

FUND DEVELOPMENT QUICK START GUIDE

*“In good times and bad, we know that people give because you meet needs, not because you have needs.”
— Kay Sprinkel Grace*



Whether fundraising is one of the many hats you wear or you have the benefit of working with a larger team, this guide can help you plan and execute successful CASA giving efforts in your community. You’ll find this guide organized into three main sections:

- **PLAN THE PLAN**, which covers how to assess your current program’s strengths and weaknesses, align your efforts to larger organizational strategies, define your goals, develop a roadmap and engage organizational leadership.
- **SET UP FOR SUCCESS**, which addresses how to articulate your value proposition in an elevator pitch, engage board members in fundraising, implement a donor management system, and collaborate with marketing and communications staff on collateral and messaging.
- **WORK THE PLAN**, which includes mapping your network, cultivating donors, diversifying your funding streams and communicating the case for supporting CASA.

For further information on the recommendations in this guide, contact:

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PLAN THE PLAN

The first step towards successful, sustaining fundraising efforts for your CASA program is an effective plan. A well-crafted plan outlines your fundraising activities, how you will accomplish them and who is responsible. Additionally, developing a fundraising plan as part of your organization's annual planning process takes the guesswork and panic out of fundraising by providing a roadmap for the year.

<p><input type="checkbox"/> Assess the strengths and weaknesses of your current fundraising model.</p>	<p>Before you set goals, you first need to understand where your fundraising stands. Take a look at the revenue brought in by fund development and ask your team:</p> <ul style="list-style-type: none"><input type="checkbox"/> Where do you see strengths? Is it in foundation grants, third party fundraisers, individual giving or event fundraising?<input type="checkbox"/> What approaches, activities and materials do you want to preserve, avoid, achieve or eliminate in the future?<input type="checkbox"/> Which efforts have proven most fruitful and why?
<p><input type="checkbox"/> Identify needs and goals for fund development based on your strategic plan.</p>	<p>Focus on the aspects of your fundraising model that have room for improvement. Are there areas that require more attention that you need to work on in the year ahead?</p> <p>Next, consider how your organization wants to use fund development moving forward: should more time be spent towards corporate relationships, grant research, or individual donors? Be sure to align your fundraising strategies with programmatic strategies defined in the plan.</p>
<p><input type="checkbox"/> Define growth goals and activities on a timeline for the year, and delegate roles for staff, board, volunteers and committee members.</p>	<p>Set specific monthly or quarterly goals each fiscal year that align with the strategic plan. It is easy to spread your staff thin, so be thoughtful on the return on investment when setting goals and planning activities.</p> <p>Additionally, to operate effectively and efficiently, delegate tasks to the appropriate people. For example, you can ask board members to help write donor thank you notes, and ask development committee members to assist staff in follow-up calls to potential event sponsors.</p>



PLAN THE PLAN (CONT.)

<p>☐ Identify a systematic and organized approach to achieving goals in the development plan, and commit deadlines to your calendar.</p>	<p>With your team, map out the series of tasks, resources, communications and stakeholders required to achieve each of your goals. Plot these activities on your calendars: setting deadlines now will help you stay organized and track your progress throughout the year.</p>
<p>☐ Ask your executive director and board of directors to review and approve your fund development plan.</p>	<p>Fundraising should be a shared responsibility with a sense of ownership across organization leadership. Getting approval from the executive director and board of directors ensures that everyone is on the same page. Additionally, involving your board in the plan allows them to see your vision and creates an opportunity for them to further engage with fundraising.</p>



SET UP FOR SUCCESS

Once you've established a plan, it's time to consider the activities required to make it a success. It starts with putting yourself in the mind of your donor and seeing your organization from their perspective, which is not always an easy task! Read on to find tips for connecting with your donors, using a database to track their behaviors and characteristics, and delivering a consistent message through your collateral.

❑ Define your value proposition and articulate it in an elevator pitch.

Think like a donor by building on what makes your organization special. Why would someone want to invest in your organization? What makes giving to your organization unique? Once you can answer these questions, you can deliver a confident pitch to a potential funder. Some additional tips:

- Your elevator pitch should highlight, concisely (in 30 seconds or less), what your organization does and how your programs and services impact community at large.
- Remember to connect to the head and the heart of the donor, leveraging both statistics and stories to communicate your message.
- Don't forget to practice! Schedule time at the next board meeting to practice the elevator pitch together.

❑ Install and maximize the use of a donor database system.

A donor database system, when used effectively, allows you to understand when, how often and why donors are giving to your cause—information you can use strategically when implementing different campaigns.

You can also use the database to track additional details attached to donors, including personal and professional background, family and education levels which can further help you make choices about how to cultivate and acknowledge them.



SET UP FOR SUCCESS (CONT.)

<p>❑ Demonstrate internal buy in by encouraging board and staff members to participate in giving.</p>	<p>Outside funders want to see that board and staff donate personally to your mission. These contributions can establish credibility that is critical for certain funders. When engaging internal stakeholders, remember to acknowledge them like the donors they are, and incorporate them in your solicitation and recognition plans.</p>
<p>❑ Work with communications and marketing staff to create branded fundraising collateral.</p>	<p>When creating fundraising collateral, remember that visual presentation matters. Consider using a balance of meaningful words, statistics, information and powerful images to demonstrate your mission and impact.</p> <p>Additionally, working with your marketing and communications staff ensures all materials issued by your organization—from the letterhead to the donation webpage to the pledge cards—are consistent and professional.</p>



WORK THE PLAN

With a roadmap and the tools for success in hand, it's time to put your plan to work! Executing your plan requires successfully mapping your network of prospective donors, establishing a plan to connect and cultivate them, and building a diverse portfolio of funding sources to sustain your programs and operations for as long as children need CASA.

<p>❑ Start with your inside connections and work your way outside.</p>	<p>Ask your board and staff to reflect on their networks, including the people with whom they have professional or personal relationships. Are there individuals in those networks who would be interested in furthering your mission? Encourage your board members to share the contact information for these individuals or to make personal introductions.</p> <p>Shifting your focus from prospective funding sources (FUNDraising) to awareness, creates an opportunity for a warmer conversation (FRIENDraising).</p>
<p>❑ "Date" your donors.</p>	<p>When planning to build and deepen your relationships with donors, it can be helpful to think of your activities along a "dating" pipeline:</p> <ul style="list-style-type: none">• Prospect: Single and ready to mingle• Cultivate: Date• Solicit: Put a ring on it• Steward: Happy marriage <p>Get to know your donors. Why are they giving to your cause? What other causes do they support? What level of participation do they want?</p> <p>Once you understand your donors, you can create targeted messaging and tailor your communication to personally connect with them, ultimately creating a long-term relationship.</p>



WORK THE PLAN (CONT.)

<p>❑ Diversify funding sources equally as possible.</p>	<p>Be careful not to become too dependent upon one type of funding. There will be times where one donor category might give less than others (oil corporations may not give as much when there's an oil crisis, and individual donors may tighten their budgets during a recession).</p> <p>A diversified funding portfolio—including individual giving, corporate sponsorships, special events and grants—is critical for sustainability.</p>
<p>❑ Clarify the type(s) of funding needed and its purpose.</p>	<p>Do your homework when approaching funders. Are you asking for operating support, project-specific funding, additional capital or capacity building funds? Ensure that your requests for funding fit within their giving parameters.</p>
<p>❑ Bring it all back to the emotional hook: the "why" of CASA's work and the "what it means" for children and your community.</p>	<p>In the end, messaging is key. Take some time to create a powerful narrative for donors. Tell a story of how their gift is directly instilling hope and creating positive change in so many children's lives, and explain that their support directly affects the future of their community and the state of Texas.</p>

