

Unlock Fund Development: Practical Strategies for Nonprofits





We love to SEE YOU

Please turn on your camera if possible.

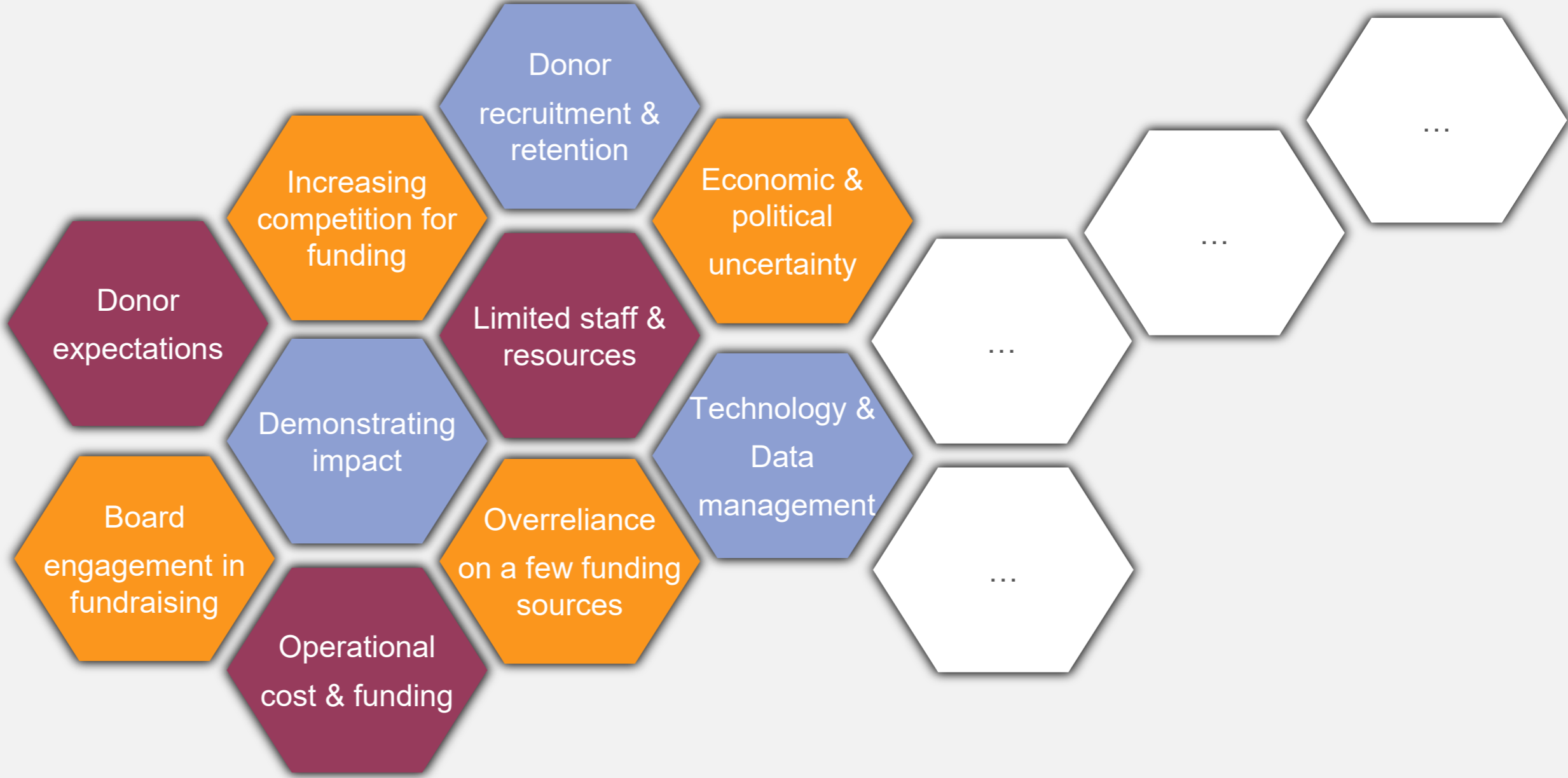
We love to HEAR YOU

Please feel free to share your concern, comments.

We love to WORK with YOU

Please feel free to reach out afterward if you have any inquiries or requests.

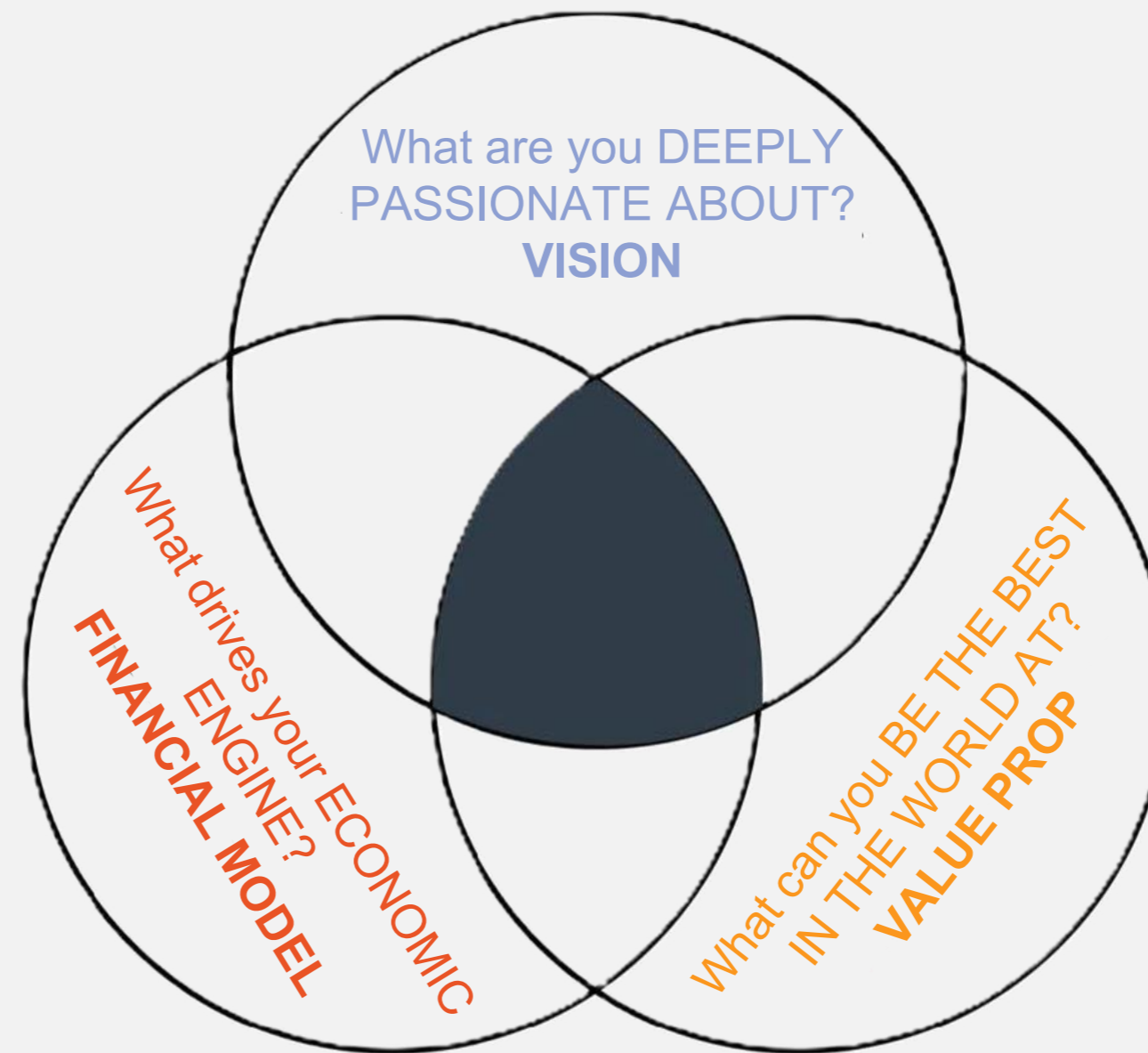
Challenges



Fund Development: A Practical Strategy for Nonprofits

Mission alignment, Philanthropic culture & Board engagement

- Government Funding
- Fundraising
- Social Enterprise



Fund Development: A Practical Strategy for Nonprofits

Create the financial resources and meaningful relationships that allow a nonprofit to



Fulfill its mission



Increase its impact



Secure its sustainability

Strengthen your Fund Development Process

Identify Opportunities for Funding Diversification

Sustainable Impact

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Strategic Planning

- **Purpose:** To develop a 3 Year Strategic Plan for The Organization
- **Objective:** A Strategic Plan that enables the Organization to grow and achieve continued success in the future
- **Deliverables:**
 - Hedgehog
 - SWOT
 - PESTLE, Porters 5 Forces
 - Strategic Direction and Path
 - Gap analysis that anchors current state of the organization versus desired future state
 - Change Agenda outlining “From”.....”To” for significant change areas
 - SOMIPPP outlining the Actions needed to execute on Business Plan
 - Balanced Scorecard with metrics in place to measure progress of the organization’s strategic plans
 - Journey Plan to bridge the gap to the 3-year future state

Includes a prioritized list of Improvement Initiatives

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Strategic Planning

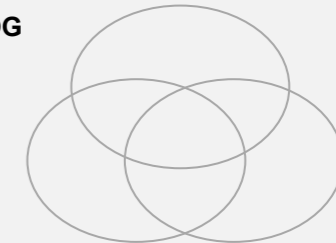
Strategic Management

- **Where do we stand today – Build and Review SWOT**
 - ✓ External Review – OT
 - ✓ Internal Review – SW
 - ✓ Strategy Review – SWOT
- **Where are we going – Change Agenda**
 - ✓ Direction
 - ✓ Strategic Path
 - ✓ Change Agenda
- **How are we going to get there – Actions**
 - ✓ Plans
 - ✓ Projects
 - ✓ People
- **Performance Metrics To Guide the Journey**

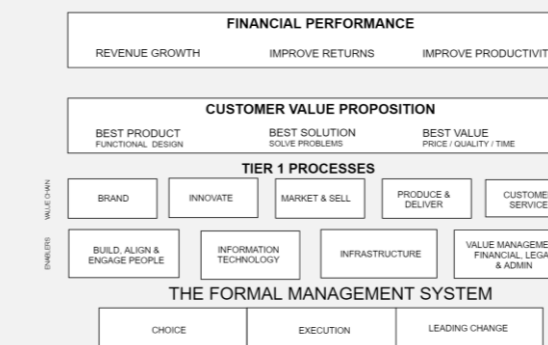
SWOT ANALYSIS

	PERFORMANCE	
	ENHANCERS	INHIBITORS
FACTORS		
	STRENGTHS	WEAKNESSES
INTERNAL		
	OPPORTUNITIES	THREATS
EXTERNAL		

HEDGEHOG



STRATEGIC PATH VISION / MISSION / GOALS



CHANGE AGENDA

VISION	FROM (F1)	TO (F2)	MEASURE	HOW INITIATIVE
FINANCIAL				
CUSTOMERS				
VALUE CHAIN				
ENABLERS				
LEADERSHIP				

SOMIPPP

	STRATEGY	OBJECTIVES	MEASURES	INITIATIVES	PROJECTS	PLANS	PEOPLE
FINANCIAL							
CUSTOMERS							
VALUE CHAIN							
ENABLERS							
LEADERSHIP							

BALANCED SCORECARD

	MEASURE	BASE	PLAN	STRETCH	RESULT
FINANCIAL					
RETURN					
REVENUE GROWTH					
PRODUCTIVITY					
CUSTOMERS					
BEST ?					
VALUE CHAIN					
1. BRAND					
2. INNOVATION					
3. MARKET AND SELL					
4. PRODUCE AND DELIVER					
5. CUSTOMER SERVICE					
ENABLERS & LEADERSHIP					
6. PEOPLE / PARTNERS					
7. INFRASTRUCTURE					
8. MANAGE VALUE					
9. LEADERSHIP					

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STRATEGIC PLANNING
is foundation

- Mission alignment
- Goals and strategic fundraising plan
- Board engagement
- Annual fundraising circle
- Case for support
- Marketing communications



RELATIONSHIPS
are crucial

- Donor pipeline management
- Donor recruitment, recognition and retention
- Government relations
- Corporate partnership
- Volunteers and alumni



DIVERSIFICATION
reduces risk

- Annual giving
- Major gifts
- Grants
- Fundraising events and campaigns
- Planned giving



INFRASTRUCTURE
enables scale

- CRM/ donor database
- Gift processing & Acknowledgment
- Policies & Ethics

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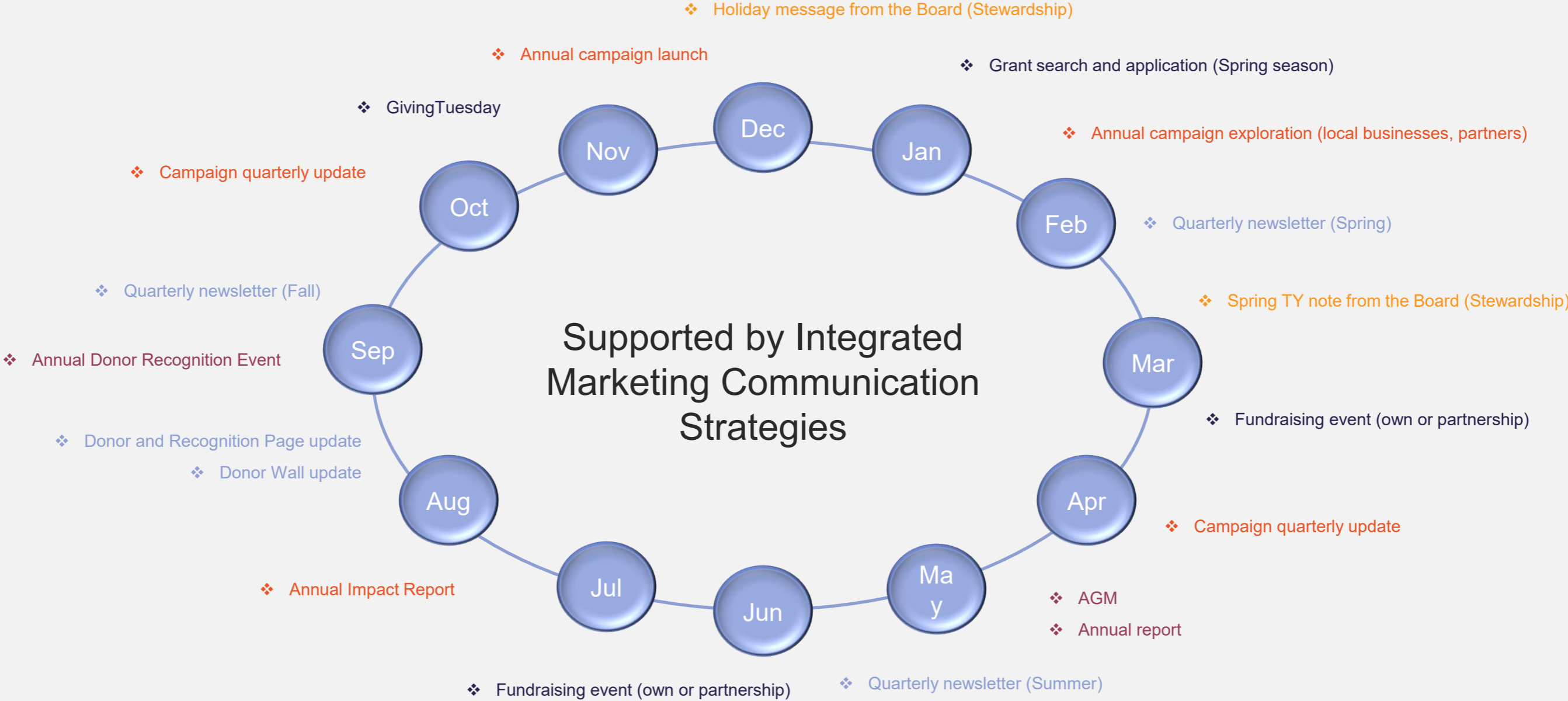
Case for Support

Key elements



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Annual Fundraising Circle



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Relationship Management Matters

- Build meaningful relationships
- Develop a consistent donor journey
- Demonstrate impact clearly and regularly
- Prioritize stewardship and recognition
- Use data to strengthen retention

Donor
Recruitment &
Retention



- Align shared values and objectives
- Focus on partnership, not sponsorship
- Create meaningful engagement opportunities
- Demonstrate impact and return on investment (ROI)
- Invest in long-term relationship management

Corporate
Partnership



- Recognize them as lifelong ambassadors
- Create meaningful and ongoing engagement
- Celebrate contributions and successes
- Communicate consistently and purposefully
- Build pathways for giving and advocacy

Volunteers and
Alumni



- A distinct revenue stream
- Relationship, not transaction (map your government stakeholders, engage year-round, tell the local story)
- Credibility boost/ Reputation lift
- Compliance (report, rules) and stewardship like a donor

Government
Relations



- Turn activity into accountability
- Guide smart decisions
- Build funder confidence
- Tools & Practices (Dashboard, CRM reporting, SMART targets, regular review & analysis, segment your analysis)
- Let data drive strategy

Fundraising
Performance
Management



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Infrastructure and Tools

- Donor retention and stewardship
- Automated CRA tax receipting
- Online giving
- Reporting and analytics
- Communications
- Time savings and integrations

CRM/ Donor management platform



- Consistency and quality
- Compliance and risk reduction
- Onboarding, continuity and knowledge retention
- Efficiency and time savings
- Foundation for automation and growth

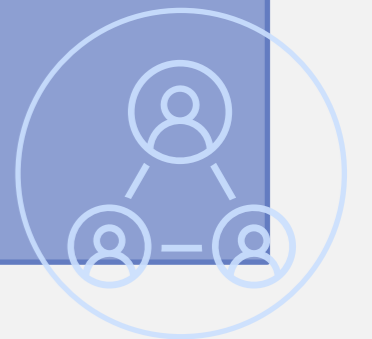
SOPs



Gift processing and acknowledgment
Major gift prospect management
Grant application process
Naming rights and donor recognition
...

- Fundraising person(s)/ department
- Communications person(s)/ department

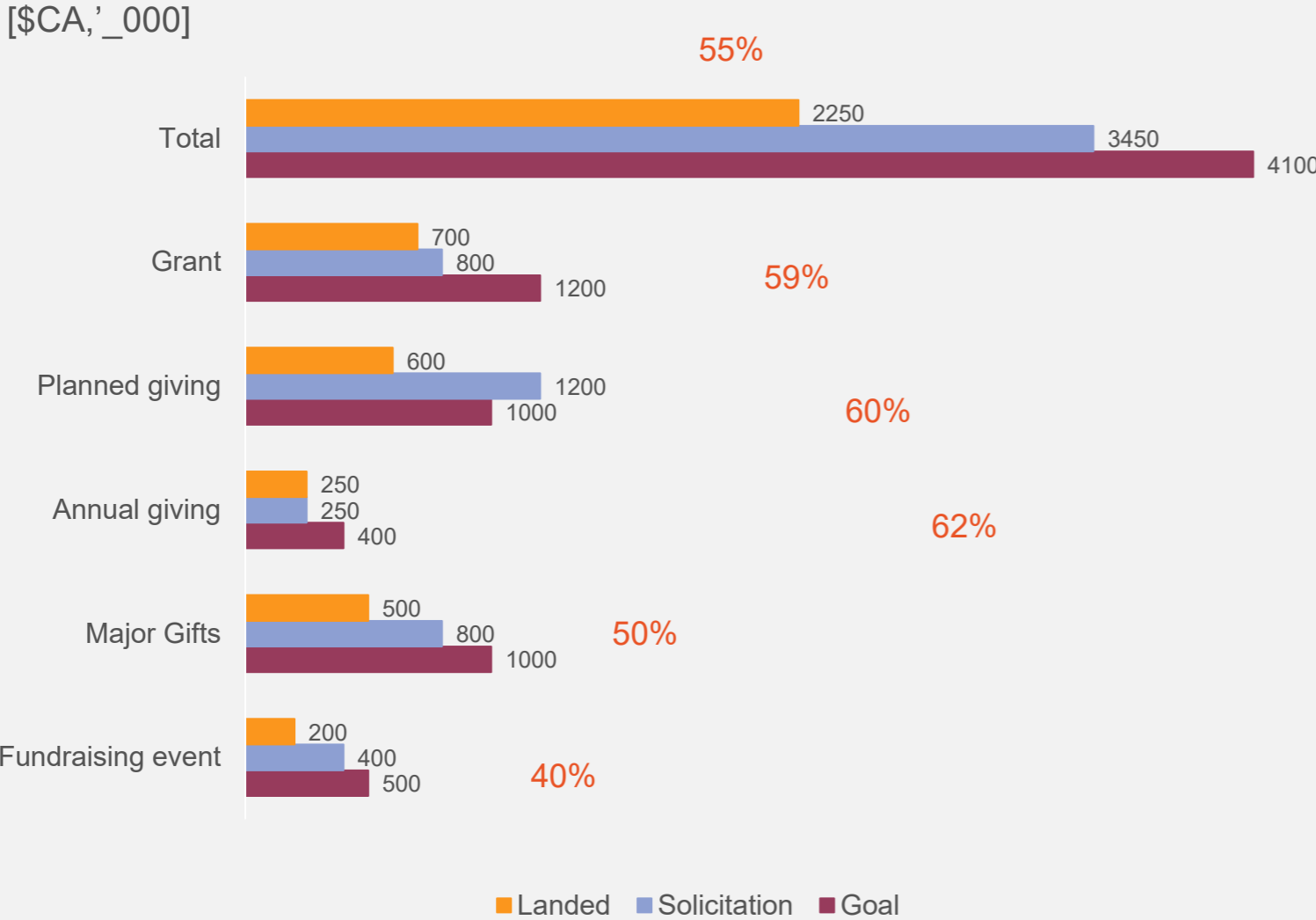
Resources



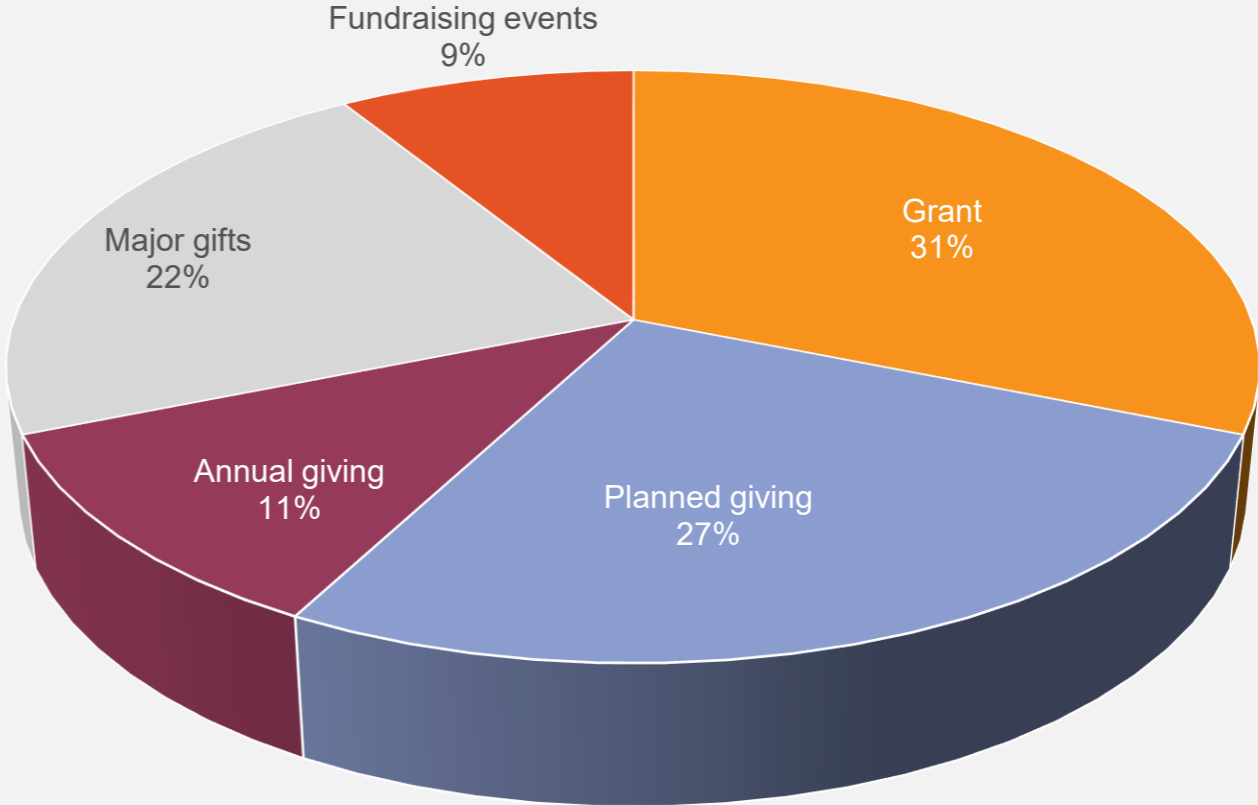
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Fundraising Performance Management

YTD Jun'2026 Performance Update



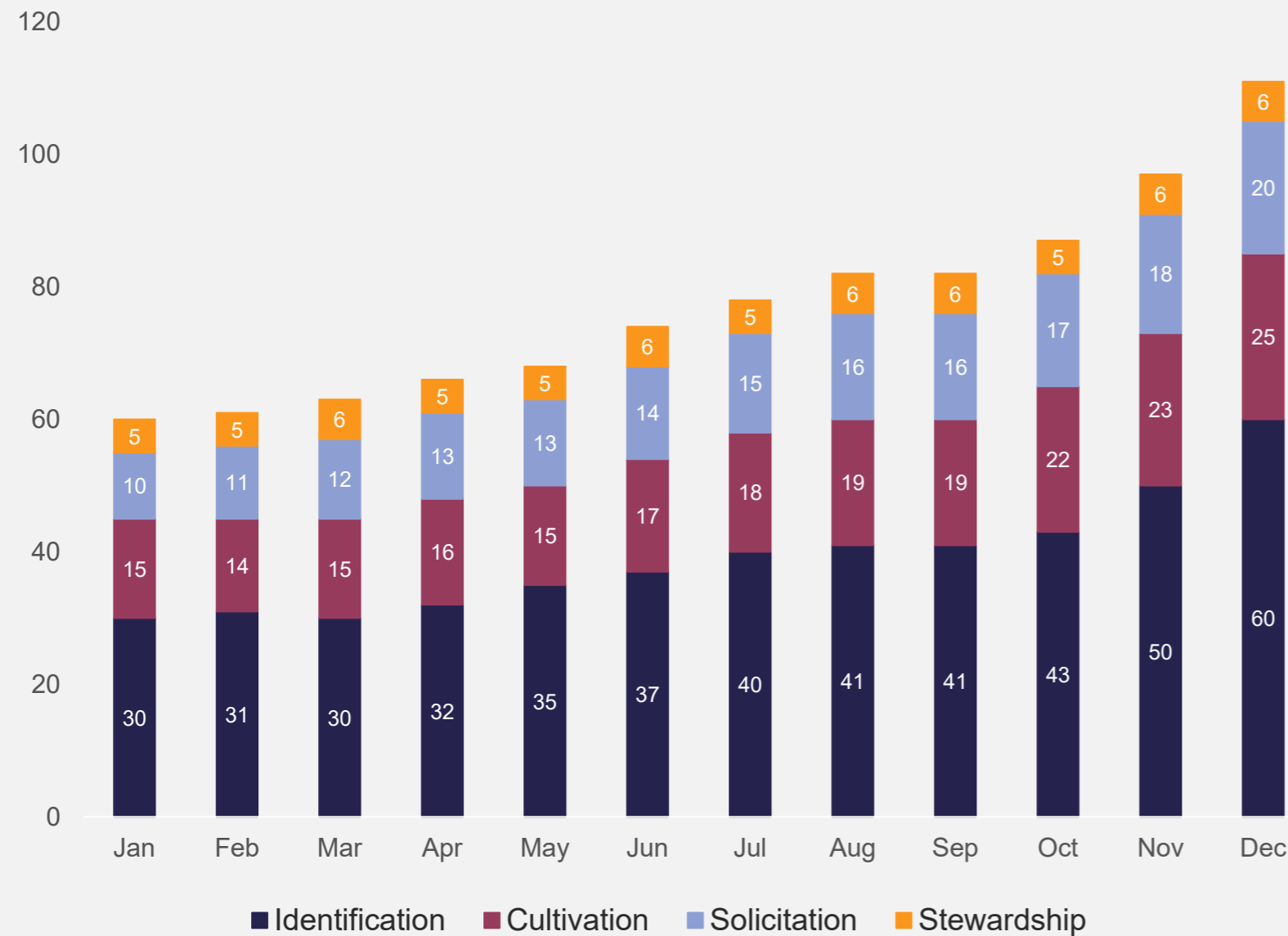
Contribution by sectors



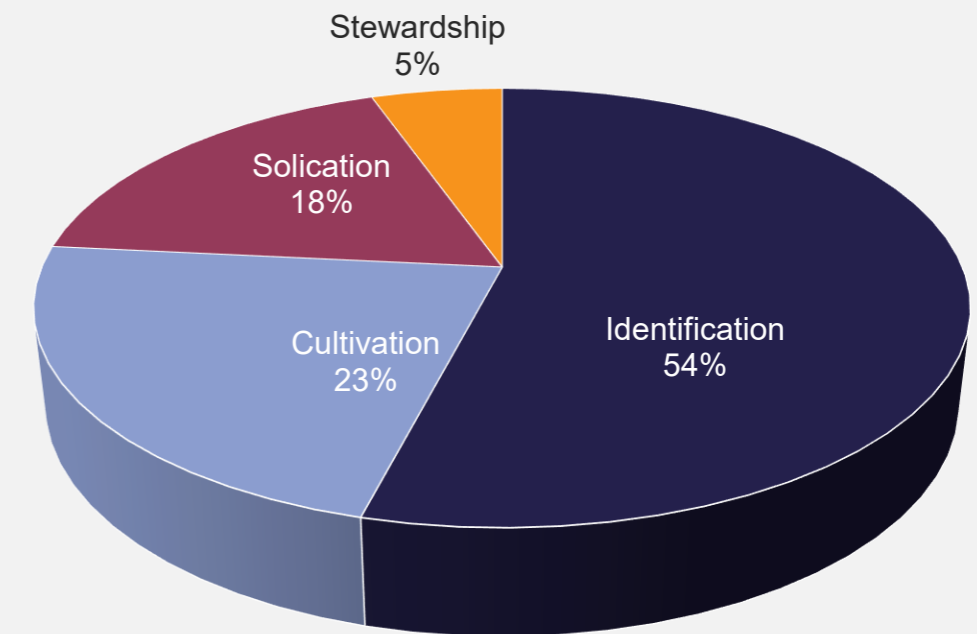
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Fundraising Performance Management

Donor Pipeline - Monthly Tracking



Pipeline Pool



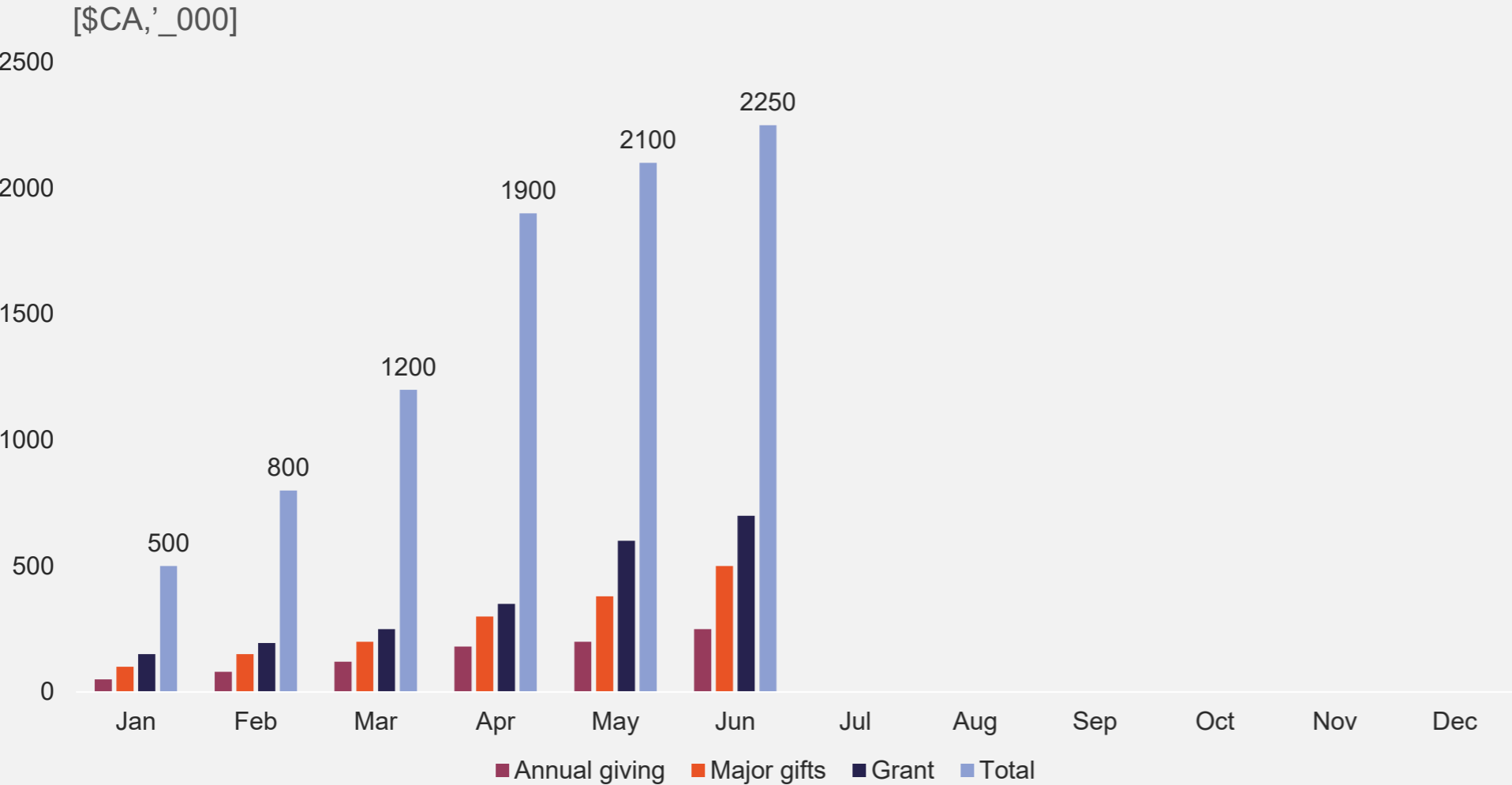
Convert rate: 46% (cultivation/identification) and 80% (solicitation/cultivation)

Success rate: 55% (approval/solicitation)

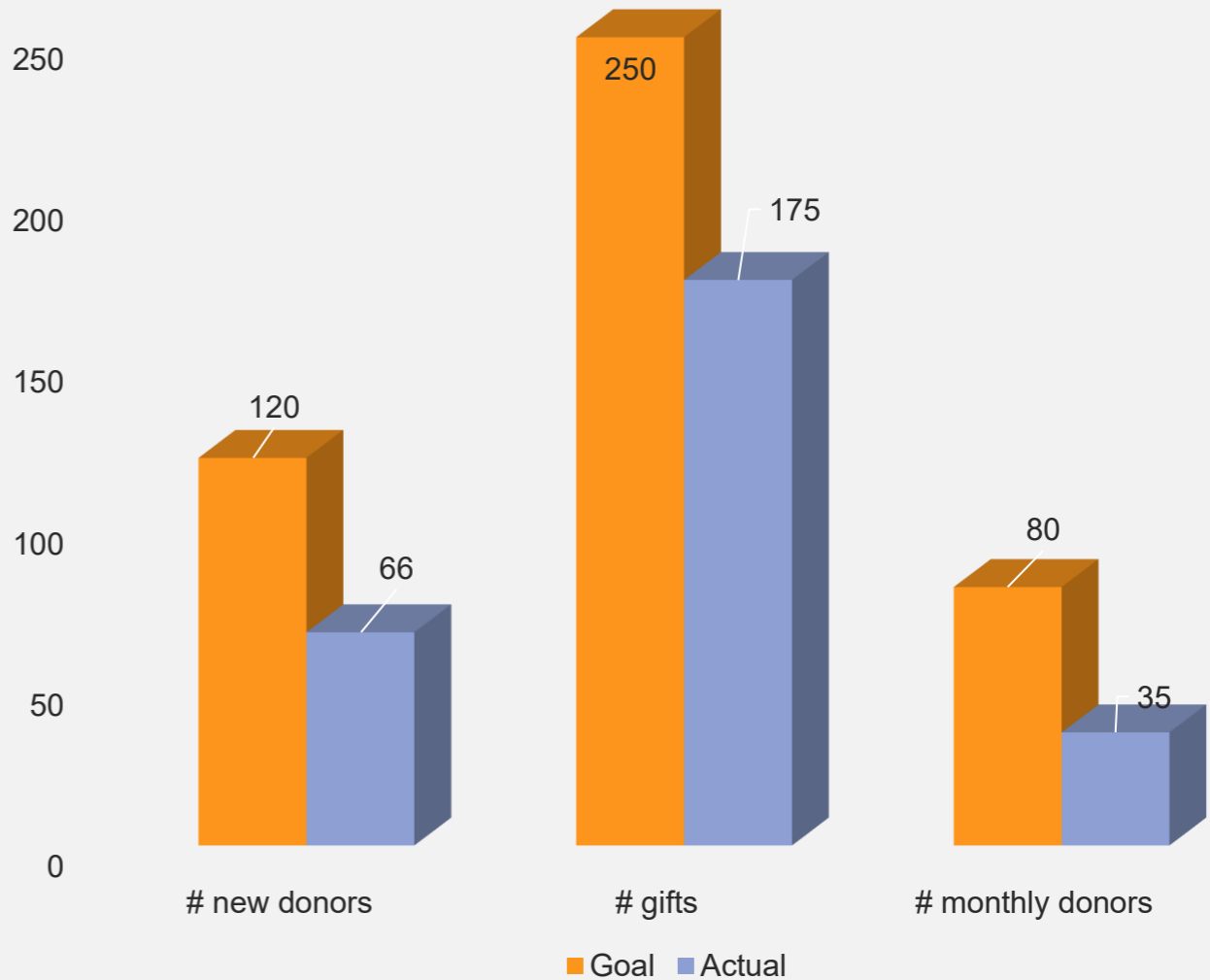
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Fundraising Performance Management

Monthly Accumulated Performance

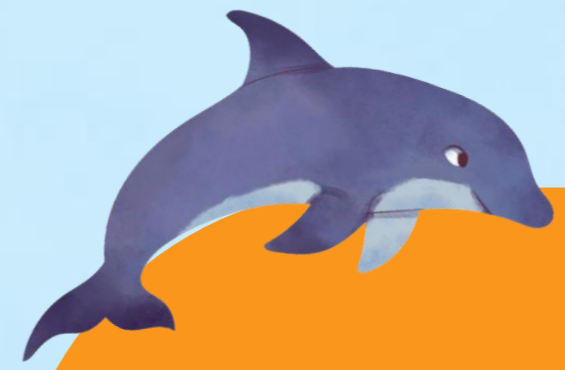


Other KPIs





WHAT TYPE OF PHILANTHROPY YOU ARE?



Discover who you are & receive a small surprise!





YOUR VOICE MATTERS...

Let's continue our meaningful conversation to turn your bold vision to lasting impact!

Meet & Eat

**A
COMPLIMENTARY
ONE-HOUR
CONSULTATION**

With BNP Inspire
Consultants



We're happy to have an in-person or a virtual meeting, based on your preference.

**Book a meeting
to talk about your needs**



EMPOWER PHILANTHROPY
ÉLEVER LA PHILANTHROPIE



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