



### ***Week 3: Making Your Plan***

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# Introduction

**It takes as much energy to  
wish as it does to plan.**

**Eleanor Roosevelt**

**Would you like to have a call to check in at the end of this course?**

If so, please just let me know at [info@wildwomanfundraising.com](mailto:info@wildwomanfundraising.com) what dates are good for you in January.

What to bring: Your new fundraising plan, ideas for your goals for the coming year, and questions on how to plan or how to get people involved.

Now that you've looked at where you've been, and thought about where you want to be. . . HOW DO YOU GET THERE?

Good question! This week is ALL ABOUT THE HOW.

You'll notice this week is heavy on the worksheets. Why? Because I believe that when you get the chance to instantly apply what you're learning to your particular situation with your nonprofit, you'll be much more likely to remember it and succeed.

We are starting to make the rudiments of your fundraising plan now.

We're going to learn how to plan backwards for an appeal letter, and an annual campaign.

We'll even go over a basic major donor cultivation calendar.

**Here's what we'll be learning this week.**

- How one document can tell you everything you need to know

- Starting appeal letters
- Starting a communications calendar
- Starting a grants calendar
- Starting an individual solicitation calendar
- Getting help creating your plan from staff and board

Let's get going!

# Principles of a good fundraising plan

The best business plans are straightforward documents that spell out the who, what, where, why, and how much...

Paula Nelson

A good fundraising plan, like a good business plan, must have all of these things.

## **o. Amount we need in our PIPELINE (how many more people will we have to ask to reach our goal?)**

How many people or companies or foundations do we need in our pipeline to actually HIT our goal? You might know that you need to get \$1M in grants this year. Maybe you already have \$300,000 in asks out. But you also know that you get a 30% success rate when you ask for grants. That means that you need to have out at least \$3 million in asks in grants to reach your goal of \$1M. That is your pipeline goal. For more about pipelines, check out Fundraising the Smart way, by Ellen Bristol. <http://bristolstrategygroup.com>

## **1. How we will raise it AKA the STRATEGY**

So if you've learned that you've got money coming in from one source, but naturally you want to figure out which sources can be the most reliable and lucrative in years to come.

If you'd like to learn lots of different ways to raise money, in more detail, there are tons of links at the end of this week's module to get you started.

## **2. Dates (WHEN will this happen?)**

The first part of a successful plan is figuring out WHAT you will do, but the second most important part is picking a date.

This is fairly easy to understand if you know the rhythms of the fundraising year: Year end appeals, your annual event, your spring appeal, your annual report due date, annual meeting of your membership if appropriate, volunteer thank-you events, monthly newsletters, and more.

### **3. Who is responsible (WHO will do it?)**

This is just as important as what you will do or when you will do it. If you don't write WHO is responsible, then it won't get done. So, it can't just be all on you. How will you get help with each of your fundraising tasks? Who will research grants for you? Who will edit your newsletter copy? Who will introduce you to potential major donors?

### **4. Amount we expect to raise AKA the GOAL**

For example, you might want to pin all of your hopes on a big fundraising event that will supposedly raise you lots of money. Well, is this the first year you've done this event? You're not going to raise as much as you want. Events are actually the worst way to raise money. They are a LOT of work. The best way to raise money? Asking people you know for money, face to face. This has a 50% chance of success. The next best way? Asking people you know for money on the phone. This has a 25% chance of success.

### **5. Amount it will cost to raise the money (How much does it cost?)**

We did a fundraising dinner for a nonprofit I used to work for, it was a long-standing event, and though it made \$250,000, it cost \$30,000 to put on. We had built up relationships with sponsors over the years that made getting larger sponsorships easier, and our banquet hall charged quite a bit for the space and the servers, catering and decor. This didn't include the time of the fundraising staff person or hired events consultant.

### **6. Net (Subtract cost from goal or actual amount raised)**

This is fairly straightforward. Subtract the cost from what you actually made. It might be difficult to calculate the cost of your time, because often we work on events while we're working on a few other projects, but if you start 6 months out from an event, for example, and work on the event a little bit each week, you'll be able to track your time a bit more easily.

I have found that when you create a one-page fundraising plan and tack it up where you can see it, it shows your office and you, at a glance, what

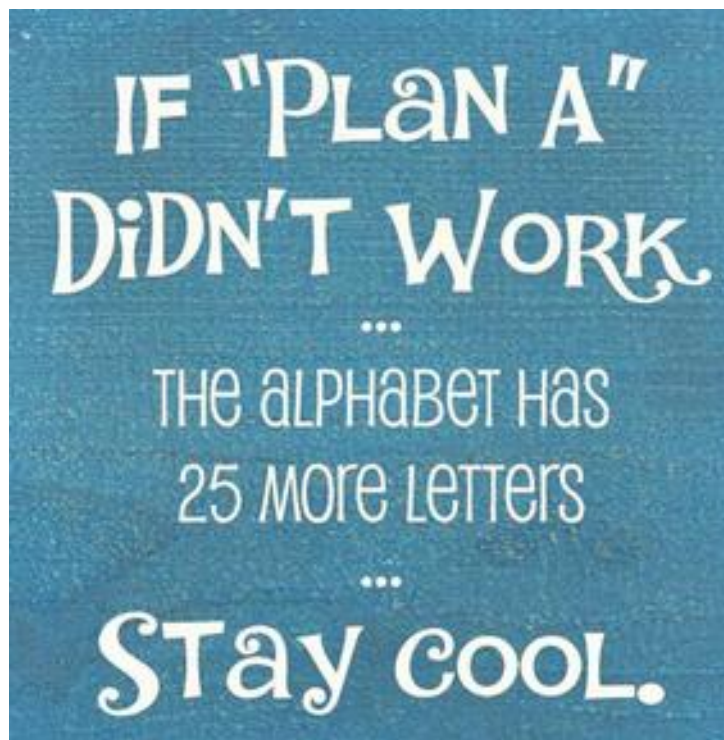
you're working on, when you're doing it, and who will help you.

### How does this look on an individual task basis?

Pipeline	Goal/Income	Strategy	Timeframe	Who's Doing it	Cost	Net
\$1M in sponsorship asks	For Operating \$500,000 in sponsorships	<b>Annual Dinner</b> 500 people, Ballroom	October	Fundraising committee, Development	\$40,000.	\$460,000.

Of course, you want to have other pages to this fundraising plan that also talks much more specifically about HOW to do things, and the steps leading up to what you need to do.

But on a day-to-day basis, having a one-page plan that everyone can clearly understand will help you, your board, and other staff leaders see what needs to be done, NOW.



# Sample Development/Fundraising Plan

Pipeline	Goal/Income	Strategy	Timeframe	Who's Responsible	Cost	Net/ Actual
# of Sponsor asks # of attendees	For Operating \$500,000+	<b>Annual Dinner</b> 500 people, Ballroom	October	Fundraising committee, Development staff	\$40,000.	\$460,000.
# of Potential major donors	For Operating \$200,000	<b>In Person Asks</b>	Ongoing	Executive Director, Board members Development staff	negligible	\$200,000.
	For Operating \$50,000	<b>Appeal letters</b> and Annual Report	November send out	Mail house and development staff	\$2,000.	\$3-7,000
	For Operating \$2,000 online donations	<b>e-Newsletter e-mails</b>	July , Sept Dec	Intern	\$29/m	\$1,000+
# of people to call	For Operating \$5,000	<b>Phone asks</b> and in person asks	May-Oct.	Board members, and all staff	free	\$5,000.
# of people to ask to throw parties and attend	For Operating \$9,000-\$15,000	<b>House parties</b> To get new members	July, Sept, Oct,	Board and volunteers are responsible.	free	\$10,000.
# of grants to apply for	For Operating \$600,000	<b>Grants from foundations</b> Research, apply	July-Dec.	Development staff	20% of Dev. time	\$300,000.
# of Asks for free media	For Operating \$50,000	<b>Spots/Ads/Articles</b> in newspapers, radio, magazines, TV	Every month	Interns, Volunteers and Development staff	\$10,000.	\$40,000.
# of times we ask via enewsletter	For Operating and Programs \$50,000	<b>Website donations</b>	Oct.	Volunteers	\$29/mo and 3% process fee.	\$45,000.
# of people we can ask for legacy gifts	For Operating and Programs \$40,000	<b>Bequests</b>	Ongoing in the next 10 years	Board Members and Researcher	Research fee	\$40,000.
					<b>TOTAL (gross)</b>	<b>\$1,061,000</b>

Now you can see how a one-page fundraising plan looks when you put your different income streams together. This sample development plan has worked well for me.



Here's how I used it at the Urban League.

### Urban League Sample Development/Marketing Plan

The Urban League's projected fundraising goal is \$400,000 this year.

Goal/Income	Strategy	Timeframe	Who's Responsible	Cost	Net/Actual
For Operating \$500,000 +	<b>Annual Dinner</b>	October	Fundraising committee,	\$30,000	\$240,000
For Operating \$32,000	<b>Career Connections Fair</b>	May	Modena Perry, Mazarine Treyz	\$8,000	\$24,000
For Operating \$50,000	<b>Appeal letters</b> to donors in database and 2,500-5,000 new donors.	November send out	Ad-Co, Excel Mailing, & Project Enterprise. Mazarine Treyz	\$2,000 \$400-list \$200-letter print \$1K-env print	\$3-7K
For Operating \$2,000 online donations	<b>e-Newsletter e-mails</b>	July , Sept , Dec	Intern: Marshawna Williams		\$1,000+
For Operating \$5,000	<b>Phone asks</b> and in person asks by board members	May-Oct.	Board members, and staff	free	\$5,000
For Operating \$9,000-\$15,000	<b>House parties</b> To get new members, Send out 220 invitations 90 new donors at \$100/each	July, Sept, Oct,	Board and volunteers are responsible.	free	\$3,000
For Operating \$600,000	<b>Grants from foundations</b> Research, apply	July-Dec.	Mazarine Treyz	free	\$120,000
For Operating \$50,000	<b>Spots/Ads/Articles in</b> The Oregonian, Portland Tribune, KBOO, Z100, Portland Community Media		Volunteers	free	
For Operating and Programs \$50,000	<b>Website donations</b> Make website more friendly to <b>online membership, registration and donations.</b>	Oct.	Volunteers	\$500-\$2K	\$500

When I was hired on in this position, the organization was hovering around \$400,000 a year in terms of revenue, and my boss wanted to jump to \$1M in one year, with only one fundraising staff person, no budget, (and a disengaged board). Sound familiar? So officially my goals were predicated on that entirely unrealistic goal.

As you can see, our actual numbers were not nearly as high as our goals, but in reality we did raise our grant revenue and event revenue over \$100,000 each more than the previous year, which I was quite proud of, even though we did not hit our \$1M goal.

This one-page document helped us keep track of what we did, and who was responsible for doing it.

In the next few pages, take a look at these fundraising plans submitted by students of the course. Write under the plan what you would change to make them more effective. Then you can see my thoughts as well.

Then, turn and look at your plan with new eyes. You can see clearly what needs to be changed with these plans. What could you change with your own plan to make it better?

# Improve this plan worksheets

Now that you know what a good fundraising plan needs to have, here's a sample fundraising plan from a course participant.

What can we do to improve this plan?

**Fundraising Brainstorm for DALIA (through December 2007)**

Target	Pre-Launch	Launch	Short Term (0-1 years)	Medium Term (1-3 years)	Long-Term (3+ years)
		newsletters, etc. to drive people to website where they can donate and subscribe	Develop membership scheme with recurrent donation by credit card or automatic bank transfer	Dalia" as a 501(c)(3); Establish mechanisms for Palestinian student groups to fundraise for Dalia	and estate planners to sell idea of bequests
Refugee organizations		Speak/advertise at major events		Engage hometown orgs-- "US Fed. of Ramallah" or "Bethlehem Assn"	
Arab Muslims		Use mosque and Islamic newspapers to drive people to website where they can donate		Consider annual Ramadan campaign for Dalia	Get student groups in mosques, colleges to do event fundraising or sponsorships
Arab Christians		Get information to churches and Christian societies to drive people to website where they can donate	Develop membership scheme with recurrent donation by credit card or automatic bank transfer		
Arab American organizations		Advertise in periodicals; get stories written in newsletters; distribute fliers at events—to drive people to website	Consider an organizational membership option	Meet with Access in Michigan to explore collaborative potential	Explore potential for joint fundraising
NGOs that support Palestine			Consider an organizational membership option	Offer vetting of local NGOs/CBOs for a fee; offer expenditure oversight and monitoring for a fee	Explore potential for joint fundraising

What I see:\_\_\_\_\_

Other thoughts:

Here's what I see.

1. Pre-launch doesn't seem to be a meaningful column.
2. This plan has no real hard dates.
3. It has no person who is responsible for these tasks.
4. It has prospects and it has ideas for how to execute, but no monetary goals, no marketing goals,
5. It has no costs, and no place for actual amount raised.

To make this plan better, I would add all of these things.

**Here's another plan: What do you think could be improved about this plan?**

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Fundraising Plan: Conference Center

**Annual Fund**

February 7, – Under the Tent Party and Auction

April – Spring Appeal Letter

November – Fall Appeal Letter

November – Annual Fund donors appreciation Oyster Roast

Monthly E-mail newsletter with donation link button/Why I Give story

December – Weekly giving e-mails, phone calls to donors

**Reach Out Camp**

May – Approach sponsors

May – Appeal letter to past donors

April – July – Include in e-blasts

**Christmas Retreat for Military Families**

July – Approach major sponsors

August – Appeal letter to past retreat donors

August – December – include in monthly e-blasts

What do you see? What would you do to improve this plan?

What I see: \_\_\_\_\_

Other thoughts:

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Here's how I would improve this plan.

1. Put in who is responsible for the tasks,
2. When they will do them, exactly,
3. How much it will cost to raise the money,
4. The monetary goal and the actual numbers they raised.
5. Make it a spreadsheet.

Here's another plan:



## 2013 - 2014 FUND-RAISING DEVELOPMENT PLAN

Strategy	Goal	Action Steps	Ownership	When	Cost
FIA Board Participation	100% giving by Board-\$2000	Presentation at Board Mtg	President and Vice president	March and Nov	No Cost Good participation, though not a significant amount in donations. About \$400
Coalition Participation-CHURCHES	100% increase-\$2000	1. Identify 5 churches -\$200 PER CHURCH 2. Contact church council leader 3. Schedule presentation 4. Cents for Seniors	Staff and Board members	March ,April, May	\$400-staff time Received about \$600
Major Individual Donors-PEOPLE	\$200 from 30=\$6000	1. Research names of potential major donors (90 names) 2. Schedule personal visits, phone calls, letters as possible	Staff and Board	Ongoing	\$200 NOTHING DONE
Annual Appeal	\$5000	1. Prepare appeal letters 2. Do follow up request in 6 weeks	Staff	November	\$600 Sent
Special Events +Miscellaneous	\$9500	1. Holiday Caroling \$5000 actual 2000 2. Ice Cream Social \$1000 actual 500 3. Make Believe Tea Mailing \$3500 actual 3880 4. Grocery store collection at check out?? NO 5. Ink and cell phone recycling \$1000 act 100 6. Monthly Giving still getting no where with this	Staff and Board	Nov July April-May September? On Going September	\$1000 Actual \$200 Actual \$1400 Actual – \$1437.78 \$0 Actual \$0

What do you see that we could improve in this plan?

What would you change?

Here's what I see.

1. The plan has strategy, who is responsible, when it is happening.  
What I would like to see is another column next to the cost, of the actual amount raised. They put the actual in the center but it's not easy to see there. And sometimes they put the actual in the cost as well. That's just plain confusing.
2. Where it says staff and board, put in people's names.
3. Where it has vague months, put in actual dates.

Now, just HAVING a plan isn't necessarily going to get these tasks done.

So how do you get people to help you get the tasks done? Read on.

# Starting Your Appeal Letters

Your appeal letters can be totally backbreaking if you let them pile up at the last minute. And if you have no volunteers to help you, and no money to farm them out to a mail stuffing service. So... what can you do if you have more time than money?

Plan backwards and your appeal letter can be a breeze!

You will want to send out at least 4 appeal letters per year, to people who have given in the last two years, in the spring, summer, fall, and winter. Winter will generally bring in the most revenue.

Why would you want to send out so many appeal letters? Because your letters can:

1. Train your list to donate
2. Remind people that you exist and still need help
3. Give you practice on how to write in a more compelling way, and allow you to experiment with what works and doesn't work for your list.
4. When you communicate **CONSISTENTLY** with your donors, and speak to them in a donor-centric way, they are much more likely to want to give.

When you do a mailing, you want to make sure that you plan out far enough in advance so you're not scrambling at the last minute. I know a nonprofit fundraising professional who was told, the week before the direct mail appeal was supposed to go out, that it was happening, she was in charge of it, and she had to get it going **RIGHT NOW. ARGH!**

Nothing had been done, and she had never done an appeal mailing before. So she called me, and we got down to work. But that is a terrible way to start your fundraising career, and I hope that kind of extreme pressure never happens to you! To make sure it doesn't, check out this planning backwards mailing checklist.

# Planning Direct Mail Checklist

Week One: Date_____	Done?
Write letter	
Recruit volunteers	
Buy stamps	
Run report to get # of donors you'll mail to (LYBUNT and TY)	

Week Four: Date_____	Done?
Letters drop (no bulk rate)	
Send email to remind donors to give	
Have phone-a-thon	
Send thank you notes	

Week Two: Date_____	Done?
Finish editing letter	
Gather letterhead, envelopes	
Get mailing trays	
Write emails	
Start printing, stuff, sort, stamp	

Week Five: Date_____	Done?
Letters drop (bulk rate).	
Send email to remind donors to give	
Have phone-a-thon	
Send thank you notes	
Have debrief -What could have gone better?	

Week Three: Date _____	Done?
Take the letters to the post office, sorted.	
Weigh them on the scale	
Estimate how many of each zip code you have.	
Stuff tray into sleeve, strap, give to employees. Pay.	
Finish editing email	

## Quick 10 step process to send your mailing

Step 0: Get the nonprofit bulk mailing permit. If you already have it, roll of nonprofit stamps. (Top TIP: For the US: First of all, do you have over 250 addresses in the same zip code? Can you wait 2 weeks for your mailing to get there? If so, nonprofit bulk mailing is for you. If not, then go regular postal mail.)

Step 1: Get strapping material, mailing trays

Step 2: Write your letter

Step 3: Merge your letter and envelopes and print.

Step 4: Get your letters and envelopes and remit envelopes to the stuffers

Step 5: Pick up your letters, make sure in first 3 digit zipcode order

Step 6: Take your letters to the post office, weigh in zipcode order

Step 7: Write down how many of each zipcode you have

Step 8: Put cardboard sleeve around the trays, put strapping around sleeve

Step 9: Make sure your trays are labeled with the Zipcode, do not mix zipcodes in trays

Step 10: Get trays on a dolly and walk it over to the postal employee, pay, and done!



# Starting Your Communications Calendar

You could also call your communications calendar your stewardship calendar. Why? Because every week or every month when you touch your donors, you remind them that you exist, that your mission is still important, and that there are tons of ways you want to involve them.

You could create a communications calendar that simply has the most important tasks or MITs, and then the secondary tasks.

<b>Month</b>	<b>MIT (most important tasks)</b>	<b>Secondary tasks</b>
Jan	Planning	Send newsletter/blog 4x
Feb	Gather input from communications committee	Send newsletter/blog 4x
Mar	Start Annual campaign	Send newsletter/blog 4x
Apr	Send out spring appeal	Send newsletter/blog 4x
May	Save the date postcards for event	Send newsletter/blog 4x
Jun	Create & Send Annual Report	Send newsletter/blog 4x
Jul	Send out summer appeal	Send newsletter/blog 4x
Aug	Debrief with committee, plan Q4	Send newsletter/blog 4x
Sept	Send out fall appeal	Send newsletter/blog 4x
Oct	Thank-a-Thon	Send newsletter/blog 4x
Nov	Send out winter appeal	Send newsletter/blog 4x
Dec	Phone-a-thon	Send newsletter/blog 4x

OR you could do it another way. I prefer to make a communications calendar in a spreadsheet that has quarterly goals, monthly goals, and outreach goals all rolled into one.

Why? Why not just make it about your blog posts and e-newsletters and appeals and call it good?

Because your communications plan has to take into account not just the products of communications, but what you're communicating about. It should also include donor cultivation activities, like a thank-a-thon.

Here's how that looks in a sample Q1 nonprofit communications calendar:

	Member goals	Outreach goals	Email Signup goals	Events	Communications Calendar	Featured in the media	Speaking engagements for ED
Q1 Goals							
January Tactics		Thank-a-thon with All-Staff, volunteers and board for Winter giving	300 email signups		1 email newsletter per week		Speak at Lion's Club
February Tactics	5 members for monthly giving		100 email signups	Friendraiser	1 email newsletter per week	*Featured in local newspaper	Speak at Rotary
March Tactics	10 members	Face to face street fundraising			1 email newsletter per week	*	Speak at corporation

As you can see, I've broken down membership goals, email signup goals, outreach goals, events, communications goals, PR goals and speaking engagements all separately in this communications calendar.

### Why did I add events?

Because you usually need to tell people you're having events or attending events. Thus, they should go on the communications calendar.

### Why did I add speaking engagements?

Because speaking engagements are important parts of communication about your nonprofit, and if your nonprofit is new, you need to be doing them all the time, to get people interested in what you have to offer, and to rise above the noise of other nonprofits that have a bigger marketing budget. Nothing beats a one-on-one connection, and speaking is a fabulous way to start creating that.

### Why did I add PR?

This is a piece that a lot of nonprofits overlook. It's not in anyone's job description, so it doesn't get done, because we're doing grants, appeals, events, etc, right? But why have it on your communications plan?

Because when you set your goals, you need to set them high. If your nonprofit doesn't get a lot of media coverage, even putting the goal of getting some is a step forward. And once you start getting it, you build trust and get exposed to a whole new potential group of donors.

### Why did I add e-newsletter signups?

Because this is one of the best ways to communicate with your potential donors. It's fairly easy to get these as well, if you have a robust tabling and speaking schedule planned out for the year. Just bring your

newsletter signup sheet to each event that you attend, and make sure that you get the names of attendees from the event organizers as well.

Once they're email subscribers, how do you build enough trust to get them to be donors? You need to communicate every month. If you know much about email marketing, you'll know that your subscriber open rate goes down over time. You have to be constantly building your email list if you want to keep getting online donations for your nonprofit.

### Why did I add monthly donor membership?

Because driving your donors to give monthly is one of the best ways to get ongoing unrestricted donations for your nonprofit, and each communication, whether it's a direct mail appeal, or an enewsletter, can remind them to give this way. This can be another metric of your success with your communications. How many people become monthly donors?

Q2 Goals							
April Tactics	15 members		500 more email sign ups	Volunteer appreciation luncheon	1 email newsletter per week	Featured on community radio station	Speak at farmer's market
May Tactics	20 members	Face to face street fundraising	100 more email sign ups		1 email newsletter per week	* Featured in GreatNonprofits	Speak at roundtable
June Tactics	25 members		40 more email sign ups	Open house	1 email newsletter per week	*	Speak at conference

Here's a sample of Q2 goals.

### How can you measure success with your communications?

By creating goals like the ones you see here. Getting featured in the media. Getting more monthly donors. Getting 200 more enewsletter signups. These are significant goals.

I think less significant ones would be "how many opens of our enewsletter? How many clicks?" It would be nice to see those going up but that matters less than "how many online donations did we get?" Still, donations are not the only metric. You want to remind people of this. Sometimes it's enough to remind donors that you exist, and that you appreciate them.

Now that we've looked broadly at a Quarterly communications plan (By the way, this plan is available this week [as](#) a download so you can edit it for your nonprofit) let's look at what this communication plan looks like on a weekly basis. (2<sup>nd</sup> tab in the spreadsheet)

Sample Communications Calendar downloadable on [this page](#)

Date	Monthly Donor Activities	Donor Cultivation Activities	Subject line	Email theme Examples	Story ideas
9/20/2013		E-newsletter	Did you know?	What we do	picture & story
9/30/2013		E-newsletter		Thank those who gave	Update on program
10/4/2013		E-newsletter	the power of one. . .	Thank you to volunteers	
10/11/2013		E-newsletter		Send out survey	Tell us what you think!
10/30/2013			Her story might move you to tears. . .	Highlight current board member	
11/1/2013	major donor phone call 6 month update	E-newsletter			
11/7/2013	Update on where we are, for last 6 months call for other donors	E-newsletter		Call to Volunteers	Speakers Bureau
11/11/2013		E-newsletter	<name> thank you!	update newsletter	
		E-newsletter		Highlight a volunteer	
11/15/2013	Thank-a-thon	E-newsletter	Thank you to donors	<a href="http://www.softi.org/nod">http://www.softi.org/nod</a>	Get in touch with board members
11/22/2013	Volunteer appreciation lunch	E-newsletter		Thanksgiving	
11/28/2013		E-newsletter		Highlight a volunteer	

**At the nitty-gritty, ground level, your communications plan should be centered around appreciating your donors through your e-newsletter and blog.**

Why? Because by communicating consistently with donors and funders, you'll make them feel more connected to your cause, and you'll have material for your annual report, and grant reports, all available right at your fingertips.

This particular calendar was useful to a coaching client of mine, and even though we didn't email every week, as shown here, we emailed twice a month, and the client always got sweet voicemails, emails and texts in response to the newsletter as she consistently appreciated her volunteers, donors, and board.

If you'd like to break down your tasks for your annual campaign, here's a sample plan to help you work backwards to get it done.

## Sample Annual Campaign Plan

Weeks 1-2: Date_____	Done?
Recruit annual campaign committee	
Segment donors	
Start writing appeal	

Weeks 3-4: Dates_____	Done?
Decide Goal	
Make press release	
Decide on branding of campaign (logo-pictures-flyers)	
Make blog post or page of website about campaign	
Edit direct mail appeal	

Weeks 4-5: Dates_____	Done?
Send out press release	
Get volunteers to flyer local grocery stores, coffeeshops, bodegas	
Call Radio/TV stations and ask if they have any open spots	
Send appeal/Start email appeal writing	
Rehearse phone-a-thon	

Weeks 6-7: Dates_____	Done?
Do phone-a-thon	
Get the word out on social media about the campaign	
Track campaign progress with blog posts on your website, (facebook and twitter if appropriate)	
Send email appeal	

Weeks 8-9: Dates_____	Done?
Update media outlets on your progress towards your goal	
Continue to update website and social media with progress towards your goal	
Send second email appeal	

# Starting Your Grants Calendar

When you research grants, where do you generally go? Here are the top places that I tell my researchers to look:

o. Board member/staff/volunteer connections

i. Foundation Center Grant Space <http://grantspace.org/Find-Us>

Look in both the private foundation section and the corporations section. This collection is most often found at your local central library. This is not just for the US however. There are also cooperating collections in Canada and Australia as well as Germany and other countries.

2. Annual reports of similar nonprofits in our region.

3. Look at our database and see who has given to us before, AND

4. Look at our pool of volunteers to see who has volunteered with us before. (This is an excellent source of corporate grants)

Once you've gotten your research started, I would recommend doing a grant search once a week, just to see what you can find. I like to break my research into TOP prospects, Good Prospects, and REACH prospects.

Once I have these parsed out, I put my top prospects into a spreadsheet that looks like this:

Name of grantmaker	What they want	Deadline	Address	Contact person	Phone	Email	Website	Did we ask if there's a match?	Result?

You may like to order this differently, so arrange your spreadsheet in the way that works best for you. Sample spreadsheet grants calendar available [here](#)

# Starting an individual solicitations calendar

## Sample Cultivation Plan Worksheet

This should be done for each donor you plan to cultivate:

Donor: \_\_\_\_\_

Donor's contact info: \_\_\_\_\_

<b>January</b>	Thank you phone call	Board president or board member
<b>February</b>	Invite to house party	Development director
<b>March</b>	Coffee w/ E.D. or pres.	E.D. or president
<b>April</b>	Invite to gala	Development director
<b>May</b>	Greet personally at gala	Board president & E.D.
<b>June</b>	Ask to come on tour, volunteer or join committee	Development director and/or committee chair
<b>July</b>	Send FY year-end report w/ personal note	Development director
<b>August</b>	Schedule advice visit, if necessary, before ask	Development director or E.D.
<b>September</b>	Schedule ask visit	Development director or assigned board asker
<b>October</b>	Invite to presentation or small event	Development director
<b>November</b>	Hold ask meeting	Board member
<b>December</b>	Personal thank you call + note w/ holiday greetings	E.D.

# Plan, Plan, Plan and work the Plan!

Now that you've gotten clearer about where you've been, where you're going, and how you're going to get there, it's time to work that plan.

When you feel comfortable enough in each of your fundraising tasks, you might like to do a sample yearly calendar, as shorthand, to help break down what the focus is for each month of the year. You can also create this with your development committee and director, to make sure that everyone knows what you're working on, and who is responsible for each task.

## Sample Development Manager Yearly Calendar in a Nutshell

<b>Month</b>	<i>January</i>	<i>February</i>	<i>March</i>	<i>April</i>	<i>May</i>	<i>June</i>
<b>Most important FR tasks</b>	Apply for grants Newsletter	Apply for grants Newsletter	Spring Appeal Newsletter	Annual Meeting Newsletter	Annual Report Newsletter	Summer Appeal Newsletter
<b>Month</b>	<i>July</i>	<i>August</i>	<i>September</i>	<i>October</i>	<i>November</i>	<i>December</i>
<b>Most important FR tasks</b>	Fundraising Event Newsletter	Time for Professional Development Newsletter	Fall Appeal Recruit FR interns Newsletter	Thank-a-Thon Newsletter	Winter Appeal Newsletter	E-newsletter End of year email appeals

Here are some worksheets that will help you work your plan.



# Monthly Planning Worksheet

*Date:* \_\_\_\_\_

*Most Important Tasks for this month*

January

Notes

February

Notes

March

Notes

You've got an editable version of this on [this page](#), so feel free to edit as you see fit for the next 12 months!

## Day-to-Day Fundraising Planning

That big picture thing is all well and good, but what about Day-to-Day stuff? Another thing I like to do each week is have this daily chart that I fill in with the most important tasks (or MIT) for that day.

Monday
Call 3 donors (by 10am)
Process TY notes (by 12pm)
Lunch with peer group
Research other NP annual reports for potential funders

Thursday
Call 3 donors (by 10am)
Lunch with donor
Enter donations in DB
Research sponsors for event
Networking event/Tabling

Tuesday
Grant Research Day!
Research grants by grantmaker:
Research grants by recipient
Research corporate grants
Transfer pdfs to flash drive

Friday
Call 3 of last year's sponsors to say thank you+ coffee? (by 8am)
Check-in with boss
Finish board report
Plan for next week

Wednesday
Call 3 donors (by 10am)
Arrange grant research in spreadsheet
Post internship description on listserv
Start board report

Weekend
Nap
Spend time with family
Take an art class
Get outside
Get a haircut

*Here's your weekly worksheet, a blank one that you can use right now!*

## Weekly Planning Worksheet

*Date:* \_\_\_\_\_

*Most Important Tasks for this week*

Monday

Thursday

Tuesday

Friday

Wednesday

Weekend

You also have [an editable version of this worksheet right here](#) so you can edit it as you wish.

## Your 1-Page Fundraising Plan Worksheet

Pipeline	Goal/Income	Strategy	Timeframe	Who's Responsible	Cost	Net (income-cost)

There is [an editable version of this worksheet here](#).

# Getting help creating your plan from staff and board

I hope by now you know that creating better donor relationships are the things that will make your nonprofit grow. How can you do this?

Speaking engagements. Open houses. Coffee with donors. Better updates with newsletters and e-newsletters, action alerts, petitions, appeals and more.

After you do all this, getting your multiple streams of income coming in will naturally follow.

Each row on your one-page fundraising plan will now have someone working on it. How do you make sure they are not all YOU?

One person taking this course writes,

*I am the typical small nonprofit director - chief cook and bottle washer. I've already received good tips from you on getting our very nonfunctional board more involved. They are even less enthusiastic about fundraising than I am. I'm afraid I view it as a necessary evil that allows me to do what I really love - wildlife rehab and education programs.*

I responded:

I hear you about not wanting to fundraise! And I know, some of us are program people and some of us are more fundraising people... but... I can't help but feel that if we got a bit more training, and were just a bit more appreciated and supported by our teams, we could find aspects of fundraising more fun.

Some people really like research! Some people really like throwing parties. Some people really like writing and editing. (I fall into that last category.) And some people really like telling others why they do this work, telling their story. Is this you? Do you like telling people why it's so important to protect the wildlife? Or do you get a kick out of sharing the stories of the animals that you've helped? Sometimes a knack for storytelling can really help you get people to care, and donate. :)

What I would do next is have a board retreat in January and ask board members:

1. What do they think fundraising is?
2. What do they feel most comfortable with in fundraising (quiz on next page) and
3. Where would they like to grow in fundraising?
4. Then solicit their advice for how to make a better fundraising plan. Why?

When you involve them in the plan, even if you know how to make one already, you will get a lot more help than if you simply sit there and tell them, “You do this and you do that.”

5. Next, allow them to take action right then and there. If they say they want to research grants, how can you teach them? If they say they want to throw a party, start to talk about when and where and who we’ll invite. If they say they want to work on the appeals, start to get them to write one. It’s all about taking action. Don’t give them time to hem and haw and back out. It’s got to be started in the moment, so they feel that it’s an easy gallop to the finish line.

You’ve got to let them have autonomy. You’ve got to let them feel like they have control over the fundraising they do for you. And you also have to give them good boundaries, and call and follow up and make sure they know how to do the tasks they have chosen.

A book that helps you get your board members more excited to fundraise, that I would HIGHLY recommend, is Fired Up Fundraising, by Gail Perry.

On the next two pages, you’ll see some surveys and quizzes that will help your board members start thinking more strategically about how they would like to get involved with fundraising for your cause.

# Board Member Survey

Name: \_\_\_\_\_

Rate yourself in how comfortable you are with these fundraising tasks:  
One is totally uncomfortable, five is completely at ease.

My rating	Task
	Calling people to say thank you for their gift
	Writing a letter to say thank you for their gift.
	Writing an email to ask for money
	Texting to ask people for money
	Using Twitter or Facebook to ask people for money
	Writing a blog post to ask people for money
	Researching grants
	Writing a letter to ask a corporation for money
	Writing a letter to ask a person for money
	Having a party at your house where you solicit donations
	Making a speech in front of an audience to ask for money
	Asking a stranger for money face to face
	Calling on the phone to ask a stranger for money
	Asking someone you know for money on the phone
	Asking someone you know for money face to face

# Board Member/Volunteer Quiz

Name: \_\_\_\_\_

Check next to the item you've got interest in.

## **Do you like parties?**

Help plan and implement our fundraising events

Help plan and implement our outreach events

Add a community service project for us at your workplace

## **Use your writing skills**

Write a letter to the editor of the opinion section of your local paper

Create SurveyMonkey surveys

Assist with newsletter/annual report articles/interviews

## **Grants**

Research grants at the Foundation Center Database

Help create a list of grant prospects for each program,  
submission dates, and requirements

Write a letter of support about what our nonprofit is doing, to add to our  
grant proposal.

Write or call the foundations that gave to us, thank them  
for the grants they gave, and encourage them to continue supporting us

## **You + Communications**

Write a blog post/FB post about us. Include a link to our website.

Call a friend and tell them about what we are doing.

Distribute brochures/flyers to a local coffee shop, bookstore, grocery  
store.



# Conclusion

Now you know how to make a one page fundraising plan!

You know how to start to plan out your year, your month, your week and your day!

And you know how to start getting your board more engaged in fundraising. I'm so proud of you.

Remember, it may seem counter-intuitive to ask your board to come together and "Create" the fundraising plan with you, but remember the old saying, "Ask for money, get advice! Ask for advice, get money, twice!"

So if you ask for their advice on how to make your fundraising plan more effective, they'll be much more interested in helping you execute than if you just come in, top down, and tell them to do things.

You've got your template and your worksheets, now it's time to work it!

Let me know how this week goes at [info@wildwomanfundraising.com](mailto:info@wildwomanfundraising.com).

You rock,

A handwritten signature in black ink that reads "Mazarine Treys". The script is fluid and cursive, with the first name "Mazarine" being larger and more prominent than the last name "Treys".

Mazarine

# Further Resources

**Your Worksheets [all available here](#)**

[Editable One Page Fundraising Plan Template](#)

[Editable Monthly Planning Template](#)

[Editable Weekly Planning Template](#)

[Editable Sample Grants Tracking Spreadsheet](#)

[Editable Communications Calendar Spreadsheet](#)

[Editable Speaking Engagements Worksheet](#)

## **Appeals**

[How to Write an Appeal Letter Part 1](#)

[How to Write an Appeal Letter Part 2](#)

[The Inner Game of Writing Your Appeal Letter: Part 1](#)

[The Inner Game of Writing Your Appeal Letter: Part 2](#)

[How many stories should you put in your appeal?](#)

[CASE STUDY: How do you edit an appeal letter to make it even more effective?](#)

[How to get money in the mail](#)

[How to get more money through direct mail, interview with Jules Brown](#)

[3 Steps to Getting More Money In the Mail](#)

[Does adding extra stuff to your appeal mailing work?](#)

[How often to communicate with your supporters?](#)

[How can you measure if your mailings are working?](#)

## **Grants**

[Top 10 Grantwriting mistakes people make-Guest post by Tonya Pennie](#)

[What your funders want to see, subjective versus objective measurements](#)

[Could your nonprofit get government contracts?](#)

[What is grantwriting?](#)

[Is grantwriting an effective use of your time?](#)

## **Major Gifts**

[Personalizing can kill your major gifts!](#)

[Who is a major donor?](#)

[Starting your major gifts program](#)

[Why major gifts fundraising is like hosting a dinner party-Guest post by Cassie Gruenstein](#)

[What is your vocabulary and how does it affect your donors? Part 1](#)

[How to speak your donor's language? Part 2](#)

## **Nonprofit Management**

[Exclusive Interview with Kim Klein, nonprofit author, editor, publisher, consultant, and grassroots fundraiser](#)

[8 ways to be a good board member](#)

[Managing and Motivating others, Part 1](#)

[Managing and Motivating Others, Part 2](#)

[Managing and Motivating Others, Part 3](#)

## **Stewardship**

[What is Stewardship?](#)

[What dreams do your donors have?](#)

How can you influence your donors?

Your donors trust you, but do you trust your donors?

How to connect with people quickly