

A Culture of Philanthropy

- For a not-for-profit organization to be truly successful and effective, the organization must develop a culture of philanthropy.

- This means that everyone in the organization — from the janitor to the president of the board — understands that philanthropy and fund development are critical to organizational health AND that each individual (both the janitor and board president) has a role in the process.

- First and foremost, everyone is an ambassador for the organization's service, philanthropy and fund development. Being an ambassador means doing one's own job well, understanding how all the various jobs in the organization create one integrated system, and — most especially — treating all of the organization's customers (clients, donors, volunteers, community people, etc.) with care and respect.

Source: Simone P. Joyaux, ACFRE

Resource Mobilization

- Is people-based and requires strong relationship building skills.
- Requires interpersonal and organizational skills similar to those used to recruit and manage volunteers, and to organize projects.
- Is very closely linked to marketing and communications.
- Is successful when there is a plan for diversified and stable avenues of participation, and that plan is worked systematically.
- Secures cash and/or in-kind resources which are critical to the long-term life of poverty-fighting projects.

How to Develop an Effective Resource Mobilization Plan

You've heard the old adage before: If you fail to plan, you plan to fail.

Too many non-profits jump from one fundraiser to the next, without a clearly developed, carefully planned resource mobilization program. Effective development involves much more than a series of isolated special events, which lack direction and cohesion. Before you undertake any development efforts, you need to create a well-thought-out resource mobilization plan. This document should highlight all the programs intended to generate revenue and assets for your organization in the next 12 months.

Planning helps give your fundraising efforts direction, creates a clear process to follow, and clarifies resources *and* costs. It enables you to map out your community or non-profit's resource mobilization program for the next year in a way that incorporates research, action, and evaluation. It serves as a resource and guide for board, staff, and volunteers. And it helps you tie your development programs to your non-profit's aims and objectives.

When should you start planning? Start planning as early as possible - perhaps four to six months prior to the end of your group or organization's fiscal year. Remember, you'll need enough "lead time" to get the necessary commitment and input from others and to conduct the appropriate research in the early stage of planning. You'll also need to allow enough time for the management committee to review, question, dismiss, and approve your resource mobilization plan.

Whom should you involve in your planning efforts? Invite key people to provide input into developing your resource mobilization plan. Depending on your group or organization, you might want to include a mix of key people in the planning process, including board members, staff, committee members, fundraising volunteers, service recipients, client, and donors. Tip: People are more likely to support your resource mobilization plan if they feel a sense of ownership in it. Instill this sense of ownership by seeking their input through all four stages of your resource mobilization plan. Make others a part of your plan by asking their opinions, insights, and feedback. Let them know you truly value their role in developing the plan.

STAGE ONE: RESEARCH

To help you create an effective resource mobilization plan, you first need to conduct research to look inside and outside your non-profit organization. Research gives you the perspective and insights you need to forge ahead in creating a custom-tailored resource mobilization plan. Use the following questions to help you jump-start your research.

How to Develop an Effective Resource Mobilization Plan (cont.)

- What local fundraising/resource mobilization trends can you spot in your community?
- What's working and not working for other community or non-profit organizations?
- What is your resource mobilization history? Describe the types of programs, duration, amounts raised, resources used, time of year conducted, etc.
- What are your community or non-profit organization's resource mobilization strengths and weaknesses? Who is currently involved in this effort? How will your efforts be coordinated with theirs?
- How can you make the most of technology in your resource mobilization program (i.e., computers, Internet, fax, telephone, etc.)?
- Who are your potential donors and what are their interests?
- What return can you expect on the money and time you invest?
- Do you have resource mobilization commitments from both staff and volunteers?
- How do your resource mobilization goals tie into your community or non-profit organization's long-range plan?
- What are the latest resource mobilization techniques, and how can you effectively incorporate them into your resource mobilization program?
- What currently limits your resource mobilization effort?

STAGE TWO: PLAN

After you've got a clear picture of where you stand in terms of resources, needs, constraints, and capabilities, you can now begin to create your resource mobilization plan. At a minimum, your plan should include the following components:

Goals

- Why do you want to raise the money?

How to Develop an Effective Resource Mobilization Plan (cont.)

- What do you want the funds to accomplish in your non-profit organization?

You must identify the need(s) that your resource mobilization plan hopes to satisfy. And, to ensure support, you must tie your resource mobilization goals to your group's aims and objectives. If not, you'll waste time and resources - and damage your credibility. To pave the way for resource mobilization success, you must keep your resource mobilization goals consistent with your organization's aims and objectives.

Objectives

- What type of funding, resources, or in-kind donations will you seek?
- What amounts?
- From whom will you solicit these funds?
- What type of programs will you conduct?
- How many activities for resource mobilization will you conduct in the next 12 months?

You must make your resource mobilization objectives as specific and measurable as possible. (For example, *determine* the cost effectiveness of a program by estimating the ratio between the money spent and the funds received.) This will make the evaluation stage easier. You should also select a "point person" to take charge of each resource mobilization activity. This helps coordinate the resource mobilization team's efforts, and it holds someone accountable for each activity.

Strategies

- Specifically, how will you accomplish your resource mobilization objectives?
- What resources do you need to accomplish these objectives (i.e., funds, person power, supplies, space, transportation, etc.)?
- Who will be responsible for each strategy?

This "meaty" section of your resource mobilization plan includes all the nitty-gritty details that specifically explain what needs to be done and who will do it.

How to Develop an Effective Resource Mobilization Plan (cont.)

Timeline

- How long will each fundraising activity last?
- When will you conduct each element of your various resource mobilization activities?
- How long will it take to complete each strategy?

Include deadlines for all the key elements of each resource mobilization objective and strategy. Regular monitoring of your deadlines will give you a quick update to see if you're on schedule.

STAGE THREE: CONDUCT

Now that you've outlined the "who-what-when-where-why" of your resource mobilization plan, it's time to put it to the test. Mobilize your resource mobilization team and arm them with the training, resources, and support they need to conduct the plan. Make sure your team is well-prepared before they embark on any fundraising effort. Conducting the plan involves implementing strategies, delegating tasks, allocating resources, training and motivating resource mobilization team members, and following up as needed.

Important: Periodically check the progress of your resource mobilization plan and individual programs to ensure your efforts are on target. Situations might change, dictating that your resource mobilization plan might need to change, too. Remember, your resource mobilization plan serves as a guideline, but its contents are not etched in stone. Keep your plan flexible to adapt to change.

STAGE FOUR: EVALUATE

To wrap up your resource mobilization plan, you need to incorporate evaluation as the final stage. You need both periodic and year-end evaluations.

- How did you do this year?
- What worked?
- What didn't?
- What would you do again next year?

How to Develop an Effective Resource Mobilization Plan (cont.)

- What would you change, add, or delete from next year's plan?
- What strengths did you capitalize on?
- What weaknesses could you improve upon?

Provide a detailed explanation of when and how you plan to monitor and evaluate your resource mobilization efforts. Check to see if you achieved your objectives. As stated earlier, the more specific you make your objectives, the easier it will be to evaluate them. (For example, did you raise a specific amount from your special event? Did you achieve a certain percentage response from your direct mail campaign? Did you reach the target market you intended to? Did you reap any non-financial benefits from a program, such as public relations or goodwill?)

With careful planning and attention to detail, your community or non-profit organization stands a much greater chance of success in your resource mobilization efforts.

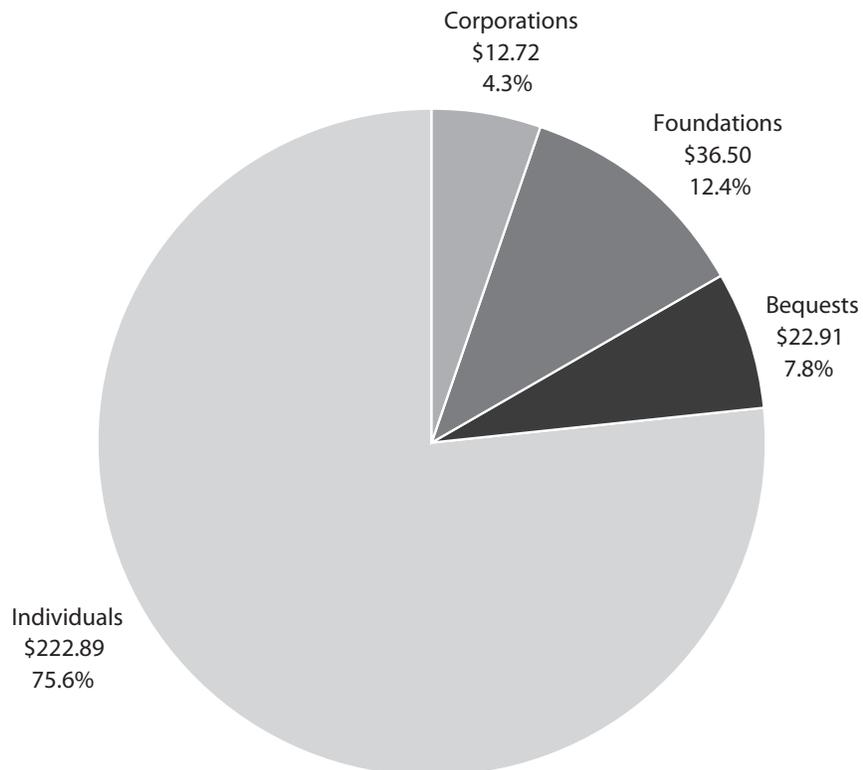
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Giving Pie: Sources of Contributions

2006 contributions: \$295.02 billion

By Source of Contributions

(Dollar amounts are in billions)



All figures are rounded. Total may not be 100%.

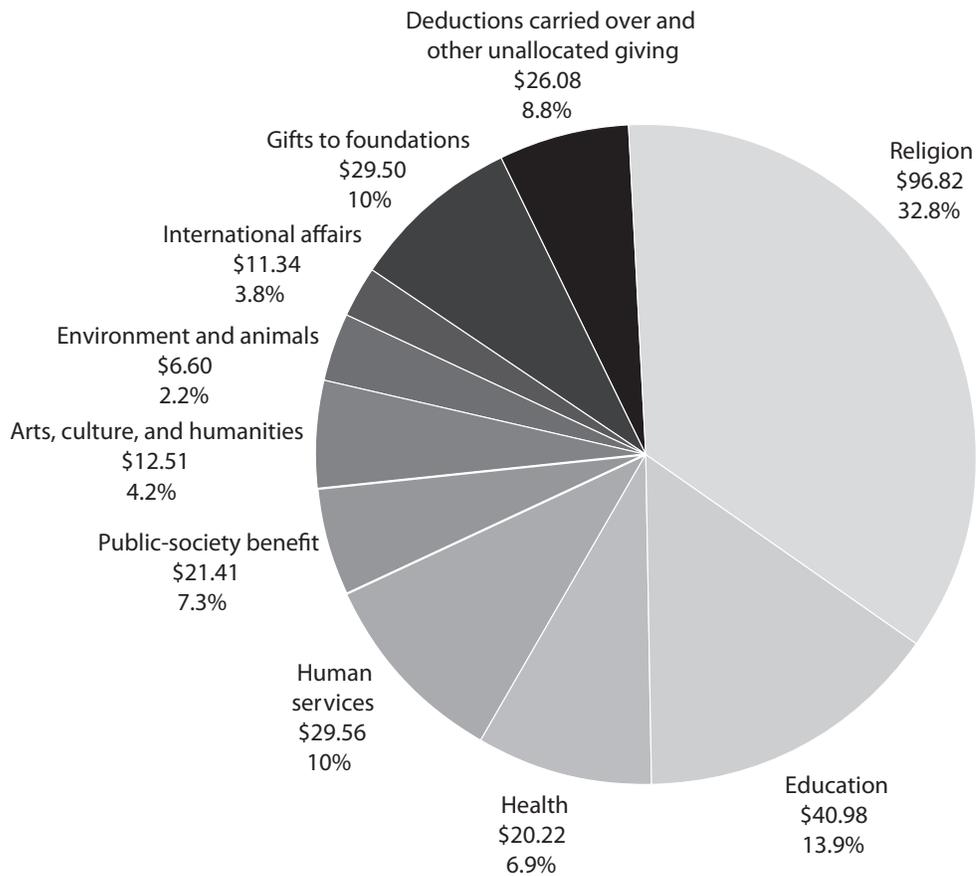
Source: Giving USA Foundation™ / *Giving USA 2007*.

Giving Pie: Recipient Organizations

2006 contributions: \$295.02 billion

By Type of Recipient Organization

(Dollar amounts are in billions)



All figures are rounded. Total may not be 100%.

Source: Giving USA Foundation™ / *Giving USA 2007*.

Resource Mobilization Resources

The following resources will assist you with ongoing fundraising efforts, trends, and circumstances relative to philanthropy and resource development. A few sites require annual membership fees, such as the Foundation Center; most do not. If you feel you want to become a member, think creatively. As a non-profit, ask your vendors to give back to the community by subsidizing a three-year membership. If the cost is too high for one vendor, ask several to split the cost. In addition, you can ask your board members, stakeholders, and local partnering organizations to chip in as well! Be sure to show them how their contribution will benefit all involved.

American Association of Fundraising Counsel (www.aafrc.org). Professional organization of fundraisers that prides itself on having high ethical standards.

BBB Wise Giving Alliance (www.give.org). Profiles US charities in order to enhance the decisions of givers and monitors the standards of charitable organizations.

GuideStar (www.guidestar.org). A database of non-profit organizations and charities that includes financial details for each group, and a profile of their purpose and programs.

Independent Sector (www.indepsec.org). A coalition of non-profits, foundations, and corporations that assist in strengthening not-for-profit initiatives, philanthropy, and citizen action. Has news, programs, and facts.

JustGive.Org (www.justgive.org). Guide to charitable giving offers details on a variety of non-profit organizations and provides instructional tips for making donations.

Foundation Center (www.fdncenter.org). Comprehensive directory offers links to provide foundations, corporate-giving programs, and other sources of non-profit funding. Has an extensive biographic database on the practice of philanthropy and the non-profit sector.

Center on Budget and Policy Priorities (www.cbpp.org). Research institute analyzes government policies and programs, particularly those affecting low- and middle-income people.

Non-Profit Times (www.nptimes.com). Covers issues of concern to non-profits and reports on news and developments regarding such organizations.

Network for Good (www.networkforgood.org). Searchable organization of non-profit foundations and charities provides an opportunity for people to make a donation, become a volunteer, or speak out about a topic.

National Society of Fundraising Executives and Association of Fundraising Professionals (www.nsfre.org). Helps its members find education opportunities and become certified.

Volunteer Match (www.volunteermatch.org). Provides information to help individuals nationwide find volunteer opportunities posted by local non-profit and public sector organizations.

America Taking Action (www.americatakingaction.com). Find childcare in any state categorized by type such as family providers, day-care centers, and camps.

Volunteer Solutions (www.volunteersolutions.org). A Volunteer Matching Application that helps connect individuals to volunteer opportunities in their communities.

Case Statement Outline

Preparing a case statement is a fundamental resource mobilization activity. All formal and informal resource development efforts require you to make the case for your organization's existence and for the potential investment a donor is asked to make. Case statements are useful in grant writing and in outlining oral presentations. Remember that chance favors the prepared mind.

1. Who are you?

- Brief history: include highlights of the past year.
- Mission: What difference do you make?
- Board members and staff list.

2. The problem today

- What issues and/or problems concern your organization? Describe the issues/problems. Use statistics and research when possible.

3. Solutions and future plans

- What strategies and/or programs have you created to address the issues/problems? Describe these fully.
- How is your organization/program uniquely qualified to implement these strategies/programs?
- Brief history: include highlights of the past year.

4. Challenges

- Why do you need the money/in-kind donation?
- Are these new programs or have costs increased?
- Why aren't the traditional sources of funding enough?
- Explain the "price tags" for strategies/programs.

5. Opportunity

- What is the organization doing to meet the challenges?
- What is the opportunity the potential donor now has to help meet the challenges? For example, "Our board is pleased to announce that we are launching a new/expanded giving program in which you can participate to help meet the challenges."
- How exactly will the money be used?