



Bring Your Fundraising
Into Focus:
Clarifying and Organizing
Your Fundraising Strategies

Nonprofit Leaders Conference
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Session Notes

Fill in the blank:

_____ Is a means to the end of _____.

What 2-3 fundraising strategies did you use last year?

1.

2.

3.

To narrow down your fundraising options, consider:

- How much _____ do you have?
- What _____ or _____ do you have?
- What _____ are in place to support fundraising?
- Who is your _____?

Four Most Common Fundraising Strategies

1.

3.

2.

4.



Elements of a Good Fundraising Plan:

Other Fundraising Building Blocks:

1. Processes

2. Data

3. Platforms

4. Messages

How to keep the plan alive:



Fundraising Plan Template

Strategy	Target (\$)	Cost (\$)	Action Steps	Lead (Support)	Key Dates	Other Important Metrics

Fundraising Plan Example

Strategy	Target (\$)	Costs (\$)	Action Steps	Lead (Support)	Key Dates	Other Important Metrics
Individual Giving * Newsletter * Direct Mail * Fall Email Appeal * Unsolicited Gifts	\$75,000 \$15,000 \$16,000 \$12,000 \$32,000	\$3,550 \$50 \$2,000 \$1,000 \$500	1) Produce and distribute monthly newsletter with ask 2) Produce and distribute fall email appeal 3) Produce and distribute direct mail year-end appeal 4) Generate gift acknowledgement letters	Amelia / Ben	Quarterly Sept Dec Ongoing	# New Donors Avg. Gift Size
Major Gifts	\$90,000 1 @ \$10K 4@\$5k 6@\$2.5K 25@\$1K 40@\$500	\$4,000	1) Update donor and prospect lists 2) Generate prospect recommendations and initiate connections 3) Develop case statement and mail out 4) Assign portfolios 5) Produce, personalize, mail end of year solicitation	Amelia and Development Committee	Feb Mar Apr May May Fall	Donor Retention Rate (%)



			6) Produce and mail thank you letters and conduct follow up calls		Dec	
Special Events * Luncheon * Fall Fundraiser	\$25,000 \$5,000 \$20,000	\$10,000 \$1,500 \$8,500	1) Select theme, location, date, vendors. 2) Solicit sponsors 3) Design, print, mail invitations 4) Host event 5) Thank attendees and sponsors	Amelia and Development Committee	Mar Apr/May Jul/Aug Sept Sept	# Attendees % Attendees who Give



Fundraising Jargon 101

Term	Definition
Annual Fund	All donations, grants, and dollars made to an organization to support their activities in a given year
Appeal	A targeted request, sometimes via a variety of methods, to a group
Bequest	Gifts made as part of a will or trust
Board Giving	Financial gifts made by the board members of an organization
Campaign	Fundraising efforts over a period of time to raise funds towards a specific financial goal.
Cultivate	To connect with or build a new relationship with a new donor or funder
Donation	Tax-deductible financial donation made by an individual donor(s) to a charitable organization, with or without restrictions
Donor Advised Fund (DAF)	A tax-benefited investment account held by a 3rd party as a vehicle for charitable donations
Event or Fundraiser	An in-person or virtual event held for the purpose of asking for money.
Fundraising Plan	A tool that helps you map out how much money you want to raise and how you will raise it over the course of a year.
Grant	Dollars gifted for a specific purpose, usually as a result of an application, from an institution such as a foundation, corporation, or government agency
In-Kind	A contribution of goods or services.
Major Donor or Major Gift	Someone who gives a gift to an organization at a significant level.



Peer to Peer Fundraising	When individuals organize personal campaigns to collect donations from their peers, may include crowdfunding (via a website), hosting events, and personal asks.
Prospect	An individual or institution that could be a
Solicit	To ask for money.
Sponsorship	Dollars gifted to underwrite costs of producing something in exchange for advertising benefits
Steward	To build relationships with, often by reporting back on impact or by thanking.
Workplace Giving	Gifts that originate from a donor's workplace; may include payroll deductions, employee-sponsored giving, time or dollar matches, etc.