



A SUPER SIMPLE FUNDRAISING PLAN TEMPLATE

7 easy steps to identify your priorities for 2017

You know you should create a fundraising plan.

You've seen it as a fundraising best practice or heard about it from your colleagues. Maybe you even read [the recent study](#) that showed the number one indicator of individual donor fundraising success is having a plan.

The question is: how do you create a plan? Writing a plan may seem like an overwhelmingly complex activity. You may not know where to begin or what needs to be included. **That's why we developed this template!**

The template includes seven steps to help you identify the right priorities for your individual giving program. Simply record your thoughts on this worksheet and voila, you've got a plan!

Please note that this guide was designed with individual donors in mind, but similar steps could be used to develop plans for other types of fundraising.

About the Author



Heather Yandow is the creator of the Individual Donor Benchmark Report. Based in Raleigh, NC, Heather is an evangelist for the power of data. Learn more at www.thirdspacestudio.com. This guide was written by nonprofit consultant, trainer, facilitator, and coach, Heather Yandow with help from Network for Good's Senior Content Associate, Liz Ragland.

Reflect on the past year.

Take time to review your fundraising activities and results from the previous year. Dive into your donor management system and get ready to analyze your data. Consider the questions:

- How much did you raise from each of your individual donor activities?
- What were your biggest successes?
- What were your biggest challenges?

P.S. If your current [donor management system](#) doesn't make it easy to collect and report donation data, it's time to make [an upgrade](#).

Example:

Results: Raised \$10,000 from 120 donors through two direct mail campaigns, \$3,000 from 60 donors during summer online campaign, and \$20,000 from four major donor solicitations.

Successes: Conducted our first online campaign and found three new major donors.

Challenges: Still struggling to start a monthly giving program, but there's not enough time for meetings with donors.

Identify your resources.

Take stock of how you can use your organization's resources to support fundraising in the coming year. Include money, but also staff time, Board and volunteer support, technology, and other assets and tools.

Example Resource List:

Funds: \$2,000 for direct mail, \$500 for donor thank you event,

Time: 5 hours per week of staff time

Volunteer Support: Three fantastic Board members who want to help fundraise

Other: Pretty good database, good online fundraising platform, and several 2016 success stories

Name the activities you have to find new donors, renew current donors, and upgrade donors.

To continue to grow your individual donor revenue, your plan should include specific tactics to attract, renew, and upgrade donors. Many organizations have consistent strategies to renew existing donors, but don't spend time discovering how to attract new donors or upgrade existing donors. Doing all three can significantly increase the amount you raise year after year.

Example Resource List:

Attract: Make sure all event sign-up forms include email and mailing address. Launch peer-to-peer campaign with long-time supporters.

Renew: Direct mail, online, and major donor solicitations

Upgrade: Ask consistent donors to start monthly giving at a higher annual gift level and ask major donors for an upgrade as appropriate.

Create your goals for each activity.

What do you want to accomplish through planned fundraising activities in 2017? Think beyond dollars raised. Your goals may include having a certain number of new donors or encouraging more Board involvement. Don't forget to develop goals that are SMART: specific, measurable, achievable, realistic, and time-bound.

Example:

Goals for attracting new donors: Acquire 75 new email addresses from in-person events. Raise \$7,500 from P2P campaign by recruiting 15 fundraisers who raise \$550 each by May 1.

Goals for renewing donors: Raise \$12,000 from current donors for spring direct mail appeal. Engage 60 online donors this summer to raise \$5,500 by August 20. Schedule meetings with 45% of major donors by August 1.

Goals for upgrading donors: By March 31, recruit 20 new monthly donors from annual givers from mid-level donor base. Raise \$45,000 by upgrading 20% of current major donors by November 1.

Identify your three focus areas for the coming year.

At the end of the year, most organizations judge their success by one question: Did we meet our budget goal? But growing future giving means investing in activities that may not generate revenue now, but will make a difference in the future. That's why it's important to ask yourself: What three things do I want to make sure happen in 2017 as a result of my organization's fundraising plan?

Example Focus Areas:

- 1. Start a monthly giving program.*
 - 2. Find one more Board member who is interested in being involved in fundraising.*
 - 3. Improve our database practices so that our donor reports are consistently correct.*
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Put it on the calendar.

Whether you use Google, Basecamp, or a paper calendar, figure out how you are going to space out your plans over the next year. Be sure to plan your activities around vacations, programmatic events, and potential busy times for the organization. Use the space below to brainstorm how to structure your year, and then translate your thoughts to your scheduling tool of choice.

Example:

Run monthly donor campaign in March.

Avoid heavy fundraising activities in June (annual meeting planning) and September (vacation).

Make time in November for reminder calls to donors who have not given yet in 2017.

Make resolutions to set yourself up for success.

Lots of us make resolutions in our personal lives, but what about fundraising resolutions? Figure out what you need to be successful this year. Do you need an accountability partner? An hour on your calendar every week to check in on the plan - or make phone calls to donors? A quarterly check-in with your team to evaluate your progress? Whatever it is, set it up now and stick to it!

Example Resolutions:

Tuesdays from 9 am to 11 am are my fundraising time. I will not meetings or calls unless related to fundraising.

I will share fundraising plan with Fundraising Committee and ask to check in quarterly to assess progress and identify help needed
