

Your Fundraising PLAN



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Pamela Grow

Your Fundraising Planner

For your fundraising success, make a plan. Work the plan.

It sounds so simple, doesn't it? And yet a lack of clarity is one of the biggest causes of waste and procrastination in the nonprofit sector.

The writer Antoine de Saint-Exupéry noted that “A goal without a plan is just a wish.”

“Peter Drucker is credited with having said “culture eats strategy for breakfast” and so it is perhaps not surprising that culture would be top of this list. If senior management set a plan that is inconsistent with “how we do things around here” it will be doomed to failure from the outset.”

-Development Plans & Fundraising Performance

If you don't know exactly what your goals are for your organization, it's unlikely that you'll be able to identify and prioritize exactly what you need to work on to achieve those goals.

Last year, the Institute for Sustainable Philanthropy, led by Dr. Adrian Sargeant, was commissioned to conduct a survey on the topic of fundraising planning. This comprehensive study indicated a powerful relationship between the degree of formality adopted in fundraising planning and all measures of fundraising performance.

2020 has been one of the worst years in history. We've endured a global pandemic and a harsh exposure of our country's racial and economic injustices. There's one thing that all economists agree on, however. Our economy is going to get worse before it gets better.

Distractions abound these days. We've just been through a rough year and there's no telling what's coming next. And I'm predicting that above all else, your commitment,



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focus, and mindset will be what sets you on the path to survive, thrive, and grow in 2021.

If you have any questions, be sure to check out the 2021 roster of *Basics & More Fundraising* classes to see how your nonprofit can build your own *Lifetime Donor Attraction Systems*. Or shoot me an email at pamela@pamelagrow.com.

To your fundraising success!

Pam

How to Use This Fundraising Planner

Create a spreadsheet in Excel or your program of choice. Begin by taking a look at your funding sources from a historical perspective.

1. How much have you raised in the past from individual donors? If you've typically run two campaigns a year (spring and EOY), could you add in a third or even a fourth or fifth targeted appeal? If you publish a print donor newsletter, are you raising revenue with that newsletter? Well-crafted donor newsletters can bring in as much (or more) as a fundraising appeal. What are your plans for increasing donor retention in 2021? How are you bringing back lapsed donors? For new donor acquisition? *Write them down!*
2. What are your goals for increasing your monthly giving or membership? Make it specific and make it actionable. Thus "grow our monthly giving program" becomes "Grow our monthly giving program by 50 new donors by December of 2021 through one direct mail appeal and three email campaigns."
3. Does 100% of your board contribute to your mission? If not, create a plan to make it happen.
4. A big question going into 2021 will be how your events fared in 2020. Some organizations saw tremendous success going virtual. For others, virtual events were a disaster. What plans do you have in place for stewarding event attendees and converting them into donors?
5. Now let's turn to grants. Consider active foundation grants and opportunities in 2021. I've always focused primarily on general operating support. If you're a Development Department of one, you'll find grants can take over your life. If you can't focus in on general operating support grants (easier to administer), you may want to consider outsourcing. I can provide recommendations.
6. Now you'll factor in any state or federal government grant funding.
7. Most of the time we think of business donors in terms of sponsorships. However, you'll also want to consider separate appeals to businesses within your community.



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8. In “Other,” you’ll turn your attention to strategies such as earned income. That includes your thrift shop, book sales, eBay sales, branded merchandise and the like.

When I’m working with clients and students on developing their plans, I like to include both a written plan that emphasizes our missions and values (for example, you should have a solid gift acceptance policy in place), and typically an excel document where you can lay out the strategies, costs, and anticipated income.

Assess your fundraising infrastructure. If you’re planning on increasing your digital fundraising in 2021, you’ll want to budget for that. Strong online fundraising requires strong systems. If you’re cobbling together too many systems, you won’t be serving your donors or your organization well. Do you have a donor database? Does your website need to be updated? Will you be making any new hires? Real fundraising, the sustainable kind, requires investment.

As a sector we’re often “Tripping Over Dollars Picking Up Pennies.” Your leadership needs to understand that all the studies indicate that multichannel campaigns rule. An investment in direct mail and donor care will yield solid returns.

You’ll want to include your goals and objectives for the year. This includes fundraising targets.

Funding Source	Strategy	Cost	Anticipated Income
1. Individual Donors			
2. Members/Monthly			
Board Giving			
Events			
Private Foundations			
Government Grants			
Business Donors			



Other			

Now you've got a plan for growing your fundraising in 2021, and the strategies to do it. You'll want to include written plans for your organization's non-financial goals.

- Did you resolve to greater diversity in your board and staff? It won't happen by osmosis. If your organization need anti-racism training, I can provide you with recommended consultants.
- How is your nonprofit attracting new donors and partners? Make a plan and make an investment in acquisition (and donor care).
- Does it make sense to outsource? Time is money. If your development director is spending time wrestling with your local print shop trying to figure out why your Canva files won't work, maybe it makes sense to hire an actual designer for that job. Similarly, if your "one-person" development department is spending 80% of her time on grants when your goal is to grow your individual giving program, outsourcing may be the answer.
- Is your organization's culture a healthy one? If not, create a plan with documented steps to get there.

Remember, you'll want to keep your plan front and center. Modify it as needed. When an "opportunity" falls into your lap, consider how it fits into your plan and if it really is an opportunity. Time is money. And go for big goals in 2021.

You've got this!

About Pam



Pamela Grow is the publisher of The Grow Report, the leading weekly newsletter for small shop fundraisers, the author of *Simple Development Systems: Successful Fundraising for the One-Person Shop*, and a fundraising copywriter. In 2016, Pam partnered with Jeff Schreifels and Richard Perry in the creation of Veritus Group Academy (formerly Major Gift Academy). Her *Basics & More* online classes have trained over 8,000 nonprofits all over the world.

Pam's been named one of the *50 Most Influential Fundraisers* by *Civil Society* magazine, and one of the *40 Most Effective Fundraising Consultants* by The Michael Chatman Giving Show.

She's also mother to two remarkable daughters, an avid reader, baker, progressive, and champion of fundraisers and donors everywhere.