

Building A Successful Fundraising Plan: Step by Step

(This handout is intended as a guide only. The order of these steps might vary for each school district and the amount of time and effort spent on each step will vary depending on your goals and plan.)

An effective fundraising program is built, over time, on clear goals, consistent communications, and mutually beneficial relationships

Organize Your Working Group: A Strong Foundation for Success

- 1) Include people who are willing and able to commit to do the necessary work to meet your goal. Include people who bring diverse skill sets. Include those who have a network of contacts in the community, the funding world (ie, director or program officer of a foundation), or among their colleagues and peers.
- 2) Determine leadership (chairs, co-chairs)
- 3) Set a realistic meeting schedule that doesn't overburden the group, but meets often enough to build momentum and get things done. With technology, face-to-face meetings aren't always necessary

Clarify your Goal(s): Your Calling Card To Cultivate Mutually Beneficial Relationships

- Build buy in from within the Working Group by collectively establishing goals
- What programs and/or operations do you need to fund?
- How much money do you need to raise to support this program for a clearly defined time period?
- Who will your programs impact?
- Besides financial goals, what are the benefits of pursuing these goals in the short term? long term?
- How will you assure that the monies will be channeled to your programs?
- Who do you need to communicate with to assure that the dollars you raise are channeled to your programs?
- Keep it Simple

Identify Resources: Know Your Strengths

- a) Internal Funding Sources (Title I, Title II, State DOE, Race To the Top, i3 grants (Investing in Innovation))
- b) Local Education Foundation
- c) Private Foundations (Bannerman, Biller, Grammy)
- d) Corporate Foundations (Boeing, Target)
- e) Government Grants (CA Arts Council, NEA)
- f) County District Supervisor
- g) PTA
- h) Booster Club/Other Parent Organizations
- i) Neighboring School Districts
- j) Local Non-profit Partners (arts, social service, education, others)
- k) Civic Groups (Kiwanis, Lions, Rotary, etc.)
- l) Local Business
- m) Companies where parents work
- n) Supermarket Programs that Raise Dollars Per Purchase For A Specific School/Program
- o) Art Stores that Raise Dollars Per Purchase For A Specific School/Program
- p) Percentages of Fees in Local Govn't (ie. film commission)
- q) Parcel Taxes
- r) Other community/school district specific resources?

Develop a Strategy: Identify the best approach to meet your goal(s). Do you need to write a grant or grants? Hold an event? Hold a year-long silent auction? Do preliminary research? Or, use a combination of tactics?

- a. Grant(s)
- b. Fundraising Event or Series of Events (golf marathon, concert series, dance, etc.)
- c. Celebrity Event(s)
- d. Raffle
- e. Silent Auction
- f. Online Auction
- g. Sale of Promotional Items (Bumperstickers/Bookmarks/t-shirts)
- h. Concert, Gala, Performance, Reception
- i. Appeal Letters

Timeline, Budget & Assignments: The Nuts and Bolts That Hold It All Together

- a. Budget
 - i. create a line by line, income and expenses for all the tactics/activities that you plan to engage in
- b. Timeline
 - i. calendar action steps on a timeline that is realistic and achievable
- c. Working Group Assignments
 - i. know who is doing what, when

Marketing Your Plan: Telling Your Story

Communicate & Know Your Audience Frame Your Message

But first...

Take time to describe your program (use the journalistic approach: 5W + H: who, what, why, where, when and how) and remember your audience. We frequently speak of 'the lens' through which we understand, or process, information. This is a valuable exercise for all forms of communication (grants, media/press releases, brochures or marketing materials, etc.) and helps to put yourself in the shoes of the person who will be reading your information.

- s) What is the Background and History of this Project (what is it that you want me to fund?)
- t) State the Need (why is this program important?)
- u) State the Benefits (who benefits?)
- v) What Media to Use to Communicate the Benefit (how do I get the word out? online social networking, dedicated website, word of mouth, buzz, local papers, local broadcast news, posters, postcards, brochures, announcements at sporting events, etc.)
- w) Create a memorable slogan that speaks to your goal (for the overall plan and for specific events)
- x) Is there a particularly compelling story or stories that gets to the heart of why you are raising money? How can you use this story to spread the word? Attract donors?

Recognize and Appreciate: The Finishing Touch

- a. Track contributions and contributors
 - a. document amounts, from who, when, address, email address, phone numbers
- b. Thank partners, collaborators, key stakeholders etc. (cash and in-kind donors/contributors rely on thank you letters as documentation of their tax deductible contribution. Phone calls and personalized notes on the letters are always welcome.)
- c. Share your Success with local press, school newspaper, school district leadership, other key stakeholders

Reflect & Evaluate, Refine: Regroup For the Next Time

- a. What worked? Why?
- b. What didn't work? Why?
- c. Keep the knowledge; document
- d. Determine the distribution of the money raised

Give Yourself A Hand!

ONLINE FUNDRAISING RESOURCES

- CHRONICLE OF PHILANTHROPY <http://philanthropy.com/>
- PHILANTHROPY NEWS DIGEST <http://www.foundationcenter.org>
- FOUNDATION CENTER <http://www.foundationcenter.org/>
- LOS ANGELES COUNTY EDUCATION FOUNDATION <http://www.lacefkids.org/index.html>
- TECHSOUP LOS ANGELES <http://www.techsoup.org>
- GRANTS.GOV <http://www.grants.gov>
- GUIDESTAR <http://www.guidestar.org/>
- U.S. DEPT. OF EDUCATION <http://www.cac.ca.gov/>
- CENTER FOR PUBLIC EDUCATION <http://www.centerforpubliceducation.org>
- NATIONAL ENDOWMENT FOR THE ARTS <http://www.arts.gov>
- CALIFORNIA DEPT. OF EDUCATION <http://www.cde.ca.gov/index.asp>
- CA ALLIANCE FOR ARTS EDUCATION <http://www.artsed411.org>
- CALIFORNIA ARTS COUNCIL <http://www.cac.ca.gov/>
- CALIFORNIA COMMUNITY FOUNDATION <http://www.calfund.org/>
- LA COUNTY ARTS COMMISSION <http://www.lacountyarts.org>
- LA CENTER FOR NONPROFIT MANAGEMENT <http://www.cnmsocal.org/>

Stay Current on Topics of Your Choice By Setting Up **GOOGLE EMAIL ALERTS**:

- From Google home page, click on **More** (top left of screen)
- Scroll to bottom, click on **Even More**
- Click on **Alerts**
- Follow prompts to set up one or multiple alerts
- You can cancel them at any time
- Examples of Google Alerts:
 - California Arts Education
 - California Arts Education Funding
 - Arts Education
 - Arts Education Funding
 - Other topics of personal interest

PRINT FUNDRAISING RESOURCE

Getting the Grant: How Educators Can Write Winning Proposals and Manage Successful Projects

Rebecca Gajda and Richard Tulikangas (2005)

Publisher: Association for Supervision and Curriculum Development (ASCD), 1703 North Beauregard Street, Alexandria, VA 22311. Tel: 800-933-2723 (Toll Free); e-mail: books@ascd.org.

TERMS TO KNOW

Education Foundation
Private Foundation
Corporate Foundation
Giving Areas

Grants

- program funding – typically supports a specific program and may or may not include salaries, but typically includes any costs incurred as a result of producing that program.
 - Artist fees
 - materials
 - supplies
 - travel
 - buses
 - teacher release time pay
- general operations funding – typically supports operations that effect entire organization, not just a specific program
- staff salaries
- equipment
- rent + utilities

restricted funds

unrestricted funds

in-kind support

- donations of goods and services, in exchange for a tax deduction
 - (check with your accounting office/legal counsel before sending thank yous)

sponsorship

- cash donations and/or the donation of good/services in exchange for promotional opportunities (logo and name preferred placement, program ads, website banners, stage, table or event banners)

philanthropy

Fundraising

Donor

Contributor

501(c)3