

Mi

Annual Fundraising Plan

Toolkit



Check In Annual Fundraising Plan

How do you imagine starting to use a fundraising plan, or improving your existing fundraising plan, would impact your fundraising?

What are you hoping to learn today?

IF YOU HAVE A PLAN:

How would you describe your approach to creating a plan?

How, and how often, do you engage with that plan throughout the year?

IF YOU DO NOT HAVE A PLAN:

What obstacles are keeping you from creating a plan?

Step I

Review Mission and Vision

PART 1: ALIGNING TO VISION	
What is the current mission statement?	
What is the greater cause to which your organization is connected?	
What specific problem(s) are you solving as an organization?	
PART 2: ADJUSTMENTS/CHANGES PLANNED (what is changing this year that will affect fundraising?)	
What changes may be impacting your champions or the cause as a whole? Think economic, programmatic or legal.	<i>Example: statewide restrictions on gatherings, increased tariffs on shipped containers, new tax laws impacting major givers.</i>
What new programs/ services are we adding or enhancing?	<i>Consider: What are you adding? How many will be served? How much will it cost? How will it be funded?</i>
What programs/services are we replacing or eliminating?	<i>Consider: How many will be affected? How many champions are invested in those programs?</i>

Step 2

Assess Current Fundraising Operations

INSTRUCTIONS: Place an “X” in the box that represents the current status of your ministry in the areas below.

Income Streams	Non- Existent	Needs Work	Adequate	Fantastic
Major Givers				
Grants (foundations /corporations)				
Churches				
Estate and Planned Gifts				
Gifts In-Kind				
Monthly Givers				
Communications (appeals, social media, newsletters)				
Events				
Earned Revenue				
Other:				

Activity

MAJOR GIFTS				
Number of face-to-face meetings				
Major gifts tracking system				
Actively managing 1-1 champion relationships				
Thoroughness of direct communication to major givers				
CHAMPION CARE & COMMUNICATIONS				
Gift acknowledgement				
Monthly giving program				
Newsletter content and response				
Direct mail frequency and effectiveness				
E-mail, social media solicitations				
Champion Growth Development (P-E-O)				
ACQUISITIONS				
Large-scale event strategy				
Micro-events activity				
Signature participation project				
Other:				
NONPROFIT LEADERSHIP				
Nonprofit-wide adoption of biblical fundraising				
ED/CEO availability and commitment to fundraising role				
Board commitment to their role in fundraising				
Board commitment to giving				
Staff other than ED in dedicated fundraising role(s)				
FUNDRAISING OPERATIONS				
Embedded P-E-O structure				
Sufficiency and usability of database software				
Accessibility of financial reports to track fundraising				
Skills and abilities of current fundraising staff				

Step 3

Gather Past Fundraising Data

INSTRUCTIONS: Enter the numbers you have available.

	2 Years Ago	Last year	YTD	Current Year Projections
INCOME THROUGH ONE-TO-ONE RELATIONSHIPS				
Major Givers				
Grants (foundations/corporations)				
Churches				
Estate and planned gifts				
Gifts In-Kind				
Other:				
Subtotal				
INCOME THROUGH ONE-TO-MANY RELATIONSHIPS				
Monthly Givers				
Communications (appeals, social media, newsletters)				
Events				
Earned Revenue				
Other:				
Subtotal				
TOTAL				

INDIVIDUAL GIVING STATS				
Total number of individuals in your database.				
Total number of individuals who gave.				
Of those, how many were major givers?				
Of those, how many were monthly givers?				
Of those, how many INCREASED their giving?				
Of those, how many DECREASED their giving?				
Of those, how many were first-time givers?				
How many previous givers have not given in 18+ months?				
TACTICS AND ACTIVITIES LOG				
How many individual face-to-face giver meetings?				
What is the size of your print mailing list?				
What is the size of your email mailing list?				
How many newsletter issues did you send (electronic or print)?				
How many appeal letters/direct mail/e-solicitations did you send?				
How many people attended events?				
CHAMPION GROWTH LOG				
How many total volunteers (number of people)?				
How many volunteer hours were contributed?				
Of those volunteers, how many are givers?				

Step 4

Set Strategic Fundraising Goals

Strategic goals take you from somewhere to somewhere by a date. You may have many you want to work on, however, which ones will get you the most impact this year? Consider which of the items, if left unattended, could block growth in other areas. Consider areas where you may already have momentum, that with concentrated effort, could yield significant impact. Before focusing on building an item that is non-existent, consider whether other areas are strong enough for you to direct the required energy toward the new addition.

Step 1: Identify at least two, and no more than three, activities that you want to give specific focus in the coming year.

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Step 2: S.M.A.R.T. goals are **S**pecific, **M**easurable, **A**ttainable, **R**ealistic, and **T**imely.

Write a S.M.A.R.T. goal and rationale explaining why this goal was selected AND what achieving that goal will do for the mission of your organization.

STRATEGIC FUNDRAISING GOALS
<p><i>Example:</i> Rationale: We currently have 100% board participation in giving, however for a few of our board members, their giving doesn't match their connection with the cause and their capacity. Goal: Increase board giving commitments by coaching and encouraging three board members to increase their giving to \$1,000 or more.</p>
<p>Rationale:</p> <p>Goal #1:</p>
<p>Rationale:</p> <p>Goal #2:</p>
<p>Rationale:</p> <p>Goal #3:</p>

Step 5

Set Financial Goals

INSTRUCTIONS: For each income stream, enter the funds raised in the previous year, consider why this income stream may go up (or down) in the coming year and discern a new target based on the rationale.

Financial Goals: One-to-One Relationships		Current Year	New Year Target	Dollar Change	% Change	Total % of Income
Major Gifts	Rationale:	\$	\$	\$	%	%
Churches	Rationale:	\$	\$	\$	%	%
Grants	Rationale:	\$	\$	\$	%	%
Gifts In-Kind	Rationale:	\$	\$	\$	%	%
Estate and Planned Gifts	Rationale:	\$	\$	\$	%	%
Other	Rationale:	\$	\$	\$	%	%
SUBTOTAL		\$	\$	\$		
Financial Goals: One-to-Many Relationships		Current Year	New Year Target	Dollar Change	% Change	Total % of Income
Monthly Giving	Rationale:	\$	\$	\$	%	%
Communications	Rationale:	\$	\$	\$	%	%
Events	Rationale:	\$	\$	\$	%	%
Earned Income	Rationale:	\$	\$	\$	%	%
Other	Rationale:	\$	\$	\$	%	%
SUBTOTAL		\$	\$	\$		
TOTAL		\$	\$	\$		

Step 5

Set Financial Goals

What gift anomalies do we need to account for?

What historical trends do we need to account for?

Step 6

Implement Tactics, Timeline, and a Review Process

Financial Goals

DESCRIPTION & GOALS		ACCOUNTABLE	PARTICIPANTS	START DATE	END DATE	PROGRESS	ADJUSTMENTS
MAJOR GIFTS		GOAL: \$					
GRANTS		GOAL: \$					
CHURCHES		GOAL: \$					
PLANNED GIVING		GOAL: \$					
GIFTS IN KIND		GOAL: \$					
OTHER		GOAL: \$					
MONTHLY GIVERS		GOAL: \$					
COMMUNICATIONS		GOAL: \$					
EVENTS		GOAL: \$					
EARNED INCOME		GOAL: \$					
OTHER		GOAL: \$					
ONE TO ONE RELATIONSHIPS							
ONE TO MANY RELATIONSHIPS							

Step 6 Implement Tactics, Timeline, and a Review Process

Strategic Goals

DESCRIPTION & GOALS	ACCOUNTABLE	PARTICIPANTS	START DATE	END DATE	PROGRESS	ADJUSTMENTS
GOAL #1:						
GOAL #2:						
GOAL #3:						

Step 7

Establish an Ongoing Evaluation Process

HOW WILL YOU EVALUATE YOUR FUNDRAISING PLAN?				
Decide who will lead the implementation and evaluation of the fundraising plan.	<i>Example: Director of Development</i>			
Consider who else will be part of the evaluation team.	<i>Example: Evaluation team will be Amy, Carly, Steve and Barbara</i>			
How frequently does the evaluation team meet?	<i>Example: Director of Development will convene a quarterly meeting of the evaluation team to review plan and recommend adjustments.</i>			
Who recommends and approves adjustments to the plan?	<i>Example: Evaluation team recommends changes to the plan which are approved by the Executive Director.</i>			
Determine what reports must be ran to track success and reveal issues in the plan. What reports do we need in order to track how we are doing on financial goals? What reports do we need in order to track how we are doing on strategic fundraising goals?	REPORT NAME	FREQUENCY	WHO IS RESPONSIBLE?	WHO REVIEWS?
	<i>Example: Gifts of \$100 or more</i>	<i>Monthly</i>	<i>Amy</i>	<i>Amy</i>
	<i>Example: Communications Calendar</i>	<i>Quarterly</i>	<i>Steve</i>	<i>Barbara</i>