Creating an Organizational Fundraising Strategy: A Training Exercise

By GIFT

Often groups don't know where to start when it comes to creating an organizational fundraising strategy. People have a lot of ideas about what they should do but don't often take the time to first assess where they are and then map out where they would like to be.

This planning tool provides a guide for any group to use toward developing a shared set of organizational values and strategies for building a fundraising culture and team.

Why: It surfaces and challenges assumptions people have about fundraising
It helps create buy-in from key stakeholders
It helps your fundraising further your organizational mission

Questions to Ask:

1.   Who should pay for the work your organization does (putting aside issues of whether they can or will)?
2.   What kind of funding does your organization need most?
3.   Who should be involved in fundraising for your organization (e.g., members, board, all staff, past and present program participants, etc.)?
4.   How should funders and donors be involved in the work of your organization?
5.   Which strategies would most resonate with your constituents (e.g., online fundraising, dance-a-thon and other events, monthly membership or sustainer program, etc.)?

Components of an Organizational Fundraising Strategy:

•   Explains why fundraising is important to the organization
•   Shares your organizational values around fundraising
•   States which sources you will seek funding from and which ones you won't (if any)
•   States who will be involved in fundraising and how

Key Fundraising Values (based on "Components of an Organizational Fundraising Strategy"):
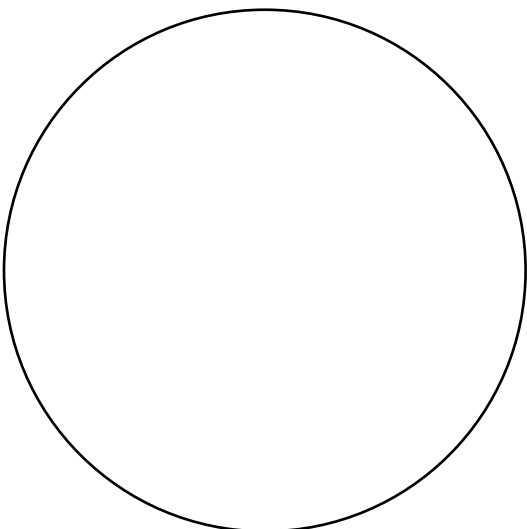
1. _____

2. _____

3. _____

Organization's main constituency

1.

2.

3.

4.

5.

Who should pay for our work?

1.

2.

3.

4.

5.

In the space below, create pie charts to represent the approximate current and desired funding sources (individuals, foundations, government, corporations, earned income, etc.) for your group:

Current

Three years from now