



EFP 26th October 2012

HOW TO DEVELOP AN ORGANIZATION FUNDRAISING STRATEGY

Sustainability indexes

Strong
relationships with
stakeholders

Financial
reserves

Overhead strategic
management

Diversified fund
sources

Risk
Management

Sustainability

Strategic

Budget;
Fundraising Budget;
Best of partnerships;
Donors relationship;
Fundraising resources....

Financial Strategy

Strategic Plan

Financial Strategy

Fundraising Plan and
Strategy

Financial Strategy

STRATEGIC PLAN:

Sets the Organization objectives for the next 3/5 years considering a budget for the costs of that plan.

Financial Strategy

How is the Organization going to fund the costs.

Fundraising Strategy and Plan

Fundraising objectives and activity plan
to reach the necessary funds.

Strategic Plan

Mission

Vision

Strategic Objectives

Operational Plans

Financial Strategy

Fundraising Strategy

Action Plans

Accountability,
technologic,
personnel



Revision



Evaluation

Fundraising Plan

Strategic Objectives and Mission

SWOT analysis

Fundraising Objectives

Fund Sources

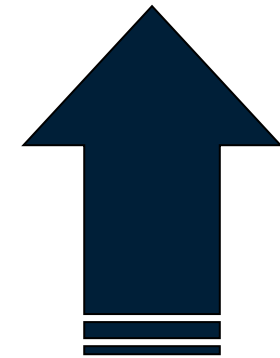
Fundraising Activities

Budget

Action Plan

Evaluation

Revision



WHERE ARE WE

Strategic Objectives and
Mission

SWOT analysis

Fundraising Objectives

Fund Sources

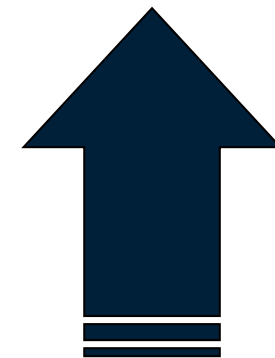
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**WHERE DO
WE WANT
TO GO**

Strategic Objectives and
Mission

SWOT analysis

Fundraising Objectives

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HOW ARE WE GOING TO GET THERE

Strategic Objectives and
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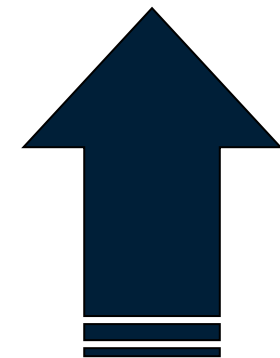
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WHERE ARE WE

SWOT Analysis

Internal		External	
Strengths	Weaknesses	Opportunities	Threats
Great summer camp property on a lake	Declining financial support	Untapped fundraising constituencies	Cash flow / external debts
Strong summer camp programs	Poor fundraising history	Using alternate facilities	Competitor programming
Dedicated, passionate staff and volunteers	Poor and aging facilities	Developing partnerships with other programs	Certain programs losing funding sources
Valuable services provided	Volunteer, staff burnout	Emerging volunteer sources	Economy reduces funds for programs, philanthropy
Long history and deep roots	Inefficient or nonexistent business systems	Competitively priced	Hard to measure impact of certain programs
Resiliency – survival despite adverse conditions	Small volunteer base	100 year anniversary pending	

WHERE DO WE WANT TO GO



SMART Goal Setting in 5 Easy Steps

Step	Mnemonic		Description
1	S	pecific	Exactly what is it you want to achieve in your business and to what extent? A good objective statement or goal should answer the question "which, what, who, where, when, why" ?
2	M	easurable	You need to be able to track the progress and measure the outcome. A good objective statement should answer the question "how much or how many" ?
3	A	ction oriented	Say what you are going to do. A good objective statement should describe a result .
4	R	ealistic & Relevant	The objective should be challenging but realistic and also relevant to your business. Objectives may appear optimistic initially, but as you develop strategies to achieve them they become realistic.
5	T	ime based	Objectives should include a time limit. A good objective statement should include "By when" do you want to achieve your result?

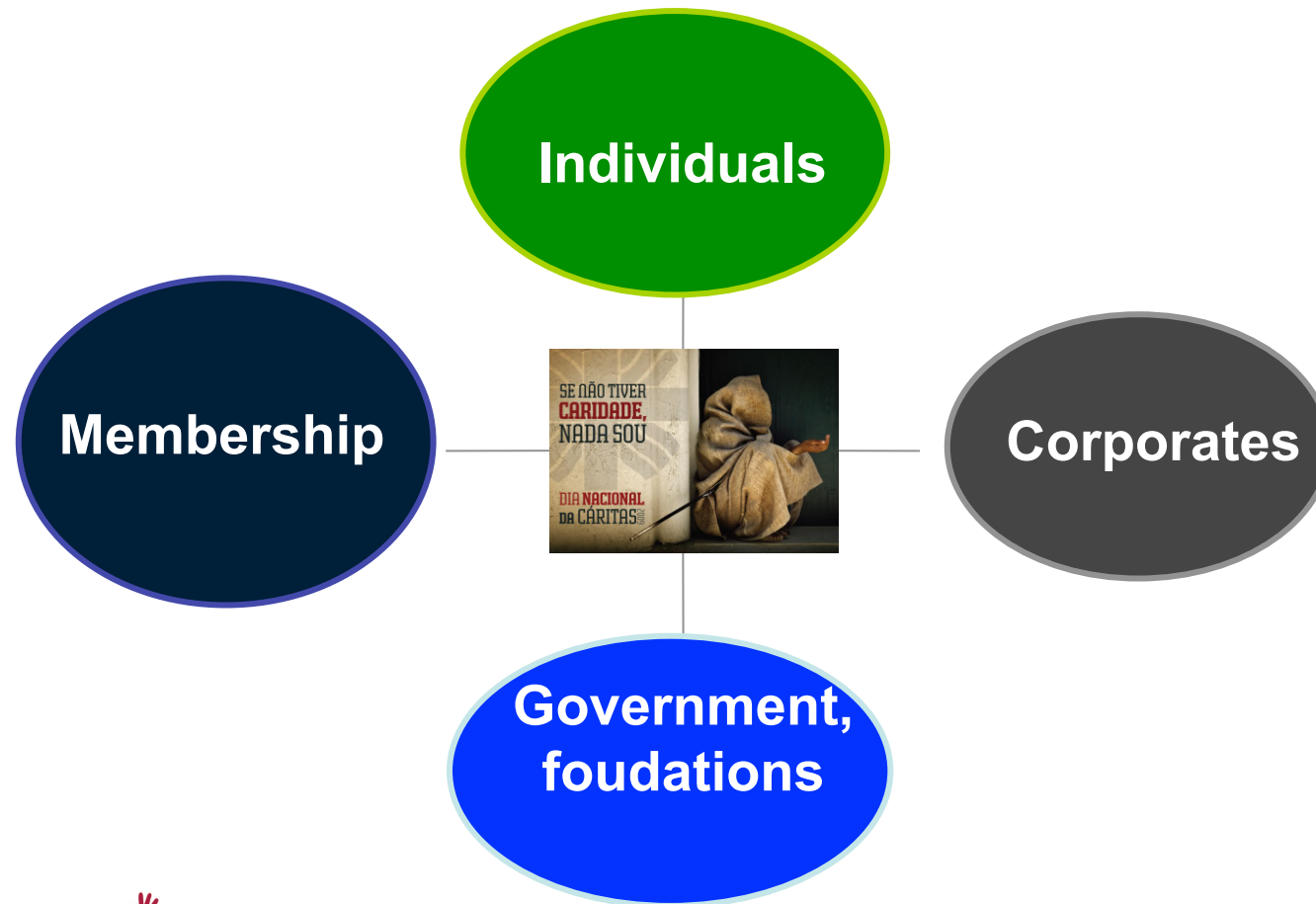
HOW ARE WE GOING TO GET THERE

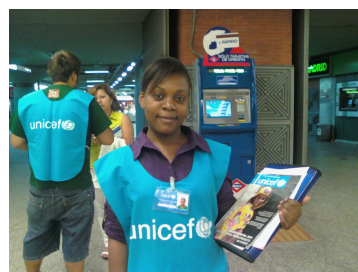
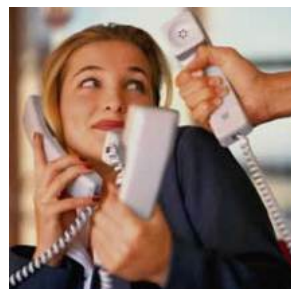


**Restricted
Funds**

**Unrestricted
Funds**

FUND sources





TARGET

Individuals



TARGET - Individuals



TARGET - Corporates

Partnership Donation

Cross selling

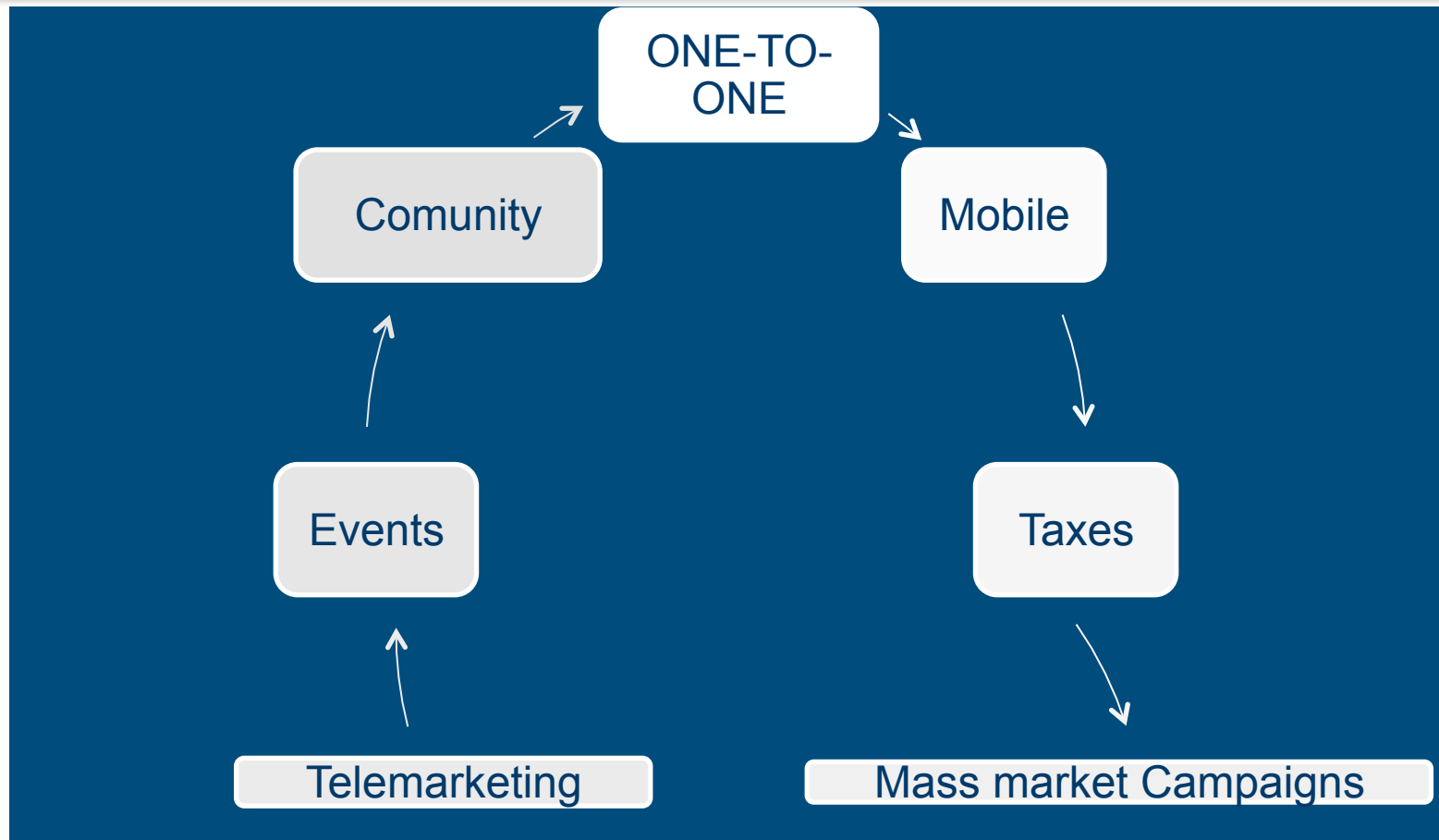
Services/
products

Voluntary work

Sponsorship

Communication

TECHNICS



When you need to decide, THINK:

- ☐ Short term results + long term results
- ☐ Diversity
- ☐ Fundraising Pyramid
- ☐ Sustainability
- ☐ Opportunities of the moment
- ☐ Enough budget and personnel
- ☐ Internal capacity

NEVER FORGET

ROI (Return on Investment)

Funds Raised/ Campaign TT Cost =
= Return

$$\frac{10.000 \text{ €}}{12.000 \text{ €}} = 83\% \\ \underline{1 : 1,2}$$

$$\frac{5.000 \text{ €}}{2.000 \text{ €}} = 250\% \\ \underline{1 : 0,4}$$

Fundraising
is the
mean, not
the goal....



Fundraising Plan

Annual Budget= 400.000€	€	% of TT Budget	Gouvernement Suupport not included
Gouvernement	100.000€	25%	
Events	20.000€	5%	6.7%
Major Donors	200.000€	50%	67%
Membership	50.000€	12.5%	16.7%
.....	30.000 €	7.5%	10%

Fundraising Time table

	Jan	Feb	Mar	Apr	May	Jun	Jul	Ago	Sep	Oct	Nov	Dez
Camp. 1												
Evento A												
Camp. 2												
Reactivação de sócios												



- If you need to fundraise a great amount of money in a short period, then design the best short term plan:
 - If you don't have much time invest on your actual contacts and donors.....
 - Identify and cultivate a good list of potential donors
 - Develop the relationship with the actual donors

- Study your competitors and your “similar” outside and inside your country.....take advantage of their experience and learn quickly with them.
- Do a great list of potential donors: individuals, corporates, foundations.....
- Investigate a lot about them. Try to know everything that is possible to know them well and have the greatest success in creating and developing the best relationship.

- Study in detail everything you do, and take careful conclusions about: return on investment, amount raised, lessons to take.
- Don't ever be afraid of using new technics and formats.....innovation and creativeness are the best to bring success.
- If you don't have too much experience in fundraising, don't be afraid.....start now and begin to have experience.

- Develop quantitative objectives for each one.
- Develop a clear plan to cultivate them and guide them through the fundraising cycle.
- Never forget to THANK you a lot of times to all of them
- Never forget to evaluate quantitatively everything you do to fundraise
- And don't forget to make the changes needed in the fundraising plan to reach the maximum success



honramo-nos
em servir causas que trabalham
para um mundo melhor

Muito obrigada

calltoaction[✎]
CONSULTORIA EM FUNDRAISING