



**J.A. Strategies, LLC**      **KRIEGER SOLUTIONS LLC**

*Present*

***Creating a Fund Development Plan***

**Jennifer Amstutz      Alan Krieger**

for Victim Assistance Programs Funded by:  
New York State Office of Victim Services

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### ASL Interpreter

- We have an ASL interpreter on video for today's meeting
- For best viewing, please update your personal webex layout to "Active Speaker and Thumbnail" or "Grid" view



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### Accessing Audio

To access audio for this meeting, please dial in

- Phone Number: 1-518-549-0500
- Access Code: 171 625 5981



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### The OVS Fiscal Resilience Webinar Series

October 7	1:00 p.m.	Creating a Fund Development Plan
November 5	11:00 a.m.	Engaging Your Board and Volunteers in Building Community Support
December 1	1:00 p.m.	Writing a Strong Grant Proposal
January 5	11:00 a.m.	Managing Funds Responsibly – Fiscal Management for Program Managers

Visit [ovs.ny.gov/training](https://ovs.ny.gov/training) to register!



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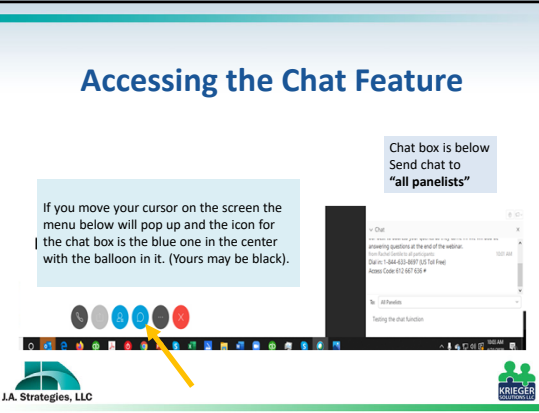
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### Accessing the Chat Feature

If you move your cursor on the screen the menu below will pop up and the icon for the chat box is the blue one in the center with the balloon in it. (Yours may be black).

Chat box is below  
Send chat to  
"all panelists"



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### Workshop Objectives:

At the end of this workshop, you will better understand:

- A process for crafting a fund development plan
- How to set realistic fund development goals and create key strategies to get you there
- Strategic plan goals and how they translate into an organizational fund development plan
- The components of a comprehensive fund development plan



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**Poll**

What is the status of your organization’s fund development plan?

- (1) We have a development plan and update it regularly
- (2) We do NOT have a yearly development plan, but we do have specific fundraising goals
- (3) We do not have a plan or specific goals
- (4) I am not sure about this
- (5) Other: please type into chat

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**WHY CREATE A FUND DEVELOPMENT PLAN**




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**What is the purpose of Fund Development Planning?**

- Links the organization’s mission, vision and strategic goals to your fundraising program
- Engages board, staff and volunteers in setting realistic fundraising goals for the organization
- Replaces “magical thinking” with a detailed roadmap to achieve financial goals
- Sets priorities for how to spend staff and board resources




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**Why Develop a Written Fund Development Plan?**

Your Fundraising Plan:

- Tells you where to focus
- Keeps you out of crisis mode
- Protects you from the fundraising “idea of the month”
- Shifts your team from being reactive to proactive
- Builds confidence in your fundraising program

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**THE FUND DEVELOPMENT PLANNING PROCESS**




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**Do a Development Audit**

Understand where your organization is right now:

- Board’s current role in fundraising
- Staff resources and expertise
- Donor systems and procedures
- Current Fundraising Results:
  - Number of donors (3-5 years)
  - Number of gifts and average gift size
  - Return on Investment by method




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**Identify Your Fundraising Challenges**

- Do you have enough person-power to implement a fundraising program?
- Do you have a way to track donors and gifts?
- Are you keeping donors from year to year? Do you know?
- What are the programs that need the fundraising dollars the most?

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**Identify Your Fundraising Opportunities**

- Have your programs been in the news recently?
- A new Executive Director or leader?
- A cause that is timely?




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**Create Your Message**

Your key messages and/or case statement should say what is unique and special about your:

- Mission
- Clients
- Programs
- Successes

Why should people give to you?

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**Determine your Fundraising Team**

Board Members	Executive Director
Other Staff	Volunteers

Who? How many? What could they help with?




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**Link your Fundraising to your Strategic Plan**

Your Strategic Plan provides the framework for your fund development plan

- Strategic Plan provides the organizational goals
- Fund Development Plan provides the financing to support those goals




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**Set Fundraising Goals**

- Specific
- Measurable
- Attainable
- Relevant
- (Time Bound)




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### Sample Fundraising Goals

Raise \$10,000 in individual donations in 2021.

Increase the number of donors in 2021 by 10%.

Create a new event to attract volunteers as donors.



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### Determine a Realistic Fundraising Mix

- Grants
- Corporate Sponsorships
- Individual Giving Programs
- Events



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### Who Gives?

2018 Contributions by Source

Source: GIVING USA 2019  
The Annual Report on Philanthropy for the Year 2018  
Infographic

Source	Percentage
Individuals	68%
Foundations	18%
Bequests	9%
Corporations	5%



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**Individual Giving: Direct Solicitation**

- Face to Face
- Phone Calls
- Letter Solicitation
- Online Solicitation

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**Individual Giving: Events**

- Galas/Dinner Events
- Community Dinners/Breakfasts
- Auctions/Raffles
- Educational Programs
- Walks/Runs




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**Develop your Stewardship Program**

- Fund Development is about building relationships
- Relationships are built through a series of interactions, over time.
- Develop opportunities to educate someone about the benefits and outcomes of your program and get him or her excited about what you do.
- Learn and understand someone’s interests and what motivates them to give.

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### Stewardship Can Include

- Phone calls
- Meetings
- Newsletters
- Notes
- Thank yous
- Tours



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### Discussion

What does your agency do as part of its stewardship program?

How do you keep in touch with donors and friends?

*Please type your answers into the chat*



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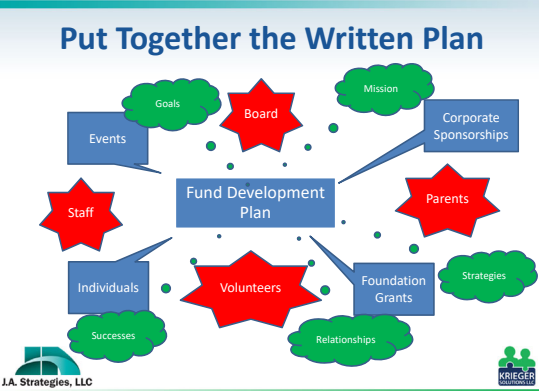
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### Put Together the Written Plan




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**Background**

- Mission
- Vision
- Strategic Plan Goals linked to plan
- Key Messages

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**Fundraising Goals and Key Strategies to Achieve Them**

- ***Increase number of donors by 10%***
  - Hold a Community Walk in September
  - Co-sponsor a violence prevention workshop or webinar in December
  - Create a database to store names and addresses of program attendees.

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**Fundraising Goals and Key Strategies to Achieve Them**

- ***Increase visibility of organization and its impact in the community.***
  - Establish a “story bank” of success stories
  - Create a quarterly newsletter to share news of organization and success stories
  - Use website, presentations and events to regularly tell story




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### Chart of Funding Sources

Project/ Program	Funding Source	Due Date	People Involved	Revenue Goal	Expense
<b>Foundations</b>					
Preschool Literacy	XX Foundation YY Foundation	5/15	Exec. Director	\$15,000	
<b>Fundraising</b>					
Donors, Events, Corp					
Scholarship Program	Letter	8/15	Board Pres.	\$6,000	\$500
General Fund	Community Walk	6/15	Parents	\$1,000	\$200

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### Fundraising Calendar

	Jan	Feb	Mar	April	May	June	July	Aug
<b>May Dinner</b>								
Form Committee						X		
Send Corp Sponsor letter							X	
Create Invite List								X
<b>Newletter</b>								
Assign Articles	X							
Design Layout			X					
Mail				X				

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### Fundraising Budget

- Don't forget to build a budget!
- Be mindful that some fundraising methods (events) are much more expensive to implement than other methods (in-person requests).

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### Poll

Based on what we have just covered, how ready are you for fund development planning?

- (1) We already had a solid plan, and are on the right track
- (2) We are on the right track, but need to hash out some details
- (3) We are ready to start a fund development plan
- (4) We will need a lot of help to even get started



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**Office of Victim Services**  
Training & Technical Assistance Request

- Training and Technical Assistance at NO COST to OVS funded VAPS
- Training, coaching and consulting can all occur remotely
- For more information:  
<https://ovs.ny.gov/training-technical-assistance-request>



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### Sample TTAR Projects

- An analysis of your current resources and revenue streams and ways you might diversify
- Working with the Board and relevant committees to develop a fund development plan for the organization
- Facilitating a fund development retreat to set fundraising goals and develop new strategies
- Develop template for or review fundraising materials, such as direct mail letters or case statements



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**Questions & Concerns?**  
Type them into the Chat Box

Or Email us later:

- [jennifer@JAstrategies.com](mailto:jennifer@JAstrategies.com)
- [alan@KriegerSolutions.com](mailto:alan@KriegerSolutions.com)



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**Thank You**  
for your time and  
participation!

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