

# **KIRSTEN'S FAVORITE FUNDRAISING PLANNING WORKSHEETS**

COMPILED BY KIRSTEN BULLOCK, MBA, CFRE

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You may not give them away, sell them or pass them off as your own. Sorry. I put too much work into them to let that happen.

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Hi!

If you could make any changes in your fundraising plan over the next year, what would it be?

There are few activities that will have more impact on the long-term sustainability of your organization than donor retention.

These are worksheets that I've been using with my clients to help focus in on communication and involvement strategies that are best suited for their supporters. By being proactive, versus reactive, you can build a stronger fund development strategy.

My favorite thing to do is to help nonprofit organizations grow a base of enthusiastic fans, volunteers and donors who will help spread your story, provide the right board members, and result in your community being impacted in a way that only you are uniquely qualified to do.

Looking forward to hearing how these worksheets help you!

Kind regards,

A handwritten signature in black ink that reads "Kirsten". The script is fluid and cursive, with the first letter 'K' being particularly large and stylized.

Kirsten Bullock, MBA, CFRE  
Nonprofit Coach



## STEP 1: SEGMENTATION

Donor Group	Identifying Factors	# in Group	What they Care About	What we Need to Know

## STEP 2: SEGMENT STRATEGY

Donor Segment: \_\_\_\_\_

What they care about:

What we need to know:

GOALS	STRATEGIES

## STEP 3: OPERATIONALIZE

Donor Group			January	February	March	April	May	June	July	August	September	October	November	December
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Segment 1:	Person Responsible	Tracking												
Personal Visit (minimum 1 visit per year per donor)			x	x	x	x	x	x	x	x	x	x	x	x
Personal Phone Call (2-3 per donor per year)			x	x	x	x	x	x	x	x	x	x	x	x
Annual Report				x										
e-update			x		x		x		x		x		x	
Printed Newsletter				x			x			x			x	
Thanksgiving Card													x	

Segment 2:														

Segment 3:														

## DRAFT DONOR STEWARDSHIP PLAN

	Newsletters - Quarterly	Updates - Monthly	Donor Recognition	Phone Calls	In-Person Meetings	Personal Notes								

### Individuals

- Major Donors - list each individually														
- Monthly Donors														
- Annual Donors														
- Other Segments														

### Businesses

- Regular Donors														
- Intermittent Donors														
- Other Segments														

### Foundations

- Regular Donors														
- Intermittent Donors														
- Other Segments														
-														
-														

### Social Clubs

- Regular Donors														
- Intermittent Donors														
- Other Segments														
-														
-														

### Churches

- Regular Donors														
- Intermittent Donors														
- Other Segments														
-														
-														



# SAMPLE SIMPLE DEVELOPMENT OFFICE PLAN

**GOAL: \$1,000,000 over three years**

**Key**

in process  
Planned

Completed  
Overdue

Year 2 add planned, memorial, and on-line giving

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	\$ Goal
<b>Individuals</b>													
<b>Personal Asks</b>	3-year pledges												
- mail letter from ED to top 100 donors													
- meet with Board members													
- review and research prospects													
- ID additional suspects / research													
- visits / asks													
<b>Direct Mail (2 this year, 4 next)</b>													
- design appeal / select mailing list													
- mail letter													
<b>Annual Gala / Event</b>													
<b>Foundations/Corporate Giving</b>													
- Research Foundations													
- initial contact with foundations													
- ongoing follow-up with foundation staff													
<b>Church Outreach</b>													
- Form Committee – Faith Outreach Breakfast													
- identify churches to invite													
- PR for event													
- follow-up with churches													
<b>Stewardship/Awareness Plan</b>													
- marketing materials													
- Monthly Press Releases													
- Monthly e-newsletter													
- Quarterly newsletter													
<b>Office</b>													
- develop policies & procedures													
- grab files for proposals													
- Software													
- Thank! Thank! Thank!													
<b>TOTALS</b>													0

## WOULD YOU LIKE TO SEE BETTER RESULTS FROM YOUR FUNDRAISING EFFORTS?

- Gifts trailing off?
- Not sure where to start?
- Overwhelmed by all of the information / trainings available?
- Frustrated because everyone runs the other way when you try to talk about fundraising?

If your organization needs a fundraising makeover – or you need to build a sustainable fundraising program – now is the time!

### DEAR NONPROFIT LEADER:

Do you wish you knew the secrets of building a strong fundraising program for your nonprofit? Let me guess... you're probably an executive director or board member who would like to...

- have the money you need to impact your community in a big way
- turn your board into fundraising superstars
- have more volunteers than you know what to do with
- be the organization everyone want to partner with
- learn proven ways to increase your visibility
- attract more financial supporters
- leave your organization on stable financial footing



If so, then say YES to learning a **step-by-step approach** that will lead you to **fundraising success**.

## FUNDRAISING MADE SIMPLE

This Fundraising Jump Start Home Study System is developed to help you raise the money you need. This is accomplished by walking you through, step-by-step, developing the promotional materials and plans you'll need.

### HERE'S WHAT YOU GET:

Your Home Study System consists of a **3-ring binder**, **over 250 pages** of reference materials, and a **resources CD** with recorded trainings and other printable forms and resources. This material covers:

**Eight In-Depth Learning Modules** that will walk you through the process of developing your fundraising materials including your ‘Case Statement,’ fundraising plan and awareness plan. That’s like getting 8 webinars. **Value: \$500**

**Fundraising Worksheets** to support the process of developing these materials. **Value: \$250**

PLUS:

**BONUS: HOW TO INTRODUCE PEOPLE TO YOUR CAUSE THROUGH SIMPLE, LOW-COST, NON-FUNDRAISING EVENTS E-REPORT.**

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You’ll learn the **two things you must include** to help people make the decision to get more involved with your organization. Plus you’ll receive a **sample script** for your follow-up call and a **sample response card** to use at your event! **Value: \$27**

**TOTAL VALUE: \$777**

**YOUR COST (FOR A LIMITED TIME): \$297**

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Visit <http://thenonprofitacademy.com/products/homestudy/> for more information. **TAKE AN ADDITIONAL \$100 OFF** when you order by January 17 and use the coupon code: **WORKSHEETS**

I’m really looking forward to helping you!

Warm regards,



Kirsten Bullock  
Nonprofit Coach

**P.S. Don’t put off** taking the steps that will help you **turn things around for your organization**. Order your copy of the Home Study System today!