

**Funding Plan Categories and Examples**

**for a Diversified Portfolio**

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Diversifying funding is crucial for nonprofit long-term fiscal sustainability. Here are key funding categories that nonprofits can include in a balanced portfolio.

TIPS: Avoid over-reliance by

* Aiming for no more than 25–30% from any one category
* Monitoring and adjusting your funding mix annually
* Building a reserve fund with surpluses from multiple sources

1. ***Individual Donations***

* Annual Giving (recurring or one-time)
* Major Gifts (high-net-worth donors)
* Monthly Sustainers
* Online Appeals (email, social media, crowdfunding)
* Planned Giving (bequests, legacy gifts)

***2. Grants***

* Private Foundations (e.g., local, family, or national foundations)
* Corporate Foundations (e.g., Walmart Foundation, Google.org)
* Government Grants
* Federal (e.g., NEA, HUD)
* State & Local Agencies
* Donor-Advised Funds (DAFs)
* One-time Campaigns (e.g., GoFundMe, Givebutter)
* Recurring Campaigns (e.g., Patreon, Ko-fi)

***3. Events & Fundraisers***

* Annual Galas
* Walks/Runs/Bike-a-thons
* Benefit Auctions
* Peer-to-Peer Campaigns

***4. Corporate Sponsorships & Partnerships***

* Event Sponsorships
* Program Support
* Cause Marketing Campaigns
* In-Kind Donations (products or services)
* Church or Denominational Support
* University- or Hospital-Affiliated Funding

***5. Earned Income***

* Program Fees (sliding scale, full pay, scholarships)
* Product Sales (merchandise, curriculum, books)
* Consulting or Training Services
* Social Enterprises (e.g., thrift stores, cafés)

***6. Memberships & Subscriptions***

* Member Dues
* Educational or Professional Memberships
* Subscription-Based Content or Access

***7. Fee-for-Service Contracts***

* Government Contracts
* School Districts, Municipalities, Healthcare Systems
* Corporate Clients

***8. Investment Income***

* Endowment Earnings
* Interest from Reserve Accounts
* Dividend or Rental Income (if applicable)

**Funding Plan Example 1:** *Small or New Nonprofit*

**Total Revenue Goal:** $60,000

**1. Individual Donations – Goal: $12,000**

* Annual fall giving appeal ($4,000)
* Online spring campaign using Givebutter ($3,000)
* Recruit 15 monthly donors at $25/month ($4,500)
* Two board-led major donor asks ($500)

**2. Grants – Goal: $20,000**

* Apply to 4–6 local foundations (e.g., Rocky Mountain Power, Cache Valley Bank Foundation)
* Submit application to Utah Division of Arts & Museums
* Consider GoFundMe campaign for equipment ($2,000 target)

**3. Events & Fundraisers – Goal: $6,000**

* Host a “Youth Art Night” with silent auction and ticket sales
* Coordinate a small peer-to-peer campaign with student ambassadors

**4. Corporate Sponsorships – Goal: $5,000**

* Ask 5 local businesses to sponsor specific youth programs
* Offer recognition at the Art Night event
* Request in-kind donations (printing, snacks, equipment)

**5. Earned Income – Goal: $10,000**

* Charge small fees for after-school arts programs (scholarships available)
* Sell student-designed merchandise at events

**6. Memberships & Subscriptions – Goal: $0**

*Not currently part of the strategy, but may consider in future*

**7. Fee-for-Service Contracts – Goal: $5,000**

* Partner with Box Elder School District for one in-school enrichment program

**8. Investment Income – Goal: $0**

*No reserve or endowment fund at this stage*

**Funding Plan Example 2:** *Medium-Size Nonprofit*

**Total Revenue Goal:** $150,000

**1. Individual Donations – Goal: $25,000**

* Fall Appeal (mail and email): $8,000
* Monthly Giving Club (30 donors at $20/month): $7,200
* Major Gifts (4 gifts at $2,500+): $10,000
* Strategy: Campaign includes client stories and donor testimonials. Board members will participate in outreach.

**2. Grants – Goal: $50,000**

* Renewal Grants (2 foundation funders): $20,000
* New Grant Applications (3–5 proposals to local/state foundations): $30,000
* Strategy: Prioritize funders focused on mental health, rural resilience, and family stability. Use Candid and Utah-based grant directories.

**3. Events & Fundraisers – Goal: $15,000**

* Annual Community Gathering with Raffle & Sponsors: $10,000
* Online Peer-to-Peer Campaign led by board: $5,000
* Strategy: Low-overhead events focused on storytelling and client outcomes.

**4. Corporate Sponsorships – Goal: $10,000**

* Local business sponsorships for events and programs (5 at $2,000 each)
* Strategy: Recognition through signage, social media, and newsletters. Will prioritize wellness-related companies and credit unions.

**5. Earned Income – Goal: $15,000**

* Workshop Fees (trauma-informed training for schools and nonprofits): $10,000
* Sales of Educational Toolkits and Guides: $5,000
* Strategy: Offer sliding scale to increase access while generating modest income.

**6. Memberships & Subscriptions – Goal: $2,500**

* Pilot a Professional Support Membership for rural social workers (includes resources, peer calls, CEUs)
* Strategy: Launch in January with 10+ early adopters

**7. Fee-for-Service Contracts – Goal: $25,000**

* Contract with County Mental Health Task Force for training facilitation and data support
* New MOU with a school district for family support referrals
* Strategy: Continue building referral-based fee-for-service options.

**8. Investment Income – Goal: $7,500**

* Interest from Operating Reserve in community foundation fund
* Board-Designated Program Reserve Growth: Small portion designated for 2026 program expansion

**Funding Plan Example 3: Larger, Established Nonprofit**

**Total Revenue Goal:** $750,000

**1. Individual Donations – Goal: $180,000**

* Year-end direct mail campaign ($40,000)
* Monthly donor program (100 donors at $30/month = $36,000)
* 12 major donors at $5,000–$10,000 level ($80,000)
* Planned giving outreach via legacy society ($24,000 pledged/bequested)

**2. Grants – Goal: $240,000**

* Renew state contracts and submit 6 new proposals
* Apply to Eccles, Sorenson, and Cambia Health Foundation
* Leverage DAF relationships through major donors

**3. Events & Fundraisers – Goal: $80,000**

* Annual gala with silent and live auctions ($50,000 net)
* “Walk for Wellness” campaign + P2P fundraising ($30,000 net)

**4. Corporate Sponsorships – Goal: $50,000**

* Offer year-round program sponsorships
* Secure presenting sponsors for events
* Develop partnership with hospital system for maternal health initiative

**5. Earned Income – Goal: $60,000**

* Fees for parenting classes (sliding scale)
* Sales of printed curriculum to other providers
* Internal consulting for early childhood program setup

**6. Memberships & Subscriptions – Goal: $10,000**

* Member dues for partner organizations
* Offer professional development webinars with tiered subscription access

**7. Fee-for-Service Contracts – Goal: $100,000**

* County health department contracts for home visiting and crisis response
* MOU with local school districts for onsite family services

**8. Investment Income – Goal: $30,000**

* Endowment earnings (managed by a community foundation)
* Interest from board-designated reserve funds