



This is a free sample of my full course, [Making Your Fundraising Plan for 2015](#).

It will help you establish a baseline for how many donors you kept from last year to this year, and your marketing progress from 2013 to 2014.

You can't move forward until you understand where you've been! So this is a sample from Week one of my four week course. I'd love to share even more with you [inside the course](#)!

Let me know if you've got any questions by emailing info@wildwomanfundrasing.com

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What do you want to improve about your current program?

Where are you at right now?

If you don't know where you are, and where you were last year, you're not going to be in a good place to measure your progress in 2015. SO, let's get started right now!

If you are new to fundraising or don't know the answers to these, look in your database, your spreadsheets, or seek out someone who DOES know this, such as your accountant, or your executive director.

Take a moment right now to reflect.

What worked about what we did this year with fundraising and marketing?

What didn't work this year with fundraising and marketing?

Did we improve on last year's fundraising results or marketing reach?

Why, or why not?

So many people who are taking this course want a way to show progress that is not dollars raised. How can you do this? By showing how many people you touched this year. Fundraising is about building relationships, and the more people you touched, the more potential relationships you helped to build.

THIS is how you can show your board members that how they measure your performance can be more than just dollars raised.

REMEMBER: It's about reach, about stewardship, and about relationships, not just about the ones and zeroes.

NOW do a quick audit of your marketing reach right now as compared with last year and fill in the blanks below.

2013-2014 Marketing Reach Worksheet

Our 2013-2014 nonprofit marketing reach:

We sent out _____ newsletters this year as compared with _____ last year.

We sent out _____ appeals this year, including the annual report as compared with _____ last year.

We got in front of _____ people this year via radio as compared with _____ last year.

We got in front of _____ people this year via TV as compared with _____ last year.

We got in front of _____ people this year via newspaper as compared with _____ last year.

We got in front of _____ people this year via _____ as compared with _____ last year.

We did outreach via tabling at _____ events this year getting in front of _____ people as compared with _____ last year.

We created _____ new partnerships this year with _____ agencies/nonprofits in town.

We got _____ volunteers this year as compared to _____ volunteers last year.

We recruited _____ of fundraising interns this year as compared with _____ last year.

We negotiated a discount of _____ on our printing costs, as opposed to paying _____ last year.

Other things you've done?

Now let's put this into an easy to understand grid, for your board members to see the hard work you've been doing!

Our Marketing Progress

How we reached people	2013 results	2014 results
Newsletters sent		
Appeals sent		
Radio reach		
TV reach		
Newspaper reach		
Tabling reach		
New partnerships		
Speaking reach		
Other ways we got the word out about what we do:		

How did this year go, with donor stewardship, as compared to last year?

We got _____ new sponsors this year as compared with _____ last year.

We got _____ renewing sponsors this year as compared with _____ last year.

We got _____ new donors this year as compared with _____ last year.

We got _____ renewing donors this year as compared with _____ last year.

We got _____ monthly donors this year as compared with _____ last year.

We lost _____ monthly donors this year as compared with _____ last year.

We got _____ bequests this year as compared with _____ last year.

We had _____ people do planned giving with us this year as compared with _____ last year.

How did this year go, with dollars raised?

We made _____ with grants as compared with _____ last year.

We made _____ with events as compared with _____ last year

- Event 1 _____ Net _____
- Event 2 _____ Net _____
- Other _____

We made _____ with volunteer fundraising as compared with _____ last year.

We made _____ with appeals as compared with _____ last year.

Appeal cost _____ Net _____

We made _____ with major gifts as compared with _____ last year.

We made _____ with speaking/house parties as compared with _____ last year.

We made _____ in earned income as compared with _____ last year.

We made _____ with government grants/contracts as compared with _____ last year.

We got _____ in online donations this year as compared with _____ last year.

Other ways we made money this year _____
(For example investments, rent, earned income streams)

How much we made _____

Total amount we raised this year _____ as compared with _____ last year

Any mitigating circumstances for different results in 2013 versus 2014:

Staff changes? Leadership changes? _____

2013-2014 Fundraising Progress Worksheet

How we stewarded our donors	2013 results	2014 results
New Sponsors		
Renewing Sponsors		
New donors		
Renewing donors		
Monthly donors		
Lapsed monthly donors		
Bequests		
Planned Giving		

How much we raised	2013 results	2014 results
Grant monies raised		
Event income (net)		
Volunteer fundraising (net)		
Volunteer fundraising (number of volunteers)		
Appeal letters (net)		
Major gifts		
House parties		
Earned income (net)		
Government Grants/Contracts		
Online donations		
Other:		
Total we raised		

Want to learn more about making a fundraising plan?



[Check out what's inside the full course](#)

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