RAISE FUNDS FASTER
A QUICK START GUIDE TO SETTING UP YOUR FUNDRAISING SYSTEM

4.0 SCHOOLS COMMUNITY SUMMIT
OVERVIEW OF FUNDRAISING PROCESSES

FUNDRAISING WORK FLOW
To run an effective development department, stakeholders should spend the appropriate time in these stages.

ENGAGE
- RESEARCH: Identify prospective partners through multiple channels
- OUTREACH: Plan strategic opportunities to make contact with prospects
- CULTIVATE: Regular touch points intended to build relationships

PROPOSE
- LAUNCH: Meeting to determine proposal approach and roles
- DRAFT: Program and communications team write proposal
- APPROVE & SUBMIT: Proposal is approved and submitted by development team

TRACK
- RECORD: Grant agreement and report deadlines are documented
- REPORT: Program and development team fulfill report
- RENEW: Management & development team pursue renewal

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IDENTIFYING NEW DONORS

USING RESEARCH TO IDENTIFY PROSPECTIVE DONORS

IDENTIFYING PROSPECTIVE DONORS

- Assess funding goals and fit
- Research Donors
- Identify high potential prospects

YOUR FUNDING GOALS AND FIT

What are your goals and priorities? Where does a donor fit in?

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<tr>
<th>ORGANIZATION</th>
<th>PROSPECTIVE DONOR</th>
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PROSPECTIVE DONORS FOR ________________________________

1.

2.

3.

4.

5.
IDENTIFYING NEW DONORS
CREATING AN OUTREACH PLAN

COMPONENTS OF OUTREACH PLAN
- Donor list with contact information
- Strategic outreach method
- Timeline / Calendar

OUTREACH STRATEGIES
- Email
- Letter of Inquiry (that can be customized)
- Connections

TIMELINE
- GOOD: Early in the year, spring, and fall
- BAD: Holidays, summer, any sensitive situations

OUTREACH PLAN FOR _______________________

<table>
<thead>
<tr>
<th>Donor</th>
<th>Fit</th>
<th>Outreach Method</th>
<th>Timeline</th>
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MAKING FRIENDS WITH DONORS
BUILDING COMMUNITY TO RAISE MONEY

WHAT IS DONOR STEWARDSHIP?
Efforts to attract prospective donors and to ensure that current partners feel valued and informed

STEWARDSHIP OPPORTUNITIES:
- DONOR COMMUNICATIONS - email newsletters, holiday cards, regular updates, annual reports
- LAUNCH PARTIES - celebrations of new initiatives, ventures, etc.
- DEMONSTRATIONS / SITE VISITS - showcase your work in action to engage donors and build interest in your work
- DONOR LUNCHEONS - a current donor hosts a lunch for friends who might become future donors
- MEETINGS - 1-on-1 coffees, lunches,

STEWARDSHIP PLAN FOR ____________________________

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<th>Stewardship Method</th>
<th>Needs</th>
<th>Timeline</th>
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WRITING A PROPOSAL
GETTING YOUR GRANT WRITING RIGHT

LAUNCH
- RUN A LAUNCH MEETING
- BRAINSTORM CONTENT
- CREATE A TIMELINE

LAUNCH MEETING AGENDA
- Review proposal guidelines
- Review relevant donor priorities
- Brainstorm content
- Create a timeline w/ roles and due dates

BRAINSTORM CONTENT
- **Needs Statement** - Make a data-driven statement about the need for your solution. Be sure to include the target community of your donor.
- **Project Description** - Clearly state what your project is and how it will address the need.
- **Goals** - Are your goals in alignment with your organization and your potential funder? Create SMART goals. Qualitative data doesn't hurt, but quantitative metrics are easier to fund.
- **Activities** - What major activities will happen in your project? Meetings, instruction or training, providing services directly to the community, etc.? Outline it here.
- **Partners** - Who will help you accomplish this? Is anyone else funding you?
- **Impact and Evaluation** - How will you measure this at the end of the grant period? In the middle of the period? Qualitatively and quantitatively? Will you get external measurement support?
- **Sustainability** - How will this program live on? Will you generate revenue? Will you employ technology to scale?
- **Budgets** - What is the beer, wine, and champagne versions of your solution? Do the numbers make sense?

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BRAINSTORM CONTENT - NOTES

Needs Statement

Project Description

Goals

Activities

Partners

Impact and Evaluation

Sustainability

Budgets
WRITING A PROPOSAL
GETTING YOUR GRANT WRITING RIGHT

CREATE A TIMELINE
• Backwards plan from submission date
• Give everyone a role
• Make mini-deadlines
• Use a calendar

<table>
<thead>
<tr>
<th>Task</th>
<th>Who</th>
<th>Deadline</th>
<th>Done</th>
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<tbody>
<tr>
<td>Draft report / Share for feedback</td>
<td>Cindy</td>
<td>1/25/17</td>
<td>x</td>
</tr>
<tr>
<td>Edits based on feedback</td>
<td>Bob / Abby</td>
<td>1/30/17</td>
<td></td>
</tr>
<tr>
<td>Financial Report Due</td>
<td>Jim</td>
<td>1/23/17</td>
<td></td>
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<tr>
<td>Final Edits</td>
<td>Cindy</td>
<td>1/30/17</td>
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<tr>
<td>Submission</td>
<td>Bob</td>
<td>1/31/17</td>
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DRAFT
• Use collaboration and document sharing tools to provide edits and feedback
• Meet your deadlines
• Always have multiple readers provide clear feedback

APPROVE
• Have you followed all proposal guidelines?
• Are your content, project, goals, and activities relevant?
• Do you have a strong vision for impact?
• Are your budgets reasonable and feasible?
• Is your proposal error free?

TURN IT IN! GET FUNDING!
KEEPING RECORDS
TRACKING IMPORTANT INFORMATION

RECORD
- Have a system to keep important documents like grant agreements, reporting guidelines, and deadlines
- Using google is ok, but consider buying a CRM system and accounting software
- Follow up with donor for a thank you (this can be an email, call, etc.)

CHECKLIST
1. Sign grant agreement
2. File documents
3. Put deadlines on your calendar
4. Thank donor for gift

REPORT
- Share challenges, successes, and relevant metrics to date

ADVICE
- Be honest about challenges
- Have hard data AND anecdotal data
- Start tracking metrics as soon as the money comes in, take a baseline and work from there

RENEW
- When your grant ends, ask for a renewal

WHEN TO ASK
- Your donor is happy with your impact
- You need more money to complete the project
- You want to start a new initiative that is aligned to your donor's interests

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