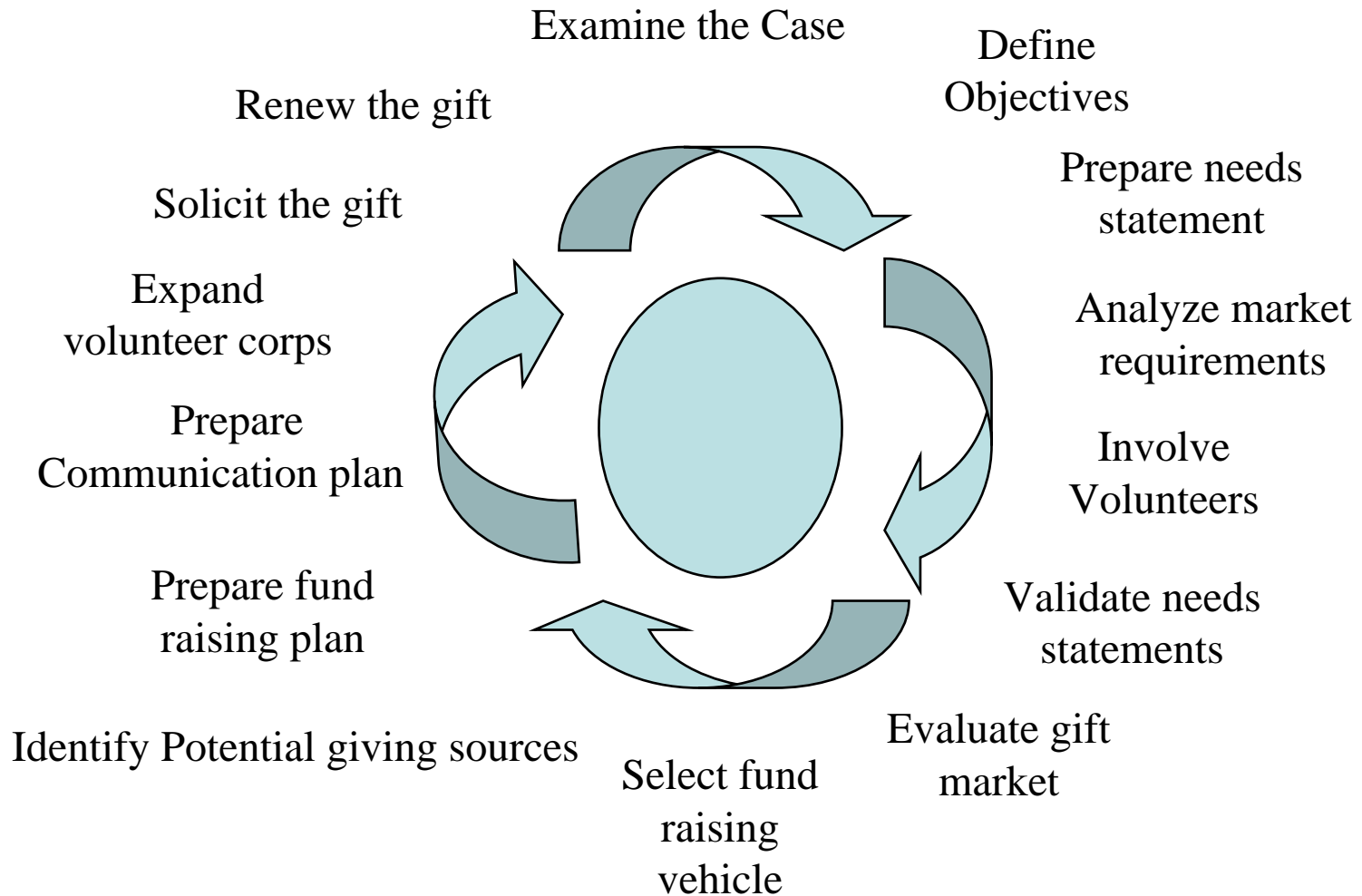
- Improve performance.
- Stimulate forward thinking.
- Clarify future direction.
- Solve major organizational problems.
- Survive—even flourish—with less.
- Build teamwork and expertise.
- Influence rather than be influenced.
- Meet others' requirements.

LIMITATIONS OF PLANNING

- Costs can outweigh benefits.
- When “life-threatening” problems should be addressed first.
- When implementation is unlikely.
- When poor plans are likely and intuition might be better.

The Fund Raising Cycle

Starts with Awareness of Marketing Principles



Writing the Plan

Annual Fund Plan

200__

Prepared by: List Committee

Approved by: Board of Trustees

Cover Page

Mission Statement

Begin with reviewing your mission statement.

Philanthropic Vision

Statement of desired future role of philanthropy and how you intend to achieve it.

Imagine where you want to take the fundraising program in the new few years, in light of your organizations mission and needs.

Mini Case for Support

- The unique benefits the organization provides to the community.
- What, at this point is especially exciting, cutting edge, or promising.
- Connections to traditions and organizational accomplishments of the past.
- The compelling nature of the current organizational goals and initiatives.

SWOT ANALYSIS

- Strengths
- Weaknesses
- Opportunities
- Threats

Fundraising Goal

1. What are you going to raise money for?
2. Why is the money needed?
3. What will the funds accomplish?
4. How much do you need to raise

Gift Range Chart

\$20,000

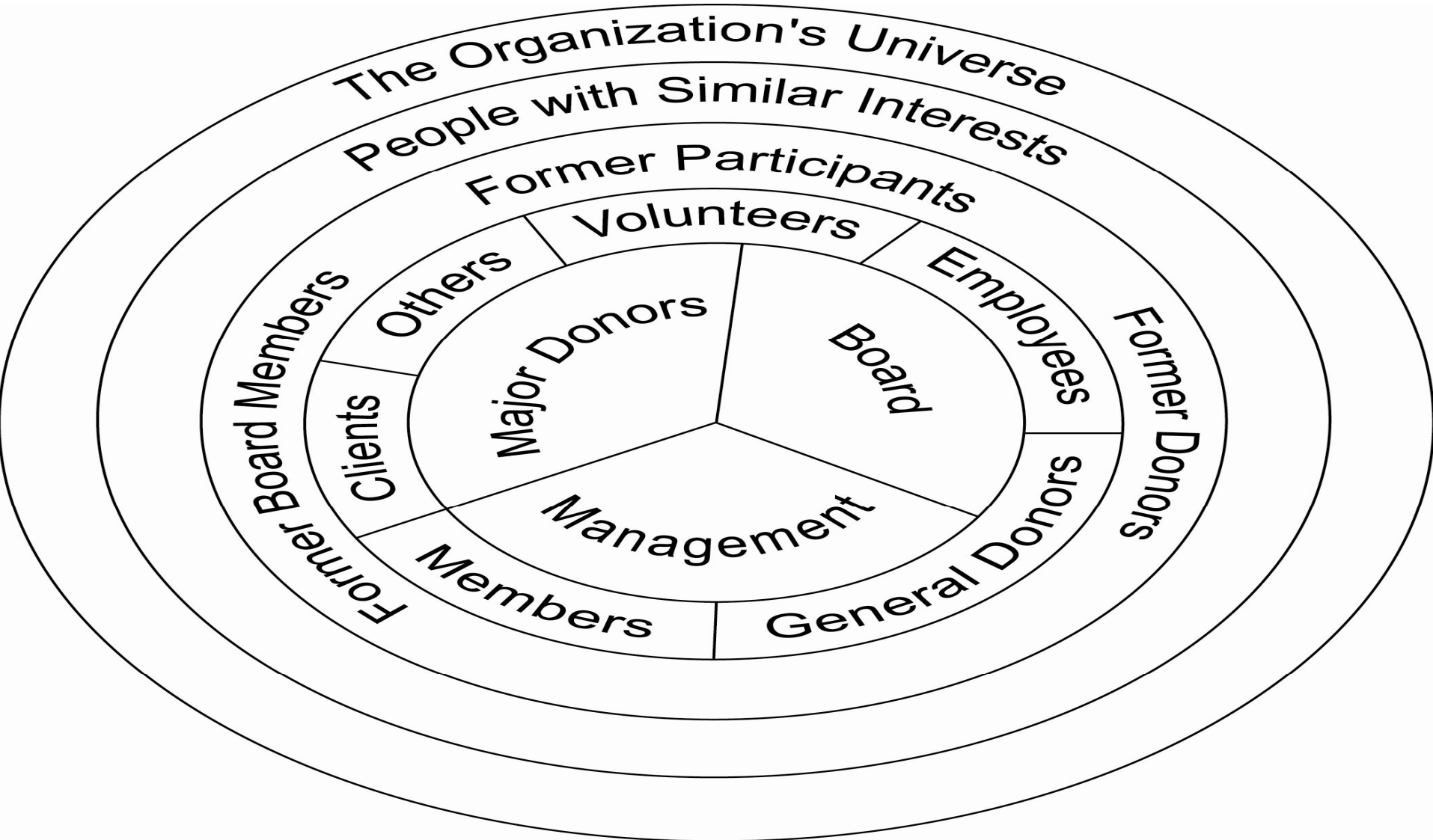
Gift Range \$	# of Gifts	Cumulative # of Gifts	Prospects#	\$ per Range	Cumulative
1,500	2	10 (5:1)	10	3,000	3,000
750	4	20 (5:1)	30	3,000	6,000
500	12	48 (4:1)	48	6,000	12,000
250	24	66 (3:1)	72	6,000	18,000
\$100 And under Many Gifts				,000	20,000

Gift Range Chart

\$60,000 Goal

Gift Range \$	# of Gifts	Cumulative # of Gifts	Prospect #	Cumulative # of Prospects	\$ per Range	Cumulative \$
3,000	2	2	10 (5:1)	10	6,000	6,000
1,500	4	6	20 (5:1)	30	6,000	12,000
750	12	18	48 (4:1)	78	9,000	21,000
500	18	36	72 (4:1)	150	9,000	30,000
250	24	60	72 (3:1)	222	6,000	36,000
<i>10% of donors</i>					<i>60% of goal</i>	
100	120	180	360 (3:1)	582	12,000	48,000
<i>20% of donors</i>					<i>20% of goal</i>	
Under 100 average gift \$30	400	580	800 (2:1)	1,382	12,000	60,000
<i>70% of donors</i>					<i>20% of goal</i>	

Constituency Model



Financial Projects

- Individuals
- Corporations
- Foundations
- Special Events
- Other

Strategies for the Fundraising and Solicitation Plans

Outline fundraising methods and match them to the constituencies from which you will raise funds.

- project purpose, status, and strategies,
- mini-case for support,
- constituency goals,
- project goals, objectives, methods, performance measures, and action steps,
- staff and volunteer roles and responsibilities
- project schedule and timelines.

Fundraising Budgets: Income and Expense by Program

In this section you will include budgets

- Income and expense budget by program.
- A fundraising income and expense budget by source/market.
- The organization's budget shows all income sources, including the amount projected from fundraising by program.

Budget Items

- Veterinary Care
- Food and Supplies
- Pull Fees
- Staff and Benefits
- Facility Overhead
- Insurance Cost
- Equipment Cost
- Transport Cost
- Community Costs

Organizational Infrastructure

- By taking some of your members off the front line and forming this fundraising committee will be a new approach.
- Fundraising Committee to deal with the financial future.
- Board and leadership buy-in.
- Bigger organizations already have committees, look at what exists.

Communication and Evaluation

- Share the plan, get feedback and buy-in, revise the plan, and then circulate it and put it into use and raise money.

Communication and Evaluation

- You need to have a plans for acknowledgment of gifts.
- Develop donor reports.
- Do you have any recognition of donors. recognition activities, and site visits for each constituent group?