



# **QUICK-AND-SIMPLE FUNDRAISING PLAN**

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Hi!

I'm so excited to bring you my favorite tool for creating a fundraising plan!

I created this piece out of desperation – I needed to get a handle on everything that was happening around me. And guess what? It worked! I was able to bring order to the chaos and lay out plans for moving forward.

Now, I share it with you.

The key to using it is to get your ideas and plans out of your head and onto paper. They must be WRITTEN. If your plan is in your head, it isn't real and it will be REALLY hard to follow. Before long, it will turn to mush in your mind, and you'll be shooting from the hip, which doesn't work when you're trying to raise big bucks to fully fund your nonprofit's work.

You'll find this tool and the supporting worksheets to be practical and immediately usable to help you prepare for the fundraising strategies and activities you'll undertake in the coming year. Modify them if that suits your needs. The most important thing is to DO SOMETHING with them.

If you have questions, pop over to my Facebook page at [www.Facebook.com/GetFullyFunded](http://www.Facebook.com/GetFullyFunded) and ask away. I personally read everything that's posted there and respond as quickly as I can.

Way too many nonprofits don't plan to fail – they just fail to plan. Don't be one of them!

Warmly,

Sandy Rees  
Chief Encouragement Officer

## MY STORY

In 1998, I drove down 5<sup>th</sup> Avenue in Knoxville, TN, and locked the car doors because the homeless people on the sidewalks made me nervous.

Within the year, I joined the staff at Knox Area Rescue Ministries and began my nonprofit journey.

It was funny really. The very people who had once frightened me became the reason I went to work every day. I spent time with them and got to know them. I learned their stories. And I fell in love with them. They became my passion and my outlet for creativity, to see what innovative ideas I could create to bring in the support the organization needed.

In practical terms, I had a background in marketing that I brought to the table. I found out later that I was hired to do all the stuff no one else wanted to do – volunteers, events, and run the thrift store. It didn't matter to me – I was happy to do my part toward bringing in the resources we needed so we could provide the highest quality services possible.

The weird thing was that I had no experience with fundraising or resource development. None. Zip. Nada.

What I **did have** was passion and drive. I did what made sense to me. I got organized. I made a few changes, and revenue started pouring in. I raised so much money so fast that my Board chair called me one day and said “what the heck are you doing?” I loved it.

Over the next several years, I learned how to find and engage donors, and become their favorite nonprofit, getting larger and more frequent gifts. I learned how to get on every tv station in town and tell a story that made our office phones ring for days. I learned how to get so close to private foundations that if I didn't apply every funding cycle, they called ME to see if we needed money.

What I learned was how to fully fund our annual operating budget. And all our equipment needs. And raise money to add new staff and expand programs. It was a ton of fun and I'm so glad to have had the experience.

It wasn't rocket science by any stretch. But I did a lot of figuring things out the hard way. There was a lot of trial and error. Over time, I learned what worked and what didn't and refined my strategies into systems that created predictable success.

Now, I teach my systems to passionate nonprofit leaders who want to fully fund their activities so they can spend more time changing lives and less time worrying about money.

And I can teach you, too!

## SUMMARY CALENDAR TEMPLATE

I create the Summary Calendar Template out of necessity.

It was 2001 and I was building my team of Fundraisers at Second Harvest Food Bank. There were 3 of us working full time plus an intern and a handful of volunteers. And I couldn't keep up with who was doing what.

I knew there had to be a way to get everything organized so I could keep my eye on the big picture of what needed to be happening and what was coming up. One day, I opened up an Excel file and just started brain-dumping everything into it. After a couple of iterations, the Summary Calendar was born.

### Purpose

The Summary Calendar is meant to give you an 'at-a-glance' view of all your fundraising strategies so that nothing sneaks up on you. If you fill it all out, you can use this one page as a guiding plan for your fundraising activities – it's that powerful.



### How to Use It

1. **Start by filling in the “knowns”** – those things you KNOW are coming up. Fill in your grant deadlines and special events. If you don't know what those are, stop now and go do some grant research and plan out the 1 or 2 events you plan to hold each year.
2. **Next, fill in your Asks and Stewardship activities.** If you plan to do direct mail or email appeals, fill in the dates you plan to send those out. If you have specific Major Gift asks that you have an idea of when you'll be making, add those to the calendar. Then fill in any stewardship activities you want to do, like donor appreciation events, thank-a-thons, and so forth.
3. **Fill in Communications and Marketing activities.** Add things like newsletters and Annual Report release, plus speaking gigs and media events. These are easier to plan out once you have the 'knowns' filled in.
4. **Finally, add any vacations, trainings, or anything else pertinent to your nonprofit.** It's helpful to know when key people will be out-of-pocket so you can plan ahead of time for that.

Once you get this all filled out, put a copy in a place where you can see it regularly. Share it with your Board or Development Committee, and talk with them about how they can support you with your plan.

## SUMMARY CALENDAR TEMPLATE

Fundraising goal:

Donor Retention goal:

Donor Acquisition goal:

	Grants	Special Events	Individual donors (monthly giving, direct mail, email appeal, etc.)	Major gifts	Communications (newsletter, website, annual report, etc.)	Marketing (public speaking, media, advertising, etc.)	Other (vacations, training, etc.)
Jan							
Feb							
Mar							
Apr							
May							
Jun							
Jul							
Aug							
Sep							
Oct							
Nov							
Dec							

## FUNDRAISING STRATEGY AND GOAL WORKSHEET

This one came about to help clients get crystal clear about their strategies and to make sure their numbers added up.

Three things are critically important with your fundraising plan. You must identify:

- Total dollars you will raise
- Number of donors you will renew
- Number of donors you will acquire



If you don't PLAN how you'll reach these, they'll just sort of happen, and trust me, no one ever fully funded their organization by happenstance.

You must be purposeful about the activities that will help you raise the dollars you need, and which strategies will help you reach your donor renewal and acquisition goals. When you plan these out, you'll increase your odds of success exponentially.

### Purpose

The Fundraising Strategy and Goal Worksheet is meant to help you get clear about the strategies you'll use and which ones will help you reach your overall goals of dollars raised, donors renewed, and donors acquired.



### How to Use It

1. **Start by filling in your goals for Fundraising (total dollars raised), Donor Renewal, and Donor Acquisition.** If you don't know how much money you need to raise, down to the penny, go figure it out now. You need to know. Don't try to hit a vague target – it just won't work. Next, fill in your target donor renewal goal (the number of active donors you want to renew). If you're not sure, shoot for 50%. Last, fill in your donor acquisition goal (the number of new donors you need to get). If you aren't sure, see how many active donors you have (people who have given in the past 12 months) and shoot to bring in at least that many people in the coming year.
2. **Fill in the specific strategies you plan to use.** For each one, estimate how many dollars the strategy will raise, and how many donors you can renew using it, and how many new donors you might acquire. Not every strategy will bring in new donors or renewals. **Don't skip this step** - this level of planning will make you evaluate everything you're doing to make sure it will bring you closer to your goals.
3. **Finally, total up the 3 important columns.** The total for each column should match the number you put in the Goal line at the top of the worksheet. If it doesn't, go back and re-evaluate the strategies you plan to use.

## FUNDRAISING STRATEGY + GOAL WORKSHEET

Year: \_\_\_\_\_

		Fundraising goal:	Renewal goal:	Acquisition goal:
Strategy	SMART Goal	Projected dollars raised	# renewed donors	# new donors
Grants				
Events				
Individual donors				
Major gifts				
Communications				
Marketing				
Other				
Total				



## COMMUNICATIONS + MARKETING STRATEGY WORKSHEET

I created to help clients manage their Communications and Marketing activities.

Communications and Marketing are critical for building relationships with current donors and prospective ones. If people don't hear from you, they'll lose interest in what you're doing. Staying on their radar is pretty simple – if you plan for it.



### Purpose

The Communications & Marketing Strategy Worksheet is meant to help you plan how you will stay in touch with current and prospective donors in the community.



### How to Use It

1. **First, fill in the Communications (internal) and Marketing (external) activities you plan to do.** Think of Communications activities are targeted toward your current donors, volunteers, supporters, and those on your list. Think of Marketing as targeted toward the community, specifically for your Ideal Donor Prospects. Write down a brief description of each activity along with the target audience for that activity (current donors, prospects, etc.).
2. **Estimate the Outcomes.** How many impressions do you think you'll get from each activity (how many individual people will you reach?).
3. **Finally, estimate the resources you'll need.** What will each strategy cost, if anything? Who will be responsible for making sure it happens? And by when do things need to get done?

Once you get this all filled out, put a copy in a place where you can see it regularly. Share it with the folks who will help you get it done.

## COMMUNICATIONS + MARKETING STRATEGY WORKSHEET

Year: \_\_\_\_\_

Strategy	Description	Target Audience	Desired Impressions	Projected Cost	Who is responsible?	By When?
Website						
Social Media						
Newsletter						
Public Speaking						
Media/Press Releases						
Annual Report						
Other						
<b>Totals</b>						

## Now what?

These three worksheets give you the basis for a powerful, purposeful fundraising plan. But you can't just create them and leave them on your hard drive or in a file.

### Monitoring the Plan

1. **Make a plan for reviewing them regularly.** I suggest you pull them out at the beginning of each month to see how you're doing.
2. **Get input from your team.** If you have other staff, volunteers or Board members helping you to execute the plan, involve them in the regular review. They may have valuable input for changes that need to be made.
3. **Modify them as needed.** These are NOT set in stone. Things change, and you need to be flexible and ready to change as needed to leverage opportunities and weather the storms.



**Don't be afraid to stretch for big goals.** Your nonprofit is capable of great things, and with a good, solid, well-thought-out plan, you can accomplish them.

Got questions? Stop by [www.Facebook.com/GetFullyFunded](http://www.Facebook.com/GetFullyFunded) and ask. We're here to help you.

## Want more?

There's SO much more that I can teach you about creating a fundraising plan.



If you'd like more worksheets, more tips, more insight, and more support, join me for a virtual planning retreat called Fundraising Blueprint.

As part of this virtual retreat, I'll teach you

- 5 surprising reasons why people don't plan
- How to assess your nonprofit's past performance to decide which activities to keep and which to let go of
- 3 main goals every nonprofit fundraiser needs to focus on
- How to choose the right fundraising strategies for your nonprofit
- The 1-10-1000 Rule for structuring your plan

Plus, you'll get my personal template for planning – the one I've used myself and with lots of clients to guide them to success.

Get all the details and sign up at [www.getfullyfunded.com/blueprint](http://www.getfullyfunded.com/blueprint).