



Community Food Bank
of Southern Arizona

Pulling It All Together: Your Fundraising Plan

By Jonathon Crider, Director of External Relations



Why create a plan at all?

- Quick Quiz

- Would you rather travel on vacation with a map, GPS, or go on fly?
- On a scale from 1-10 how fun is it to be in November knowing that donors give the most at year end and you know you need to do something but have no idea where to start?
- How do you talk about all the things that your organization is doing without flooding every communication with everything but the kitchen sink and overwhelm everyone you see?
- Why don't people flock to us because we are so great?



Why create a plan at all?

- A Fundraising Plan will address all of these scenarios and more
 - Give you direction and an opportunity to explore and implement best practices
 - Help you stay on top of (or at least not blindsided by) your schedule
 - Clearly show a diverse platform of options from which to share a diverse message
 - Build brand identity and recognition to increase effectiveness of all fundraising and marketing





When should you start your fundraising plan?

- TODAY!
 - There is no reason to wait
 - Anything is better than nothing
 - There is no “right way” to start out
 - You can improve and build upon it over time





How long does it need to be?

- Schedule some time on your calendar to work on this
- Put a goal in place that your first plan extends 6 mo. out.
- Then, halfway through the 6 mo. plan add the rest of the year
- Before the year is out, add a second year
- Then in a perfect world, you'll end up with a three year plan before you know it; this can then be tweaked a little at the beginning of each fiscal year.

What should be included?

- This depends on how diverse your organization is.
- The best place to start is to consider what is in your personal responsibility.
 - Direct Mail
 - Events
 - Major Gifts
 - Emails
- Direct Response activities in general is a good, broad place to begin





What should it look like?

- There really is no right or wrong way to set up a fundraising plan as long as you, and anyone you need to share it with, can read it.
- A couple rules of thumb for me are:
 - Provide as much info as will fit reasonably, stay away from acronyms
 - Using columns (in Excel or Word) is ideal; one axis will need to be timeline and the other might be communications channel
 - Colors are our friends: color-coding things can make signal campaigns and keep things organized
 - (see example)

Sample Fundraising Plan #1

		SEPTEMBER National Hunger Action Month				OCTOBER				NOVEMBER National Day of Giving 11/29 @ Tour de Tucson (10-21)				
		5-Sep	12-Sep	19-Sep	26-Sep	3-Oct	10-Oct	17-Oct	24-Oct	31-Oct	7-Nov	14-Nov	21-Nov	28-Nov
High Dollar Currents Lyb units Lapsed Refusers	Direct Mail	9/5 - Hunger Action Month #2		9/19 - Hunger Action Month #3		10/5 - October Newsletter	FALL Campaign 10/17, 10/31				WINTER Campaign 11/04	2017 Calendar 11/28		
1/3 Cuts		9/12 HAM												
High Dollar Currents Lyb units Lapsed Refusers	Email	9/5 - H.W. "Join HW" 9/5 - H.W. "Share message"	9/9 - E-Newsletter (HAM focus)	9/15 - H.W. "Pick up share" 9/25 - H.W. "Remind/Park ing/online msg"	9/30 - HAM Follow up #3		FALL Campaign 10/21				FALL Campaign 11/07			
High Dollar Currents Lyb units Lapsed Refusers	Phone		9/13 HungerWk Solicitation Campaign 1-4pm & 4-7pm		9/26-30 HAM calling Campaign MW 4-7pm, T,TR 9-Noon									11/29 Giving Tuesday - calling campaign
*all segments	Events	ALL SEPT: H.A.M. daily events		9/17 - HungerWk EBNT @ Sam Lane Park	9/22-25 Greek Festival @ St. Demetrios	10/1 Construction						11/19 - El Tour MARANA	12/1 - Wells Fargo Stuff the Stagecoach	
PRESS RELEASE PRESS RELEASE PRESS RELEASE	TV, Radio, Outdoor, Press, Digital	HungerWk 2016 (Tucson/GV)												
SEM		SNAP CHALLENGE FOR HAM												
AZ Jewish Post AZ Daily Star Tuc. Lifestyle Mag Tucson Weekly Desert Leaf		HungerWk 2016								Desert Leaf Ad - TBD				
Inside Tucson Business AZRM Scripps KICI KOLD KGUN KVDA		Biz Tucson - generic 1/3 pg. ad - (M.McDonald Ceased interview)												
Eolie Sep Lamar (Transit) Advison (Outdoor) Social Ads		HungerWk Facebook Ad												
Web Banner #1 Web Banner #2 Web Banner #3 Web Banner #4 Web Banner #5		7/11 to 9/17 HungerWk 2016 promotion												
		Hunger Action Month												
	Double Up SNAP													

Sample Fundraising Plan #2

	January												February												March												April												May											
1	FY16 Draft Communications Calendar																																																											
2																																																												
3	Donor Segment																																																											
4	Planned Giving																																																											
5	Major Donors																																																											
6	High Dollar																																																											
7	Lybeats																																																											
8	Lapsed																																																											
9	Long Lapsed																																																											
10	Future Donors																																																											
11	Marana Donors																																																											
12	Marana Future Donors																																																											
13	Green Valley Donors																																																											
14	Green Valley Future Donors																																																											
15	Amado Donors																																																											
16	Amado Future Donors																																																											
17	Nogales Donors																																																											
18	Nogales Future Donors																																																											
19	Monthlies																																																											



Some helpful tips...

- Think about how many messages/topics/programs you would like to communicate and then divide the calendar into sections that can address that message/topic/program
- Think about how many different communications segments that you have, then look at the calendar and see if the number of communications makes sense for each segment
- Don't try to fit too much into any one section of your plan
- Test!



Questions and Comments?



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