

## Exercise – Creating a Fund Development Plan

March 14, 201, 4:00-5:00pm (60 minutes)

Boosting Local Investment in Early Childhood -- ECIC Great Start Conference

Designed and Facilitated by Professor Jerry Lindman, JD, Director at [jerryindman@gmail.com](mailto:jerryindman@gmail.com)

### INSTRUCTIONS:

- Break into teams
- Designate someone to write down group answers
- As a team, answer each question and write your response (and any questions) on a separate piece of paper
- Prepare a short report back to whole group addressing questions:
  - *Did you make progress on a plan?*
  - *What questions does group have regarding crafting a fundraising plan?*

### AS A TEAM, ANSWER THE FOLLOWING QUESTIONS:

#### A. Keeping it legal – need for license to fundraise in Michigan:

1. Are you a 501c3 nonprofit organization? If so, how long have you been in existence and has your 501c3 managed grant funding and individual donations before?
2. Do you need a license to fundraise from the MI Attorney General? READ THE FOLLOWING:  
State licensing requirement: The Michigan Charitable Organizations and Solicitations Act require an organization to obtain a charitable solicitation license if it solicits or receives contributions in excess of \$8,000 in Michigan or if it compensates any person for fundraising services, including employees or independent contractors. COSA also requires professional fundraisers to be licensed and bonded before soliciting, planning, or carrying out a solicitation campaign in Michigan on behalf of a charitable organization. Under this law some organizations are exempt from licensing requirements. Exemptions must be approved by the Charitable Trust Section-not presumed by the organization. If you believe your organization qualifies for an exemption, submit the Request for Exemption.
3. Review the other state licensing issues below; if you plan to use any of the following fundraising activities, check state and local licensing requirements:
  - Auction? Possible sales tax issue
  - Gaming? Bingo, Raffles, Texas Hold-em Tournaments, Las Vegas Nights? This is charitable gaming and need license from MI Dept. of Lottery's Charitable Gaming portion of the State of Michigan website at <http://www.mi.gov/cg> .

#### B. What forms of donations do you plan on accepting?

- a. Personal checks?
- b. Credit Cards? In-person? Mail-in? Online?

#### C. Do you have a website and other social media sites setup and designed for fundraising? Ability to accept credit card donations online?

#### D. Identify your Fundraising Team – All persons who will be working on this fundraising campaign. Assess their skills and interests in various aspects of the campaign such as putting on events, making 'asks', financial management, social media, email, database management.

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- E. Determine Your Total Fundraising Goal** – what is the total fundraising goal for this campaign?
- F. Evaluate all possible sources of funding** - Assess your ability to use each of the following methods of fundraising, your effectiveness and the estimated amount of funding that might be generated from each. For grants, identify specific government, foundation or business names. *The targeted fundraising goal for each method below should total to your Total Funding Goal.*
- Event fundraising
  - Individual- Small gifts
  - Individual - Major Gifts
  - US Mail solicitation
  - Email solicitation
  - Social media solicitation
  - Grants from Government
  - Grant from Foundations
  - Grants from Business or Corporations
  - Earned Income - Sales of items
  - Other: \_\_\_\_\_
  - Volunteer Solicitation
- G. Design and write a ‘case statement’:**
- a. Concisely written and compelling piece
  - b. Explain the reasons why people should give to your fundraising campaign
  - c. Use same language in all promotional outlets including social media
- H. Getting the word out -- create a promotional strategy for all aspects of your fundraising plan**
- a. Review methods of reaching possible donors; include online, local print, radio and TV, word-of-mouth, posters.
  - b. Identify specific local media, print, radio and TV to contact or use
  - c. Social Media – Are you going to use social media tools to fundraise?
  - d. Review and identify types of social media websites and whether you have capacity to use them?
    - Facebook – Share story, build relationships and collect donations
    - Google Grants – Free advertising for sharing your story and building relationships
    - Twitter – Share story and build relationships
    - YouTube (Video) – Share visual story/build relationships
    - Texting – Use of cell phone to share story, build relationships and collect donations
    - Others?
- I. Wrap up Exercise**
- a. Compile all answers
  - b. Collect questions your group has on crafting a fund development plan
  - c. Present and ask questions when reconvene during Q & A session.