

### **Sample: Steps to developing a fundraising & marketing plan for a Hospital Parent Advisory Board**

- 1) Identify with the hospital (Department Head & Development Director) a list of funding priorities & projected timelines (can range from human resources, capital improvements, programs, meals for families, life saving equipment, grand rounds, etc...).
- 2) Create any necessary restricted hospital accounts to meet the funding priorities.
- 3) Develop a job description & length of tenure for the fundraising & marketing committee members.
- 4) Actively recruit parent & hospital members to join the fundraising & marketing committee.
- 5) Develop: Mission, Vision, Case for Support
- 6) Identify the types of fundraising your group is capable of performing (see advantages & disadvantage chart).
- 7) Develop a yearly calendar (see sample) and detailed yearly action plan with budget projections (see sample).
- 8) Develop a marketing brochure (see sample) – either in-house from the Hospital’s marketing department or pro-bono from an outside source but get approved and printed from the hospital.
- 9) Research and identify potential donors/stakeholders (begin with grateful patients & their families)
  - Solicit ideas from other hospitals & members of the community about who might share interests with your program (i.e. grateful parents & their families)
  - Talk to staff and community members about why this program/effort is needed, who will benefit, why your organization is the best organization to undertake it.
  - Identify and talk to informal community leaders who might have common vision/mission to see if they will serve in an advisory role.
  - Talk to local businesses about how your program can benefit their philanthropic interests.
  - Launch an online community either via Facebook or Inspire.com
- 10) Initiate relationship & communicate with potential stakeholders
  - Introduce yourself and program to other prospective donors and/or local media by doing meetings and/or events. Provide brochure, press kit or e-newsletters.
- 11) Continue to cultivate stakeholders – Sample ideas:
  - Launch a yearly reunion event if one does not already exist – this will become the best format to recruit future parents to join the PAB.
  - Launch or partner with another organization for an annual fundraising “event” – begin small & build upon (i.e. golf tournament or reception).
  - Send e-newsletters
- 12) Ask for financial support (provide specifics on how the funds will be used)
- 13) Be a Good Steward
  - Send thank you, receipts, & update on how the funds will be used.
  - Offer opportunities for continued involvement in shaping the program through regular meetings and dialogue.
  - Share the credit and celebrate small successes.

### SAMPLE DEVELOPMENT ACTION PLAN

Strategy	Goal	Action Steps	Ownership	When	Cost
<i>Direct Mail Prospecting: New Small Donors</i>		DM Piece #1: 1. List development (geographical region) 2. Draft piece / determine signature 3. Approve / print / mail piece 4. Monitor results / send thank yous			DM Piece #1: 1. List rental \$ TBD 2. Design – in-kind 3. Postage - \$ TBD Printing - \$ TBD
<i>Direct Mail Renewal</i>		DM Piece #2: 1. List development (2008 donors) 2. Draft piece / determine signature 3. Approve / print / mail piece 4. Monitor results / send thank yous			DM Piece # 2: 1. Donor Software – \$400 / month (yr: \$4,800) 2. Design – in-kind 3. Printing - \$ TBD Postage - \$ TBD
<i>Special Appeals via e-newsletter</i>	\$500	1. Collect e-mail address for entire base of supporters 2. Prepare a special appeal within the quarterly e-newsletters		July, October, February, June	1. Do on-line via Constant Contact – 15 cents / e-mail. Designer – in-kind donation
<i>Special Events</i>	\$35K	1. Golf Tournament – April (\$25K) 2. NICU Family Reunion – September (\$2K) 3. Holiday Reception – December (\$5K) 4. Community Event – TBD (3K)		1. April 5, 2010 2. TBD 3. TBD 4. TBD 5. TBD	1. \$12K 2. \$250 (postage / invite) 3. \$500 4. \$500 (for give aways)
<i>Major Donors Goals: \$55,000 from 22 people</i>	1 @ \$20,000 (\$20,000) 1 @ \$10,000 (\$10,000) 2 @ \$5,000 (\$10,000) 2 @ \$2,500 (\$5,000) 5 @ \$1,000 (\$5,000) 10 @ \$500 (\$5,000)	1. Research names of potential major donors 2. Create a special donor club with special benefits 3. Schedule personal visits with as many of these people as possible to ask for money 4. When visits are not possible, write a personal letter	1	1. Ongoing 2. Ongoing 3. Ongoing 4. Ongoing	1. No cost 2. TBD 3. Travel and/or meal reimbursement (minimal) 4. Letterhead & postage
<i>Corporations</i>	Goals: \$10,000	1. Increase participation in Employee Match Programs 2. Target local business	1		1. Printed brochures 2. Travel to DC & brochures 3. Printed brochures 4. Printed brochures & business cards 5. \$1000 for give aways
<i>Foundations</i>  Only if there is a grant writer available					
	<b>TOTAL POSSIBLE INCOME = \$</b>				<b>TOTAL EXPENSE = \$</b>

## SAMPLE OVERVIEW OF FUNDRAISING/COMMUNICATIONS ACTION PLAN CALENDAR

	<b>January</b>	<b>February</b>	<b>March</b>	<b>April</b>	<b>May</b>	<b>June</b>
<b>Direct Mail Prospecting</b>	Begin list development & determine budget	Draft piece & determine signature	Finalize & approval lists & piece	Print & Mail piece		Pay bills & send thank yous
<b>Direct Mail Annual (only after you have enough donors to mail)</b>	Send out April Golf Tournament Reminder					
<b>Major Gifts</b>		3 - 6 meetings / month	3 - 6 meetings / month		3 - 6 meetings / month	
<b>Special Events</b>			Donor Cultivation Reception (in home)	Annual Golf Tournament		
<b>Foundation &amp; Corporate Grants (only if there is a grant writer available)</b>						
<b>Media</b>				Golf Tournament Notice & Article		
<b>Newsletters</b>		e-newsletter				e-newsletter
<b>Phone</b>	Phone base to collect e-mails for contact list	Phone base to collect e-mails	Phone base to collect e-mails			
<b>Corporate</b>		1- 2 meetings or letters sent / month	Secure corporate sponsors for golf tournament	Thank corporate sponsors		

	<b>July</b>	<b>August</b>	<b>September</b>	<b>October</b>	<b>November</b>	<b>December</b>
<b>Direct Mail Prospecting</b>	Begin list development & determine budget	Draft piece & determine signature	Finalize & approval lists & piece	Print piece	Mail piece to hit in home by 2nd week of November	Pay bills & send thank yous
<b>Direct Mail Annual</b>		Begin list development & determine budget	Draft piece & determine signature	Finalize & approve lists & piece	Print piece	Mail piece to hit in home by 1st week of December
<b>Major Gifts</b>	3 - 6 meetings / month			3 - 6 meetings / month		
<b>Special Events</b>			Annual Reunion & Volunteer Appreciation Event	NICU Night at the Ballpark		Donor Cultivation Holiday Reception (in home)
<b>Foundation &amp; Corporate Grants</b>						
<b>Media</b>				Radio & newspaper article about ballgame		
<b>Newsletters</b>	E-newsletter			E-newsletter		End of year Thank You
<b>Phone</b>	Phone base to collect e-mails	Phone base to collect e-mails	Phone base to collect e-mails			
<b>Corporate</b>	1 - 2 meetings or letters sent / month			Begin to get corporate sponsors for April 2011 golf tournament	1 - 2 meetings or letters sent / month	

**Typical Funding Sources and Advantages/Disadvantages of Each**  
 (Credit to Ellen M. Hatfield of the Twin Cities in Minnesota)

Source	Advantages	Disadvantages
Individuals	<ul style="list-style-type: none"> <li>· Largest source of giving</li> <li>· Ongoing source one can build</li> <li>· Once a giver, also an advocate</li> <li>· Volunteers are a good source of money</li> </ul>	<ul style="list-style-type: none"> <li>· Costly to develop, small return per individual unit</li> <li>· Hard to generate unless broad-based direct service appeal</li> <li>· Risky for the inexperienced</li> <li>· Need significant assistance from the organization's board and volunteers</li> </ul>
Large-Family Foundations	<ul style="list-style-type: none"> <li>· Source of large sums of money</li> <li>· Accessible, professional staff</li> <li>· Clear guidelines, process</li> <li>· Most likely to research your request</li> <li>· Board volunteers can help, not always key</li> </ul>	<ul style="list-style-type: none"> <li>· Start-up funds only</li> <li>· Lengthy process</li> <li>· More difficult to access through personal influence</li> <li>· Proposals may be more lengthy</li> </ul>
Community Foundations	<ul style="list-style-type: none"> <li>· Much like large-family foundations</li> <li>· Staff may be sufficient</li> </ul>	<ul style="list-style-type: none"> <li>· Host of foundations within foundations</li> <li>· Most money is earmarked, special funds</li> </ul>
Small-Family Foundations	<ul style="list-style-type: none"> <li>· May fund ongoing operating expenses</li> <li>· Personal influence with board members helps</li> <li>· Guidelines often broad</li> <li>· Not very fussy about grant format</li> </ul>	<ul style="list-style-type: none"> <li>· Hard to access, no professional staff</li> <li>· Often not large sums of money</li> <li>· Without personal influence, may not be possible</li> </ul>
Large Corporations / Corporate Foundations	<ul style="list-style-type: none"> <li>· Can be source of large sums of money</li> <li>· Smaller amounts of money may be ongoing</li> <li>· Often accessible, professional staff</li> <li>· May be tied to volunteer involvement</li> <li>· Business strategy may be clear</li> <li>· Source of cause-related marketing</li> </ul>	<ul style="list-style-type: none"> <li>· Large sums of money aren't ongoing</li> <li>· Hard to get around staff</li> <li>· Must be within their guidelines</li> <li>· Not likely to contribute if not headquartered locally or have a public consumer base</li> <li>· Often want board representation</li> </ul>

Small Corporations	<ul style="list-style-type: none"> <li>· Very informal approach</li> <li>· Money may be ongoing</li> <li>· Personal connections will suffice</li> <li>· Neighborhood focus will help</li> </ul>	<ul style="list-style-type: none"> <li>· Small amounts of money</li> <li>· Narrow range of interest</li> <li>· Personal contacts are key</li> </ul>
Federated Funds (United Ways, United Arts, Combined Health Appeal)	<ul style="list-style-type: none"> <li>· Steady source of relatively large sums of money</li> <li>· Clear process</li> <li>· Professional staff, can be agency staff driven</li> </ul>	<ul style="list-style-type: none"> <li>· Generally can't be a start-up organization</li> <li>· Must be social service and fit priority focus</li> <li>· Very lengthy entry process</li> <li>· Very time consuming as must be part of yearly fund raising process, with periodic in-depth review</li> </ul>
Government	<ul style="list-style-type: none"> <li>· Large sums of money possible</li> <li>· Process is set, clear</li> <li>· Political clout helps</li> <li>· May be source of ongoing money</li> </ul>	<ul style="list-style-type: none"> <li>· Application procedures may be long, tedious</li> <li>· May only pay by unit of service, fluctuates</li> <li>· Unspent monies may be returned</li> <li>· Difficult record keeping</li> </ul>
Churches and Organizations	<ul style="list-style-type: none"> <li>· Often looking for group projects</li> </ul>	<ul style="list-style-type: none"> <li>· In-kind services most likely</li> <li>· Need to fit their service focus,</li> </ul>