



Build Next Year's Fundraising Plan in Less Than a Day



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===== CELEBRATING 15 YEARS



Session Objectives

In this session, we'll discuss:

- Key Elements of a Fundraising Plan.
- Scheduling turnkey activities for maximum impact.
- Integrations, Segmentation, and Relationship-building strategies.
- Setting Realistic Fundraising Goals.



Poll: Who is in the room?

CEOs/Executive
Directors?

CDOs/Directors
of Fundraising?

Fundraising
Staff?


Board
Members?

Program or
Other Staff?



Ah-hah Moment: A ½ time Forward-Facing fundraiser can...

- Make 7-10 donor visits per week (up to 40/month).
- Call 60-80 donors in a week, assuming 20-30 min phone call (240-320/month).
- Send 60-80 personal communications in a week (240-320/month).
- Send fewer communications to thousands per week (e-mail, social media).
- Write 2 – 3 foundation/corporate submittals weekly.
- Or a combination thereof.
- ***IF they are prioritizing*** relationship-building, donor cultivation, and stewardship.



Key Elements
of a
Fundraising
Plan

Integrated Annual Campaign Appeals

Donor Engagement/Cultivation Activities

Major Gift/Planned Giving Strategies

Special Events

Corporate & Foundation Requests

Grants

Capacity Building

Professional Development

The background features a complex network diagram with nodes of various colors (red, green, blue, orange, grey) and lines connecting them. A large, dark grey arrow points from the left towards the right, partially overlapping the network. The text is positioned on the left side of the arrow.

Build Your Plan

Start monthly, 12-month Fiscal Year plan. Narrative Based. Theme it monthly. Include Financial Goals in Year 2.



Development Plan Item #1: Build Your Annual Campaign Machine

- ▶ A systematized process of running multiple campaigns per year to raise unrestricted operating funds from individuals.
 - ▶ Multichannel.
 - ▶ Designed to increase your volume of activities with entry and mid-level donors. It can reach major donors but is not the primary way to raise major or planned gifts.
 - ▶ Utilize segmentation (especially for large lists or mature fundraising programs).
 - ▶ Efforts like raffles, events, and proposals to companies and foundations may be part of your annual fundraising but are separate from campaigns.

Annual Campaign (Appeals)



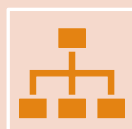
5-6 unique appeals per year for small to mid-size organizations. Monthly for large and/or nationally branded groups.



Integrated multi-channel communication strategy, incl. mail, email, social, phone, text, in-person, peer-to-peer, etc.



Multipronged remittance: online/credit card, ACH, check, asset transfers. Offer one-time or repetitive giving options, pledges too.





Schedule for November (Thanksgiving/Giving Tuesday), December/ Year End, March/April, May/June, Board Drive (month 1 of FY), and at least one other month (May or October).




Development Plan Item #2: Fundraising Events

- ▶ Schedule your events, preparation, and follow-up activities.
- ▶ Build Donor Engagement VIP opportunities into current events (if you have them).
- ▶ Evaluate events annually, for Return on Investment, Costs per Dollar Raised and Opportunity Costs.
- ▶ Avoid subverting other fundraising with events.



The Key to
Successful
Fundraising =
Personal
Relationships with
Donors



Development Plan Item #3: Donor Engagement / Cultivation Strategy

*Create turnkey
ways to connect
with donors and
prospects.*

*Schedule something
monthly.*

Offer different engagement opportunities to meet donor needs.

Mix it up by including three or four different types of engagement strategies annually.

Schedule 4 VIP Events.

Build off an event or program hallmark that you already offer. For ex, add a “social hour” to an event and invite an exclusive group of individuals. Typically reserved for top donors/prospects.

Send Communications.

E-newsletters, Videos, Emails, social posts to share the mission work of the organization. Intentionally schedule during slower fundraising months: January, February, July, August, September.

Schedule Opportunities with Leaders.

Offer four opportunities annually to connect with the CEO and/or staff, like lunch-and learns, CEO Corner Chats, etc. Invite donors of all levels.

Thank You Bank

Activate your board and volunteers as ambassadors by standing up a monthly thank you bank, as the first or last part of your board or other committee meetings.

Personal Acknowledgements

Choose an activity and operationalize it for regular monthly implementation, for ex, holiday cards, thank you lunch, etc.

Follow Up Builds Relationships

So... Follow Up After All Events & VIP Gatherings

(Include in your Fundraising Plan!)

Schedule 5-point phone call within 2 business days.

Track Responses in CRM

Follow-up as appropriate



The 5 Point Follow Up Call



Thank them for attending.



Ask their opinion “What did you think?”



(Most importantly...) Be quiet and listen.



Ask how they might see themselves becoming more involved.



Engage in follow up activities and then communicate with donor to match them with their involvement interests.

Having trouble connecting with donors?

Employ a Leads Generation Strategy

(especially helpful for building major or planned giving)



A program designed for people to self-identify as interested in something.



Especially good for narrowing a larger list of leads or getting people to rise.



Connect with donors the way they are most comfortable (Zoom, IM, phone, mail, e-mail, text)



Consider a Special Offer, free event, or VIP Event Invitation



Track success



Development Plan Item #4: Corporate & Foundation Giving



Personal asks, sponsorship requests and proposals for significant gifts.



Goals: 5-10 funder meetings monthly. 5-10 applications monthly.



Align with funder's mission/purpose. Utilize internal connections to warm asks.



Send reports annually.



Engage and cultivate. Invite reps to donor engagement activities.



**Development
Plan Item #5:
Major Gift
Strategies**

*Create a turnkey
way to connect
with donors and
prospects.*

*Schedule
monthly
activities.*

Identify Your Prospects

Build Portfolios

**Integrate Donor Engagement
Strategy into MG Outreach.**

Build Relationships.

Ask for a Gift.

Recognize & Acknowledge.



To get started...

Work with the team you have.

You may not need a Major Gift Officer to do Major Gifts Fundraising.

Review your total number of leads.

If you have less than 100 leads, divide and connect using a team-based approach among your fundraising and leadership staff, development committee, Board, or another group.

Begin with Engagement & Cultivation Strategies.

Ensure that all prospects are on your invite lists for all events, engagement and cultivation activities. Consider them VIPs if they are current donors or if they are likely to give soon.

Build Relationships.


Meet for coffee, breakfast or lunch. Get to know people and what motivates them to give to your cause. Invite your donors to get involved. Document what you learn in your CRM.

Ask for a Gift.

At least once annually, ask for a specific gift that aligns with their personal philanthropic interests. Make the ask “in person,” resorting to mail or another communication only if you cannot reach them after multiple attempts.

Recognize & Acknowledge.

Honor donors and recognize their support in ways that are meaningful to them. Let them know how their gift helped.



Development Plan Item #6: Planned Giving Strategies

Create / Update Gift Acceptance Policies (Summer!)

Develop a Simple Marketing Strategy

- Keep it simple to start! 95% of Planned Gifts are beneficiary inclusions in Wills, Trusts, and TOD accounts. Let people know ways they can make a gift in low-cost, high-touch ways.

Implement a Leads Generation Strategy

- Develop an outreach strategy where donors identify themselves and reach out to you to learn more, ex. premium gift offer or a workshop series. Start with as little as two workshops per year. Schedule in slow fundraising months (July, Aug, Feb)



Development Plan Item #7: Capacity Building

Schedule time in slow fundraising months for...

CRM integrity, cleanup, and data append projects.

Wealth/Propensity Analytics, with append support.

Onboarding new applications and integrations.

Producing new stories & Reframing case statements.

Integrating new technologies & outsourced support to grow fundraising success.



Development Plan Item #8: Goals & Revenue Expectations

- ▶ **Fundraising in Startup or Early Growth phase.**
 - ▶ Focus on increasing the volume of your activities. You will see a “lift” in overall fundraising results as you improve communications and “shake the tree.” The money will come.
 - ▶ Start by including everyone. Add segmentation to your strategies after year 2 so that you establish baseline data from which to determine estimated growth.
 - ▶ First 3 years may see unusually high growth, then normalize.
- ▶ **Fundraising Program that is Well Established.**
 - ▶ Plan for 5-10% growth in good economic years.
 - ▶ Plan to hold steady in tough economic times.
 - ▶ Add segmentation strategies and increase the frequency of campaigns (a topic for another seminar!)

Chart Your Year

Add a snapshot to keep folks on track.

This is an example of what a planned fiscal year might look like.

Type of Activity	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE
Plan/Prep appeals			X	X	X	X		X	X		X	
Send appeals	X			X	X	X		X	X			X
Craft Capital Campaign Mailing & Remits		X	X									
Capital Campaign Mailing			X	X								
Plan for Special Events and queue up invitations	X	X	X	X	X	X	X	X	X	X	X	X
Send Event Invites (Include Alumni)	X		X	X	X				X	X		
Implement Special Events		Teacher Party & 85 th KO		Alumni Events	Musicale	Holiday Events	Fam Event			Carmina Event	Pops 85 th Event	
Contact potential major gift / capital donors for meeting	X	X	X	X	X	X	X	X	X	X	X	X
Annual Report								X				
Research foundations/grants	X	X	X	X	X	X	X	X	X	X	X	X
Write proposals to Companies & Foundations	X	X	X	X	X	X	X	X	X	X	X	X
E-news	X	X	X	X	X	X	X	X	X	X	X	X
Create Alumni Video stories for 85 th & Promote	X	X	X	X	X	X	X	X	X	X	X	X
Coffee with Conductor			#1				#2	#3				#4
85 for 85 Video Campaign	X	X	X	X	X	X	X	X	X	X	X	X
VIP Socials (Plan the prior month)		#1			#2	#3				#4	#5	
Board Thank You Calls/Notes		X			X		X	X				
Travelling campaign	X		X		X							



Questions



Thank you for attending today's session.



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*Fundraising. Organizational Alignment.
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