



Creating Your 12-Month Fundraising Plan (with No Budget or Staff)

The Essential Get-It-Done Toolkit

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.

IMPLEMENTATION

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?