



MY BEST FUNDRAISING PLAN WORKSHEETS

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GET **FULLY**
FUNDED

THE FINE PRINT

My Best Fundraising Plan Worksheets

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Got questions? Need clarification? Contact us at support@getfullyfunded.com.

Please use these materials! If you do nothing with them, nothing will happen.

I know that when used properly, the information in these can be game-changing for your nonprofit. However, I cannot guarantee anything. Your results are up to you.

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Dear reader,

I'm so excited to bring you My Best Fundraising Plan Worksheets!

These are tools that I created for myself over the years. I've used them and loved them, and I hope you will, too.

The main purpose of using planning worksheets is so you can be proactive and not reactive – working on purpose makes all the difference in the world in successfully raising money.

You won't find a lot of fluff here. Instead, you'll find practical, usable templates and worksheets that will help you create the best plan you've ever had for fundraising.

My favorite thing to do is to give nonprofits the tools to develop a vibrant donor base, spread the word about their cause, and build a strong Board of Directors. That's why I'm so happy to get these worksheets in your hands!

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

Warmly,

A handwritten signature in black ink that reads "Sandy".

Sandy Rees
Fundraising Coach

Simple Success Fundraising Plan Self Assessment

Evaluating your organizational strengths, weaknesses, and capacity for fundraising is a great place to start with pre-planning. Sometimes the simple exercise of collecting and analyzing information can reveal areas where attention is needed.

Take the time to answer each question for your organization's fundraising efforts so you can get an accurate snapshot of your current fundraising program.

Organizational Information

Do you have appropriate registrations and permits to operate and fundraise? Yes No

Do you have a clear and easy-to-understand mission statement? Yes No

How much is your organization's annual budget? _____

What are the main sources of revenue? _____

How much revenue comes from fundraising? _____

Does your organization have a current, written strategic plan? Yes No

Does your organization have a current, written fundraising plan? Yes No

Do you have a budget for fundraising? Yes No

How much money do you have budgeted for fundraising expenses during the year? _____

Basis for Fundraising

Do you know why you need to raise money? Yes No

Do you have a written case for support? Yes No

In one easy sentence, why should someone give money to your organization? _____

Donor Base

Do you use a donor-tracking software? Yes No Which one? _____

How many donor names are in your donor data base? _____

How many of them made a donation in the last 15 months? _____

How do you track information about your donors and their gifts? (software?) _____

Do you track specific details about every gift, like the date, the amount, the gift type (check, cash, credit card, etc., and the reason for the gift)? Yes No

Do you have a policy for keeping donor information confidential? Yes No

Marketing

Do your organization and its leaders have name recognition in the community? Yes No

Do your organization and its leaders have a good reputation in the community? Yes No

Do you know who your typical donor is? Yes No

Have you developed a donor profile to identify the common donor demographics? Yes No

Do you have a relationship with the local media (tv, radio, newspaper)? Yes No

How many times during the past year have you been in the media? (estimate) _____

Do you create an annual report? Yes No

Do you have a basic brochure for your organization? Yes No

Do you seek out speaking opportunities in the community? Yes No

How many times in the past year has your organization made presentations to groups in the community? _____

Newsletter

What is your newsletter's purpose (is it to provide information, raise money, or both? Or something else?) _____

In a perfect world, how often would your newsletter go out? _____

In reality, how often does it go out? _____

When was the last time you sent out a newsletter? _____

Did you mail it to everyone on your list? _____

Do you include a reply envelope so that the recipient could send a gift back to you? Yes No

Direct Mail

Do you send fundraising letters through the mail to your donors? Yes No

How many times each year do you mail fundraising letters? _____

Who writes the letter? _____

How do you decide who to mail to? _____

Do you ever rent lists of names to mail to? Yes No

How do you decide if the mailing was successful? _____

Grant Writing

How many grant proposals did your organization submit last year? _____

How many were funded? _____

Do you have a grant calendar or a list of the proposals you will submit this year? Yes No

Who writes the grant proposals? _____

Who researches new grant opportunities? _____

Acknowledgement & Recognition

How often do you change your standard Thank You letter? _____

How long does it usually take you to get a Thank You letter in the mail to a donor? _____

Do you do anything else to thank donors? Yes No

Major Donors

How do you define a Major Donor? (\$500, \$1000, etc.) _____

Do you know without looking how many major donors you have? Yes No

Do you know without looking who your major donors are? Yes No

What do you do to cultivate relationships with major donors? _____

Special Events

How many special events does your organization hold each year? _____

Who is largely responsible for organizing the event, staff or volunteers? _____

Do you recruit corporate sponsors for your events? Are you successful in getting them? _____

Do you recruit media sponsors for your events? Are you successful in getting them? _____

How do you decide if the event was successful? _____

Online

Does your organization have a website? What's the address? _____

How often is your website updated? _____

Is there an easily-recognized "Donate Now" button on your website? Yes No

Is there a way to capture visitors' names and email addresses on your website? Yes No

Do you have a blog? How often do you post? _____

Do you send out an electronic newsletter? Yes No

How often do you send out the electronic newsletter? _____

Is it different than your print newsletter? Yes No

Do you have a presence on Facebook, Twitter or other social media? Yes No

How often do you share information on each? _____

Personnel

Do you have a staff person whose sole job is fundraising? Yes No

Does this person attend Board meetings? Yes No

What skills do you have to fundraise? _____

What skills do other staff, Board, and volunteers have to help you fundraise? _____

Is there training you need? _____

Is your Board willing to help with fundraising? _____

Does the Board have a Fundraising Committee? Yes No

Do each one of your Board members make a personal financial gift? Yes No

Do you belong to a professional association? Yes No

Do you follow a fundraising code of ethics? Yes No

Do you follow the Donor Bill of Rights? Yes No

Simple Success Summary Calendar Template

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

Simple Success Strategy & Goal Worksheet

Year: _____

Strategy	Description	Target Audience	Revenue Goal	Projected Cost	Who is responsible?	When?
Grants						
Events						
Individual donors						
Major gifts						
Marketing						
Communications						
Other						
Totals						

Simple Success Action Step Detail Worksheet

Objective : _____

Action Step	Who will do it?	When will it happen?	What resources are needed?
Step 1			
Step 2			
Step 3			
Step 4			
Step 5			
Step 6			

Simple Success Monthly Checklist

Month/Year:

Date Completed	Item
1. 2. 3. 4.	Fundraising Management <ol style="list-style-type: none"> 1. Compare actual revenue from the month to budget. 2. Compare actual expenses from the month to budget. 3. What adjustments need to be made for the coming month? 4.
1. 2. 3.	New Donors <ol style="list-style-type: none"> 1. How many new donors made gifts this month? 2. Call and thank new donors. 3.
1. 2. 3.	Donor Acknowledgement <ol style="list-style-type: none"> 1. Update “thank you” letter text 2. Email Board members with names/phone numbers of donors to thank from previous month 3.
1. 2. 3. 4.	Grants <ol style="list-style-type: none"> 1. Identify upcoming proposal deadlines 2. Check to see if any follow-up is needed on outstanding proposals 3. Check to see if any reports are due 4.
1. 2.	Special Events <ol style="list-style-type: none"> 1. What activities need to happen this month in support of upcoming special events? 2.
1. 2. 3.	Direct Mail <ol style="list-style-type: none"> 1. What activities need to happen this month in support of the next upcoming direct mail letter? 2. Update direct mail campaign tracking sheets. 3.
1. 2. 3.	Major Gifts <ol style="list-style-type: none"> 1. Review your list of top 10 donors 2. Choose 2 to visit during the coming month 3. Schedule visits

4.	4.
1. 2. 3.	Lapsed Donors 1. Pull list of recently lapsed donors and send hand-written cards 2. Call those who have renewed during the month to thank them 3.
1. 2. 3.	Newsletter 1. What activities need to happen this month in support of the next upcoming newsletter? 2. Update newsletter campaign tracking sheets. 3.
1. 2. 3. 4. 5. 6. 7.	Marketing 1. How many times did the organization appear in the news or gain exposure during the month? 2. What media exposure is planned for the coming month? 3. Were appropriate “thank you” notes sent to the media reps? 4. How many speaking engagements or presentations did the organization provide during the month? 5. What speaking engagements or presentations are planned for the coming month? 6. Were appropriate “thank you” notes sent? 7.
1. 2.	Miscellaneous 1. Were appropriate memorial and honorarium notices sent? 2.

READY FOR MORE?

There are more worksheets and detailed explanations in my **Simple Success Fundraising Plan**.

In this do-it-yourself kit, you'll get a blueprint to follow through each of the major components of fundraising that you should be implementing, starting with your organization's strategic goals.



Just follow along and complete the worksheets, and you'll have a plan to raise all the money you need for 2015.

Here's what you'll create using this do-it-yourself kit:

- Specific fundraising goals for your organization
- Your top fundraising strategies for the year
- Your top marketing strategies for the year
- Simple Case for Support
- Customized monthly checklist to stay on track
- Work plans for each strategy

I can remember the first year that I created and used some of these tools – it was very exciting! I was thrilled each time a large gift came in, so much so that I usually did laps around the office to celebrate! I'd love for you to have the same experience!

Here's what you get in the Simple Success Fundraising Plan:

- 100+ page workbook in a 3-ring binder
- 28 worksheets, templates, and samples
- Data CD containing Word versions of the worksheets so you can customize them
- Sample fundraising plan

Want a discount? Sign up at www.getfullyfunded.com/grow and receive a coupon code for 50% off!

ABOUT SANDY REES

I'm Sandy Rees, creator of the Get Fully Funded system for attracting donors.

I'm a fund-raising coach, and I love showing mission-driven nonprofit organizations how to raise all the money they need.



My favorite thing to do is to give nonprofits the tools to develop a vibrant donor base, spread the word about their cause, and build a strong Board of Directors. I love seeing them “get it” about fundraising and I love being there to celebrate their successes with them.

My personal Fundraising Beliefs:

- Every non-profit organization with a compelling mission can be fully funded.
- The best fundraising is based on relationships with donors.
- Donor relations and gift acknowledgement are critical to successful fundraising.
- Heartfelt passion is the key to attracting support.

What's ‘Get Fully Funded’ about?

‘Get Fully Funded’ is a concept I started mulling over many years ago. I was working at the local Food Bank and it was February. If you’re not familiar with food banking, winter is not a good time for food donations. Our shelves were empty and it bothered me. I knew that many of the food pantries we supported relied on us for canned goods, and when we didn’t have them, they didn’t have them. I shared my concerns with my Executive Director and she said “we never have cans this time of year.” I was stunned. Somehow, she accepted the status quo. But it was NOT okay with me! So I set out to do something about it. I started figuring out how to shift some big food drives from the Fall to Winter. I recruited new food drives. I turned over every rock to find other ways to get food into the warehouse during the low times. And guess what? The next year, we had canned goods in the warehouse in February.

Bottom line - I changed the status quo!

Fast forward to today. I’m now a coach and consultant, and spend my days doing what I love: helping nonprofits make a difference in the world. I challenge my clients to be the best they can be and I expect the same level of “no excuses” work from them that I used to be successful when I sat in the Development chair. That’s what it takes to Get Fully Funded.

Read more about me and the Get Fully Funded movement at www.GetFullyFunded.com.