

Fund Raising Plan for the Nonprofit Organization - Instructions & Rubric

The purpose of this course project is to apply knowledge gained throughout the course to create a systematic fund raising plan for your chosen nonprofit organization. This fund raising plan may serve as a blueprint for the organization's overall fund raising efforts with diverse methods and approaches. Few supporting documents and two samples of fund raising plans from previous courses are provided to assist you in completing this course project. The two sample fund raising plans had different instructions and sequencing of sections. Review only the relevant sections of samples.

You are required to submit a hard copy of the final fund raising plan (in a 'professional' format bound with tabs, images, etc.) and an electronic copy of the entire document as one pdf file via Canvas on or before April 21. The fund raising plan is worth 200 points. The hard copy (post marked April 21 or earlier) should be mailed to the instructor at the following address:

Muthusami Kumaran
Department of Family, Youth & Community Sciences
University of Florida
3002 McCarty Hall D
PO Box 110310
Gainesville, FL 32611.

You are also required to develop a PowerPoint presentation of your fund raising plan (one slide per section) and post it on Canvas on or before 11:55pm EST, April 14. Sample PowerPoint of fund raising plans are posted. You will share this presentation with your fellow classmates for discussion forum #5. The PowerPoint presentation of fund raising plan is worth 100 points.

Note: It is recommended that you make two additional professionally bound copies of the fund raising plan: one to present to the nonprofit and one for your records. The copy submitted to the instructor will not be returned as it is part of the course work.

FORMATTING: (10 points)

1. The fund raising plan should be 40 – 45 pages (double spaced, except sections 7, 8, 9 & 11) in length
2. Include a cover page with the nonprofit organization's name and logo, "Fund Raising Plan Developed by" your name, course number, instructor name, and date
3. Include "Table of Contents" page with required sections and page numbers listed in appropriate sequence
4. Organize the fund raising plan according to the sections below in specific order
5. Follow the page limit for each section
6. Include a references page after section 13, APA style
7. Include an appendices section at the end of the document
8. Make sure the final document appears professional.

FYC6424: Fund Raising for Nonprofit Organizations

9. You are required to submit an electronic copy of the entire development plan as a single pdf document on Canvas AND provide a professionally bound hard copy to the instructor

SECTION 1: PROFILE OF THE NONPROFIT ORGANIZATION (4 - 5 pages, 5 points)

This section provides the background information of the nonprofit organization and its operations.

1. Name and location of the organization (office address), website (if any)
2. Mission statement of the organization
3. Vision statement
4. Core values
5. Brief history of the organization including the reason/cause for which the organization was established and the year IRS granted the tax-exemption certificate. Also include the IRC code (such as 501(c) 3) under which the organization is registered with IRS
6. Organizational structure including names of Board of Directors & their positions, and number & roles of paid staff
7. Current programs and services. Provide brief descriptions of programs, services, their clients and geographical areas
8. Overall impacts of the organization on its clients and the society at large
9. Financial information and current sources of funding (from the latest available 990)
10. A brief history of fund raising of the organization

SECTION 2: THE FUND RAISING CASE STATEMENT (3 pages, 5 points)

Include your assignment # 2 (without the cover page). Modify the case statement developed for assignment # 2, if necessary, in consultation with your contact person of the nonprofit.

SECTION 3: THE ANNUAL FUND DRIVE (5 - 6 pages, 25 points)

This section provides the plan for the organization to raise its entire annual operating budget (ie: raising the “sustaining funds”).

1. Referring to the annual operating budget of the nonprofit from its latest available IRS Form 990 and adding any expected increases in the operating cost for the next financial year (consult with your contact person), develop the annual fund raising goal. Provide a one paragraph (about half a page) rationale for the annual fund drive goal. Review module 7.1 PowerPoint slides in completing this section.
2. Irrespective of current fund raising methods of the nonprofit, develop an Annual Fund Drive Plan table that provides details of diversified fundraising methods/strategies (refer to slides 2 & 3 in page # 5 of module 6.3). You are required to include the following methods in this table: one-on-one solicitation, direct mail, email solicitation, online giving, fund raising event, and one foundation grant. There is no standard formula on how to divide the annual

FYC6424: Fund Raising for Nonprofit Organizations

fund raising goal for each method. Make an educated guess based on the organization's fund raising history. Use the following template and provide as elaborate information as possible. .

Annual Fund Drive Plan Overall Goal: \$100,000					
Strategy/ method	Goal & % of overall	Action steps	Who	When	Cost
One-on-one	\$ 35,000 35% of the overall goal	Prospect research, solicitor recruitment, training, etc.	Volunteers, board members with assistance from fund raising staff	Months 1 – 5 and 10 - 12	\$ 1,200
Direct mail					
E-mail					
Online					
Event					
Grant					

3. On a separate narrative section, provide brief information on each one of the fund raising strategy covered in the table
4. Develop a fund raising pyramid with appropriate stakeholders of the nonprofit in appropriate tiers of the pyramid. Refer to the slides in page # 2 of module 6.3. Remember that there is no one cookie-cutter fund raising pyramid. Each nonprofit has distinct fund raising pyramid
5. Develop a gift ratio chart that forms the basis of all individual contributions to the nonprofit. Refer to slides in page # 3 of module 7.1. The overall goal (\$\$\$) of the gift ratio chart is the sum of funds to be raised through all five (one-on-one, direct mail, email, online & special event) fund raising methods targeting individual contributions in the annual fund drive plan table. You can use the Blackbaud gift range calculator available at this website:
<https://www.blackbaud.com/nonprofit-resources/gift-range-calculator>

SECTION 4: MARKETING STRATEGIES FOR FUND RAISING (3 - 4 pages, 15 points)

This section focuses on reaching out to the nonprofit's stakeholders through various marketing strategies for the purpose of fund raising. Referring to module 5 and module 9.2, develop a set of recommendations for various marketing tools for the organization with a focus on fund raising.

1. List all current strategies of the organization in reaching out to donors (such as flyers, annual reports, online marketing, newsletters, etc.)
2. Develop a logo and tagline for the organization. If the nonprofit has a logo, use it and develop a strong tagline (even if the organization has a tagline)

FYC6424: Fund Raising for Nonprofit Organizations

3. Provide specific recommendations for the organization to inform stakeholders about programs, services, and impacts through traditional marketing methods (traditional media, printed material, etc.) before an appeal for donations can be effectively delivered
4. Provide specific recommendations for the organization to inform stakeholders about programs, services, and impacts through online and social media marketing methods (the nonprofit's presence online and in social media, frequency of information updates, etc.) before an appeal for donations can be effectively delivered. Provide one marketing message for the organization through each of the following social media outlets: Facebook, Twitter, Youtube, Google +, Pinterest, and Instagram. Review the pdf document titled "Networkforgood – Social Media Mini Guide for Nonprofits" for tips. Your marketing message for the social media outlets can be an appeal, announcement to volunteers for assisting in fund raising, informing stakeholders about a fund raising event, etc. Develop messages to suit specific social media outlets. For example, a twitter message (aka, a tweet) must be 140 characters or less. For Youtube, suggest the description of a short video that can convey a strong appeal to prospects/donors.

SECTION 5: DONOR RESEARCH FILE (3 pages, 5 points)

Include your assignment # 3 (without the cover page). Modify the prospect profiles developed for assignment # 3, if necessary, in consultation with your contact person of the nonprofit.

SECTION 6: INFORMATION SHEET FOR ONE-ON-ONE SOLICITATOR (3 - 4 pages, 15 points)

This section of the plan provides all necessary information that will assist volunteers who will serve as solicitors for the organization's one-on-one fund raising method. Assuming that the solicitors do not have extensive knowledge/information about the organization, its services, clients, impacts, and need for funds, develop a three-page information sheet (ie: "cheat sheet") that should be in the form of a script with appropriate questions and answers. Logically develop questions that prospects/donors are likely to ask before making decisions to donate. Referring to the case statement, testimonials, and other information, develop the answers to potential questions in a script form with a 'conversational' tone. The answers should help the solicitor to make a stronger appeal.

1. Start the information sheet with the script "Hello (include the name of one of the prospects from the prospect research file)...my name is _____ and I am a volunteer with the (name of the nonprofit)
2. Provide basic information about the organization (mission, clients, services & very brief history of impacts) in no more than one page
3. Develop the potential questions and their answers in the next 2 -3 pages (questions may be about the specific purpose for which funding is sought, need for funding, reason for which a specific (SSS) gift is sought, how the gift will help, etc.)

FYC6424: Fund Raising for Nonprofit Organizations

SECTION 7: DIRECT MAIL FUND RAISING APPEAL (2 pages, 20 points)

Develop a one-page direct mail solicitation appeal letter for the organization and a one-page response device (this is the sheet of paper or a card that the donor will complete and send it along with the donation check or credit card information) that goes along with the appeal letter. Review the slides on direct mail fundraising in module 8, Tempel chapter 27, and Weinstein chapter 9 for information on developing a strong direct mail appeal letter. Feel free to use features from any direct mail solicitation letter of any nonprofit.

1. The appeal letter must be in the organization's stationary which should have its logo, mission statement, mailing address, telephone #, and website
2. The appeal statement is about $\frac{3}{4}$ of the letter (single spaced), derived from the case statement
3. Personalize the direct mail appeal to one of the three prospects identified in section 5 (donor research file)
4. Include appropriate picture/graphic, if necessary
5. Include a one page response devise with the organization's name, donor's address, range of donations, information for credit card payments, etc. Review the example from sample fund raising plan

SECTION 8: EMAIL SOLICITATION APPEAL (1 page, 10 points)

Develop an email solicitation appeal which does not exceed $\frac{1}{2}$ a page (single spaced).

1. Personalize the email appeal to the same prospect to whom your direct mail appeal is addressed to
2. Include a strong "subject line" with no more than 6 words
3. Provide link to the organization's website and/or online donation page in appropriate part of the text
4. End the email appeal with a post script that captures the essence of the appeal in no more than two lines

SECTION 9: ONLINE GIVING WEB PAGES (2 pages, 20 points)

This section should have a home page of the nonprofit (in MS Word or any other software) with adequate information and a prominent "donate now" button. Assuming that a prospect clicks on the donation button, develop an online giving page with gift options and methods of payment. Review the pdf document "Networkforgood – Nonprofit Website Guide" for tips. Feel free to use features from any other effective nonprofit websites.

1. Develop a vibrant home page for the nonprofit (even if it already has one) with logo, mission statement, navigation buttons such as: about us, programs & services, volunteering, etc.
2. Include a prominent "donate now" or "donate here" button on the home page
3. In the giving page, include the organization's mission statement and a "thank you" message for supporting the organization

FYC6424: Fund Raising for Nonprofit Organizations

4. Include relevant information on gift ranges or options and information on how they will help the organization (similar to the response devise in section 7)
5. Include gift payment options (check, credit card, etc.).

SECTION 10: FUND RAISING EVENT PLAN (2 - 3 pages, 20 points)

Develop the plan for a fund raising event appropriate to the nonprofit (it could be a simple fund raising dinner or an elaborate gala event).

1. Referring to the funds to be raised through special event in the Annual Fund Drive Plan table in section #3, develop types and levels of donations individuals can make to attend the event (for example: \$50 per person for the annual fund raising dinner, \$1000 for a table sponsor, etc.)
2. Include a basic budget for organizing and implementing the event (for example: rental for the venue, cost of food, entertainment, etc.)
3. Provide brief information on various methods through which the organization can market the event
4. Include a list of volunteers, their roles in the event, and other resource requirements
5. Include a list of potential sponsors, and other relevant information.

SECTION 11: ENDOWMENT & PLANNED GIVING APPEAL BROCHURE (2 pages, 20 points)

This section should contain a two-page tri-folded brochure with appeals for endowment gifts and planned giving options to the organization. Review the pdf document “Camp Ocala endowment & planned giving” (you will not include all gift options given in this brochure), Tempel chapter 20, and Weinstein chapters 13 & 14. Your brochure should have the following:

1. Organization’s logo, tagline, mission statement, brief information of its programs and impacts
2. An endowment appeal
3. An appeal for planned giving with at least three planned giving options
4. Include appropriate pictures, testimonials, and other relevant information
5. Contact information

SECTION 12: FOUNDATION RESEARCH FILE AND A GRANT PROPOSAL (6 pages, 15 points)

Include your assignment # 4 (without the cover page). Choose one of the foundations identified in assignment # 4 and write a three page grant proposal to that foundation for the funds to be raised through grants in the Annual Fund Drive Plan table in section #3.

Refer to the document titled “SUN-Gheens EmpowerNet grant proposal” as a model to develop the grant proposal. Your grant proposal should be no longer than three pages in length and must have the following sections:

FYC6424: Fund Raising for Nonprofit Organizations

1. Name of the foundation and the specific grant for which the proposal is developed
2. Purpose of the program
3. Program principles
4. Program plan
5. Expected outcome
6. Program evaluation
7. Leveraging additional resources (organization's existing resources, partnerships, etc.)
8. Program timeline
9. Program Budget outline

SECTION 13: A BRIEF EVALUATION PLAN (2 pages, 10 points)

Write a brief evaluation plan on how the nonprofit can assess the success of each fund raising strategies captured in the fund raising plan. Include expected output (such as: number of solicitations, number of direct mails, emails, etc.) and outcome (\$\$\$ raised) measures.

Provide brief evaluation strategies for each one of the seven fund raising methods (one-on-one solicitation, direct mail, email, online, special event, endowment, and planned appeals and grant writing).

For example:

One-on-one solicitation:

In order to evaluate the effectiveness of one-on-one solicitations, the following information will be gathered: number of prospects identified through prospect research, actual number of solicitations from prospects, number of prospects who made gifts; types of training provided to volunteer solicitors; number of follow-up calls to prospects; total funds raised through one-on-one solicitation compared to the goal. These information will be analyzed to identify the level of success in the organization's one-on-one solicitations methods. If the number of solicitations and/or amount of funds raised are not reached as per the plan, modifications will be suggested to improve during the next fund raising cycle.

REFERENCES (1 page) - 5 points for both References and Appendices sections

APPENDICES (No page limit)

Include the first two pages of the latest available IRS Form 990 of the nonprofit

Include any other relevant material (few pages of annual reports, flyers, brochures, etc.)