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

<table>
<thead>
<tr>
<th>SEPTEMBER</th>
<th>OCTOBER</th>
<th>NOVEMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>National Manager Action Items</strong></td>
<td><strong>Fundraising Campaign</strong></td>
<td><strong>Final Review</strong></td>
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<tr>
<td><strong>Email</strong></td>
<td><strong>Phone</strong></td>
<td><strong>Webinar</strong></td>
</tr>
<tr>
<td><strong>Website</strong></td>
<td><strong>Social Media</strong></td>
<td><strong>Training</strong></td>
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<tr>
<td><strong>Twitter</strong></td>
<td><strong>Facebook</strong></td>
<td><strong>Build Team</strong></td>
</tr>
<tr>
<td><strong>LinkedIn</strong></td>
<td><strong>Meetup</strong></td>
<td><strong>Launch</strong></td>
</tr>
<tr>
<td><strong>YouTube</strong></td>
<td><strong>Podcast</strong></td>
<td><strong>Follow-up</strong></td>
</tr>
</tbody>
</table>

**Key Actions:**
- Development Plan
- Budgeting
- Marketing Strategy
- Fundraising Techniques

**Timeline:**
- September 1
- October 1
- November 1

**Events:**
- Event Planning
- Sponsorship
- Volunteer Coordination

**Resources:**
- Database Management
- Event Planning Tools
- Fundraising Software

**Outcomes:**
- Increased Donor Base
- Enhanced Community Engagement
- Improved Fundraising Techniques

**Support:**
- Training Sessions
- Webinars
- Workshops

**Contact:**
- National Manager
- Local Coordinator
- Fundraising Team

**Follow-up:**
- Post-Event Evaluation
- Monthly Reports
- Quarterly Reviews

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**Note:**
- Adjustments may be necessary based on feedback and results.
- Regular meetings with the team are essential for effective planning.
- Keep communication channels open for real-time updates.
### Sample Fundraising Plan #2

#### FYE E-mail Communications Calendar

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Jan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feb</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mar</td>
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<tr>
<td>Apr</td>
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<tr>
<td>May</td>
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<td></td>
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<tr>
<td>Jun</td>
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<tr>
<td>Jul</td>
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<tr>
<td>Aug</td>
<td></td>
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<tr>
<td>Sep</td>
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<tr>
<td>Oct</td>
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<tr>
<td>Nov</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dec</td>
<td></td>
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</tbody>
</table>

#### Phased Giving

<table>
<thead>
<tr>
<th>Phase</th>
<th>Month</th>
<th>Goal</th>
<th>Activities</th>
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<tbody>
<tr>
<td>Kickoff</td>
<td>Feb</td>
<td>$5K</td>
<td>Launch</td>
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<tr>
<td>Early Donor</td>
<td>Mar</td>
<td>$10K</td>
<td>Follow-up letters</td>
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<tr>
<td>Mid-Year Fundraiser</td>
<td>Apr</td>
<td>$15K</td>
<td>Event, Gala, Gala Auction</td>
</tr>
<tr>
<td>Annual Appeal</td>
<td>May</td>
<td>$20K</td>
<td>Direct Mail</td>
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<tr>
<td>Major Gift Campaign</td>
<td>Jun</td>
<td>$25K</td>
<td>Proposal, Site Visits</td>
</tr>
<tr>
<td>Capital Campaign</td>
<td>Jul</td>
<td>$30K</td>
<td>Fundraising Plan, Grant Writing</td>
</tr>
</tbody>
</table>

#### Monthly Goals

<table>
<thead>
<tr>
<th>Month</th>
<th>Goal</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>$1K</td>
<td>Direct Mail</td>
</tr>
<tr>
<td>Feb</td>
<td>$2K</td>
<td>Online Campaign</td>
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<tr>
<td>Mar</td>
<td>$3K</td>
<td>Event Planning</td>
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<td>Apr</td>
<td>$4K</td>
<td>Sponsorship Program</td>
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<tr>
<td>May</td>
<td>$5K</td>
<td>Donation Drive</td>
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<tr>
<td>Jun</td>
<td>$6K</td>
<td>Gala Planning</td>
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<td>Jul</td>
<td>$7K</td>
<td>Corporate Partnerships</td>
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<tr>
<td>Aug</td>
<td>$8K</td>
<td>Major Gift Campaign</td>
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<tr>
<td>Sep</td>
<td>$9K</td>
<td>Capital Campaign</td>
</tr>
<tr>
<td>Oct</td>
<td>$10K</td>
<td>Annual Appeal</td>
</tr>
<tr>
<td>Nov</td>
<td>$11K</td>
<td>Mid-Year Fundraiser</td>
</tr>
<tr>
<td>Dec</td>
<td>$12K</td>
<td>Kickoff</td>
</tr>
</tbody>
</table>

**Legend:**
- **Profile:** Individual, Corporate, Organization
- **Goal:** Financial, Mission, Vision
- **Activity:** Fundraising Event, Direct Mail, Online Campaign, Donation Drive

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**Notes:**
- Monthly goals should be adjusted based on fundraising progress and external factors.
- Phased giving should be reviewed and adjusted quarterly.
- The capital campaign should be prioritized and monitored closely.

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**Key Dates:**
- February 1st: Kickoff Meeting
- March 15th: Mid-Year Fundraiser
- April 30th: Annual Appeal
- June 10th: Major Gift Campaign
- July 15th: Capital Campaign
- August 31st: Major Gift Campaign
- September 15th: Annual Appeal
- October 31st: Mid-Year Fundraiser
- November 15th: Capital Campaign
- December 31st: Kickoff
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?
Contact info

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