



GROWING PHILANTHROPY WORLDWIDE

Is Your Comprehensive Fundraising Plan Ready?

Shepherd's Centers of America

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Webinar

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Who Needs a Plan?



*"Would you tell me, please,
which way I ought to go from here?"*

"That depends a good deal on where you want to get to," said the Cat.

"I don't much care where--" said Alice.

"Then it doesn't matter which way you go," said the Cat.

"--so long as I get SOMEWHERE," Alice added as an explanation.

"Oh, you're sure to do that," said the Cat, "if you only walk long enough."

(Alice's Adventures in Wonderland)

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Why Have a Plan?

- Evaluation
 - Examination of Practices
 - Professional Review
- Staff and Board Guidance
- Responsible Stewardship
- Good Business
- Grow Philanthropy

Agenda

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- Audit
- Fundraising Environment
- Developing the Plan
- Evaluation and Reporting

External Review

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- Viable Prospects
- Number of Donors
- Total Money Raised
- Perceptions

Internal and External Review

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- Leadership
- Staff
- Board
- Policies

Fundraising Environment

There is no shortage of “good causes”:

- More than 1.5 million nonprofit organizations in USA

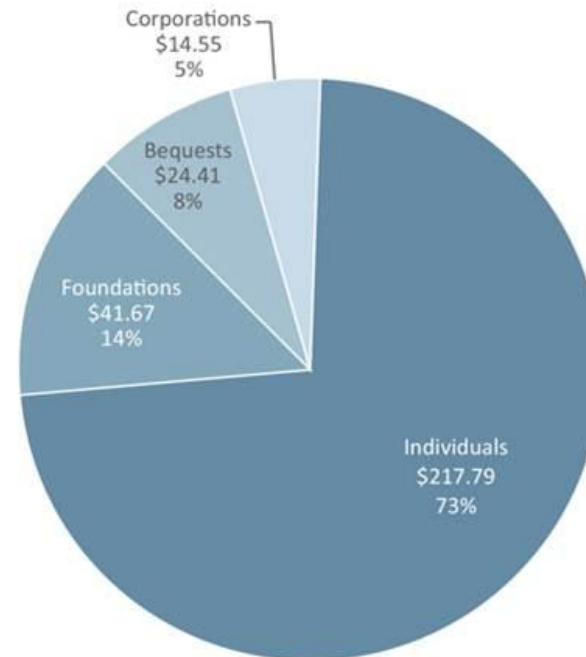
**According to The National Center for Charitable Statistics*

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2011 charitable giving Total = \$298.42 billion

2011 contributions: \$298.42 billion by source of contributions
(in billions of dollars – all figures are rounded)



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Developing the Plan

- Strategic Plan
- Case for Support
- Solicitations
- Goals
- Stewardship and Appreciation
- Solicitation Timeline

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Strategic Plan

The Strategic Plan should:

- Help drive your case for support
- Answer the question:

“If we had all of the money in the world for this organization, we would...”

- Demonstrate that your organization will be around for a long time

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Case for Support

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Your Case for Support should:

- Demonstrate need
- Be clear and concise
- Share stories of organization's impact

Solicitations

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Your Solicitation Plan may include:

- Direct Mail Appeals
- Electronic Appeals
- Telephone Appeals
- One-on-One Appeals

Identifying Measureable Goals

Measureable goals may include:

- Restricted Funds
- Unrestricted Funds
- Specific Total Money Raised
- Specific Number of Donors

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Goal Setting

Realistic Goal Setting may include:

Strategic Plan

What do you need and where are you going?

Benchmark Data

What is the external baseline for success?

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Stewardship and Appreciation

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Your Stewardship and Appreciation Plan may include:

- Recognition Levels
- Special Events
- Process for Appreciation Gifts

Solicitation Timeline

Your Solicitation Timeline should consider:

- Best Quarter Giving
- Time of Year
- Energy Around Organization's Events

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Evaluation

Evaluation methods should be measurable:

- Money Raised
- Total Donors
- Donors Acquired
- Loyalty of Donors

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Fundraising Reports

Reports you may use:

- Weekly/Monthly Comparison (total dollars and comparisons)
- Weekly/Monthly Comparison (donor counts and comparisons)
- Fundraising Status Report
- Priority Prospect Report
- Asks on the Table Report
- Not Yet Report

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Questions? Comments? Discussion?

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Thank you.



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