Toolkit

# Creating Your 12-Month Fundraising Plan

## (with No Budget or Staff)

The Essential Get-It-Done Toolkit

Network for Good

WWW.NETWORKFORGOOD.COM

INTRODUCTION

# What Do I Need to Know?

Fundraising plans are essential for fundraising success. While the planning process can be time-consuming and, if you hire a consultant to do it for you, expensive, it doesn't have to be. Instead, your plan should be simple, straightforward and rooted in an understanding of both your organization's challenges and opportunities.

Your plan doesn't just help you stay organized—it will help your entire organization stay focused on what will create the best results for the lowest cost. With a plan, you can table interesting ideas in favor of concrete actions knowing:

1. **What gets measured gets managed. You need to bring transparency to not only what matters, but what can work;**
2. **What gets managed becomes prioritized. You need to align scarce resources around the right opportunities; and**
3. **What gets prioritized produces results. You need to set yourself and your board up for success.**

Also, it's important to understand how you have raised money in the past will guide how you raise dollars in the future. To give you some simple insights about where you can grow, create a fundraising history that shows your sources of revenue over time and be sure to note any trend line.

Your plan should create focus, foster transparency, and inspire confidence – and we have a template that will help you build one.

## DOWNLOAD >> Fundraising Plan Assessment & Worksheet

# How Do I Use This Kit?

Once you've downloaded the Assessment & Worksheet, answer these questions to address each element of a solid fundraising plan:

**Funding Source** is the donor or prospect segment from which you have or plan to raise money

**Strategy** is the top line plan you will use to engage each segment – and the channel (mail, event, in-person, etc.)

**Number to be Solicited** is the number of donors or prospects that comprise the segment you will engage

**Average Gift** is an estimate of the average gift amount per donor or prospect – based on previous year's data, if available

**Estimated Income** is the number of donors or prospects multiplied by the average gift.

**Associated Expenses** are the expenses that will be incurred to execute the strategy (postage, printing, catering, travel, etc.)

**Net Income** is the difference between Associated Expenses and Estimated Income

**Completion Deadline** is the date you will commit to have fully executed and completed the Strategy

**Staff Responsibilities** are the tactics and deliverables you or staff will be responsible for completing

**Board Dependencies** are the areas or tasks that board members can support to accelerate or enhance the Strategy

# What's Up for Discussion?

If you're like most nonprofits, you'll need to increase your goals and/or sources of revenue to balance your operating budget. Before you commit to any new fundraising activity or strategy, ask yourself the following questions:

## Conditions for Success

These questions are designed to help you determine if the existing or planned fundraising activity is a fit for your organization – before you even bring it to your board for discussion and/or approval.

1. Does this strategy fit with the mission of our organization?
2. Does this strategy represent a stable source of income?
3. Does this strategy build our organization, board or volunteers?
4. Does this strategy create annual, renewable revenue?
5. Does this strategy fit well with other activities we have planned?

## Ease of Execution

These questions will help you decide if the existing or planned fundraising activity has a chance of (continued) success relative to your available resources.

1. Do we have adequate time to make this activity a priority?
2. Do we have the skills and expertise we need to carry it out?
3. Do we have the resources (money, people) to carry it out?
4. Do we know what could go wrong and how to avoid it?
5. Do we know what success looks like and have defined objectives?

# What Else Should I Know?

Before you can operationalize any fundraising activities, you need to explain your vision, the problem you're solving, and how you plan to solve it – because donors don't give to your nonprofit, they give through it. You need to create a compelling case for giving that concisely describes:

**Your History.** Why and how did you come into existence? What issues caused your formation? Describe the social and demographic setting. Describe in dramatic terms your incomparable mission. Remember, you are making the case for your future and your dreams – not your distinguished past.

**The Problem or Opportunity.** State the social problem that creates the need for your particular project or program. Describe the compelling opportunity and challenge for service that is presented to your nonprofit. Write about the urgency.

**The Proposed Solution.** This is your plan for solving the problem. Keep in mind that people are motivated by what saves or changes lives. Do not describe how the proposed program will help your nonprofit. It is important that the case has a larger platform than your organization alone.

**Your Unique Role.** Why your nonprofit is best qualified to respond to the problem, meet the challenge, and render the proposed service. Include the names and qualifications of those who will be responsible for the program and policies for spending the money.

**Your Plan & Goal.** What are the sources of funding that will combine to make the goal? What part does private philanthropy play in that equation? Describe your fundraising projects, how you propose to raise the required funds, and any evidence that this plan will be successful.

**How to Give.** Statements concerning the nature and kind of gifts you seek and the benefits and/or recognition after giving.

# Completing Your Case for Giving

Your case for giving is the basis for all of your fundraising communications, so it's important to spend time to get it right.

## Before you consider your case for giving complete, ask:

1. Does it elicit emotional as well as rational reasons to give?
2. Does it tell your potential donors how their gift will make an impact?
3. Does it offer proof that your plan will work?
4. Does it emphasize opportunity for a donor rather than your need?
5. Is your information presented in a logical order?
6. Is it easy to read with a reasonable font size, short sentences, and paragraphs?

# About Network for Good

We love nonprofits. We also believe small organizations have important missions and deserve great technology, too. We're a mission-minded organization, and, like you, we're passionate about seeing good causes succeed.

Network for Good combines fundraising expertise with simple-to-use technology to provide smarter fundraising software, tools, and coaching that are easy to use and raise more money. Since 2001, we've processed over $1.4 billion in online donations for more than 125,000 nonprofits. We're here to help you connect with donors and create more successful fundraising campaigns.

## Ready to get even more from your fundraising efforts?

We've got you covered. Our suite of tools includes everything you need to grow individual giving:

Donation Pages    Peer-to-Peer Fundraising    Donor Management

Plus, best-in-class email marketing, event ticketing, and expert-backed coaching and resources.

For a personalized demo or to find out more, contact us today: 888.284.7978, option 1.

Or visit us online to reserve a time with one of our fundraising consultants and find out how the right software, tools, and support can help your organization raise more money this year.

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