Beyond the Dollars Raised: Evaluating How You Build Sustainable Support
Money For Our Movements
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WHY

Why is it worth focusing on capacity? What can a capacity focus do for you?
• Broaden the number of markets to approach
• Identify more distinct ways of engaging and cultivating people
• Increase the number of people asking on your behalf
• Build connections to major donors
• Expand the range of resources you can pursue
• Increase the ways in which donations are solicited
• Motivate board, fellow staff to help fundraise—clarifies where they can make a unique contribution

WHO

Who should join you in your fundraising evaluation:
• Staff --- Fundraising and Program
• Board members
• Constituents/Members/Volunteers
• Donors
• Others?

WHAT

IDENTIFICATION – CULTIVATION – SOLICITATION – RECOGNITION

Look at each stage of the development process to strengthen overall health of solicitation results

Identification –
• Who’s helping you find people?
• How many new prospects are brought in – at what level (high-middle-low)?
• Are you reaching new markets or just the same-old, same-old?
• How successful was your ability to reach people you’d targeted?
• Are you pressing on long-term as well as medium-term and immediately-reachable prospects?

Cultivation –
• How many mid- and major donors at the beginning of this process? How many at the end?
• Necessity of cultivation for upgrades – what happened here and how successful was it?

Solicitation –
• How much raised – but also
• Look at total giving - break down that information in various ways including:
  ➢ donation size,
  ➢ frequency of gift,
  ➢ solicitation activity,
  ➢ longevity of donor base
  ➢ percentage of increased gifts,
  ➢ donors’ organizational contact,
  ➢ how much staff time it took to get gifts,
  ➢ the Board’s role in getting gifts
  ➢ or any other way that seems relevant, so you have an idea of what has worked for
    you in the past and why
• Ratio of requests to gifts; and to deferrals

Recognition (donor stewardship) –
• Are your donors being brought closer to the agency?
• Cite specific examples
• Look at additional opportunities

Segmentation: working the dev. cycle in a strategic, customized manner for each market.
Peers-developing the “right person” for each market and particularly to reach major donors.

Capacity-building/Indirect goals –
• Look at your development plan’s range
  ➢ Do you have high, mid, low level donors?
  ➢ Are you reaching all the sectors (and if not, are there well-thought-out reasons
    for not approaching one sector)?
  ➢ Do you have donors, and donor markets, at all phases of the development cycle?
  ➢ Are you particularly heavy – or light – on any particular donor sectors or phase
    of the development cycle? Do you need to develop that – or another – part of
    your base to become well-rounded/diverse?
  ➢ Are there particular training/expertise needs to build up your solicitor base?
  ➢ Are you ready to approach your targeted donors? Do they need to know more
    about you? Do you need to build up that part of the development cycle?
  ➢ Are your Board and other volunteers participating sufficiently in fundraising?
    Can improving their participation increase your results?
  ➢ Are you sufficiently staffed in the development function?
  ➢ Are you being strategic enough in your thinking and planning?

Capacity-building in Your Fundraising Plan
• Timing
• Workload distribution
• Communality
• How did your logistical decisions support your goals?

Costs to raise a dollar
• A check to make sure that you’re not way out of line
• Have to balance long-term and short-term goals
• Development vs. fundraising (strengthening the base vs. dollars today/yesterday!)
• Explain how to calculate this cost for your own activity
HOW

Tools to help you analyze your fundraising capacity

- Surveys
- Spreadsheets
- Analyze trends Look at your institutional fundraising and determine

WHEN

Question to the group: how often should you re-evaluate your development plan?
- Every day
- Once a year
- Quarterly

Key points
- Evaluate and monitor against original AND revised goals Compare your written objectives to your actual (financial or otherwise)
- Involve “doers” in the planning and evaluation process
- Meet w/ donors, participants, staff members
- Write down your findings and thoughts so that you can refer to them the next time

Take two things from this session as priority next steps. These are your capacity-building goals, the rest is your plan