THE ULTIMATE FUNDRAISING PLANING TOOLKIT

Tips and templates to crush the next twelve months of your fundraising

Network for Good ®

About This Guide

Every new fiscal year deserves a new fundraising plan.

A good fundraising plan serves as your roadmap for the year. It doesn't need to be complicated but your plan should help you answer these four question:

1. What goals should I set for my fundraising efforts this year?
2. What strategies should I focus on to hit these goals?
3. When will I implement my various fundraising strategies?
4. How will I measure fundraising success?

Don't worry if you've never created a fundraising plan before. This guide is a nice refresher for seasoned fundraising pros and a great introduction for those who are drafting their first ever fundraising plan.

Network for Good.

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.

Set Goals

Confirm expectations

The first step to building a good fundraising plan starts with a discussion with your senior staff (executive director, board, development director, senior leaders).

During this discussion, you should determine your anticipated overall expenses and how much funding is needed to support operations. It's important to get everyone on the same page when it comes to expenses so that you avoid unrealistic fundraising expectations and goals.

Here are questions you should ask during this meeting with senior leadership:

- What are our organization's projected expenses for the next fiscal year?
- How do the projected expenses break down between core operating costs and current programmatic needs?
- Are there "wish list" program ideas (such as a new initiative, creating a scholarship/award fund) that can be presented as seed funding opportunities to donors?

In addition to talking about expenses, sit down with appropriate staff members and discuss expected income:

- Are there multi-year pledge payments that are expected this year?
- What about endowment earnings?
- Earned income from programs that are guaranteed?
- Are there any known foundation or government grants, or corporate gifts that have a high likelihood of success?

Set the "Left-to-Raise" goal

After you've had these discussions, you should be able to calculate your goal for the year:

The total projected expenses minus expected income totals your fiscal year's "left-to-raise" fundraising goal.

What are your different sources of funding?

Using the last few years as a guide (and your donor management system to review these numbers) think about how much revenue you can expect from your main sources of funding to cover this "left-to-raise" goal.

If you can't attach a dollar amount to each of these categories, attach a percentage to each category. The different sources of funding should break down to

- Individual gifts
- Major donors
- Board Giving
- Special Events
- Private Foundations
- Government Grants
- Business donors/sponsorships
- Any earned revenue

Now, fundraising success isn't just about meeting your goal. It's about understanding how and where to focus efforts to grow your current universe of donors and prospects. In addition to revenue from each of these main groups think about goals that also consider:

- Total number of donors
- Total number of new donors to acquire
- Total number of recaptured donors that lapsed last year
- Total number of major donors committed to large pledges
- Total number of grants we applied for
- Total number of new corporate sponsors

After you have some goals in mind and a breakdown of your funding sources, think about existing fundraising efforts you are already committed to (year-end appeal, any events).

Then brainstorm fundraising efforts that could contribute to hitting those goals. Before writing anything down in ink, be sure to follow the steps on the next page to ensure you're plans are on the right track.

Prioritize Fundraising Efforts

Before you commit to fundraising activities or strategies, 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?

Are these ideas doable?

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 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?

Setting SMART goals for each activity

After you've decided a fundraising activity is worth pursuing or investing in, set SMART goals for each activity to ensure that these ideas are specific, measurable, achievable, relevant and time-bound. Here are some examples:

> • *Goals for attracting new donors: Raise $7,500 from a P2P campaign by recruiting 15 fundraisers who raise $550 each by May 1.*

> • *Goals for upgrading mid-level donors: By March 31, recruit 20 new monthly donors from annual givers from mid-level donor base.*

> • *Goals for upgrading major donors: Raise $45,000 by upgrading 20% of current major donors to a higher giving level by November 1.*

Tracking your activities and goals

Download Network for Good's fundraising plan template in Excel and start recording your strategies, goals,budget, and deadlines for each activity.

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DOWNLOAD TEMPLATE

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FUNDING SOURCE

Network for Good.
Template courtesy of http://www.networkforgood.com

Individual Donors	Strategy	Number to be Solicited	Average Gift	Estimated Income	Associated Expenses	Net Income	Completion Deadline
Renewing annual donors			$	$	$	$	
Prospective annual donors			$	$	$	$	
Major Donors	**Strategy**	**Number to be Solicited**	**Average Gift**	**Estimated Income**	**Associated Expenses**	**Net Income**	**Completion Deadline**
Renewing annual donors			$	$	$	$	
Prospective annual donors			$	$	$	$	
Board Giving	**Strategy**	**Number to be Solicited**	**Average Gift**	**Estimated Income**	**Associated Expenses**	**Net Income**	**Completion Deadline**
Individual cash commitments			$	$	$	$	
Special Events	**Strategy**	**Number to be Invited**	**Ticket Price**	**Estimated Income**	**Associated Expenses**	**Net Income**	**Completion Deadline**
Event name			$	$	$	$	
Event name			$	$	$	$	
Event name			$	$	$	$	
Event name			$	$	$	$	
Private Foundations	**Program Officer**	**Date of Meeting with PO**	**Target Ask Amount**	**Estimated Income**	**Associated Expenses**	**Net Income**	**Application Deadline**
Foundation name			$	$	$	$	
Foundation name			$	$	$	$	

Campaign Ideas & Additional Resources

Monthly/Recurring Giving Campaigns

- [DOWNLOAD] > RECURRING GIVING QUICK START GUIDE
- [DOWNLOAD] > SAMPLE DONOR COMMUNICATION FOR MONTHLY DONORS
- [WEBINAR] > UNLOCK THE MAGIC OF MONTHLY GIVING

Donor Relations Best Practices

- [DOWNLOAD] > DONOR RETENTION TOOLKIT & COMMUNICATION TEMPLATES
- [DOWNLOAD] > THE COMPLETE DONOR THANK YOU GUIDE
- [WEBINAR] > 7 WAYS TO UPGRADE YOUR DONORS
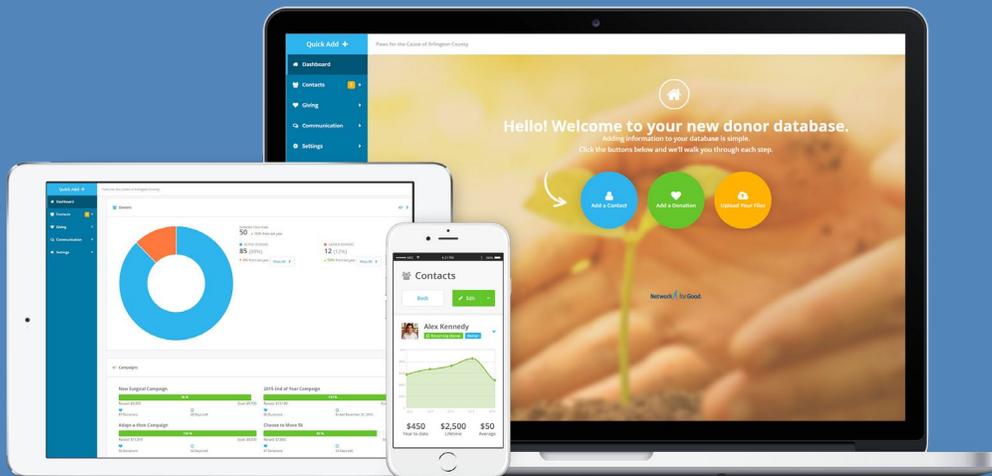- [WEBINAR] > DONOR CULTIVATION EVENTS DONE RIGHT

Major Donor Tips & Strategies

- [WEBINAR] > 5 SIMPLE STEPS TO START A MAJOR GIFTS PROGRAM

Peer-to-Peer Fundraising

- [DOWNLOAD] > PEER FUNDRAISING CAMPAIGN PLANNER
- [WEBINAR] > HOW TO TURN BOARD MEMBERS INTO DONORS

READY TO CREATE YOUR FUNDRAISING PLAN?

We love small nonprofits. We also believe small organizations deserve great technology, too. We're helping 6,000 emerging nonprofits create more successful fundraising campaigns, and we want to help you, too.

Network for Good combines fundraising expertise with simple-to-use technology to provide **smarter fundraising software** that's easy to use, with all the support and coaching you need to get the most out of your investment.

DONATION PAGES   **DONOR MANAGEMENT**   **PEER-TO-PEER FUNDRAISING**

Our suite of tools includes everything you need to grow results, not expenses. Schedule a time to talk with a fundraising consultant today!

SCHEDULE A DEMO NOW