

7 Steps to a Written Fundraising Plan

Sandy Rees
Chief Encouragement Officer

GET **FULLY**
FUNDED





Not this:



What you'll get today:

- ▶ 5 ways people get stuck with planning
- ▶ 3 main goals you *MUST* include
- ▶ How to create an Impact Goal to guide your plan
- ▶ How to choose the right strategies for YOU
- ▶ Simple tool to get started planning

About me



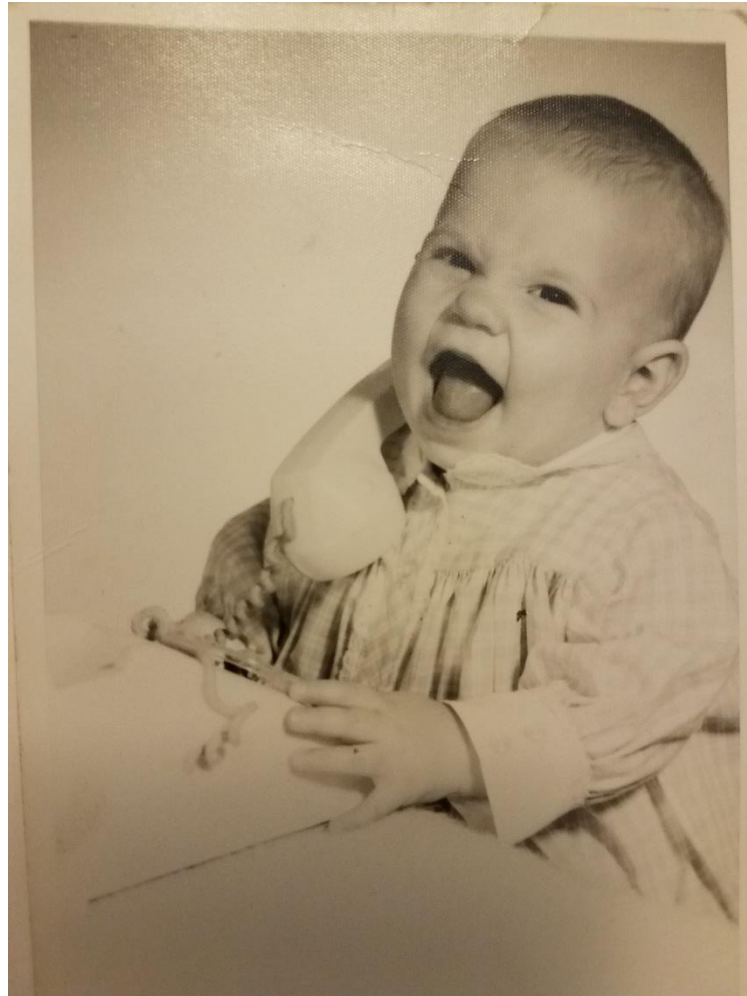
- Fundraising Coach
- Trainer
- Author
- Animal Lover

Me and Lucy



Here's my story...

I wasn't born with fundraising skills...



I didn't sign up for fundraising at career day...



What happened was...



Today...



Let's jump in!



\$100,000!!

But first, a poll



Truth #1:

When you raise more money,
You can change more lives.

Truth #2:

Working from a PLAN makes fundraising easier.

5 surprising reasons people don't plan

5 reasons people don't plan:

▶ Should-ing

5 reasons people don't plan:

- ▶ Should-ing
- ▶ Perfectionism

5 reasons people don't plan:

- ▶ Should-ing
- ▶ Perfectionism
- ▶ Rigidity

5 reasons people don't plan:

- ▶ Should-ing
- ▶ Perfectionism
- ▶ Rigidity
- ▶ Inadequacy

5 reasons people don't plan:

- ▶ Should-ing
- ▶ Perfectionism
- ▶ Rigidity
- ▶ Inadequacy
- ▶ Imposter Syndrome

Which one best describes you?



Big takeaway -

Done is better than perfect.

**Imperfect action
will always win over inaction.**

With a plan you can

- ▶ Block out the unnecessary
- ▶ Deflect “great new ideas”
- ▶ Stop spinning your wheels



Without a plan...



7 steps to a simple, successful fundraising plan

7 steps to a fundraising plan:

1. Learn from the past
2. Shine a guiding beacon
3. Set 3 critical targets
4. Put on your Super Cape
5. Choose the right strategies
6. Write it down!
7. Course correct

Step 1: Learn from the past



Look at each past activity

1. Did we get enough ROI?
2. Can we improve it?
3. Has it run its course?

Review your list and ask

- ▶ What should you **KEEP?**
- ▶ What should you **TWEAK?**
- ▶ What should you **DUMP?**

Never do something just because
you always have.

Do it because it WORKS!

Step 2: Shine a guiding beacon



Set an Impact Goal

What impact will your nonprofit have?

Set an Impact Goal

What impact will your nonprofit have?

For example,

“We’ll double the number of animals we save this year.”

“We’ll eliminate our waiting list.”

Set an Impact Goal

What impact will your nonprofit have?

For example,

“We’ll double the number of animals we save this year.”

“We’ll eliminate our waiting list.”

Make it SMART - Specific, Measurable, Actionable, Realistic, and Timely

Step 3: Set 3 critical targets

3 Critical Targets

1. # dollars to raise



3 Critical Targets

1. # dollars to raise
2. # donors to renew



3 Critical Targets

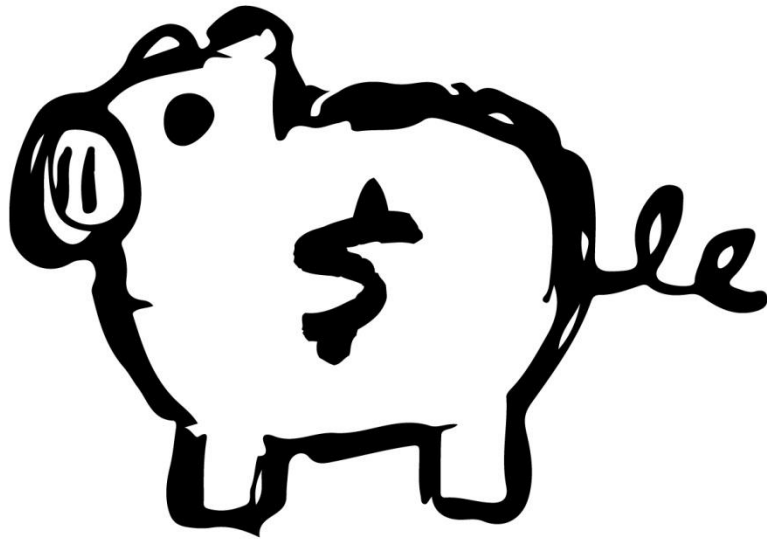
1. # dollars to raise
2. # donors to renew
3. # donors to acquire



Step 4: Put on your Super Cape



Organizational assets



Organizational assets

- ▶ Name recognition
- ▶ Strong brand
- ▶ Well-known leaders
- ▶ Broad-reaching or well-loved cause
- ▶ Great facility or location
- ▶ Big social media following
- ▶ Dedicated volunteer base

Personal strengths

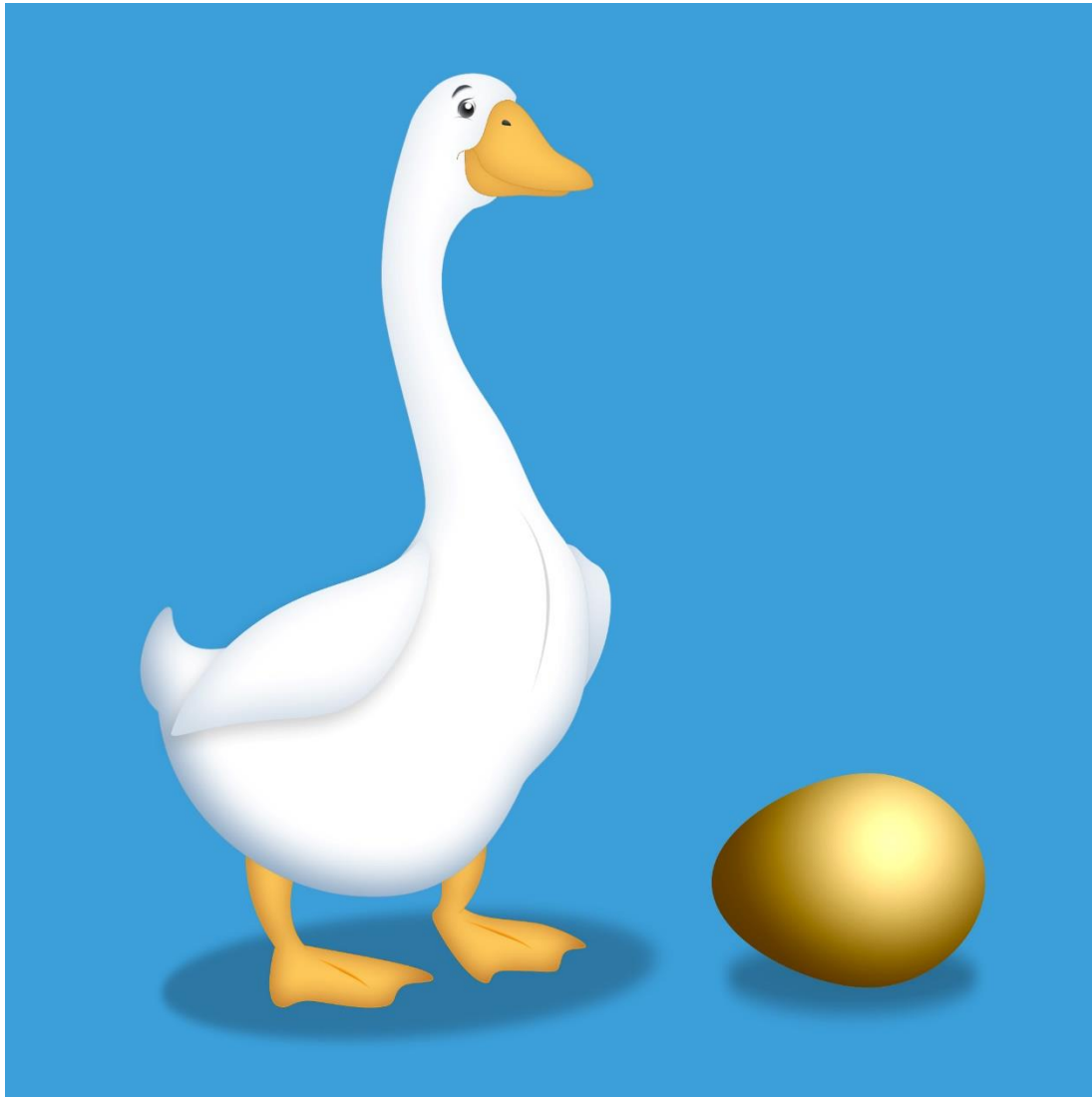


Step 5: Choose the right strategies

Choose strategies



Keep everything
donor focused.



How many events are you holding?



1 tool to help you choose
the right strategies

1-10-1000 Rule

- ▶ 1 signature event



1-10-1000 Rule

- ▶ 1 signature event
- ▶ 10 grants



1-10-1000 Rule

- ▶ 1 signature event
- ▶ 10 grants
- ▶ 1,000 donors



Fundraising Math

▶ 1 Signature Event	\$25,000
▶ 10 Grants @ \$2,500 each	\$25,000
▶ 1,000 Donors @ \$50 each	<u>\$50,000</u>
	\$100,000

Bend the rule for virtual fundraising

- ▶ 1 signature event held virtually

Bend the rule for virtual fundraising

- ▶ 1 signature event held virtually
- ▶ 3-4 mid-size activities held virtually

- ▶ Monthly giving or sponsor recruitment campaign
- ▶ Peer-to-peer campaign
- ▶ Online auction, concert, other fun event
- ▶ Giving Tuesday

Bend the rule for virtual fundraising

- ▶ 1 signature event held virtually
- ▶ 3-4 mid-size activities held virtually
- ▶ 5 or 6 tiny activities held virtually

- ▶ \$5 Friday on Facebook
- ▶ Meet the Need through email
- ▶ Wish List

Step 6:
Write it down!

If it's not in writing, it's not real!



Write it down!

FUNDRAISING PLAN TEMPLATE GETFULLY FUNDED

FY: _____

Impact goal: _____

Targets:

- _____
- _____
- _____

Fundraising Plan Summary

Strategy	SMART GOAL	Projected dollars raised	# reserved donors	# new donors
Events				
Events				
Individual donors				
Major gifts				
Other fundraising				
Marketing				
Communications				
TOTAL				

©2011 Study Res. www.getfullyfunded.com
Fundraising Strategies Annual Fundraising Plan template

1

2

3

4

2002-03 Development Budget.xls (Compatibility Mode) - Microsoft Excel non-commercial use

		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Public Support	4400 General Public Contributions	2000	5000	4000	2500	8000	25000	20000	5000	2500	2000	2000	2000	78500
	4415 Newsletter Contributions	250	250	500	300	500	500	500	250	500	200	500	200	4450
	4416 Local Direct Mail Contributions	2000	5500	4000	2500	50000	25000	15000	5000	2000	2500	10000	1500	125000
	4418 Hunger's Hope	1000	1000	1000	1000	1000	1000	1000	1500	1500	1500	1500	1500	14500
	4419 Major Donors													0
	4420 Other Misc Contributions		100	100	250	250	500	100		100	100			1500
	new Lapsed Donor Renewals		100	200	500	500	1000	100	100					2500
	new Thank You Letter Contributions	500	500	500	1000	2500	6000	3500	2500	1000	1000	500	500	20000
	Total													247950
Food Drive Projects	4405 Food Drive Contributions				100	5000	2500	500	100	100	100	100		8500
	4406 HSFC Contributions		500	1000	1000	5500								8000
	4410 Can Hunger				500	1500	1000							3000
	4430 Tim Kerin Food Drive Contributions				25000									25000
	4437 Construction						1000							1000
	Total													45500
Other Development Projects	4432 Hams for the Hungry	100	100	100	100	100	100	100	5000	10000	100	100	100	16000
	4434 FICAH												1500	1500
	4436 Pampered Chef						1500			1500				3000
	new Holiday Ornament Contributions				2500	7500	5000							15000
	4440 Food Procurement Campaign								5000					5000
	4450 Other Development Projects				1000	1000	1000	1000						5000
	Total													45500
Special Events	4501 Without Reservations						5000	5000	15000	20000	20000	20000	20000	90000

Revenue / Expenses - Sheets

Grab yours --

Sandy's 1 Page Fundraising Plan

www.GetFullyFunded.com/Plan

SUMMARY CALENDAR TEMPLATE

Fundraising goal: Donor Retention goal: Donor Acquisition goal:

	Grants	Special Events	Individual donors (monthly giving, direct mail, email appeal, etc.)	Major gifts	Communications (newsletter, website, annual report, etc.)	Marketing (public speaking, media, advertising, etc.)	Other (vacations, training, etc.)
Jan							
Feb							
Mar							
Apr							
May							
Jun							
Jul							
Aug							
Sep							
Oct							
Nov							
Dec							

© Sandy Rees, 2010. The 1-Page Quick-and-Simple Fundraising Plan
www.GetFullyFunded.com 6

1 Page Fundraising Plan

HORSE HAVEN FUNDRAISING CALENDAR

	Grants	Special Events	Individual donors (monthly giving, appeals, etc.)	Major gifts	Marketing (public speaking, news media, etc.)	Communications (newsletter, annual report, etc.)	Other (vacations, conferences, etc.)
Aug	Scaife Fdn (9/1)	Back to School at the Barn		1-3 visits		Email newsletter 8/31	ACAT conference 8/14-15
Sep	Aslan Foundation Doris Day (10/1)	TY video to 2017 Dancing sponsors		1-3 visits, 2-3 asks	TY Akima	Email newsletter 9/30 Print newsletter 9/5 TY video-horse sponsors New website live	Homes for Horses conference
Oct		Boo at the Barn	Segmented appeal 10/16	1-3 visits, 2-3 asks	Pitch story	Email newsletter 10/31	
Nov	Gus Hawthorne (11/20)		Giving Tuesday 11/28	1-3 visits, 2-3 asks	Pitch story	Email newsletter 11/30 Thankathon 11/18	
Dec	Brennan Equine Welfare Fund (1/1) Kenneth Scott (12/15)		Year-end campaign (12/26-12/31)	1-3 visits, 2-3 asks	Pitch story	Email newsletter 12/30 Holiday postcard	

Step 7: Course correct

Course correct

How will you stay on track?



NOW
WHAT?

Fundraising Blueprint

Let's go deeper on what you've learned today!



FUNDRAISING BLUEPRINT WORKSHOP

1 Day Virtual Workshop
February 4th from 10am-4pm eastern
getfullyfunded.com/blueprint

Fundraising Blueprint

- ▶ Create a detailed annual fundraising plan
- ▶ Learn what to focus on and what to let go
- ▶ Play to your strengths
- ▶ Choose the best strategies

- ▶ Fun, virtual workshop format!



Fundraising Blueprint

Save \$15 by using code KINDFUL *(expires Jan 17)*

www.GetFullyFunded.com/Blueprint

A graphic for a fundraising workshop. It features a background of a calendar grid with days of the week and numbers. Overlaid on this is a white rectangular box containing the text for the workshop. The text is in a mix of blue and black fonts, with some words in a larger, bolder font.

FUNDRAISING BLUEPRINT WORKSHOP

1 Day Virtual Workshop
February 4th from 10am-4pm eastern
getfullyfunded.com/blueprint

Stay in touch!

Join our free community!

www.Facebook.com/FundraisingForFounders

1 page fundraising plan

www.GetFullyFunded.com/Plan

