

STRONG PARKS, STRONG COMMUNITIES

Tool 10: Fundraising Plan Outline

This tool outlines the components of a fundraising plan. It is not exhaustive or prescriptive and can be adapted to suit your organization's specific needs and situation. Some sections may be brief; some lend themselves to tables and graphic presentation of information. We recommend the main body of your plan be succinct and readable so people in your organization can easily see their roles in implementation. Additional data can be included in an appendix.

1. Fundraising situation analysis

This section should state the revenue goal from your strategic plan (if one was articulated). It will describe the fundraising capabilities and capacity you bring to meet the opportunities and challenges you face. This could be a simple "SWOT" analysis (summarizing strengths, weaknesses / gaps, opportunities, and threats) or a description of your group's strengths and vulnerabilities in four aspects of organizational impact – strategy, leadership, culture, and brand – viewed through a fundraising lens.

2. Fundraising needs and drivers

This section describes what is driving this plan. Whatever your reasons – whether it is the need for financial stability or to raise your group's profile – describe them here.

3. Fundraising program outcomes

This section will describe the funding needs of your organization and the dollars that you are confident you will receive in any given year. If you are not confident of any of it – because every year feels "hand to mouth," seeking grants and donations and hoping for the best – that is important: your plan will have a heavier lift. Fundraising fills the gap between *revenue you need* for your operations and to support your park and *revenue committed from known sources* in any given year (such as multi-year foundation grants, government contracts, etc.).

Tool 6 offers fundraising consultant Mal Warwick's "GIVES" framework, with five possible areas of fundraising focus: Growth, Involvement, Visibility, Efficiency, and Stability. Warwick's guidance is to pick two for each year of the term of your plan. *See Tool 6 for more detail.*

4. Profiles of funder/donor constituency (AKA target audiences for communications)

This section will describe the types of donors you are trying to communicate with for purposes of fundraising. Identify their ability to give (A) based in any research you may have done, your sense of their belief / interest in your work (B), and their connection / linkage to your organization (C). This could be presented in a narrative or as a table. For each constituent type – current donor, current / former board member, business owner, etc. – rate them on the ABC's and prioritize constituents with the highest ABC rating.

5. Key messages

This section of the plan will include general and specific messages to use when soliciting donors. Because plans are never static, your initial plan draft will include a set of preliminary messages that will need to be refined. Test your initial messages in donor cultivation meetings, solicitation events, and fundraising appeals, and adjust the language based on donor responses.

6. Essential case for support

This part of the plan articulates your value proposition and the big picture of what you are trying to do. It wraps around the messages and packages them with a tidy bow. It is likely to be about a page, and the point of this section is that it can be a complete stand-alone document. You will be able to use this material with all kinds of donors – individuals, corporate donors, foundations – even as you use the more specific messages with particular audiences.

7. Revenue goals

As specifically and realistically as possible, define how much money you need overall, and how much you anticipate from each funding source. For individual donations, identify a range of gift sizes and the number of prospects and gifts you anticipate at each giving level.

8. How money will be raised – specifically

This part of the plan is detailed: building from the revenue goals, this part of the plan defines your fundraising strategies to meet each target and the fundraising activities associated with each approach. If you are developing an integrated fundraising and communications plan, this section will include “channels” for communicating with your key audiences.

9. Organizational capacity and fundraising cost

In this section of your plan, you will anticipate board and staff roles in fundraising, as well as all fundraising expenses: that part of the executive director’s compensation attributable to fundraising; the compensation for fundraising staff; any hard costs of travel, mailings, food and beverages, publicity, etc. Anticipate these costs carefully: many groups ignore these details and spend a lot of money (via staff time) on events that don’t bring in enough cash to warrant the effort.

10. Timeline/owners of activities

This level of detail will be in the annual workplan. With your strategies and activities, this section fleshes out the details of tasks, who is responsible for doing them, and key deadlines.

11. Pre-conditions for success

To implement your plan, what will the organization require? This section will describe any of the ingredients you need, and if you don’t have them, how you’ll get them.

***NOTE:** Your plan might be 10-15 pages long once the detail is there.*