

Building a Fund Development Program



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Planning is a process of determining how best to achieve desired outcomes

✓ Strategic Plan

✓ Development Plan



Logic Model Planning

The *WHAT*: Logic Model Definition

Basically, a logic model is a systematic and visual way to present and share your understanding of the relationships among the resources you have to operate your program, the activities you plan to do, and the changes or results you hope to achieve.

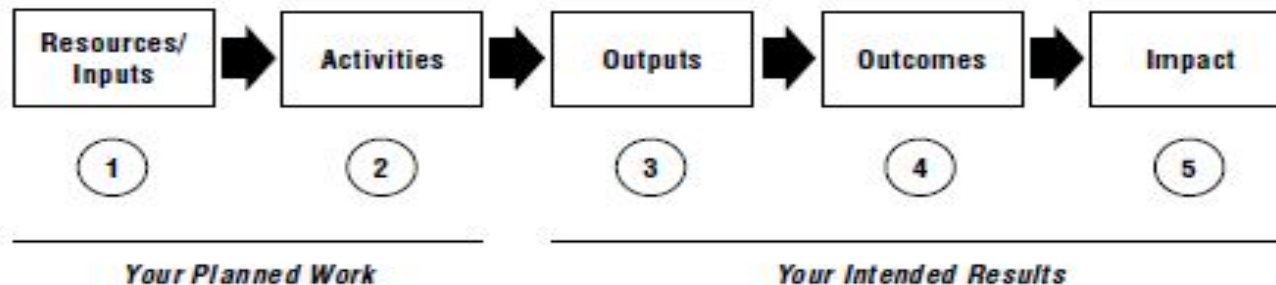


Figure 1. The Basic Logic Model.

The most basic logic model is a picture of how you believe your program will work. It uses words and/or pictures to describe the sequence of activities thought to bring about change and how these activities are linked to the results the program is expected to achieve.

Task: Beginning a planning process

- Imagine your organization is undertaking a planning process. Think about these questions and share your answers with the person next to you:
 - Besides the board and staff, what outside stakeholders might you tap for input?
 - What current program strengths will the plan identify?
 - What are some of the current trends that will impact the organization?
 - What might the impacts be?
 - What possible new directions do you see emerging from the future trends?

Your development plan should:

- Set goals to fulfill budget needs
- Identify best and available strategies to raise funds
- Analyze potential by constituency
- Create a budget to fund each strategy
- Determine marketing needs to support each strategy



Pyramid of Giving



Determine Your Goals

Set goals to fulfill budget needs. Identify income categories from the previous year and actual income generated then add the income projections for the upcoming year and the difference. For example:

FUNDRAISING FINANCIAL GOALS

PROJECTED BY FY 2017 OPERATING BUDGET: \$326,800.00

| Income Categories | | FY 2016 Income Actual | FY 2017 Income Projections | Difference |
|--|--|----------------------------------|---|--------------------|
| Foundations | | \$38,000.00 | \$45,000.00 | \$7,000.00 |
| Individuals/Family Trusts | | \$95,200.00 | \$120,000.00 | \$24,800.00 |
| Federated Campaigns (CFC, United Way) | | \$23,000.00 | \$25,000.00 | \$2,000.00 |
| Special Events | | \$80,000.00 | \$90,000.00 | \$10,000.00 |
| Other (Unsolicited income) | | \$18,000.00 | \$5,000.00 | -\$13,000.00 |
| Corporations | | \$30,000.00 | \$40,000.00 | \$10,000.00 |
| Interest income | | \$2,500.00 | \$1,800.00 | -\$700.00 |
| TOTAL INCOME | | \$286,700.00 | \$326,800 | \$40,100.00 |

What will get you to your goal?

Identify fundraising methods and strategies, construct a timetable and goals, set benchmarks, and assign responsibilities. Choose the fundraising methods, personal solicitation; special events; direct mail; foundation grants; federated campaigns; family trusts; bequests, etc. you will use to reach your fundraising financial goals. Spell out your strategy listing time frame, number of prospects or participants, goal, method, and solicitors for each one. For example:

FUNDRAISING METHODS

A. Personal Solicitation Campaign

1. Board Solicitation (Chairs: President, Fund Development Chair)

Time Frame: September – December, 2017

Number of Prospects: 18

Goal: 100% giving; \$8,500 (Amount raised in previous FY \$7,820)

Method: Personal solicitation. Request amounts based on giving history.

Solicitors: President and Fund Development Chair

B. Special Events

1. The Mighty Dog Walk (Walk Chair: Name)

Time Frame: September 4, 2017

Number of Walkers: 200

Goal: \$35,000 gross/\$30,000 net (FY 03 Walk grossed \$34,000)

Method: Mailing: 4,000 pieces; phone-a-thon 2 weeks later to recruit walkers, pledgers, donations, news articles and other promotional items; other personal recruitment by board, staff, and students.

Candidates for Fundraising Volunteers

- Board of directors or trustees
- Campaign feasibility study participants (if available)
- Members, corporate donors, alumni, friends, auxiliaries
- Community leaders
- Users of your service
- Volunteers serving on other agency committees
- Existing donors
- Development committee members
- Leadership programs
- Service club members
- Professional group members
- Event attendees
- Who else can you think of?



7 Key Points for Constituency Development

- Identifies fundable projects
- Matches prospects to projects
- Conducts thorough, realistic research
- Conducts cumulative, on going research
- Organizes prospect information
- Handles information ethically, accurately, and confidentially
- Involves prospects

Rosso's Concentric Circles



- Begin in-house with those already involved in your organization-board members, program participants, past donors, and others (your natural constituencies).
- Move outward in concentric circles to individuals and institutions in your geographic territory and/or those whose giving priorities match your programmatic focus.
- Then include those served indirectly by the work of your organization-businesses in the general area, family and friends of participants, etc.

Menus of Giving Opportunity

Help us save animal lives

We need your help to keep the spay/neuter, wellness clinic open. Your donation to sponsor any item(s) listed here will help us continue to provide and expand quality services for animals in need at our clinic:

| | |
|---|----------------|
| “Vet for a Day” pay for one full day of surgery, up to 50 spays/neuters | \$400.00 |
| Dog Surgical Instruments for spays/neuters | \$165.00 ea. |
| Cat Surgical Instruments for spays/neuters | \$125.00 ea. |
| Suture Material: | |
| One Month Supply | \$1,185.00 |
| Three Month Supply | \$3,550.00 |
| Six Month Supply | \$7,100.00 |
| One Year Supply | \$14,200.00 |
| Surgical Light | \$1,200.00 |
| Pulse Oximeter | \$2,300.00 ea. |
| Anesthesia Machine | \$3,600.00 |
| Autoclaves (desperately need 2) | \$3,000.00 ea. |
| Centrifuge | \$1,500.00 |
| Industrial washer and dryer (2 sets needed) | \$2,500.00 ea. |

Thank you for helping us save animal lives by considering one or more of these giving opportunities. Working together we make our community a better place for people and animals.

Board Commitment

- Get specific and concrete commitments from board members each year, if they select the types of fundraising they feel they can do you are more likely to be successful.
Examples: personal gift, house party, donor solicitation, foundation contacts, corporate contacts, working on a major event, committee work, training, etc.
- Create a supportive and fun environment in your organization for fundraising
- Follow-up on progress made toward the board's total giving and raising goals at each board meeting.





