

4. The fundraising mix template

The Tool

The fundraising mix is another tool you can use to plan and overview your annual fundraising activities, this time taking the perspective on the methods you are going to involve, the fundraising objectives of each method, and the cost-efficiency of each method - when looking to costs, time needed and human resources needed for implementation.

The fundraising mix table

Fundraising methods		Fundraising objectives		Total estimated costs	Time period for implementation	No of staff and volunteers needed		Type of funds: restricted/ unrestricted
		total value of gifts	no of donors			staff	volunteers	
Total incomes	Restricted		Total costs					
	Unrestricted							
Estimated raised funds		Restricted						
		Unrestricted						

The fundraising mix template explained

We will explain the tool by giving an example. Let's say that your organization's fundraising goal for the current year is to raise 5,000 euro unrestricted funds (to cover overhead costs or co-funding in some grants you received from the European Commission, etc.), but also 10,000 euro restricted funds (needed to cover some of your regular activities you plan to have with the young people you serve). So, in total, you need to raise 15,000 euro.

Here is how a fundraising mix can look like to fulfill these objectives:

Fundraising methods		Fundraising objectives		Total estimated direct costs	Time period for implementation	No of staff and volunteers needed		Type of funds: restricted/unrestricted
		total value of gifts	no of donors			staff	volunteers	
Special event - Summer picnic for members, family and friends		4,200	150 individual donors 2 local companies	1500	March-June	2	10	unrestricted
Sponsorship for project X (email solicitation & face to face solicitation)		7000	5 local companies	0	January-April	2	0	restricted
Annual campaign - individual donors/members (online campaign at the end of the year)		2500	100 members	500	September-December	2	2	unrestricted
Peer-to-peer fundraising (participation at Swimathon from your community) for project Y		3000	10 fundraisers 170-200 donors	500	April-July	2	13	restricted
Selling merchandise products of the organization, in special events or online		1000	80-100 buyers	200	On-going	1	1	unrestricted
Total incomes	Restricted	10,000	Total costs	2,700				
	Unrestricted	7,700						
Estimated raised funds		Restricted	10,000					
		Unrestricted	5,000					

How to use the fundraising mix in your organization?

This planning tool, the fundraising mix, will help you:

- To have an overview of all fundraising effort you will conduct during one year;
- To keep a good balance in the income sources for your organization, making sure the organization does not become heavily dependent on one or two income sources;
- To plan and prioritize your resources - money, time, and staff and volunteers - for the fundraising resources;
- To make decisions during the year regarding adapting, redesigning, dropping out or adding new fundraising activities, depending on the results obtained or on the new needs that may appear;

To evaluate the results obtained through each fundraising method implemented towards the initial objectives;

To further develop your fundraising activities and fundraising planning, constantly improving the methods, based on the results you obtained in the previous years.