

MID-JUNE 2008

The Value of Planning



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A service of the Corporation for National and Community Service - Resource and Fund Development Initiative

Dear "Planning" Colleague,

Thinking ahead instead of "winging it" will put you ahead of the game of effective fundraising. This issue of On-the-Go eTA is chock full of planning tips and tools. Click on the titles on the right to learn more about...

[Planning Your Communications Strategy](#)

[Steps to a Successful Special Event](#)

[A Year-long Resource Development Plan](#)

Do you have questions about planning your resource development strategies and activities? Contact us through LEADline@CampaignConsultation.com for more information. You can still access previous issues of On-the-Go eTA by clicking on the title at the right.

TOP ▲

Planning Your Communications Strategy

The mass media (newspapers, magazines, radio, TV, and the internet) has transformed our communities and the way we are perceived and perceive by others. If our programs and organizations are going to prosper, working with the media is inevitable, and planning our relationship with intention is necessary.

Develop a media plan as part of your overall public relations/communications strategy. Include the following steps in your plan:

Steps in Your Media Plan

Define your objective	<ul style="list-style-type: none"> • Introduce your program to the community or publicize the work of your program? • Establish you and your organization as experts in your field? • Generate fundraising opportunities? • Delay the impact of a crisis? • Other?
Identify audience you want to reach	Whom do you want to receive your message and what media would they be most apt to receive? Key your message to supporters.

IN THIS ISSUE:

click on titles below to read full articles

[Planning Your Communications Strategy](#)

[Steps to a Successful Special Event](#)

[A Year-long Fundraising Plan](#)

[Share Square](#)

Facts for your fundraising volunteers to know

[Resources](#)

[Resource Development Learning Products and Services](#)

[On-The-Go eTA Back Issues](#)

[LEADline](#)

[GIZMOs](#)

[The Chronicle of Philanthropy](#)

[Workshops/ Clinics](#)

[Online Courses/ Webinars](#)

Develop calendar of media themes	Identify opportunities such as seasonal interests, program successes, anniversaries, special events, other.
Identify media approaches	<ul style="list-style-type: none"> • Hard news • Feature stories • Editorials • Interviews • Other
Develop media outlets	<ul style="list-style-type: none"> • Print Outlets (Newspapers, Magazines, Wire services) • Television • Radio • Websites • Other
Develop media list	Research and record full contact information including fax and e-mail addresses for all outlets in your area and nationally if appropriate. Update annually.
Develop press kits and media materials	<p>Include:</p> <ul style="list-style-type: none"> • Background material on your organization, your clients, your mission, etc. • Your Case for Support • Information about your program's issues and concerns • Bios for staff and volunteer leaders • Picture file • Previous media stories about your program • Other
Cultivate personal relationships	Develop ways to stay in touch with reporters, editors and media gatekeepers.

When a crisis occurs, it is even more important to have a communication plan ready. [Click here](#) to view important steps to building a Crisis Communication Plan.

TOP ▲

Steps to a Successful Special Event

Special events take careful planning that should begin a year or more ahead for a major event. You will need to allow time for goal setting, team building, logistics, marketing, and communications in addition to pursuing sponsors and donors. The checklists can be adapted to your own needs.

» Planning Phase: *One year to six months before event*

During this phase you will be heavily engaged in goal setting and team building activities.

- Identify purpose: fundraising, cultivation, recognition, education, other
- Select type of event and them
- Identify audience

Share Square

- Secure buy-in from you volunteer leaders
- Set initial goals: net profit, expenses
- Identify additional sources of revenue
- Research and determine date
- Identify location and check availability
- Identify chairs and co-chairs
- Draft committee descriptions and form committees
- Prepare activity timetable

» **Activity Phase: *Nine months to three months before event***

Continue team building and begin logistics and marketing activities. Start pursuing sponsors, advertisers and gifts-in-kind.

- Determine volunteer responsibilities and number of volunteers needed
- Begin meetings with chairs and co-chairs
- Chairs and co-chairs recruit additional volunteers
- Invite special guests or celebrities
- Establish cost to event participants
- Secure location
- Develop sponsor goals and packages
- Prepare marketing and PR plans
- Identify printing needs and prepare printing timeline
- Draft invitation and response package
- Compile invitation lists
- Secure sponsors
- Send out "Save-the-date" notices
- Secure catering bid
- Secure musicians
- Secure media coverage
- Prepare draft event timetable
- Solicit in-kind donations
- Tour site
- Review volunteer needs and continue to draft more if needed
- Continue to add names to invitation list
- Secure permits and insurance
- Make preliminary layout and decoration plans
- Print tickets location

» **Execution Phase:**

This is the time to finalize logistics and do heavy marketing. Your success in pursuing sponsors and donors will depend upon good planning.

• **Three months to six weeks before event**

- Send out "save the date" notices and invitations
- Perform menu tastings
- Sign contracts with venue, caterer, entertainment, etc.
- Reconfirm all speakers, performers, celebrities and find out their special needs
- Draft program
- Draft site layout
- Finalize menu and floor plan
- Monitor underwriting, sponsorships and program ads

Facts for your fundraising volunteers to know

In a crisis it is important to remember that bad things can happen to any initiative. Help volunteers to understand that prospects will measure your worth by how you react under stress.

TOP ▲

- Record invitation responses and issue tickets
- Collect in-kind donations
- Send out press releases and calendar notices
- Prepare and print programs

• **Event Day**

- Arrive very early and come prepared** with emergency phone numbers, first aid kit, office supplies, insurance paperwork and contract confirmations, guest lists and extra copies of scripts and volunteer instructions.
- Do layout walkthrough
- Perform equipment check
- Place signage
- Check restrooms and grounds
- Layout registration tables and materials
- Brief volunteers
- Station yourself where you can be seen if needed
- Pay vendors
- Mix and mingle and have fun

» **Recap Phase: After the event**

Communicate with everyone involved in the event. Beguine building next year's team.

- Thank volunteers, sponsors and donors appropriately
- Return borrowed or rented equipment
- Tally expenses and income
- Prepare final report and share with volunteers and key players
- Review all aspects of event with volunteers for use next year
- Publicize success

A Year-long Resource Development Plan

A fundraising action plan requires you to set down the tasks you need to complete and a deadline for completion. A fundraising action plan is a:

- Planning document to help you and volunteer leaders coordinate a variety of activities
- Visual aid to explain the continuum of activities that are necessary to identify and convert prospects into donors
- Tool for sequencing time-intensive activities across the calendar year
- Device to remind fundraising volunteers about the number of "touch points" they have or could have with donor prospects
- Way to assign to different individuals responsibility for separate tasks associated with the fundraising program
- Reminder of goals and deadlines

[Click here](#) to download a sample fundraising action plan and a blank form for your use. To order the \$ Keys to Special Event Fundraising GIZMO, contact Campaign Consultation, Inc. at LEADline@CampaignConsultation.com

TOP ▲

Let us know

“Reduce your plan to writing. The moment you complete this, you will have definitely given concrete form to the intangible desire.”

Napoleon Hill
(American author, 1883-1970)

Have you found ways to plan your resource development activities?

Contact us at LEADline@CampaignConsultation.com (LEADline is sponsored by the Corporation for National and Community Service through its Resource & Fund Development Initiative.) We would be happy to answer questions or to give you more support.

Thank you for your interest in On-The-Go eTA, We encourage you to [send this and other issues of OTG eTA to friends and colleagues](#) who would benefit from the information. Also, if you're on information-overload, you may request [email removal](#). Otherwise OTG e-TA will be back soon with another edition.

TOP ▲

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For more information, contact:
CAMPAIGN CONSULTATION, Inc.
2819 Saint Paul Street, Baltimore, MD 21218.4312 USA
T. 410.243.7979 F. 410.243.1024 Toll Free: 1.877.243.2253
LEADline@CampaignConsultation.com
www.CampaignConsultation.com

Resources

The National ASK (Awareness, Skills, Knowledge) to Sustain Institute, sponsored by Corporation for National and Community Service, provided by Campaign Consultation, Inc. 1998, 2002

The CNCS Resources Now! National Institute, sponsored by Corporation for National and Community Service, provided by Campaign Consultation, Inc. 2005-07

TOP ▲

Learning Products and Services

LEADline:

(*Learning Experiences At a Distance*) LEADline is designed to give information fast. Have a resource & fund development question? Use LEADline and within 24 hours you will receive response and advice from a fundraising professional.

Contact us

LEADline@CampaignConsultation.com

GIZMOS:

(Giving Information for Zooming Money Objectives) GIZMOS are resource and fund development tools for you and your volunteers. They are tangible products in packets, pocket brochures, CD-ROMs, games, etc. They feature a myriad of fundraising topics such as The Case for Support, an interactive online resource. To order, contact us through LEADline@CampaignConsultation.com or call 410.243.7979 or toll free at 1.877.243.2253

View and use our newest GIZMO, Building Your Case for Support, at www.CampaignConsultation.com/gizmos/case

The Chronicle of Philanthropy:

: Everyone who comes to a Resources Now! National Institute gets a free subscription to the Chronicle for a year. Participants in CNCS Campaign Consultation workshops receive the latest issue free of charge plus a \$20 discount on one year's subscription.

Workshops/Clinics:

The Corporation for National and Community Service (CNCS), through its T/TA service provider Campaign Consultation, Inc., offers a three-hour workshops and clinics for those interested.

Online Courses/Webinars:

Web course delivery of topics pertinent to resource development such as — **Build Fundraising Volunteer Champions** and **Cause Related Marketing and Corporate Partnerships**. Available through the Resource Center at <http://nationalserviceresources.org>

TOP ▲

Read Back Issues of OTG e-TA

- [June 2008 *The Five "C"s*](#)
- [May 2008 *Attracting Media Attention*](#)
- [Mid-April 2008 *Corporate sponsors and Business Sponsors*](#)
- [April 2008 *How to Ask*](#)
- [March 2008 *Planned Giving*](#)
- [Mid-February 2008 *Using Fundraising Consultants*](#)
- [February 2008 *Raising Funds from Neighbors and Friends*](#)
- [January 2008 *Fundraising in Diverse Communities*](#)

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