



**S**

**Strengths**

What  
worked well?  
What sets  
this campaign  
apart?

**W**

**Weaknesses**

What went  
wrong? What  
factors  
negatively  
impacted the  
success of this  
campaign?

**O**

**Opportunities**

What could  
be done  
differently  
next time?

**T**

**Threats**

What factors,  
either  
controlled  
or not, are  
impacting  
campaign  
performance?



## Get SMART About Goals



Specific

.....



Measurable

.....



Ambitious yet Attainable

.....



Relevant

.....



Timely





## Fundraising Assessment Quiz

*Don't jump into fundraising before you are ready. Ascertain first where you are strong and where you are weak relative to your ability to raise funds. This self-assessment quiz, developed by the Society of Nonprofit Organizations, will help you determine where to focus your fundraising efforts.*

Is there someone in your organization, paid or volunteer, who is able to devote at least three hours a day to fundraising?

☐ Yes ☐ No ☐ Not sure

Do you have up-to-date mission and vision statements for your organization?

☐ Yes ☐ No ☐ Not sure

If you asked staff and board members to state your organization's mission and vision statements, could they all do so, and would all their statements match?

☐ Yes ☐ No ☐ Not sure

Can you list the key markets for your services?

☐ Yes ☐ No ☐ Not sure

Do you know how each of your markets would describe your organization's image?

☐ Yes ☐ No ☐ Not sure

Does every one of your board members help raise funds for your organization?

☐ Yes ☐ No ☐ Not sure

Is every one of your staff and board members committed to and enthusiastic about your organization's mission and services?

☐ Yes ☐ No ☐ Not sure

Do you have resources earmarked especially for fundraising?

☐ Yes ☐ No ☐ Not sure

Does your budget include money for training?

☐ Yes ☐ No ☐ Not sure

Do you have resources to hire a consultant?

☐ Yes ☐ No ☐ Not sure

Do you have collaborative relations with other nonprofits?

☐ Yes ☐ No ☐ Not sure

Is your technology up-to-date?

☐ Yes ☐ No ☐ Not sure

Do you have a strategic plan for your organization?

☐ Yes ☐ No ☐ Not sure

Do you keep in regular contact with the media about your organization and its events?

☐ Yes ☐ No ☐ Not sure

Do you have good relationships with corporate leaders in your community?

☐ Yes ☐ No ☐ Not sure

Do you have up-to-date versions of at least seven of the following materials describing your organization?

<input type="checkbox"/> brochure	<input type="checkbox"/> newspaper clippings
<input type="checkbox"/> marketing piece	<input type="checkbox"/> case statement
<input type="checkbox"/> direct mail letter	<input type="checkbox"/> wish list
<input type="checkbox"/> special event invitations	<input type="checkbox"/> video
<input type="checkbox"/> newsletter	<input type="checkbox"/> slide show
<input type="checkbox"/> press releases	<input type="checkbox"/> public service announcement (PSA)
<input type="checkbox"/> annual report	

☐ Yes ☐ No ☐ Not sure

Can you name everyone who gave to your organization more than once last year?

☐ Yes ☐ No ☐ Not sure

Scoring: Give yourself 10 points for every "yes," and score yourself as follows:

<input type="checkbox"/> 0-40	A ticket to disaster. You won't be ready for fundraising for a while. Better start with the basics.
<input type="checkbox"/> 50-90	A good start; concentrate on firming up your foundation.
<input type="checkbox"/> 100-130	A bit of fine-tuning needed; pinpoint where you need to focus your work.
<input type="checkbox"/> 140-160	Congratulations! You're probably ready to add new sources of income.

## REVIEWING A FUNDRAISING PLAN

### REVIEWING A FUNDRAISING PLAN COMPONENT CHECKLIST

The component checklist consists of elements normally present in effective fundraising programs that should be considered when developing and/or approving a plan to begin or expand efforts to raise money.

A nonprofit should consider each element in the checklist for its relevance to the nonprofit's needs and circumstances, assuming each is relevant unless there are sound reasons for it being omitted.

		CHECK ONE	
		YES	NO
<b>I. Basic Plan Objective:</b>			
A. To strengthen our current fundraising efforts.			
B. To begin, or to expand current, fundraising efforts.			
C. Includes an explanation of the plan's objective that is clear and compelling, e.g., "We are undertaking this effort to..... "			
<b>II. Funds Needed and Intended Use:</b>			
A. There is a clear statement of how much money is needed for each type of use, i.e., to support current operations, for a particular project(s), for capital spending, and/or endowment.			
B. Within each type, there is a clear listing of individual needs, functions, and/or uses for which donations will be sought and their amounts, i.e., how donated funds will be used.			
C. Where relevant, there is a clear statement of the date or schedule by which certain funds will be needed, e.g., to complete a matching grant, by the end of the fiscal year, etc.			
D. The bases for arriving at the specific amounts are identified, e.g., a bid, an estimate, etc.			
E. The time period covered by the plan is described and explained, with specific starting and ending dates.			
F. The plan includes tools for explaining to donors what their investment of funds will generate in terms of return.			
		Subtotal, II	
		Percent	

## REVIEWING A FUNDRAISING PLAN (continued)

		CHECK ONE	
		YES	NO
I.	Sources and Amounts of Funds to Be Raised:		
A.	For each type of and need for funds, the plan indicates what the most likely sources of donations are expected to be, i.e., from foundations, corporations, individuals, public funds (federal, state, or local governments), or other.		
B.	Within each source (foundations, corporations, etc.) the plan identifies and ranks by order of priority (from most likely to give to less likely to give) which individual prospects are to be asked.		
C.	The plan estimates the amount of funds to be received from each source.		
D.	The plan includes a description of the roles various fundraising techniques (e.g., annual giving, major gifts, planned giving, special events, etc.) will play.		
E.	The plan includes a gift pyramid, estimating the amount of funds, and numbers of gifts for each level of giving.		
		Subtotal	
		Percent	
II.	Communication, Cultivation, and Solicitation:		
A.	The plan explains the communications strategy to be used to establish and maintain contact with relevant constituencies.		
B.	The plan explains how prospects will be cultivated, solicited, and acknowledged.		
		Subtotal	
		Percent	
III.	The Fundraising Team:		
	The plan explains the responsibilities, roles, and level of effort each of the following will be expected to commit to the fundraising effort:		
A.	The board and individual board members		
B.	The chief executive officer		
C.	Other staff		
D.	Other volunteers		
E.	Others (e.g., outside consultants)		
		Subtotal	
		Per cent	
IV.	Adequacy of Fundraising Resources:		
A.	The human resources needed to successfully move forward with the plan are sufficient.		
B.	The facilities and equipment needed to go forward are adequate.		
C.	The IT hardware and software needed to support the plan's implementation are satisfactory.		
D.	Information for current and prospective donors is available and accessible.		
E.	The financial resources needed to fund the plan are available.		
F.	The policies and procedures needed for plan implementation exist and are current.		
		Subtotal	
		Per cent	

## REVIEWING A FUNDRAISING PLAN (continued)

		CHECK ONE	
		YES	NO
V.	The Plan Budget, includes		
	A. annual amount of funds to be raised for each year in the plan, and a plan total		
	B. cash flow to be expected by year		
	C. fundraising costs by year		
	D. satisfactory explanatory narrative accompanies the data		
	E. projected annual ratio of income to costs		
		Subtotal, II Percent	
VI.	Schedule and Performance Tracking:		
	A. The plan includes a schedule, or timetable, for starting and target completion dates for different elements and phases of the plan.		
	B. The criteria by which the plan's performance will be assessed are listed including the frequency of assessment, and how and by whom the assessments will be made.		
	C. Samples are included of the tracking reports of the plan's progress that will be made available to whom and on what timetable.		
		Subtotal, II Percent	
VII.	Additional Considerations:		
	A. In addition to increased funds, the plan identifies additional benefits that can be expected as a consequence of undertaking the plan, e.g., more members, higher visibility, etc.		
	B. The plan identifies potential hurdles that may limit the plan's success, and includes strategies for surmounting those hurdles.		
	C. The plan reflects a consideration of whether and how other nonprofits' activities may impact the plan's implementation and potential success.		
	D. The reasons for moving forward at this time with the plan are clearly explained.		
	E. The reasons why donors should respond positively to the plan have been identified and are convincingly stated.		
	F. The plan reflects not only the needs of the nonprofit, but also its personality and style.		
	G. The plan explains the consequences of not moving forward with the plan.		
		Subtotal, II Percent	

## REVIEWING A FUNDRAISING PLAN (continued)

### CONCLUSION:

YES

NO

- A. All factors taken into account, this plan should be approved as presented.  
 B. All factors taken into account, this plan should be revisited and possibly revised.

### HOW TO SCORE THE PLAN

Sum the number of "Yes" and "No" responses and determine the percent of "Yes" and "No" responses in each of the categories II-IX. For items marked "No", ask the question, "Why is it not needed?"

Where answers are not convincing, the missing elements should be added to the plan.

The total percent of "Yes" responses indicates the relative level of thoroughness of the plan, how well it has been prepared.

CATEGORIES	NUMBER OF	
	YES	NO
I, C Objective Clearly Explained		
II Funds Needed and Intended Use		
III Sources and Amounts of Funds to Be Raised		
IV Communication, Cultivation, and Solicitation		
V The Fundraising Team		
VI Adequacy of Fundraising Resources		
VII The Plan Budget		
VIII Schedule and Performance Tracking:		
IX. Additional Considerations		

### COMPOSITE SCORE

Total number:  
 Percent of total:

A composite score of 70% or higher indicates a well-conceived plan ready for implementation, if any missing factors can and will be readily addressed.

A composite score below 70% indicates that a significant number of missing elements should be addressed before the start of plan implementation.

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

POSITION: \_\_\_\_\_





## TWO TYPES OF FUNDRAISING

There are two distinct types of fundraising: one with a short-term focus on raising immediate cash, and one with a long-term focus on building relationships with ongoing supporters of the organization.

Understanding the distinction between short-term and long-term fundraising is important because

- each has its own style, methodology, results, and costs
- each nonprofit should decide which of the two will best meet its particular needs and circumstances. The choice will have a significant impact on not only funds raised but also on how your nonprofit is perceived. The chosen type says much about the relationship your organization wants with its supporters.

How do the two differ?

### DISTINGUISHING TRAITS

	SHORT-TERM	LONG-TERM
Goal:	Immediate cash flow, e.g., one-time or infrequent asks <sup>2</sup>	Developing a steady stream of ongoing financial support
Focus:	A focus on immediate cash flow; gift-centered	A focus on building relationships with supporters; donor-centered
Donor pool:	Large number of small givers; number of supporters	A range of donors, from small focus on to large with a large number of donors of small gifts at the base and a smaller number of donors of large gifts at the top
Donor traits:	Indistinguishable and frequently unknown	Identified and individualized
Visual:	A large, amorphous mass	A table of donors, with a large number of donors of small gifts at the bottom and a small number of donors of large gifts at the top
Style:	Immediacy of the ask	Donor cultivation over time

<sup>1</sup> In fundraising parlance, an “ask” is the act of soliciting (requesting, inviting, any form of asking for) a donation. “Please give generously” and “Please consider making a donation” are examples of asks.




	SHORT-TERM	LONG-TERM
Solicitation:	En masse by mail, media, web, social media	Personalized
Results:	Many small gifts with some larger gifts	A gift table with a wide base of small donors supporting smaller numbers of increasingly larger donors
Costs:	Inexpensive; takes less time and less senior-level effort	Expensive; requires time and effort of volunteers (board members and others), senior staff, and support staff
Examples:	Crisis response to emergencies, such as natural disasters and mass appeals for needs, e.g., CARE, ASPCA	Recurring annual giving and campaigns to raise funds for endowments or capital spending, e.g., facilities

Our focus in this guide is on the long-term development of relationships with donors. Why? Because we have concluded that it is the approach that most strengthens nonprofits and best positions them for the future.



## Fundraising Campaign Chart

CAMPAIGN CHART 		
Spring Fun Run		
Logistics	Costs	Goals
<ul style="list-style-type: none"> <li>• <b>Date:</b> May 5th</li> <li>• <b>Time:</b> 4 PM - 7 PM</li> <li>• <b>Location:</b> Jones Elementary School</li> <li>• <b>Est. attendance:</b> 500</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Venue:</b> \$1,000</li> <li>• <b>Personel:</b> \$500</li> <li>• <b>First Aid Tent:</b> \$300</li> <li>• <b>Music:</b> \$150</li> <li>• <b>Advertising Budget:</b> \$500</li> <li>• <b>Total:</b> \$1,450</li> </ul>	<ul style="list-style-type: none"> <li>• Raise \$10,000</li> <li>• Acquire 300 new donors</li> <li>• Increase retention from last year's fun run by 25%</li> </ul>