

# Planning fundraising activity

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# Why we need to plan

- To see a big picture of the challenge.
- To break down the big picture into small manageable parts.
- To priorities and allocate proper resources and time to fundraising activities.
- To focus on the key issues.
- To have control over your time, resources, needs, opportunities, etc.
- To have confidence.

# Where to start from

- Annual budget for the entire organisation.
- Assessment of your fundraising resources.
- Initial funding.

# Annual budget

- Reflects your core activities.
- Reflects your organisational structure.
- Should include the money needed to raise funds (fundraiser's salary, equipment, cost of the events, promo materials, etc.)
- Should account for all your needs including funds for goods and services in monetary equivalent.
- Should be conservative and realistic.

# Available resources

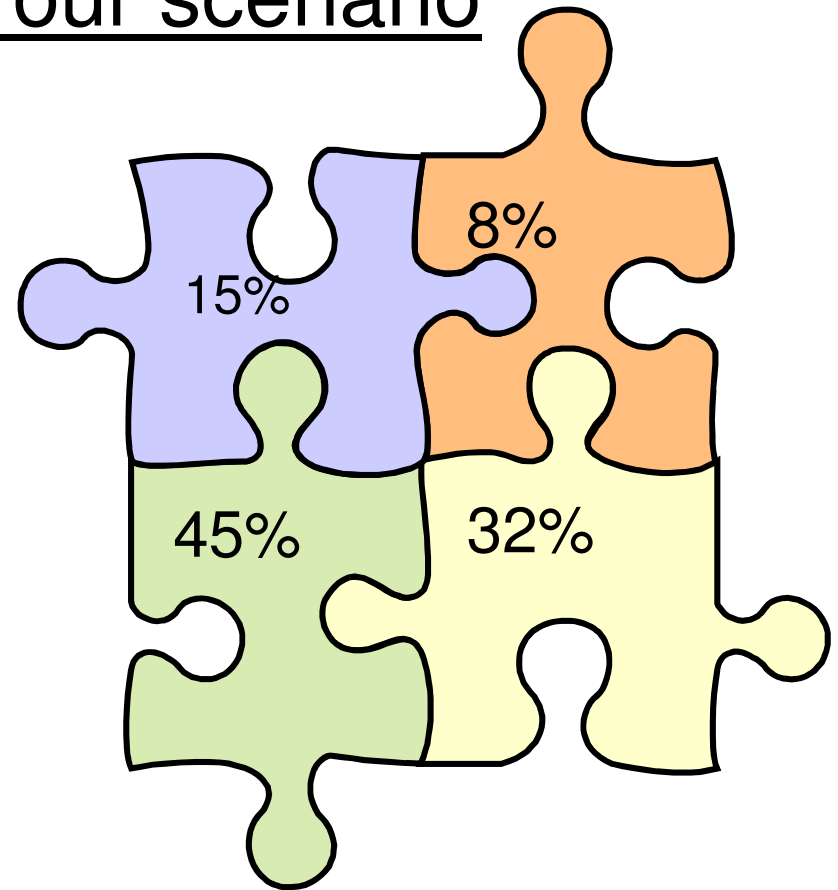
- Fundraising manager(s)
- Administration resource of the entire organisation (driver, receptionist, accountant, data base, etc)
- Equipment
- Volunteers

# Sources of resources ;)

## Classic scenario

- Grants
- Private donations
- Corporate support
- Events
- Commercial activities

## Your scenario



# Resources target plan

- Write a simple plan indicating where money might come from (table in Excel).
- How much money from each source?
- When money actually will come to your bank? Balance it through the calendar year according to your organisation needs.

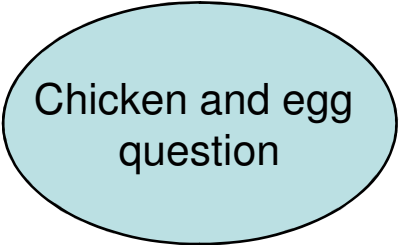
# Calendar plan

- How your time will be allocated throughout the year?
- Monthly plan for each team member including volunteers and other key people.
- Weekly plan for each team member.
- Monitor the plan together with a team.

# Initial funding

Where to find the start up money?

- Trustees' pockets
- To borrow
- To organise an event with services, goods and times donated
- Others?



Chicken and egg  
question

# Key issues

- Planning is a group process under leadership of a responsible manager.
- Planning without monitoring is a useless exercise.
- Allocate enough time for planning and monitoring – it pays off!