



# ARE YOU READY FOR SUCCESSFUL FUNDRAISING?

ASSESSING YOUR READINESS

Nonprofit Networking Day  
St. Bonaventure University  
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## TODAY'S AGENDA

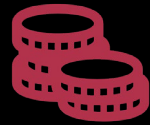
- Educate leadership staff and volunteers on proven best practices
- Understand the success factors for fundraising readiness
- Share a tool to self-assess your organization's readiness
- Discuss strategies to improve your readiness



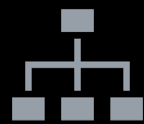
# READY – ISN'T EVERY ORGANIZATION READY?



Capacity = Readiness



Fundraising campaigns involve strategies to strengthen capacity



Think about it – what organizations do you know that have raised a lot of \$ - what do you know about their organizational capacity

# 10 PREREQUISITES FOR A SUCCESSFUL FUNDRAISING CAMPAIGN

1. Influential & Committed Board
2. Experienced & Respected CEO
3. Positive Community Image
4. Loyal & Committed Constituents
5. Ongoing Strategic Planning
6. Stable Financial Position
7. Successful Previous Fundraising Campaign
8. Compelling Case for Support
9. Adequate Fundraising Infrastructure
10. Leadership Passion for the Cause

# SELF ASSESSMENT

**4—Strongly Agree**

**3—Agree**

**2—Disagree**

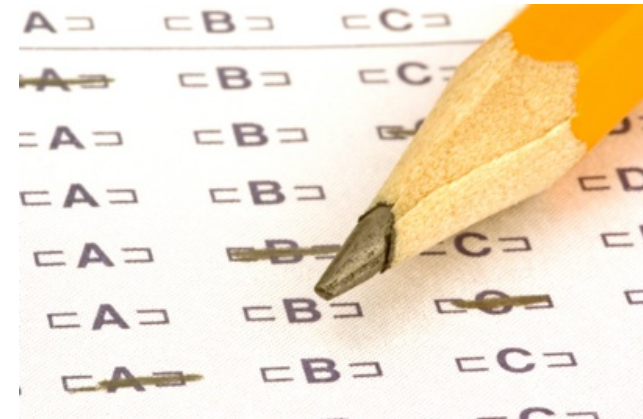
**1—Strongly Disagree**

If you don't know the answer, leave that section blank.

Assess each statement within the category.

Average the scores to determine the category rating.

When you complete the survey, add up your score in the Category Rating column.



## SELF ASSESSMENT

**Score of 3.0-4.0:** Your general perception is one of high confidence for fundraising readiness, although low scores in any particular area indicate opportunities for strengthening.

**Score of 2.0-2.9:** Your organization has several strengths but may not be quite ready for a major fundraising campaign or commitment to a capital project. Focusing on these few areas where you scored a 3 or lower can put you in a position for success.

**Score below 2.0:** Your organization is probably not ready to embark on a public fundraising campaign and would benefit from strengthening the organization in multiple areas.

# INFLUENTIAL & COMMITTED BOARD

STATEMENTS	RESPONSE
The board includes influential community and business leaders who have a passion for the organization.	
The board is composed of peers of potential major donors or has access to those who can contribute a lead gift to the campaign.	
Board members are connected to leaders from key community partners.	

## Suggested Strategies:

- Engage in an intentional Board Development process focusing on board recruitment and on-boarding

## EXPERIENCED & RESPECTED CEO OR EXECUTIVE DIRECTOR

STATEMENTS	RESPONSE
<p>Your organization has an experienced and respected CEO or Executive Director who is willing to devote 50 percent or more of his/her time to a fundraising campaign. (Think about how long the CEO has been on the job and how successful he/she has been in developing solid relationships with community leaders.)</p>	
<p>The CEO or Executive Director has a reliable and stable staff team in place to operate the organization while he/she devotes at least 50 percent of his/her time to the fundraising campaign.</p>	

### Suggested Strategies:

- Develop the organizational structure necessary for the CEO/ED to spend 50% his/her time to relationship building and fundraising.
- In the case of a new CEO or a CEO who is not connected with the community, plan 2-3 visits per week with key community leaders – listen, inform, and leave the door open for another visit.



## POSITIVE COMMUNITY IMAGE

STATEMENTS	RESPONSE
<b>Your organization has a positive community image and top-quality services and programs upon which to build its case for support.</b>	
<b>Your organization demonstrates the impact its programs are making in solving critical community issues related to your mission.</b>	

### Suggested Strategies:

- Engage in a Value Proposition project – understand and document how your organization impacts the community and the people you serve.
- Develop a Marketing Plan focused on telling your story and clearly articulating your impact.

# LOYAL AND COMMITTED CONSTITUENTS

STATEMENTS	RESPONSE
<b>Your organization has a multiyear track record showing growth, delivery of high-quality programs and/or services.</b>	
<b>Your organization's programs and/or services and its community engagement strategies are designed to promote relationships among staff, program participants, and the community.</b>	
<b>Your organization's programs are designed to address identifiable needs in the community.</b>	

## **Suggested Strategies:**

- **Collect multi-year data to analyze and develop strategies for program development. Answer the question – How can we have the greatest impact through our programs and services?**
- **Conduct a Mission Cost Analysis – Is it no Mission without Money or no Money without Mission?**

# ONGOING STRATEGIC PLANNING

STATEMENTS	RESPONSE
<b>You can easily describe how the fundraising campaign will support the organization's strategic plan and its long-term objectives for community impact.</b>	
<b>Your organization has investigated options for providing expanded programs through collaborative opportunities with other organizations to achieve higher quality community service.</b>	
<b>Key community leaders and representative stakeholders have played a part in your organization's planning process.</b>	

## **Suggested Strategies:**

- **Create or Update your strategic plan.**
- **Conduct community leader focus groups to better understand the community needs and how your organization can help support these needs.**
- **Be open to collaborations that compliment your organization's mission.**

# STABLE FINANCIAL POSITION

STATEMENTS	RESPONSE
<b>Your organization has been generating surplus funds for several years. (The ability to cover all operating expenses and still put some funds in reserve for future replacement and maintenance of facilities/equipment is a critical indicator of good financial stewardship.)</b>	
<b>Your organization has a plan for financial sustainability over at least the next decade. Your organization is aware and has a plan to combat the external threats that challenge the financial sustainability of the organization (minimum wage increases, change in demographics, loss of a grant funding source, etc.).</b>	
<b>Your organization leaders are familiar with your organization's debt structure and understand the potential impact of acquiring any new debt.</b>	

## **Suggested Strategies:**

- **Conduct a Cost Study to fully understand the financial impact of the programs and services you offer.**
- **Maximize revenue opportunities and minimize expenses. Have an outside financial consultant review your operating practices.**

## SUCCESSFUL PREVIOUS FUNDRAISING CAMPAIGN

STATEMENTS	RESPONSE
Your organization has had a successful campaign in the last 3-5 years. The fundraising goal was met.	
Your organization meets recommended practices for annual fundraising such as: at least 50 percent of your annual donors comes from major gifts; a high percentage of donors increase their contribution level annually; donor retention is at a high level; and the number of campaign volunteers grows each year.	
The board views philanthropy as one of its top priorities and leads by example. The board is formally solicited for personal gifts, 100 percent of board members make meaningful gifts, and board members are involved in two or more of the following activities: identifying prospects, cultivating prospects, asking for donations, thanking contributors, or reporting back on how donated funds made an impact.	

### Suggested Strategies:

- Hire Campaign Counsel to educate and assist your organization to follow campaign best practices.
- Key staff and board leadership engage in philanthropy education.

# COMPELLING CASE FOR SUPPORT

STATEMENTS	RESPONSE
<b>Your fundraising case is so compelling that it will move your campaign to the top of prospective donors' list of philanthropic interests.</b>	
<b>You can easily explain why this fundraising effort is important to the community, how it meets identified critical needs, and why it is vital at this time.</b>	

## **Suggested Strategies:**

- **Develop your elevator speech. Make sure all staff and board leaders know the key talking points.**
- **A picture speaks 1000 words – create a 1-2 minute video that highlights your Cause in Action.**
- **Engage in training for Telling Your Story.**

# ADEQUATE FUNDRAISING STRUCTURE

STATEMENTS	RESPONSE
<b>Your organization has adequate staff, up-to-date fundraising policies and procedures, and sufficient technology to support conducting a fundraising campaign.</b>	

## **Suggested Strategies:**

- Visit another not-for-profit who has had proven success in fundraising campaigns and study their fundraising structure.
- Consider partnering with other not-for-profit to share fundraising resources (staff, technology).
- If you are able, purchase fundraising software

## LEADERSHIP PASSION FOR THE CAUSE

STATEMENTS	RESPONSE
You believe this fundraising campaign will support critical community needs.	
You are willing to make a stretch gift according to your personal means.	
You are willing to work on the fundraising campaign in some capacity.	

### Suggested Strategies:

- Educate your board at every board meeting on your organization's cause, the impact that your work is doing, and how your fundraising efforts are critical to your organization's ability to serve and grow.
- Passion is authentic and genuine – recruit people in leadership positions who are genuinely passionate for your work.



# STRATEGICALLY THINK · PLAN · ACT

## Community Needs

- Critical social issues related to your cause
- **Opportunities & Strategies**
  - Your response to the community's needs
  - Strategies in pursuit of transformational and measurable outcomes
- **Community Impact**
  - Individual and collective impact



# QUESTIONS CLOSING THOUGHTS

