

## UNIT 1: FUNDRAISING BASICS

### 1. UNDERSTAND YOUR NEED & GOALS

We encourage you to begin this process by understanding your needs to pinpoint your goal.

#### Your Organisational Goal

Let's say as organisation you want to reach 50 families and support them with schoolbooks or other basic school supplies within the year because one of your organisation's missions is "inclusive education".

This is your macro-goal. You need to fit all the rest of your activities within it. If you start working in other things during the year, then you probably are not achieving your organisation's mission.

#### Ask yourself: is such an extra task something fitting in my macro-organisation goal?

To better do it, you should make a little plan before the new year starts (we suggest to always make plans according to the calendar year as it will be easier).

How? Making a rough estimation of what you expect according to the action.

1. Write down how much you expect to spend on ALL expenses (administrative, programming, fundraising)
2. Write down how much are you expecting to bring in from guaranteed, committed sources (Campaign pledges, government grants, private grants, foundations) in the upcoming year
3. Calculate the total you need to raise by subtracting your guaranteed income (#2) from your total expenses (#1). This is how much you need to raise in other types of fundraising activity during the next calendar year.

	ORGANISATIONAL EXPENSES	FUNDRAISING EXPECTED PER SOURCE	SUBTOTALS
<b>Administration</b>	15.000€	0	-15.000
<b>Fundraising</b>	4.000€	15.000€	9.000
Social media campaign	1.500€		
Graphic designer	1.000€		
Copywriter/social media manager	1.500€		
Public funds project #1	2.000€	30.000€	28.000€
Foundation funds #2			

Etc.			
------	--	--	--

## Fundraising Goals

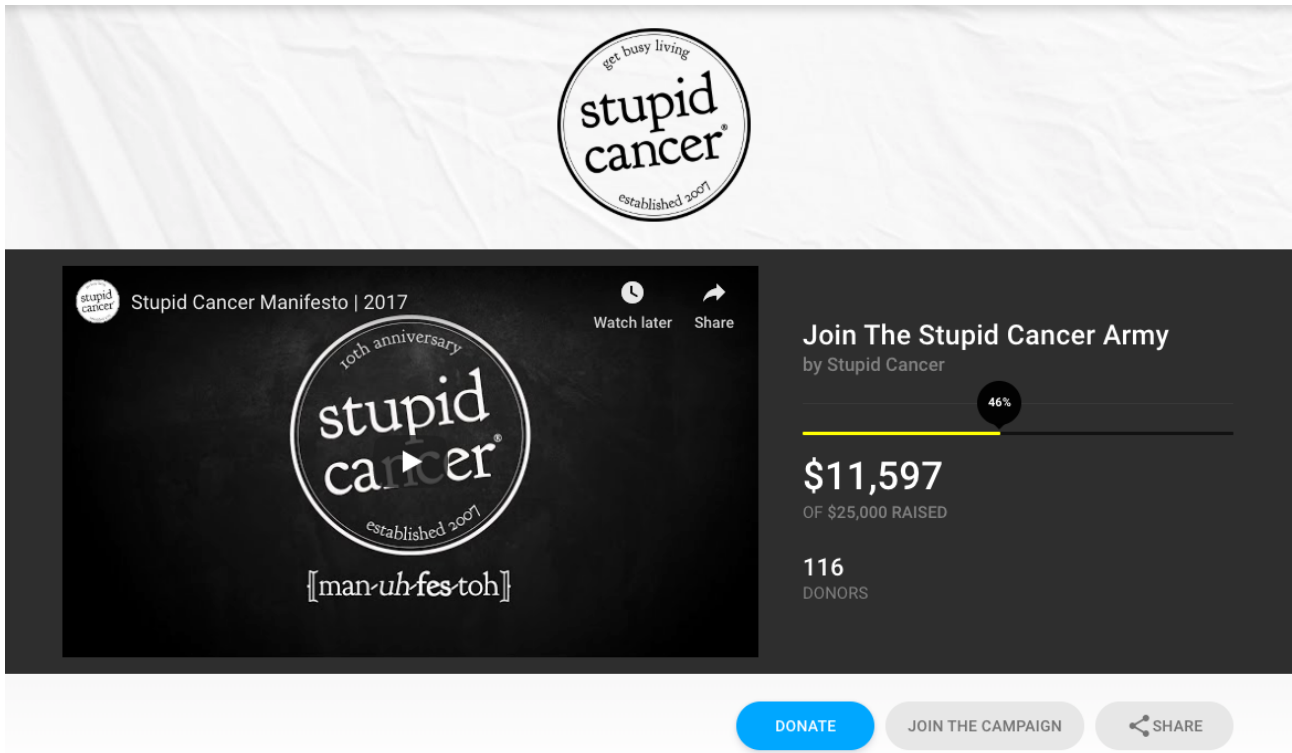
As you can see from the table above, you should set different micro-goals per each activity in a way that it is SMART – specific, measurable, actionable, realistic and time bound. You should definitely aim high with these, but make sure they're realistic within the timeframe you have.

These smaller, strategic goals will feed directly into your organizational goal. For example, if you want to expect a certain amount as public fundraising, you need to make sure there is a full-time or a part-time person working on it or a person of your team needs to get training to perform that for the upcoming year. So, what do you choose?

Let's say you want to increase fundraising from donors. You need then to have a wider list of donors or you need to adjust the gifts you ask for or you need to participate to more online platforms. What do you think might be better?

Put these goals in order of priority – which ones have the most impact, and which ones should you prioritize? We are sure you'll want to do them all, but remember this plan is about focusing your efforts on what will matter [to your bottom line] most.

By starting big (your organizational goal) and working your way down (to your micro goals), you now have a great understanding of what you need to accomplish throughout the year to be successful.



*Here is an example of a fundraising campaign with a “micro-goal” by Stupid Cancer – a campaign such as this can have its own target that will help you to achieve your organizational goal.*

## 2. STUDY PAST FUNDRAISING TRENDS

If you don't know where you have been, how will you know where you need to go? You may have heard this saying a time or two, and it really rings true when it comes to fundraising.

In this sense, if you have never done fundraising, what you can do is at least to know which your potential donors are and whom you will be speaking to. If you have already done fundraising or have had an attempt, it is good to have a critical vision of that.

So, what we suggest as second step is to make a comparison with your previous year. What we suggest is to look at:

- The expenses of running the activity (including staff and volunteer time)
- The revenues that you have had (such as bank transfers, social visibility, donors)
- Other information (e.g. networking etc.)

In this way, you can understand whether it is worth repeating or not.

Remember to cover ALL sources of income on [our spreadsheet](#). Just to resume:

- All individual donations
- Corporate sponsorships
- Grants
- Sale of gadgets or services/rent of equipment

Let's make an example

Specific fundraising activity	Expenses	Fundraised amount	Staff/volunteer time	Notes
Health week	100	3.000	1 week: every morning 3 volunteers	- Increases exposure -

### 3. LIST YOUR RESOURCES

Now it is time to map your resources in an organised manner.

For starters, answer these questions:

- How many staff people can devote their time to fundraising?
  - How much time can they devote each week?
- Do you have a volunteer base to help with fundraising tasks?
  - If so, how many hours per week total for all volunteers?
- Are your board members required to fundraise on behalf of your organization?
  - If so, how many hours per week can you expect them to engage?
- What is your annual fundraising budget, including marketing costs?

Then, organize your findings using this checklist on a spreadsheet or table similar to the one provided below:

- List each staff person and the amount of time they can devote per week
- Write down the average number of volunteers and their anticipated weekly commitment
- Outline your annual fundraising budget, including staff time, fundraising, and other expenses

Staff	Hours/week
Name/surname	
Volunteers	
Total	

## 4. OUTLINE YOUR STRATEGIES FOR THE YEAR

Your strategies relate back to how you are going to achieve your fundraising goals – these are the activities you will undertake to help you achieve each goal.

It takes some time, but it will be great to have a specific goal, like:

Goal: Increase the total number of donors by 5%

- Strategy: Organize one major fundraiser per quarter and one small fundraiser per month.
- Strategy: Plan a peer-to-peer fundraising campaign to acquire new donors online
- Strategy: Use Facebook and Instagram ads to direct a targeted online audience to our fundraising website.

Goal: Increase the average donation size by 3%

- Strategy: Create giving levels and incorporate into all online fundraisers
- Strategy: Ask returning donors to increase donations
- Strategy: Target one-time donors for a recurring giving campaign

## 5. CREATE A PATH FORWARD

To sketch your fundraising plan, you need to put together the different goals, strategies and resources as depicted. In this sense, as a starting point, you can fill out the following table.

<i>Name of the fundraising action</i> Health week		
<i>Audience</i> Local population and attendees of the pharmacies		
<i>When</i>  1-6 February 2021  10-13 every day	<i>Estimated expenses</i>  150€ <ul style="list-style-type: none"><li>● Training equipment (papers, pens, identifiers etc.)</li><li>● Collection boxes</li><li>● Breakfast per each volunteer</li><li>● Daily insurances</li><li>● Facebook ads</li></ul>	<i>Expected fundraising goals</i>  500 medicine boxes to donate
<i>Who</i>  3 volunteers	<i>Communication plan</i>  1-7 January: contact pharmacies 8-24 January: contact volunteers 25-31 January: train volunteers	<i>Obstacles</i>  <ul style="list-style-type: none"><li>● Under-engagement: add budget on Facebook</li><li>● Too short time: consider to engage one extra person from the staff</li></ul>
<i>Additional notes</i> Contact with pharmacies to host volunteers by the 1 <sup>st</sup> week of January Use social media to advertise to recruit volunteers between the 2 <sup>nd</sup> and the 3 <sup>rd</sup> week of January Train volunteers on the 4 <sup>th</sup> week of January		

Indeed, a suggestion is to use some precious tools like [Trello](#) or [Tasks](#) to assign tasks to your team and check how everyone is doing.