



Fundraising Guide

- 1) Overview:
 - a. Community Fundraising Process
- 2) What funding they currently have and what it looks like
 - a. Worksheet A Understanding partner Funding
 - b. Worksheet B Analyzing funding streams
- 3) What's working and where they want to grow and what funding they would need
 - a. Scale and Scope Example
 - b. Strategy Worksheet
- 4) Development plan of how they want to raise the money
 - a. Sample Fundraising Plan
 - b. External Relations Calendar of Activity
- 5) Stewardship/donor recognition plans once they have donors
 - a. Sample Donor Recognition Chart
 - b. Stewardship Plan
- 6) How to keep track of donors and fulfill their requirements
 - a. Donor Tracking Template

COMMUNITY FUNDRAISING PROCESS

If your community has a community collaboration, please work with your local coordinator and Nebraska Children staff on your community fundraising plan.

1 Review current priorities and plans

2 Review budget to determine inflow and outflow

- Draft current snapshot of budget

3 Analyze the following:

- **Fundraising landscape** – what’s coming in, going out, and the work this money is supporting
- **Gaps that need additional funding** or where funding growth needs to happen based on community priorities
- **Funding priorities**
- **Funding strategies:**
 - **More efficient operation** through use of intentional collaboration – are there places where we have duplication of efforts or dollars?
 - **Grow current funders** – is there a strategy to increase asks to current funders?
 - **Engage new private local funders**
 - **Maximize public funding opportunities**
 - **Explore other means of fundraising:**
 - Guild
 - Funders Collaborative
 - In-kind support

4 Identify top 2 strategies and draft plan

5 Get community/collaboration/partners’ input

6 Engage all partners in fundraising strategies



Worksheet A: Understanding Partnered Funding

FY _____

1	2	3	4	5	6	7	8
Program Name (by Agency)	Type of Funding Source (E, B, D)*	Source of Funding	Function % / \$ (direct services)	Function % / \$ (infrastructure, facilities)	Function % / \$ (other)	Total Expenditure	Program Goal

Public Funds

Health & Human Services Agency Programs

Educational Agency Programs

Juvenile Justice or Corrections Agency Programs

Housing Agency Programs

Labor & Economic Development

*Entitlement; Block or Formula Grant; Discretionary.

Worksheet A: Understanding Partnered Funding

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Private Sources

Foundation							
	N/A						
	N/A						
	N/A						
Business/Corporate							
	N/A						
	N/A						
	N/A						
Fee-for-Service (e.g., Parent Fees) or Unrelated Business Income							
	N/A						
	N/A						
	N/A						
Total All Programs							

*Entitlement; Block or Formula Grant; Discretionary.

Worksheet B: Analyzing Current Funding Streams

1	9	10	11	12	13	14	15
Program Name (by Agency)	How many served by this program? What's been accomplished?	Eligibility	Who provides this service? How do funds flow?	Is this funding source optimized?	Coordination opportunities?	Barriers to Use?	Is this source "stable", "short-term & soft", or "vulnerable"? What are the trends?

Public Funds							
Health & Human Services Agency Programs							
Educational Agency Programs							
Juvenile Justice or Corrections Agency Programs							
Housing Agency Programs							
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Private Sources							
Foundation							
Business/Corporate							
Fee-for-Service (e.g., Parent Fees) or Unrelated Business Income							
Total All Programs							

What Do You Want to Sustain?

Strategies and activities the initiative will sustain	Current Level of Activity	What scale is the initiative aiming to sustain? (for example: number of youth served, range of services offered)			Who is responsible?
		2019	2020	2021	
Quality Early Childhood Child Development Center					
Opportunity Passport					
Community Response					
Housing					
Behavioral Health					
Family and Youth Engagement					



Sample Fundraising Plan: ABC River Corporation

Strategy	Goal(s)	Action Steps	Who	When/How Much
New Member Acquisition	200 new members \$4,000	<ol style="list-style-type: none"> 1. Do a direct mail campaigns to 5,000 prospects, 1.5% response=75 2. Each board members recruits 5 new members (45) 3. Participants in rafts trips become members (50) 4. Buyers of books of raffle tickets become members (30) 	<ol style="list-style-type: none"> 1. Staff with help of consultant 2. Board 3. Staff 4. Staff 	<ol style="list-style-type: none"> 1. May and September /\$4,000 monthly/no cost 2. Summer/no cost 3. Fall/no cost
Renewals	100 out of 154 (65%) @ \$35 dues \$3,500	<ol style="list-style-type: none"> 1. Call last year's unrenewed members, asking them to renew 2. Do 3 mailings to current members, spaced 1 month apart 3. Call unrenewed members, asking them to renew 	<ol style="list-style-type: none"> 1. Staff and volunteers 2. Staff 3. Staff and volunteers 	<ol style="list-style-type: none"> 1. January/\$50 2. Jan, Feb, March/\$400 3. May/\$50
Special Appeals	454 names @ 10% response, \$50 average gift = \$2,250	<ol style="list-style-type: none"> 1. Prepare a special appeal to all members on lawsuit; 	<ol style="list-style-type: none"> 1. Staff 	Mid-November/\$400
Special Events	\$10,000	<ol style="list-style-type: none"> 1. Hold a raffle which will generate money, educate the public, and recruit members. Sell 2,000 tickets @ \$5/ticket 	<ol style="list-style-type: none"> 1. Board Committee 	June-October/\$2,500
Major Donors	\$5,000 30 Donors: 20 @\$100 8 @ \$250 2 @ \$500	<ol style="list-style-type: none"> 1. Research names of potential major donors (120 names) 2. Create a special donor club with special benefits; 3. Schedule personal visits with as many of these people as possible to ask for money; 4. Where visits not possible, call or write a personal letter. 	<ol style="list-style-type: none"> 1. Staff with help of Board 2. Staff 3. Staff and Board 4. Staff and Board 	Do two campaigns, one in May-June and one in Nov-Dec/\$500
Businesses	\$2,000	<ol style="list-style-type: none"> 1. Talk with local businesses and ask them to sign on as "Friends" with a gift of \$100 2. Send proposals out to selected corporations 	<ol style="list-style-type: none"> 1. Staff and volunteers 2. Board Committee 	<ol style="list-style-type: none"> 1. June-July/\$100 2. May/\$100



Foundations: Lazar Trust, UPS Foundation, Belden Fund	\$35,000	1. Research & prepare a list of foundation prospects 2. Prepare & mail out proposals 3. Follow-up	1. Intern 2. Staff 3. Staff	Ongoing/ insignificant cost
Workplace Giving	\$1,000	1. Apply for admission to state environmental federation or local Combined Fed Campaign	1. Staff or Board Member	Spring and Fall/no cost
Planned Giving	-0- Income unpredictable	1. Put an ad about bequests in every issue of newsletter	1. Staff	Ongoing/no cost
Total Income	\$62,750		Total Expenses	\$11,300

Fundraising Calendar, ABC River Organization

Strategy	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
New Members								X	X	X		
Renewals	X	X	X		X							
Special Appeals											X	X
Raffle						X	X	X	X	X		
Major Donors					X	X					X	X
Businesses						X	X				X	X
Foundations	X	X	X	X	X					X	X	X
Workplace	X	X	X						X	X		
Bequests		X				X				X		
Newsletter		X				X				X		

2019 EXTERNAL RELATIONS CALENDAR

	January	February	March	April	May	June	July	August	September	October	November	December
Events	Perfect Pour invitation		Perfect Pour (Friends of Nebraska Children)	Prevention Month / FOSTER documentary screening	Foster Care Month/Mental Health Month (including Eagle Riders)	Changemakers Save-the-Date		Changemakers Invitation		Changemakers		Perfect Pour Save-the-Date
	Corporate Sponsorships											
Acquisition/ Community Relations	Omaha Gives (May), Give to Lincoln Day (May), AmazonSmile, Giving Tuesday (November), Community Services Fund											
Retention			Spring Spout (donor newsletter)	Spring Direct Mail				Summer Spout (donor newsletter)			Fall Spout (donor newsletter)	Holiday Direct Mail
	Frequency gifts (donors who have given yearly for at least 3 years in a row), Renewal mailings (those who have given in the past, but not in last 2 years)											
Board of Directors	External Relations workgroup	Board Meeting		External Relations workgroup	Board Meeting		External Relations workgroup	Board Meeting	External Relations workgroup	Board Retreat	Board Appeal /Highlight card	
Legislative		Handout on proposed bills/ BSB legislative breakfast / CYI & GYAC legislative day										
Awareness/ Messaging Themes	Bring Up Nebraska / prevention - statewide messaging strategy and nationwide PR strategy											
	Connected Youth stories (including Opportunity Passport)			Prevention			Community Collaborative Stories			System of Care		



Sample Donor Recognition Chart

Donor Level	Type of Recognition
Donors of \$25,000+	Personal letter from CEO or executive director of organization Personal letter from development officer Call from CEO Personal letter from CEO Call from development officer or key volunteer (with relationship to donor) Personal restricted program update (if related to donation) Photo opportunities for general communications Wall plaque and certificate Copy of annual report with personal letter attached Invitation to private meal with board, board CEO, CEO, key volunteer, or development director Seat at VIP table at special event
Donors of \$5000+	Personal letter from CEO, executive director, or development officer Invitation to special breakfast meetings, luncheons Personal restricted program update (if related to donation) Photo opportunities for general communications Recipient of organization's newsletter Copy of annual report with personal letter attached Wall plaque and certificate
Donors of \$1000-\$4,999	Letter from development officer Call from development officer Invitation to special luncheon Copy of annual report Printed status of program(s) (if related to donation) Certificate
Remaining donors, Below \$1,000	Personalized e-mail Personalized letter



Individual Giving Stewardship Chart

Stewardship Function	Up to \$99	\$100-\$499	\$500-\$999	\$1,000 - \$10,000	\$10,000 +
Mailed thank you letter signed by fund development, added to newsletter, annual report, and email lists	x	x	x	x	x
Personalized thank you note from VP of Development, added to newsletter, annual report, and email lists			x		
Personalized thank you note from CEO, added to newsletter, annual report, and email lists				x	x
Gift acknowledged in Annual Report	x	x	x	x	x
Handwritten note		From VP of development	From VP of development	From VP of development and CEO	From CEO and board member
Personal call from board member				x	X
Invitation to coffee/lunch with fund development			x	x	x
Monthly touches from Fund Development staff, board or CEO			x	x	x
Event Invitations	x	x	x	x	x

