



Nonprofit Founders Society

Implementation Guide

January 2021 | What's Your Plan? Creating Your Fundraising Plan for the New Year

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Video Guide

Part 1: What is a Fundraising Plan?

I think of a Fundraising Plan as a _____ . You start out at one place, decide on where you want to go, and then choose your route to your destination. **A Fundraising Plan is how to get where you want to go.**

Part 2: Why do we Need a Fundraising Plan?

Writing and executing a Fundraising Plan has four big benefits.

1. It gets everyone on the _____ page. It keeps you out of _____ mode. No more Fundraisers of the _____ or last-minute fundraisers. With a plan, you know exactly when money will come in and how much to expect. There is no more cycle of "we need money, let's do a fundraiser" with little time to put together anything of quality.
2. It helps control _____. When you intentionally plan out your fundraising strategies and activities, you can control when certain activities will happen. This means you can more evenly distribute your activities and manage your time.
3. It builds _____ in your program with your donors. When you can show you are financially stable and have a plan to stay that way, donors and funders have more confidence in your financial stability and longevity- making you a good investment.
4. You raise more _____. Organizations that have Fundraising plans raise more money. They focus on the strategies and activities that work for them and stop doing those things that don't. They can plan in advance which means they can budget and take advantage of cost savings opportunities, lessening their expenses.

How Do You Implement The Information?

Step 1: Current Assessment

The first step is to figure out where you are. I remember when I was first driving and before the days of GPS, I got lost. I mean I had no idea how I got where I was much less *know* where I was. In a slight panic, I called my mother and told her I was lost. She asked me where I was. Was there a street sign or landmark? I couldn't find anything useful. She said well I can't get you home until I know where you are! Eventually, I came to a street sign and let my Mom know the name of the street. My Mom was able to get me home because she knew where I was starting from. The Current Assessment is the same thing. You don't know how to get to your destination if you have no clue where you are.

The Current Assessment workbook is comprehensive. Don't let that intimidate you. You probably won't have every answer or do every activity. That's okay. Answer what you can. Another great use of this workbook is to show you opportunities for growth.

Step 2: Determine Your Goals, Strategies, and Activities

Next, you will decide on your goals for the coming year and pick your strategies to get you to your goals. Think of the strategies as the modes of transportation you will use. A comprehensive list of strategies is included in the Implementation Guide. Circle the strategies you want to use in the coming year.

Important Point:
There are three Fundraising Goals in every plan.
They are Fundraising Dollar Amount, Donor
Acquisition, and Donor Retention.

Take a look at the activities under each strategy you've chosen and circle those activities that your organization will use.

Step 3: Income Streams Spreadsheet

Now, it's time to use the Income Streams Spreadsheet to play with the numbers and activities you want to execute in the coming year. When you are confident you have a do-able plan, it's time to move to the next step.

Step 4: Fundraising Plan Calendar

Use the Fundraising Plan Calendar to plan your workflow. Write all your activities by month and the planning activities to accomplish the activities. Move things around until you are confident these activities can be accomplished with the manpower you have available.

Step 5: Fundraising Plan Template

Use the Fundraising Plan template to solidify your plan. Strategies, activities, and milestones will be recorded here. Remember this is a living document and not one to be completed and put on a shelf. Put your milestones on a Fundraising calendar where you will see them regularly. Tactical Plans will give you all the details and to-dos for each activity. Finally, set your fundraising goals up for success by incorporating your fundraising plan to-dos in a daily, weekly, and monthly routine.

Worksheets

Fundraising Plan Workbook

Current Situation Overview

Donors

Number of Active Donors currently: _____

Dollar Amount Raised through Donors for the Current Year: \$ _____

Fundraising Goal

What was your fundraising goal last year? \$ _____

Did you hit that goal? Yes No

Why? Or why not?

Where Are We Going?

Answer these questions based on what you want this plan to reflect and get you to. Every plan starts with three categories: Fundraising goal you want to achieve, Donor acquisition goal you want to achieve, and the donor retention rate you want to obtain.

Here are the definitions we will use:

Fundraising goal- the amount of money you want to raise through fundraising activities. This does not include fees for services or income streams that does not involve donations.

Donor acquisition goal- the percentage or number of new donors you want to add to your donor list. This is individual donors only and does not include companies or foundations.

Donor Retention Rate- the number (or percentage) of donors that return to give another gift in a specific time period. Most nonprofits and charities measure donor retention year over year. Use the formula: $\text{Year \#2 Donors who gave more than one gift} / \text{Year \#1 (Previous Year) Donors} = \text{Donor Retention Rate}$

For example, if 60 donors out of 200 decided to give a gift again, your retention rate is 30%.

What is your fundraising goal for this plan? _____

What is your donor acquisition goal for this plan?

What is your donor retention rate goal for this plan?

Fundraising Activities

Use the following table to fill in all fundraising/ marketing activities you did last year. Please include all Grant deadlines, Events, Individual donor activities (monthly giving, direct mail, lapsed donors, etc.), Major gifts, Marketing (public speaking,

media, advertising, etc.), Communications (newsletter, website, annual report, etc.), Other (vacations, training, etc.).

Quarter 1	Quarter 2
January <ul style="list-style-type: none"><li data-bbox="251 787 722 829">• (Example) Activity /Milestone	April
February	May
March	June

Quarter 3 July August September	Quarter 4 October November December
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The Total Amount of Money the Fundraising Activities Raised: \$_____

Are there any changes in funding you are expecting that will alter your fundraising this year? (Example: You have been awarded a large one-time grant that you didn't receive last year, or your funding has been cut or down in a certain income stream.)

Yes No

If yes, what income stream and by how much?

Are there changes in donor behavior that you are expecting this year? (Example: You did a capital campaign last year and don't want to ask Major Donors for funds right away.)

Organizational Information

Do you have appropriate registrations and permits to operate and fundraise? Yes
 No

Do you have a clear and easy-to-understand mission statement? Yes No

How much is your organization's annual budget? _____

What are the main sources of revenue?

How much revenue comes from fundraising? _____

List the fundraising revenue sources and how much money you raised from those sources last year.

Does your organization have a current, written strategic plan? Yes No

Does your organization have a current, written fundraising plan? Yes No

Do you have a budget for fundraising? Yes No

If yes, how much money do you have budgeted for fundraising expenses during the year? _____

Reason for Fundraising

Do you know why you need to raise money? Yes No

Do you have a written case for support? Yes No

In one easy sentence, why should someone give money to your organization?

Donor Base

Do you use a donor-tracking software? Yes No

If yes, which one? _____

How many donor names are in your donor data base?

How many of them donated in the last 15 months?

What was their average gift amount? _____

How do you track information about your donors and their gifts? (software?)

Do you segment your list? Yes No

If yes, what are your segments?

Do you track specific details about every gift, like the date, the amount, the gift type (check, cash, credit card, etc., and the reason for the gift)? Yes No

Do you have a policy for keeping donor information confidential? Yes No

Marketing

Do your organization and its leaders have name recognition in the community?
Yes No

Do your organization and its leaders have a good reputation in the community? Yes No

Do you know who your typical donor is? Yes No

Have you developed a donor profile to identify the common donor demographics? Yes No

Do you have a relationship with the local media (tv, radio, newspaper)? Yes No

How many times during the past year have you been in the media? (estimate)

Do you create an annual report? Yes No

Do you have a basic brochure for your organization? Yes No

Do you seek out speaking opportunities in the community? Yes No

How many times in the past year has your organization made presentations to groups in the community?

Newsletter

Print

What is your newsletter's purpose (is it to provide information, raise money, or both? Or something else?)

In a perfect world, how often would your newsletter go out?

How often does it currently go out? _____

When was the last time you sent out a newsletter?

Did you mail it to everyone on your list? Yes No

Do you include a reply envelope so that the recipient could send a gift back to you?
 Yes No

What amount of fundraising dollars comes from the print newsletter?

Online

Do you send out an electronic newsletter? Yes No

How often do you send out the electronic newsletter?

Is it different from your print newsletter? Yes No

What amount of fundraising dollars comes from the online newsletter?

Direct Mail

Do you send fundraising letters through the mail to your donors? Yes No

If yes, how much money comes from direct mail? _____

How many times each year do you mail fundraising letters?

Who writes the letter? _____

How do you decide who to mail to? _____

Do you ever rent lists of names to mail to? Yes No

How do you decide if the mailing was successful?

Grant Writing

How many grant proposals did your organization submit last year?

How many were funded? _____

What was the amount asked for? _____

What was the amount funded? _____

Do you have a grant calendar or a list of the proposals you will submit this year?

Yes No

Who writes the grant proposals? _____

Who researches new grant opportunities? _____

Grant Readiness Checklist

Fill this checklist out only if you haven't applied for grants or had limited success (less than 1 grant request funded for every 10 you applied for).

A. When do you need the funds?

If you need funding sooner than 6 months to a year, grants won't be a viable funding source right now.

Can you write the proposal? Proposals need the following:**B. Do you have a program in place?**

1. Is your program up and running?
2. Can you describe the program?
3. Do you have the staff needed to carry out the program?
4. Can you describe your clients? (e.g., age, race, gender, needs, strengths, economic status)
5. Are you collecting measurable outcomes data for your program? How do you know if your program is working?

Example: If you are teaching children to swim, how will you measure success? Do they have to swim a certain distance? Do they need to know more than one stroke? Or is a doggy paddle considered sufficient?

Example: If you are teaching adults to read, how will you measure success? In this example, it would be wise to conduct a pre-test of skills, then a post-test after the course is over to measure how much improvement has been made.

Example: If you want to clean up a stream, how will you measure success? Will you measure the water quality before and after treatment? Will you count how many bags of trash you haul away?

C. Are you proposing a new program?

1. How did you devise your program? What other program models did you consider? How are you incorporating best practices in your field?
2. Can you describe the program?
3. Can you describe your potential clients? (e.g., age, race, gender, needs, strengths, economic status)
4. Do you have the staff needed to carry out the program? If not, how will you recruit them?
5. What measurable outcomes data will you collect to demonstrate success?

D. How will you finance the program?

1. Have you developed a realistic budget for the program?
2. Is your program dependent on securing a grant from this particular foundation or Request for Proposals?
3. What other sources of revenue can contribute to this program?
4. When this grant ends, will you have to discontinue the program?

E. Other information usually needed to complete a grant application:

1. Mission statement
2. Historical information (usually 2-3 paragraphs)
3. Description of clients, consumers, beneficiaries, including demographics and needs
4. Description of program (if your organization manages more than one program, this information is needed for each program)
5. Demonstrated sustainability: Describe track record, achievements, accolades, accomplishments
6. Description of management team and program staff qualifications
7. Description of partnerships and affiliations with other organizations, federated campaigns, government agencies, stakeholders, etc.
8. Description of benefits to clients, consumers, others (focus on measurable outputs and measure outcomes)

Example: Children will swim 500 meters after 6 months of instruction.

Example: Participants will improve one grade level in reading after completing this course.

Example: The stream water will be 50% cleaner after six months of treatment, as measured by water samples.

F. Do you have these documents to attach to your proposal?

1. Organization's IRS 501c3 determination letter
2. Any registration/certification required by your state
3. Organization budget – current and upcoming fiscal years

4. Audited financial statements – last 2 years if available
5. Most recent IRS Form 990
6. Board of directors list: Names, affiliations, responsibilities
7. Criteria for board selection
8. Documentation of support from your board of directors; i.e., what percentage of your board contributes funds to support the organization? (Ideally 100% of the board should financially support your organization.)
9. Organization chart
10. Newsletters (if available)
11. Published articles highlighting your organization (if available)

Acknowledgement & Recognition

How often do you change your standard Thank You letter?

How long does it usually take you to get a Thank You letter in the mail to a donor?

Do you do anything else to thank donors? Yes No

Major Donors

How do you define a Major Donor? (\$500, \$1000, etc.)

Do you know without looking how many major donors you have? Yes No

Do you know without looking who your major donors are? Yes No

What do you do to cultivate relationships with major donors?

Special Events

How many special events does your organization hold each year?

Who is largely responsible for organizing the event, staff or volunteers?

Do you recruit corporate sponsors for your events? Are you successful in getting them?

Do you recruit media sponsors for your events? Are you successful in getting them? _____

How do you decide if the event was successful?

Online

Website

Does your organization have a website? What's the address?

How often is your website updated?

Is there an easily recognized "Donate Now" button on your website? Yes No

Is there a way to capture visitors' names and email addresses on your website?

Yes No

Do you have a blog? How often do you post?

Social Media

Do you have a presence on Facebook, Twitter or other social media? Yes No

How often do you share information on each?

Do you have a social media strategy or plan? Yes No

Do you have a social media policy for Board, Staff, and Volunteers? Yes No

Personnel

Do you have a staff person whose sole job is fundraising? Yes No

Does this person attend Board meetings? Yes No

What skills do you have to fundraise?

What skills do other staff, Board, and volunteers have to help you fundraise?

Is there training you need? Yes No

If yes, what training would that be?

Is your Board willing to help with fundraising? Yes No

Does the Board have a Fundraising Committee? Yes No

Do each one of your Board members make a personal financial gift? Yes No

Do you belong to a professional association? Yes No

Do you follow a fundraising code of ethics? Yes No

Do you follow the Donor Bill of Rights? Yes No

Planning Questions

What would you like to stop doing this year?

What would you like to continue doing this year?

What would you like to start doing this year?

Income Streams Spreadsheet

Find the spreadsheet at

<https://members.nonprofitfounders.club/wp-content/uploads/2021/12/Fundraising-Plan-Income-Streams.xlsx>

Strategies and Activities Worksheet

This comprehensive list of strategies and activities is divided up into strategy levels and steps for each level. The steps are the activities that build on each other. Step one is the beginning step. Step three is the most advanced step.

<p><u>Level 1</u> Individual Donors</p>	<p><u>Level 2</u> Companies, Churches, Denominations</p>	<p><u>Level 3</u> Grants and Federated Funds</p>	<p><u>Level 4</u> Fees for Services, Sales of Products, Earned Income</p>	<p><u>Level 5</u> Supporting Organizations</p>
<p>Step 1: Online Direct Mail Newsletters In-Kind (Individuals) Peer-to-Peer Fundraising</p>	<p>Step 1: Corporate In-Kind Check Out Campaign (Donate a % of profits) Donations</p>	<p>Step 1: Community Foundations Private/ Public Foundations</p>	<p>Fees for Services Sales of Products Earned Income Social Enterprise Thrift Shop Consult or Facilitate Training</p>	<p>A charity in its own right set up as an auxiliary, association, friends group, or other nonprofit. An Example: Friends of the Library</p>
<p>Step 2: Text to Give Events* You Others</p>	<p>Step 2: Cause Marketing (Collaboration) Sponsorships</p>	<p>Step 2: Federated Funds (CFC, United Way)</p>	<p>Rental of Facilities</p>	

<p>(DIY) *Events are a gateway to Level 2</p>				
<p>Step 3: Pledge Fundraising Monthly Donations Annual Campaigns Planned Gifts Major Gifts Capital Campaign* * Leads to Grants</p>	<p>Step 3: Matching Gifts Volunteer Grants Corporate Grants</p>	<p>Step 3: Government Grants City State Federal</p>		

Fundraising Plan Calendar

Quarter 1	Quarter 2
January	April
· Activity /Milestone	
February	May
March	June

<p>Quarter 3</p> <p>July</p> <p>August</p> <p>September</p>	<p>Quarter 4</p> <p>October</p> <p>November</p> <p>December</p>
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Organization's Fundraising Plan

January 1

2021

This Fundraising Plan lays out the specific goals and action steps to raise money for Organization during the FY 2018-2019. Prepared by the Fundraising Committee.

How
(Organization)
Will Raise
\$5,000

Presented
By:

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Current Assessment Narrative

Where are you right now? How many donors do you have? What is the amount that has been given (in the current year)? Have you done any fundraising? What worked? Why? What didn't? Why?

Identify Your Assets

Think about Board members with connections. Supporters with connections. Do you have great name recognition? What does your organization have going for it that you can leverage in your fundraising efforts?

Targets, Strategies, Goals and Action Steps

Target 1: Fundraising: \$

Strategy 1:

Action Step 1:

Action Step 2:

Action Step 3:

Key Milestones

Milestone	Due Date

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Strategy 2:

Action Step 1:

Action Step 2:

Action Step 3:

Key Milestones

Milestone	Due Date

--	--

Strategy 3:

Action Step 1:

Action Step 2:

Action Step 3:

Key Milestones

Milestone	Due Date

--	--

Target 2: Existing Donors:

Strategy 1:

Action Step 1:

Action Step 2:

Action Step 3:

Key Milestones

Milestone	Due Date

Strategy 2:

Action Step 1:

Action Step 2:

Action Step 3:

Key Milestones

Milestone	Due Date

Strategy 3:

Action Step 1:

Action Step 2:

Action Step 3:

Key Milestones

Milestone	Due Date

Target 3: New Donors:

Strategy 1:

Action Step 1:

Action Step 2:

Action Step 3:

Key Milestones

Milestone	Due Date

Strategy 2:

Action Step 1:

Action Step 2:

Action Step 3:

Key Milestones

Milestone	Due Date

Strategy 3:
Action Step 1:

Action Step 2:

Action Step 3:

Key Milestones

Milestone	Due Date

Budget

Activity/Item	Projected Cost	Actual Cost
Total:		

Monitor Plan

- How will you monitor your progress? What milestones will you need? Combine a calendar and Step 6 here.

Refine Plan

- As you go through your year, make sure you add a Right, Wrong, Missing, and Confusing report for your activities. This report will help you refine your activities the following year. How will you revisit your plan to make changes? What system will you have for those changes?

Appendix

SMART Goal Worksheet

Initial Goal *(Write the goal you have in mind):*

1. Specific *(What do you want to accomplish? Who needs to be included? When do you want to do this? Why is this a goal?)*

2. Measurable *(How can you measure progress and know if you've successfully met your goal?):*

3. Achievable *(Do you have the skills required to achieve the goal? If not, can you obtain them? What is the motivation for this goal? Is the amount of effort required on par with what the goal will achieve?):*

4. Relevant *(Why am I setting this goal now? Is it aligned with overall objectives?):*

5. Time-bound (*What's the deadline and is it realistic?*):

S.M.A.R.T. Goal (*Review what you have written, and craft a new goal statement based on what the answers to the questions above have revealed*):

Right, Wrong, Missing, Confusing Report

Right

What did we do right? What were the positives?

Wrong

What could we have done better?

Missing

What were we missing this time? What ideas did we have to improve next time?

Confusing

What was confusing? Where did we misstep?

Worksheets