
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?

Fundraising Plan Workbook

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.).

Fundraising Plan Workbook

<p>Quarter 1</p> <p>January</p> <ul style="list-style-type: none">• (Example) Activity /Milestone <p>February</p> <p>March</p>	<p>Quarter 2</p> <p>April</p> <p>May</p> <p>June</p>
<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>

Fundraising Plan Workbook

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.)

Fundraising Plan Workbook

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? _____

Fundraising Plan Workbook

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

Fundraising Plan Workbook

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? _____

Fundraising Plan Workbook

Online

Do you send out an electronic newsletter? Yes No

How often do you send out the electronic newsletter? _____

Is it different than 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? _____

Fundraising Plan Workbook

Who researches new grant opportunities? _____

Fundraising Plan Workbook

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?

Fundraising Plan Workbook

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

Fundraising Plan Workbook

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)

Fundraising Plan Workbook

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?

Fundraising Plan Workbook

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

Fundraising Plan Workbook

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 N

Fundraising Plan Workbook

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?