

BUILDING A FUNDRAISING PLAN

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WELCOME & OVERVIEW

Agenda Overview

<p>SCHEDULE</p> <ol style="list-style-type: none"> 1) Fundraising Overview 2) Where to Start? 3) Fundraising Methods 4) Developing a Plan <ul style="list-style-type: none"> • Activity #1: Building a Case Statement • Activity #2: Evaluating Funding Methods • Activity #3: Setting Fundraising Goals & Timeline 5) Wrap Up 	<p>GOALS FOR TODAY</p> <ul style="list-style-type: none"> • Using your mission to guide and evaluate your fundraising efforts. • Identify and actively pursue a variety of income sources. • Thinking and planning strategically. • Gaining practical tools to help you move forward. 
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Fundraising Overview

**WE PUT THE
FUN
IN FUNDRAISING**

WHAT IS FUNDRAISING?

- Fundraising is about **sharing a story** you are passionate about with someone with similar interests.
- Fundraising is about cultivating and maintaining **relationships**.
- Fundraising **takes time** – to build relationships, share your story, and demonstrate your value.

Fundraising Overview

- Evaluate **your current needs**:
 - What does your organization **need most right now**?
 - A **few years** from now?
 - How can you work on strengthening key relationships now to **build support for future** needs?
- Evaluate **your resources**, be realistic regarding staff time and budget – prioritize!
- Evaluate **your ROI** for current and potential fundraising methods, and choose wisely.
- **Don't go it alone** – board members & volunteers can assist with fundraising efforts in many ways.



WHERE TO START?

Where to Start?

ASSESS YOUR ORGANIZATION

- **What can you do** in relation to fundraising?
 - Be creative within your boundaries!
- Broaden your view of fundraising to include **“friend-raising”**
 - Identify and develop relationships with key stakeholders who hold the purse-strings to your community (e.g., individuals, organizations, businesses), and are taxpayers and supporters of your governing authorities.
- Through the lens of this **broadened view of fundraising**
 - How can you utilize and modify as needed, any of the general principles we’ll cover today?



Where to Start?

ASSESS FUNDRAISING CULTURE IN YOUR COMMUNITY

- How many other organizations in your community are fundraising?
- How are your peer organizations funded?
- How many grant-making agencies and foundations give to your community?
 - What is their focus?



Callin-Leguako, Cinnamon & Klingler, Stacy, Small Museum Toolkit, Altamira Press, 2012.

Where to Start?

ASSESS FUNDRAISING CULTURE IN YOUR COMMUNITY

- Which are the most generous businesses and corporations in your community?
 - How do they like to give? (cash, volunteering, in-kind goods or services, etc.)
- Are there philanthropists in your community?
 - How do they like to give?
- What is the per capita income of the community?




Callin-Leguako, Cinnamon & Klingler, Stacy, Small Museum Toolkit, Altamira Press, 2012.

FUNDRAISING METHODS


Membership

- Offers the first connection to the individual.
- Can become the base of your fundraising program.
- Great opening for sharing organizational story & goals.
- Questions to ask:
 - What benefits are offered?
 - Are there appropriate price points?
 - How many new and renewing members are anticipated?
 - Is there a big exhibition/program to boost membership?
 - What is the role of your governing authority?
 - Have you crafted effective communications? (case statement, letter of appeal, renewals, etc.)



Grants

- Are you doing something important? For whom?
- Do you do it well?
- Are you a smart investment?
- Are you a good partner?
- How are you uniquely positioned/suited to do this work?
- Would your grantor want to work with you again?
- Is the grant funding worth the time and effort? Would it require new programming? If so, do you have the resources to support it, and is it sustainable?
- Are you tracking grant application and evaluation deadlines?
- Is it possible to call the grant officer and have a conversation?



Sutton, Sarah, *Is Your Museum Grant Ready?*, Rowman & Littlefield, 2018.

Individual Gifts



- Individual giving comprises 70% of all giving.
- On average, 80% comes from 20% of donor base.
- A large first gift is rare. Caring, patient stewardship is key.
- Assess - Linkage, Ability, Interest
- Do you have a realistic “wish list” of individuals you’d like to cultivate?
- Does your Governing Authority/Board reach out to their networks and help grow your potential prospects?

Sponsorships



- Who gives to similar organizations or interests?
- Can you identify the amounts of the gifts?
- Do you present flexible giving options to the potential sponsor?
 - E.g., in-kind options such as staff volunteer time, board service, products or specialized services you need help with, etc.
- Can you clearly communicate how you will acknowledge the sponsor?

Events & Earned Income

- Carefully consider the required resources for the event.
- A good fundraising program is broad and does not rely solely on one special event.
- Don’t reinvent the wheel each year. Create and utilize an event plan.
- The most common forms of earned income for museums include admissions, facility rental, and store revenue.



Annual Fund & Campaigns



- An annual fund is typically started after one or two cycles of successful membership participation.
- Alternate the timing of your annual fund with membership and other communications.
- Campaigns are typically for capital & endowment purposes.

Planned Giving



- You don't need to be an expert on planned giving – you simply need to connect your donors to one.
 - Find an expert you trust and develop a working relationship.
 - This connection often comes from members of your governing authority.
- Establish a plan for how to handle bequests.
- Encourage individuals to leave a bequest to your organization.

DEVELOPING A PLAN

Start with a Case Statement

WHY SHOULD PEOPLE SUPPORT YOUR MUSEUM? (think more broadly than money)

- What is the need?
- How can you tell this is a pressing need?
- How is your organization uniquely qualified to tackle this need?
- What will be the benefits of your action?
- What are the negative consequences if you fail?

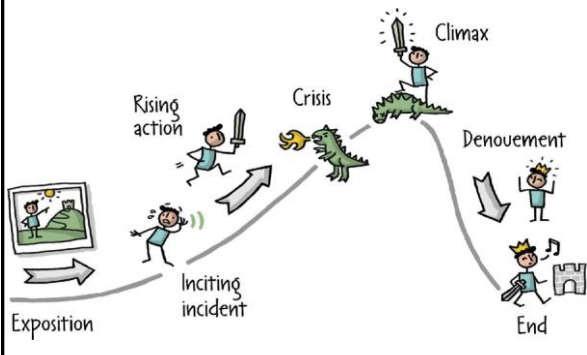
Bernard Ross & Clare Segal, The Influential Fundraiser

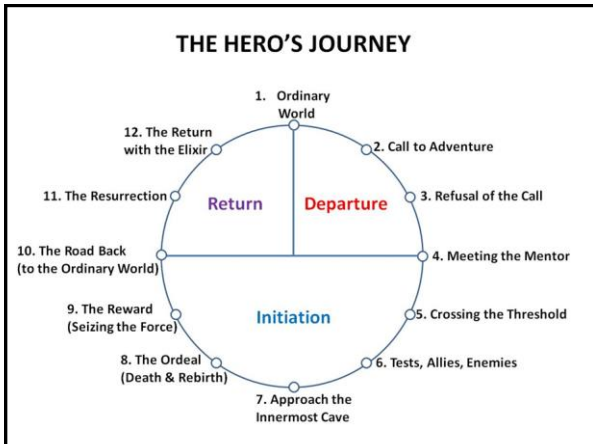
Create Your Case Statement

- Make it visually appealing – start with engaging images and infographics for data.
- Keep it story-centered – the secret to success is knowing your audience and crafting a story that resonates with them.
- Your Strategic Plan can feed right into your Case Statement.
- Wrap your Case Statement in a story that illustrates the impact of your organization and/or project.
- Your Case Statement should clearly articulate:
 - why people should support
 - how the money will be used
 - the impact of their gift



The Art of Storytelling





HANDS-ON ACTIVITY #1

BUILDING A CASE STATEMENT

Building a Case Statement

Objectives:

1. What is the need?
2. How can you tell this is a pressing need?
3. How is your organization uniquely qualified to tackle this need?
4. What will be the benefits of your action?
5. What are the negative consequences if you fail?

- 1) Select a partner to work with.
- 2) Answer these questions to start developing a case statement for your museum (15 minutes):
 - ✓ What is the need?
 - ✓ How can you tell this is a pressing need?
 - ✓ How is your organization uniquely qualified to tackle this need?
 - ✓ What will be the benefits of your action?
 - ✓ What are the negative consequences if you fail?

Bernard Ross & Clare Segal, The Influential Fundraiser

HANDS-ON ACTIVITY #2

EVALUATING FUNDING METHODS

Evaluating Funding Methods

Objectives:

1. Select a partner to work with.
2. Read "Writing Your Fundraising Plan - 9 Steps" information (5 minutes).
3. Complete "Evaluating Funding Methods" exercise on pages 2-4 (20 minutes).

- 1) Select a partner to work with.
- 2) Read "Writing Your Fundraising Plan - 9 Steps" information (5 minutes).
- 3) Complete "Evaluating Funding Methods" exercise on pages 2-4 (20 minutes).

Modified from Rackusin & Yokoi, Writing Your Fundraising Plan.

HANDS-ON ACTIVITY #3 SETTING FUNDRAISING GOALS & TIMELINE

WPA of Management
Building a Fundraising Plan

HANDS-ON ACTIVITY #3 - 20 minutes
Setting Fundraising Goals & Timeline

Instructions:

1. Select a partner to work with.
2. Review Goals and Timeline sections of the plan (pages 4-6).
3. Complete the "If you get stuck" information (page 3) or the sample plan (pages 4-6).
4. Group discussion about takeaways from the exercise (10 minutes).

GOALS TO ACCOMPLISH BY THE END OF THE YEAR
Set a total annual goal. Additional individual goals will support the main goal.

Name: _____

MOBY: _____

What will you be able to do?

Measure	Completed
Measure 1	Completed
Measure 2	Completed
Measure 3	Completed
Measure 4	Completed
Measure 5	Completed
Measure 6	Completed
Measure 7	Completed
Measure 8	Completed
Measure 9	Completed
Measure 10	Completed

Partner Feedback:

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- 1) Select a partner to work with.
- 2) Complete Goals and Timeline sections on pages 1-2 (20 minutes).
- 3) If needed, see the "If you get stuck" information (page 3) or the sample plan (pages 4-6).
- 4) Group discussion about takeaways from the exercise (10 minutes).

Modified from Rackusin & Yokoi, *Writing Your Fundraising Plan*.

WRAP UP

Quick Recap

What We Have Covered Today:

- Fundraising Overview
- Where to Start
- Fundraising Methods
- Developing a Case Statement
- Building a Plan



Key Takeaways

- Remember to view fundraising through a **broadened lens**.
- Fundraising is about **sharing a story** you are passionate about with someone who has similar interests.
- Fundraising is about cultivating and maintaining **relationships**.
- Evaluate and **prioritize** your fundraising & friend-raising efforts.
- **Diversify** your funding sources.
- Clarify **what** needs to happen, **when** it will happen, **who** is responsible, and what **resources** are needed.
- Develop a compelling **case statement** as the basis for all your communications and fundraising and friend-raising efforts.
- Ensure you have clear & **consistent messaging**.
- **Gratitude!** Thank in ways that are meaningful to the giver.

What principles and/or strategies have you gained from our work today that you can apply to your museum?



Recommended Resources

Catlin-Legutko, Cinnamon & Klingler, Stacy, *Small Museum Toolkit*, Altamira Press, 2012.

Sutton, Sarah, *Is Your Museum Grant Ready?*, Rowman & Littlefield, 2018.

How to Write a Great Case Statement for 21st Century Donors
<https://www.thebalancesmb.com/how-to-write-a-great-case-statement-for-today-s-donors-2502100>

DIY Strategic Planning for Small Museums <http://download.aaslh.org/technical+leaflets/Tech+Leaf+242.pdf>

BoardSource, *Measuring Fundraising Effectiveness*
<https://boardsource.org/wp-content/uploads/2017/01/Measuring-Fundraising-Effectiveness-Summary.pdf>
<https://boardsource.org/wp-content/uploads/2017/01/Measuring-Fundraising-Effectiveness-Toolkit.pdf>

Taproot Foundation: Pro-bono services in areas that are often underserved from finance to HR support
<https://taprootfoundation.org>

Indiana Historical Society, Detailed descriptions of funding methods and key considerations
<https://indianahistory.org/wp-content/uploads/DevelopingAnAnnualFundraisingPlan-1.pdf>

Boomerang: free webinars with experienced presenters and relevant, timely content, blog posts and articles
<https://boomerang.co/blog/>

Council of Nonprofits <https://www.councilofnonprofits.org/tools-resources/categories/fundraising>

Classy <https://www.classy.org/blog/11-tried-and-true-nonprofit-resources/>

Network for Good <https://www.networkforgood.com/non-profit-fundraising-resources/>

Wrap Up! Thanks for Coming!

- This workshop is part of the Utah Division of Arts & Museums' Office of Museum Services **Skills Lab** training series. Subscribe to our newsletter to learn about new topics in coming months!
- This workshop is part of **STEPS-UT**, a partnership between the Utah Division of Arts & Museums, Utah Division of State History, and Utah Humanities, with funding from the Utah Department of Heritage & Arts, the State of Utah, and the National Endowment for the Humanities.
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