7 Steps to a Written Fundraising Plan

Sandy Rees
Chief Encouragement Officer

GET FULLY FUNDED
What you’ll get today:

- 5 ways people get stuck with planning
- 3 main goals you MUST include
- How to create an Impact Goal to guide your plan
- How to choose the right strategies for YOU
- Simple tool to get started planning
About me

- Fundraising Coach
- Trainer
- Author
- Animal Lover

Me and Lucy
Here’s my story...
I wasn’t born with fundraising skills...
I didn’t sign up for fundraising at career day...
What happened was...
Today...
Let’s jump in!

$100,000!!
But first, a poll
Truth #1:

When you raise more money,

You can change more lives.
Truth #2:

Working from a PLAN makes fundraising easier.
5 surprising reasons people don’t plan
5 reasons people don’t plan:

- Should-ing
5 reasons people don’t plan:

- Should-ing
- Perfectionism
5 reasons people don’t plan:

- Should-ing
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- Rigidity
5 reasons people don’t plan:

- Should-ing
- Perfectionism
- Rigidity
- Inadequacy
5 reasons people don’t plan:

- Should-ing
- Perfectionism
- Rigidity
- Inadequacy
- Imposter Syndrome
Which one best describes you?
Big takeaway -

Done is better than perfect.

Imperfect action will always win over inaction.
With a plan you can

- Block out the unnecessary
- Deflect “great new ideas”
- Stop spinning your wheels
Without a plan...
7 steps to a simple, successful fundraising plan
7 steps to a fundraising plan:

1. Learn from the past
2. Shine a guiding beacon
3. Set 3 critical targets
4. Put on your Super Cape
5. Choose the right strategies
6. Write it down!
7. Course correct
Step 1: Learn from the past
Look at each past activity

1. Did we get enough ROI?
2. Can we improve it?
3. Has it run its course?
Review your list and ask

- What should you **KEEP**?
- What should you **TWEAK**?
- What should you **DUMP**?
Never do something just because you always have.

Do it because it WORKS!
Step 2: Shine a guiding beacon
Set an Impact Goal

What impact will your nonprofit have?
Set an Impact Goal

What impact will your nonprofit have?

For example,

“We’ll double the number of animals we save this year.”

“We’ll eliminate our waiting list.”
Set an Impact Goal

What impact will your nonprofit have?

For example,

“We’ll double the number of animals we save this year.”

“We’ll eliminate our waiting list.”

Make it SMART - Specific, Measurable, Actionable, Realistic, and Timely
Step 3:
Set 3 critical targets
3 Critical Targets

1. Number of dollars to raise
3 Critical Targets

1. # dollars to raise
2. # donors to renew
3 Critical Targets

1. # dollars to raise
2. # donors to renew
3. # donors to acquire
Step 4: Put on your Super Cape
Organizational assets
Organizational assets

- Name recognition
- Strong brand
- Well-known leaders
- Broad-reaching or well-loved cause
- Great facility or location
- Big social media following
- Dedicated volunteer base
Personal strengths
Step 5:
Choose the right strategies
Choose strategies

RIGHT

WRONG
Keep everything donor focused.
How many events are you holding?
1 tool to help you choose the right strategies
1-10-1000 Rule

- 1 signature event
1-10-1000 Rule

- 1 signature event
- 10 grants
1-10-1000 Rule

- 1 signature event
- 10 grants
- 1,000 donors
Fundraising Math

- 1 Signature Event: $25,000
- 10 Grants @ $2,500 each: $25,000
- 1,000 Donors @ $50 each: $50,000

Total: $100,000
Bend the rule for virtual fundraising

- 1 signature event held virtually
Bend the rule for virtual fundraising

- 1 signature event held virtually
- 3-4 mid-size activities held virtually

- Monthly giving or sponsor recruitment campaign
- Peer-to-peer campaign
- Online auction, concert, other fun event
- Giving Tuesday
Bend the rule for virtual fundraising

- 1 signature event held virtually
- 3-4 mid-size activities held virtually
- 5 or 6 tiny activities held virtually

- $5 Friday on Facebook
- Meet the Need through email
- Wish List
Step 6:
Write it down!
If it’s not in writing, it’s not real!
Write it down!
Grab yours --

Sandy’s 1 Page Fundraising Plan

www.GetFullyFunded.com/Plan

<table>
<thead>
<tr>
<th></th>
<th>Donor Retention plan</th>
<th>Donor Acquisition plan</th>
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</thead>
<tbody>
<tr>
<td>Goal</td>
<td></td>
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<tr>
<td>June</td>
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<td>July</td>
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<td>Nov</td>
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<tr>
<td>Dec</td>
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</tbody>
</table>
# Horse Haven Fundraising Calendar

<table>
<thead>
<tr>
<th>Month</th>
<th>Grants</th>
<th>Special Events</th>
<th>Individual donors (monthly giving, appeals, etc.)</th>
<th>Major gifts</th>
<th>Marketing (public speaking, news media, etc.)</th>
<th>Communications (newsletter, annual report, etc.)</th>
<th>Other (vacations, conferences, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug</td>
<td>Scaife Fdn (9/1)</td>
<td>Back to School at the Barn</td>
<td>1-3 visits</td>
<td></td>
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<td>Email newsletter 8/31</td>
<td>ACAT conference 8/14-15</td>
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<tr>
<td>Sep</td>
<td>Aslan Foundation Doris Day (10/1)</td>
<td>TY video to 2017 Dancing sponsors</td>
<td>1-3 visits, 2-3 asks</td>
<td>TY Akima</td>
<td></td>
<td>Email newsletter 9/30 Print newsletter 9/5 TY video-horse sponsor New website live</td>
<td>Homes for Horses conference</td>
</tr>
<tr>
<td>Oct</td>
<td>Boo at the Barn</td>
<td>Segmented appeal 10/16</td>
<td>1-3 visits, 2-3 asks</td>
<td>Pitch story</td>
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<td>Email newsletter 10/31</td>
<td></td>
</tr>
<tr>
<td>Nov</td>
<td>Gus Hawthorne (11/20)</td>
<td>Giving Tuesday 11/28</td>
<td>1-3 visits, 2-3 asks</td>
<td>Pitch story</td>
<td></td>
<td>Email newsletter 11/30 Thankathon 11/18</td>
<td></td>
</tr>
<tr>
<td>Dec</td>
<td>Brennan Equine Welfare Fund (1/1) Kenneth Scott (12/15)</td>
<td>Year-end campaign 12/26-12/31</td>
<td>1-3 visits, 2-3 asks</td>
<td>Pitch story</td>
<td></td>
<td>Email newsletter 12/30 Holiday postcard</td>
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</tbody>
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Step 7: Course correct
Course correct

How will you stay on track?
NOW
WHAT?
Fundraising Blueprint

Let’s go deeper on what you’ve learned today!

FUNDRAISING
BLUEPRINT WORKSHOP

1 Day Virtual Workshop
February 4th from 10am-4pm eastern
getfullyfunded.com/blueprint
Fundraising Blueprint

- Create a detailed annual fundraising plan
- Learn what to focus on and what to let go
- Play to your strengths
- Choose the best strategies

- Fun, virtual workshop format!
Fundraising Blueprint

Save $15 by using code KINDFUL (expires Jan 17)

www.GetFullyFunded.com/Blueprint

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1 page fundraising plan
www.GetFullyFunded.com/Plan