



C.R.I.B. Notes:

10 Steps critical to launching (or enhancing) a Comprehensive, Responsive, Integrated, Balanced fundraising program.

More frequently, nonprofits are taking a step back and evaluating their fundraising programs. Philanthropy has become an essential income line for nonprofit organizations. No longer is it looked upon as an “Oh, and we have fundraising, whatever it brings in I hope it’s a lot” approach. Now, in response to recent economic influences and increased competition for donor’s attention, it is considered part of a critical and required stream of sustainable funding.

Sustainable funding is a concept widely demanded by donors, grantors and program evaluators. It is a measurable and indispensable part of your nonprofits business practice. But how to go about establishing a viable and sustainable fundraising program?

For a fundraising program to be sustainable it must be comprehensively designed, integrated throughout the nonprofit organizations strategy and work plan, responsive to donor and program needs and balanced to ensure its smooth transition through the many economic and societal impacts the organization will face in its lifetime.

Here are ten fundamental steps that must occur, which if performed successfully, will position your fundraising to be Comprehensive, Responsive, Integrated and Balanced.

1. **Review your organizations Mission/Vision:** Why do you exist? What are you seeking to do and who else is doing it as well? Audit the communities’ needs and what other providers of service to those needs exist. Are others doing exactly what you are doing? Successfully? With funding? If you stand out alone in your field, congratulations! If not, but you can justifiably compete, consider collaborating. If you cannot justifiably compete, then consider amending or abandoning your mission focus.
2. **Determine your organizations Value Proposition:** What real, fundamental and measureable value impact does your organization have on the community it serves? Your true value must be determined by



- evidenced based outcomes that you can point to in support of your organizations reason for being. People will not fund what you do, but they will flock to you if you can prove, with results, what changes you bring about that either affect their lives or align with their values. It can be as simple as ‘We lighten the spirits of 5,000 urban and suburban symphony members every year from May through October’; or as complex as ‘We reduced crime 34% in the last 18 months through our youth crime prevention mentoring initiative’. Either way, it will require some work on your part, to consistently and accurately determine your programs valuable achievements.
3. **Establish a financial forecast for your fundraising:** Why do you need this money and what are you going to do with it? How much is needed and why that specific amount? Your donors will want this information to be valid, reasonable and transparent, if they are going to trust their investment with your organization and buy in to your ability to be successful in your efforts. No trust, no funding.
 4. **Audit and Assess your prospective donor pool and determine your viability in fundraising and your financial capacity:** Where will you be pulling your donors from? Internally? Externally? Warm prospects? Cold lists? Individuals? Corporations? Foundations? How much can convincingly be raised from these prospective donor pools? And how long will it take you to move your donors to achieve this amount of funding? Does the amount of money you can project to reasonably raise meet your needs, as outlined above? If not how will you fill the gap? Your board, not to mention your donors, will **not** want to fund a program set to fail because of poor long term financial planning. Have your ducks lined up and know how your money is going to come in, how much and from whom and how long to achieve your goal.
 5. **Develop a budget for your fundraising program:** Raising money is a product generating and performance enhancing business practice, which requires a budget for expenditures in its implementation. Set your organizations mind right, by building a budget that will be sufficient to generate the returns you have determined you can achieve.
 6. **Establish and follow Performance Metrics:** Tangible, measurable, meaningful metrics on your fundraising program, will provide feedback in the short term for iterating your fundraising plan. Iteration is an important part of your plan and should be built into your strategy. The term and technical process of iteration is stolen from the Tech world, but it is a wildly successful and highly focused tool for making significant



- and donor centric improvements to your fundraising plan over short term intervals. Responsiveness will increase your fundability. Over the long term, performance metrics will validate your efforts to your donors, your clients and your leadership and set a foundation for additional growth.
7. **Develop your case for support:** Assess your organizations service programs, your fundraising goals, your measurements as above and your donor prospects. Tell your donors through the development of your Case Statement, specifically why funding you is an excellent investment, what programs will be supported, what outcomes will be achieved, how you will achieve them, by when and by whom.
 8. **Get your papers in order:** Review your By-Laws. Ensure your organization is set up to fundraise. Consult with your financial advisor and your attorney to validate your organizations filing status with the state or states you are fundraising in. Avoid costly legal and financial miss-steps before they occur.
 9. **Organize your interactions:** Invest in a Donor Relationship Management database early on, before you launch your new or newly expanded fundraising program. Building on your success and establishing a long term trusting relationship with your donors is the most significant strengthening exercise to your sustainability. This cannot be done without a tool to accurately and confidently track your relationships. Don't skimp on this one. Luckily, there are many software programs that are no or low cost to qualified nonprofit organizations.
 10. **Assemble and engage your key stakeholders:** Administrative leadership, board, employees- these are not only your first donor set, but your strongest and most important partners in your sustainable fundraising program. Empower them and make them apostles of the fundraising plan. With the first nine steps in place, their confidence will be raised and their enthusiasm to lead the effort will be the natural response.