



YOUR PERSONAL FUNDRAISING STRATEGY:

Discover your fundraising potential

These worksheets will give you a realistic idea of how much money you can raise.

- Let go of what you think your fundraising potential is. This worksheet may bring you to a total that is higher or lower than what you thought. CalBike's staff is here to strategize with you if the total is too low.
- Remember, you have a team of fundraising professionals at CalBike eager to see you succeed! Contact minnie@calbike.org to schedule a fundraising strategy session with Minnie or Jenn.

40 CONTACTS IN 4 MINUTES

First things first: you'll need a rough idea of about how many people you can ask to donate.

Set an alarm for 4 minutes, grab a pen and start writing down the names of:

4 FRIENDS _____

4 RELATIVES _____

4 CO-WORKERS _____

4 FORMER CO-WORKERS _____

4 NEIGHBORS _____

4 SOCIAL CONTACTS (civic group, clubs, worship, other parents at your kids' school)

4 PEOPLE YOU DO BUSINESS WITH (barber/stylist, dog-walker, banker, doctor)

4 PEOPLE WHO OFTEN POP UP ON YOUR FACEBOOK FEED

4 CHILDHOOD OR FAMILY FRIENDS _____

4 HIGH SCHOOL OR COLLEGE FRIENDS _____

Circle the first 4 people who you thought of during this exercise; we'll revisit them later.



REALISTIC FUNDRAISING EXPECTATIONS

Each group from our **40 Contacts in 4 Minutes** exercise is listed in the columns below:

- In column 1 estimate how many **total** contacts you have on each lists.
- In column 2 estimate an average donation amount from the people on each list.
- In column 3 estimate what percentage of people from each list are likely to make a donation *anytime between now and October 1*.

If you have groups of contacts that aren't listed, add them below. You know your contacts best, so your strategy will be unique to you.

List Name	How do you connect with this group and how often?	Total Contacts	Average Donation Amount	% likely to donate	Anticipated Subtotal
Ex: Dinner Club	In person, monthly	20	x \$ 50	x 50 %	= 500
Friends			x \$	x %	=
Relatives			x \$	x %	=
Co-workers			x \$	x %	=
Former Co-workers			x \$	x %	=
Neighbors			x \$	x %	=
Social Contacts			x \$	x %	=
Services			x \$	x %	=
Facebook			x \$	x %	=
Family Friends			x \$	x %	=
Classmates			x \$	x %	=
			x \$	x %	=
			x \$	x %	=

Anticipated Fundraising Subtotal "A" \$

Congratulations! No matter what your worksheet results are you've taken the first step in setting a fundraising goal that you can realistically achieve.



ASKING FOR LARGE DONATIONS WITH A DIRECT APPEAL

In addition to sending an email ask to the people you've identified, another proven fundraising method is to make a direct appeal (by phone or by email) to people who might afford to give larger amounts.

Think of 5 people to approach directly about making a large donation.

Fill in the lowest amount you think each person will give, as well as the highest amount. Figure the average. With those 3 amounts in mind, use your best judgment to guess how much each of these people might realistically donate.

Your Potential Direct Appeals

Contact Name	Contact Deadline	Low	High	Average	Best Guess
Ex: Dad	Labor Day	\$ 100	+ \$ 500	/2 \$ 300	= 250
1:		\$	+ \$	/2 \$	=
2:		\$	+ \$	/2 \$	=
3:		\$	+ \$	/2 \$	=
4:		\$	+ \$	/2 \$	=
5:		\$	+ \$	/2 \$	=

Anticipated Fundraising Subtotal "B" \$ _____

Tips for direct appeals in person:

- Direct appeals allow you to demonstrate your passion for making our streets safer and better for people who ride bicycles.
- Make a specific ask for a specific amount, based on what you think they might give. After you make the ask, wait a minute for them to respond. Don't immediately offer them an out, for example, don't follow your ask with "Of course, I understand if you can't."



BUILD A PERSONAL CAMPAIGN TEAM

Think of 4 people who love and support you and might be willing to help you reach your fundraising goal this year. Ideally these people have 1 or more networks that don't overlap with your own.

Who were the first 4 people you thought of during the exercise 40 Contacts in 4 Minutes? These might be the 4 people you are looking for. List them below:

Your Personal Fundraising Campaign Team

Contact Name	Relationship	Unique List	When will you ask?
Ex: Dave	classmate at Cal	Berkeley, SF	by Aug 1
1:			
2:			
3:			
4:			

Call these supporters and ask them to be your Campaign Managers. The worksheet you see below is an example of how to discover their fundraising potential. Four blank worksheets are available in the Appendix.

Campaign Manager: Dave from college

List Name	Method/Approach	Total Contacts	Average Donation Amount	% likely to donate	Anticipated Subtotal	
1: His close friends	Dinner party	20	$\times \$50$	$\times 75\%$	= 750	
2: Grad school/UCLA	Facebook	60	$\times \$40$	$\times 20\%$	= 480	
3: Family in SF	Letters	30	$\times \$50$	$\times 25\%$	= 375	
			Low	High	Average	Best Guess
Contact 1: His old boss	Dinner?	\$100	+	\$500 / 2	\$300	\$100
Contact 2: His aunt	Let's visit!	\$250	+	\$500 / 2	\$375	\$500

Anticipated Fundraising Subtotal: \$2205



PUTTING IT ALL TOGETHER

Use the matrix below to tally the anticipated fundraising subtotals from all of your resources that we've explored so far. Stretch the possibilities!

	From the worksheets	Increase by 10%	Increase by 20%
Subtotal "A" <small>(Page 2)</small>			
Subtotal "B" <small>(Page 3)</small>			
Subtotal "C" <small>(Appendix)</small>			
Subtotal "D" <small>(Appendix)</small>			
Subtotal "E" <small>(Appendix)</small>			
Subtotal "F" <small>(Appendix)</small>			
<i>Totals</i>			

The totals listed above represent your realistic fundraising potential at a glance. Truth be told, you can likely raise much more. In that case what should your GOAL be?

Remember your motivation for joining the Dream Ride. Seize the day, maximize your impact in the fight for better biking, and increase your fundraising goal to a higher amount **right now**.

REVISIT THESE WORKSHEETS with Minnie or Jenn to dig even deeper. Together you'll discover new possibilities and your realistic fundraising potential will increase.

NEXT STEPS:

- Increase your Fundraising Goal on the Dream Ride website
- Schedule a time with CalBike staff to revisit these worksheets or to brainstorm about your fundraising (email minnie@calbike.org)
- There are several additional ways to raise even more money: parties, auctions, matching gifts, social media... just to name a few.



Appendix

Campaign Manager Worksheets

Campaign Manager: _____

List Name	Method/Approach	Total Contacts	Average Donation Amount	% likely to donate	Anticipated Subtotal	
1:			X	X	=	
2:			X	X	=	
3:			X	X	=	
			Low	High	Average	Best Guess
Contact 1:			+	/2		
Contact 2:			+	/2		

Anticipated Fundraising Subtotal "C": _____

Campaign Manager: _____

List Name	Method/Approach	Total Contacts	Average Donation Amount	% likely to donate	Anticipated Subtotal	
1:			X	X	=	
2:			X	X	=	
3:			X	X	=	
			Low	High	Average	Best Guess
Contact 1:			+	/2		
Contact 2:			+	/2		

Anticipated Fundraising Subtotal "D": _____



Appendix

Campaign Manager Worksheets

Campaign Manager: _____

List Name	Method/Approach	Total Contacts	Average Donation Amount	% likely to donate	Anticipated Subtotal
1:			X	X	=
2:			X	X	=
3:			X	X	=

	Low	High	Average	Best Guess
Contact 1:		+	/2	
Contact 2:		+	/2	

Anticipated Fundraising Subtotal "E": _____

Campaign Manager: _____

List Name	Method/Approach	Total Contacts	Average Donation Amount	% likely to donate	Anticipated Subtotal
1:			X	X	=
2:			X	X	=
3:			X	X	=

	Low	High	Average	Best Guess
Contact 1:		+	/2	
Contact 2:		+	/2	

Anticipated Fundraising Subtotal "F": _____