

Developing Your Strategic Fundraising Plan



Presented by:

Cathy Mann, MA, CFRE.

President of Cathy Mann and Associates

#CanadaHelpsChats
#MyFundraisingStrategy



CanadaHelps is a non-profit social enterprise serving charities & donors.



CanadaHelps is a charity that helps charities. We ensure all Canadian charities – most notably the smallest ones that need it the most – have access to the online fundraising tools, technology, and education they need to succeed. Because we're a charity, our fees are a fraction of those of the for-profit alternatives.



For donors, we offer a one-stop shop for supporting any registered Canadian charity online. CanadaHelps makes giving easy. Easily explore and discover new causes. Give once or monthly, donate securities, or increase your impact fundraising for charity. Enjoy instant or anytime access to all your charitable tax receipts.



At a glance: Trusted for over 17 years, over 18,000 charities rely on our non-commercial online fundraising platform and more than 1 million Canadians have given using CanadaHelps. We have a spotless record for safe and secure payment processing & instant tax receipting.



DEVELOPING YOUR

STRATEGIC FUNDRAISING PLAN

From Start to Secret Ingredient

JUNE 7, 2018

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Who am I?

As President of Cathy Mann & Associates, I work with clients from multi-level and community-based organizations working in social justice, with youth, in education, with indigenous communities, and in healthcare. Since starting my career in the charitable sector in 1989, I've focused on helping groups develop the infrastructure and culture of philanthropy required to build sustainable development programs.

I have been Academic Coordinator in Ryerson University's Fundraising Management Certificate program since '08, an instructor since '03 and have been teaching fundraising since '96 beginning at Algonquin college. I recently completed my Masters of Philanthropy and was recognized by Saint Mary's University of Minnesota excellence scholarship for my final graduate project on the role of philanthropy in collective impact.



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Who are you?

- ☐ Executive Director
- ☐ Fundraising Staff
- ☐ Board member
- ☐ Program staff
- ☐ Other



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Let's start a conversation

- Follow me on Twitter [@CathyJMann](#)
- Ask a question or share what you've learned [#MyFundraisingStrategy](#)
[#CanadaHelpsChats](#)



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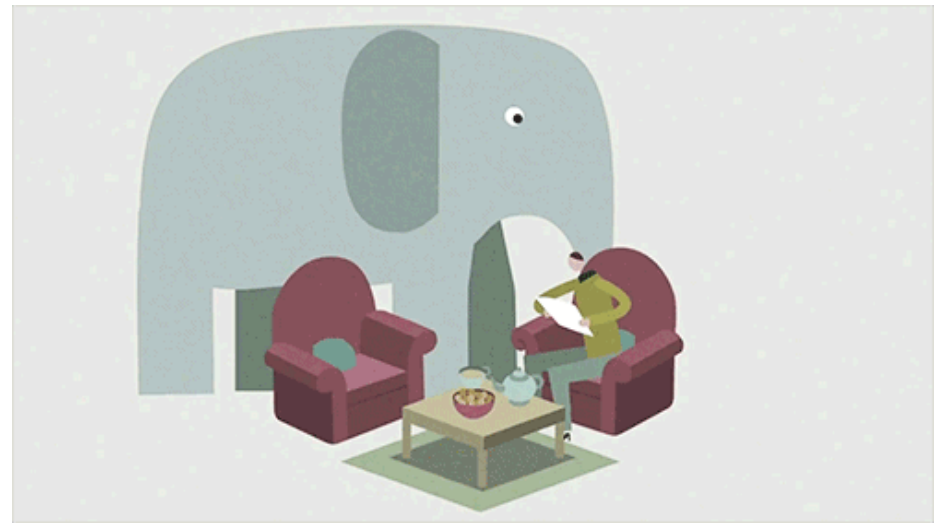


Our agenda

1. Fundraising Fundamentals: A bit of context
2. Let's develop a plan
3. Sample plan
4. A big, hairy, audacious question
5. Find your secret ingredient

Terminology and the elephant in the room

- Fundraising?
- Philanthropy?
- Revenue generation?
- Resource development?
- Fund development?
- Development?





See the possibility, not the probability

To engage in fundraising is to take a leap of faith.

Successful fundraising organizations

1. Take care of details/plan AND
2. Are connected to affluence and influence AND/OR
3. Have an optimistic view of reality!

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Fundraising is not easy

- You need the right org culture
- You need the right structure
- You need patience
- You need great planning



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There is no secret sauce

- But pay attention to best practices. They are a good starting point.
- More on this later.



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Pop quiz

Outside of the government, which group gives the most to charities?

- ☐ Corporations
- ☐ Foundations
- ☐ Individuals



Who gives?

Giving by individuals:

- 82% of Canadians made donations to charities, according to Stats Can.
- \$12.8 billion worth of donations from individuals in 2013.

Giving by foundations:

- Over 10,000 foundations in Canada with investments of over \$55 billion
- They gave away approx. \$4.6 billion in grants

Giving by corporations:

- Give approx. \$3 billion in donations and sponsorships



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Executive Director's role in fundraising

- We heap unrealistic expectations on EDs in our sector, especially in smaller organizations. We expect them to be SMEs in all aspects of the org.
- Most of my clients don't know fundraising and are frustrated because they see potential but don't know how to achieve it.
- ED's role: create the enabling ecology to allow fundraising to succeed. Namely:



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An ED's role in fundraising is to:

- Make sure your organization does good work
- Create space for two distinct cultures to co-exist: service delivery and fundraising
- Understand the importance of relationship building
- Lead by example – act as the lead fundraiser in your org
- Learn about fundraising – we are a profession with a body of knowledge. Don't only lean on your gut feelings.





2. Let's develop a plan



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Step 1-Take inventory

When I do this in real life, I either:

- use big sheets of flip chart paper with clients or
- I have multiple sheets of lined paper that I write on
- I start right right away using the excel FR Planning template -that you'll also find in the hand-out section - if the details are somewhat easier to pin down.

Worksheet #1: Take Inventory

CanadaHelps Webinar
June 7, 2018
Fundraising Plan Worksheet

1. TAKE AN INVENTORY OF WHAT YOU'RE ALREADY DOING

What are we already doing?	How much \$ do we make from it?	Keep?
Direct mail twice per year. Not sure how much each raises but in total it raises \$55k, I think.	\$55,000	Y
Golf tournament	\$50,000	Y
Foundation grants. Mr. Money Baggs grant = \$25k. Others are about the same, I think	\$50,000	Y

Fundraising Inventory

Direct mail - \$40k per year

- 2 letter per year in Feb and Nov, printed in-house. Volunteers fold and stuff. Postage is approx. \$900 using postage meter
- 11 monthly donors
- Ann'l report goes to 1,100 donors and friends. 2,000 printed and sent to satellite offices as promotion at cost of \$5,000

Special events

- Golf tourney raises \$55k
- Walk/run raises \$15k
- 3rd party events: Last yr-\$12k; yr b4-\$5k; yr b4-\$22k

Foundation grants

- 1 grant at \$25k; other btw \$1k and \$5k

Corporate grants

- \$5k in sponsorship to golf

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Sheila's Fundraising Inventory

What am I already doing	\$ raised	Keep?
Golf tournament (May)	\$55,000	Y
Ann'l report (June)	0	Y
Walk/run (Sept)	\$15,000	Y
Mr. \$ Bags Foundation Grant (Oct)	\$25,000	Y
Direct mail letter (Nov)	?	Y
Client Holiday party (Dec)	0	Y
Third party events (On-going)	\$12,000	?
Direct mail letter (April)	?	Y
Meet with Golf tourney sponsor (July)	\$5,000	Y



Step 2 - Put inventory in the Fundraising Plan Template



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Fundraising Plan Template (1/3)

The DoGood Society
Fundraising Plan 2017/2018

Date submitted:										
Over-arching strategy: Modest growth while we develop infrastructure										
OVERALL STRATEGIC GOALS										
1	Do what we're already doing but better									
2	Layer new initiatives on what we're already doing									
3	Tighten systems and processes, including more robust tracking of fundraising activities and revenue									
FUNDRAISING ACTIVITIES				Actual 2016/17	Budget 2017/18	Resources Required	Timeline			
ANNUAL CAMPAIGN							Q1	Q2	Q3	Q4
	Individual giving			\$ 55,000	\$ 75,000					
	What we're already doing									
		Direct Mail (Nov)				Development Manager; Printer; Lettershop; ED to review letter				x
		Direct Mail (Feb)					x			
		Monthly (11 donors)					x	x	x	x
		Annual report mailed to 1,100. Printed and sent to satellite offices							x	
	Proposed new initiatives									

Fundraising Plan Template (2/3)

The DoGood Society
Fundraising Plan 2017/2018

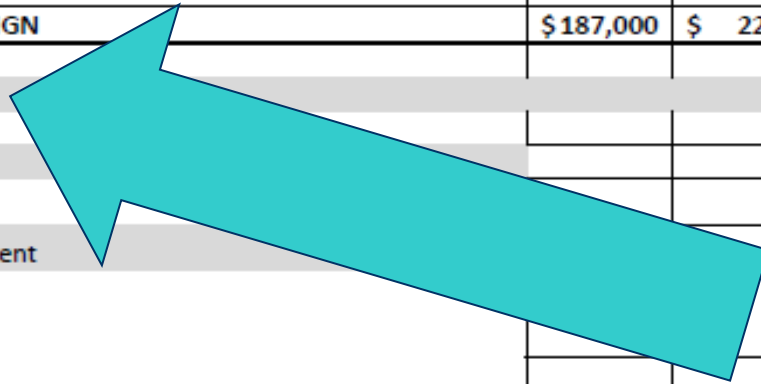
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Fundraising Plan Template (3/3)

+ Infrastructure Section

The DoGood Society
Fundraising Plan 2017/2018

FUNDRAISING ACTIVITIES			Actual 2016/17	Budget 2017/18	Resources Required	Timeline			
						Q1	Q2	Q3	Q4
		Third party events	\$ 12,000	\$ 10,000					
		TOTAL ANNUAL CAMPAIGN	\$187,000	\$ 227,050					
		INFRASTRUCTURE							
		Stewardship							
		Information management							
		Policies and Risk Management							
		Case statement							



Infrastructure Inventory

- Old, clunky database in use. Are tracking contact info and donation amount but not what appeal donor responded to.
- Finance system enters donors as vendors in their finance system. It issues tax receipts.
- All fundraising reporting comes from finance.
- Donation button on web site is small and not as visible on page as it could be. Web site is not mobile responsive.
- Online giving is a CH button that takes the donor to DoGood's page on CH's web site.
- No fundraising policies in place.
- No formal case statement.

Sheila's Infrastructure Inventory

What am I already doing?	\$ raised	Keep?
Database - needs to capture more detailed info		
Review web site's donate button location		
Web site is not mobile responsive		
Online giving tool – shouldn't it be right on the web page? Don't donor abandonment levels go up if you switch to a different looking site?		



Step 3: What will you keep?

Factors to consider when deciding to keep or discontinue initiatives already being undertaken:

- Net revenue
- Return on investment or cost of fundraising
- Volunteer engagement/burn out
- Potential for growth/stability/enhancement
- What are the implications if we discontinue the initiative?
- Others?

Step 4. What will you add?

What might you add/enhance?

- Leadership giving program?
- Bequest program?
- A new special event?
- Collaborative opportunities?

Things to consider when deciding:

- Which initiatives will have the greatest return on investment?
- Can I collaborate with other groups?
- What resources will I need to introduce new initiative
- What makes our organization unique?



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Resources Required

The DoGood Society Fundraising Plan 2017/2018

Site submitted:								
Over-arching strategy: Modest growth while we develop infrastructure								
OVERALL STRATEGIC GOALS								
1	Do what we're already doing but better							
2	Layer new initiatives on what we're already doing							
3	Tighten systems and processes, including more robust tracking of fundraising activities and re							
FUNDRAISING ACTIVITIES		Actual 2016/17	Budget 2017/18	Resources Required		Timeline		
ANNUAL CAMPAIGN						Q1	Q2	Q3
Individual giving			75,000					
What we're already doing								
	Direct Mail (Nov)			Development Manager; Printer; Lettershop; ED to review letter				x
	Direct Mail (Feb)				x			
	Monthly (11 donors)				x	x	x	x
	Annual report mailed to 1,100. Printed and sent to satellite offices						x	
Proposed new initiatives								
	Track each initiative by "appeal" so we will know how much each one raised.							
	Add email and social media outreach to Dir Mail							



3. Sample Fundraising Plan



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The DoGood Society
Fundraising Plan 2017/2018

Date submitted:								
Over-arching strategy: Modest growth while we develop infrastructure								
OVERALL STRATEGIC GOALS								
1	Do what we're already doing but better							
2	Layer new initiatives on what we're already doing							
3	Tighten systems and processes, including more robust tracking of fundraising activities and revenue							
FUNDRAISING ACTIVITIES		Actual 2016/17	Budget 2017/18	Resources Required	Timeline			
ANNUAL CAMPAIGN					Q1	Q2	Q3	Q4
	Individual giving	\$ 55,000	\$ 75,000					
	What we're already doing							
	Direct Mail (Nov)			Development Manager; Printer; Lettershop; ED to review letter				x
	Direct Mail (Feb)				x			
	Monthly (11 donors)				x	x	x	x
	Annual report mailed to 1,100. Printed and sent to satellite offices						x	
	Proposed new initiatives							
	Track each initiative by "appeal" so we will know how much each one raised.							
	Add email and social media outreach to Dir Mail							
	Use more inspiring language to tell stories in Dir Mail packages							
	Add best practices in Dir Mail re: format of letter and reply coupons							
	Use CanadaHelps embedded CDN pages for each appeal							

The DoGood Society
Fundraising Plan 2017/2018

FUNDRAISING ACTIVITIES			Actual 2016/17	Budget 2017/18	Resources Required	Timeline			
						Q1	Q2	Q3	Q4
Foundations			\$ 50,000	\$ 55,000					
What we're already doing									
	Mr. Money Baggs Foundation		\$ 25,000						
	Others tbd		\$ 25,000						
Proposed new initiatives									
	Develop tracking system of foundations applied to, report deadlines and due dates								
	Develop a new foundation grant template that can be adapted as needed for new grants								
Corporate giving			\$ -	\$ -					
What we're already doing									
	Sponsorship (this is tracked in Golf Tournament)								
	We will try to enhance sponsorship for events. No other corp focus this year								
Special Events									
What we're already doing									
Golf tournament			\$ 55,000	\$ 60,600					
	Sponsorship		\$ 5,000	\$ 10,000					
	Golfers x 72 X \$175 each		\$ 12,600	\$ 12,600					
	Silent/live auction		\$ 28,000	\$ 28,000					
	Mulligans, on course activities		\$ 9,400	\$ 10,000					
Proposed new initiatives									
	Transition away from Gold, Silver, Bronze and towards more activation discussions with prospective sponsors								
Walk/Run			\$ 15,000	\$ 26,450					
	Sponsorship		\$ -	\$ 5,000					
	Registrant fees (100 walkers/runners x \$35)		\$ 3,500	\$ 4,200					
	Pledges		\$ 11,500	\$ 17,250					

The DoGood Society
Fundraising Plan 2017/2018

FUNDRAISING ACTIVITIES			Actual 2016/17	Budget 2017/18	Resources Required	Timeline			
						Q1	Q2	Q3	Q4
		Move registration online using CanadaHelps							
		Move pledge gathering online using CanadaHelps							
		Develop new sponsorship approach, similar to golf tournament. Add overall sponsorship opps for both events							
		Third party events	\$ 12,000	\$ 10,000					
TOTAL ANNUAL CAMPAIGN			\$ 187,000	\$ 227,050					
INFRASTRUCTURE									
		Stewardship							
		Develop a formal stewardship plan							
		Information management							
		Review donor database and make recommendations for enhanced tracking of data							
		Use this year as a benchmark year for data							
		Policies and Risk Management							
		Research and develop appropriate fundraising policies							
		Develop donation agreements for donations over \$5,000 and for multi-year pledges							
		Case statement							
		Develop a case statement to tell the story of DoGood's work in an inspiring fashion							



Next Steps

What are the three things you will do as soon as you get back to the office?

Examples:

- Fill out step 1 of this worksheet so that I understand what our fundraising program looks like
- Modify my existing fundraising plan into the format provided



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4. A big, hairy audacious question



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Can you collaborate?

In terms of fundraising

- Do you share a common issue with other organizations that you'd like to address?
- Can you collaborate and use your respective strengths?
- Are you stronger individually or together?
- Is there one central body that can facilitate these relationships and identify task sharing?



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Canadian Charities by Size

Revenue size class	Freq.	Percent	Cum. Percent
<\$500K	65,734	79.64%	79.65%
\$500K<2M	10,440	12.65%	92.29%
\$2M<\$5M	3,060	3.71%	96.00%
\$5M<\$10M	1,300	1.58%	97.57%
\$10M<\$25M	961	1.16%	98.74%
>=\$25M	1,043	1.26%	100.00%
Total	82,538	100.00%	



5. Secret Ingredients



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A successful fundraising program is an artful mix of:

- Passion
- Possibility,
- Fundamentals &
- Fairy dust



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THANK YOU!



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