

AbaF

Developing a giving plan

Fundraising success is directly related to building, cultivating and nurturing relationships with a number of people connected with your organisation. There are five parts to writing a giving plan.

1. Establish goals

Goals are broad statements of what you are aiming to achieve. Goals should be realistic and take into account:

- your organisational strengths and weaknesses and its competitive positioning
- the level of in-house fundraising skills and expertise and the ability to mobilise a strong and committed fundraising team
- your prospective donor market, include individuals, foundations and businesses who are likely to give
- the range of contacts you can draw upon, including board contacts, to build relationships
- costs to the organisation associated with fundraising.

2. Identify objectives

Objectives are more specific than goals. Goals state what you aim to achieve and by when. Objectives need to be realistic and need to be based on an analysis of your capacity and readiness to implement the plan.

3. Implement strategies

Strategies outline the ways in which your objectives will be achieved. Strategies for reaching your objectives might be:

- holding two special events for fundraising in the first year of the campaign
- putting in place a new donor program
- putting in place a bequest program
- producing marketing material which informs potential donors about your organisation and encourages support.

4. Develop action plans

Action plans the action plan spells out what will be done, when, by whom. Everyone in the organisation can play a role in fundraising.

5. Develop an evaluating plan

The evaluation plan spells out what, how and when will results be monitored to evaluate the effectiveness of your plan. Your evaluation plan may include analysing:

- how much money has been raised in donations, grants and in-kind support
- the number of people donating a second, third, fourth time and the number of people are no longer donating can give you insight into the effectiveness of your programs and campaigns
- the increases or decreases of the average gift size and individual gifts can provide data to assist with improving marketing strategies.
- expense-to-contribution ratio and communication to donors that they are contributing to programs rather than administration costs of raising money.

SAMPLE: Giving Plan for Mediterraneo Multi-Arts*	
Categories	Descriptions
Goals	To increase our income from donations and grants from the current 1% of total annual income (\$2,000)
Objectives	<p>In year 1:</p> <ul style="list-style-type: none"> Establish Mediterraneo donors circles and increase donations from individuals from \$2,000 to \$2,500 <p>In year 2:</p> <ul style="list-style-type: none"> Increase donations from donors from \$2,500 to \$4,500 <p>In year 3:</p> <ul style="list-style-type: none"> Increase donations from \$4,500 to \$5,500
Strategies	<p>In year 1:</p> <ul style="list-style-type: none"> Identify all existing supports and segment them according to: interest: gift size; length of association Set up a system for tagging supporter segments on the database and recording information on individuals, businesses and foundations Include a sharp and inspiring appeal to donate (demonstrating our achievements in the community) on the reverse of programs and distribute to all ticket buyers and event participants <p>In year 2:</p> <ul style="list-style-type: none"> Concentrate on five or six major donor prospects and set up personalised contact, preparing groundwork to make the ask Convert 20 members into Mediterraneo donors Organise social gatherings for existing donors, celebrating recent successes <p>In year 3:</p> <ul style="list-style-type: none"> Maintenance of all donor relationships with increased concentration on securing one or two major gifts and a foundation grant
Action plans	<p>In year 1:</p> <p><i>Strategy: Customise all contact with segments and arrange meetings with all who have donated in the past three years.</i></p> <p>Actions:</p> <ul style="list-style-type: none"> Identify longest term members and diarise date to call and invite them to an event and provide updates on the organisation's work (Administrator) For those who have made donations \$100 or less or \$100 - \$500, call to thank them within two days of receiving donation and follow up with a thank you letter and receipt within one week. Diarise when and how we will next communicate with these donors and let them know how their donation made a difference (Administrator) For those who make donations over \$500 thank donor in person if possible, over coffee or lunch, ensure response to donation is immediate. Plan when and how we will next meet with these donors to tell them how their donation was spent and how it made a difference (Director/Chair)

<p>Action Plans</p>	<p>In year 2: <i>Strategy: Maintain and build relationships with significant donors and donor prospects, focus on gearing relationships toward increased involvement with the organisation.</i> Actions: Continue with the above system for relationship building and include extra personalised contact for significant donors:</p> <ul style="list-style-type: none"> • Report back to the fundraising leader any information on audience members who may be prospective donors (volunteers/administrator) • Send photographs of donors at events to the donor, with handwritten 'thought you might like this memento' note With permission, publish photographs in newsletters accompanied by good stories relating to the event. (Fundraising leader/Board member entertaining the donor at the event) • Ensure that major donors know what the organisation's plans are and what well be raising funds for in the future (Fundraising leader/Board member) <p>In year 3: <i>Strategy: maintain and build donor relationships with increased concentration this year on securing one or two major gifts and a foundation grant</i> Actions:</p> <ul style="list-style-type: none"> • Identify prospective major donors • Identify the right person to make the ask, the right timing and right way to go about it (Fundraising leader/Board member) • Frame the ask in accordance with donors' motivations and connection to the organisation (Fundraising leader/Board member) • Based on connections with philanthropic foundations, prepare an application
----------------------------	--

* Mediterraneo Multi Arts is a fictional organisation. The goals, objectives, strategies and actions in this table are a guide only. The levels of contact would vary significantly depending on the size of the organisation, the number of participants, ticket buyers, members, donors etc and the levels of funds sought.

Reproducing this Fact sheet

You may download and print one copy of this Fact Sheet from our website for your individual use. These Fact Sheets should not be reproduced in multiple copies for use in any educational or training programs without the prior written permission of AbaF.

© Australia Business Arts Foundation,

Find out more at www.abaf.org.au