

Creating a Fundraising Development Plan

Ten Steps to Make a Successful Plan

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Why Plan?

Research reveals that a key indicator of fundraising success is having a plan. A development plan sets goals that promote sustainability and growth as well as create ownership among team members.

Fundraising plans can also alleviate the need for crisis fundraising. They enable you to track progress, identify challenges in real time, balance your priorities, and avoid competing timelines.

This document walks you through creating a nonprofit development plan step by step.



Step 1: Gather past information

Start with information you already know!

- Complete the chart below with information from the last two year’s fundraising activities, current year-to-date figures, and projections for next year.
- Sources listed are just examples; replace with those that best suit your organization.
- Organization financials are helpful resources to inform this exercise.

Source	FY17 Income	FY17 Expense	FY18 Income	FY18 Expense	FY19 Income	FY19 Expense	FY20 Income	FY20 Expense
Individual donor email								
Individual donor meeting								
Events								
Online – not campaign								
Online - crowdfunding								
Membership								
Earned Income								
Government								
Foundations								
Corporations								
In-Kind								
Bequests								
Totals								



Step 2: Analyze past information

Think about your different fundraising strategies in light of the data on the prior page. Based on your analysis, consider and respond to the following:



Take time
to reflect.

- Where were your biggest successes or challenges?
- Where is the greatest potential for growth?
- Where should you devote more time?
- Which areas are not producing and why?
- Are there areas that might be eliminated?
- Where can you involve more board members and volunteers?
- If you had a larger budget for fundraising, which areas would you invest in more?



Step 3: Evaluate the current climate

Fundraising goals are often based on how much money is needed to balance your budget. While this seems to make sense on the surface, that number does not reflect your ability to raise that amount of money. There is a better likelihood of success in basing the fundraising goal on the criteria that affects your ability to raise money, including past performance and internal and external factors. This is the number to use to inform your budget.

A sensible way to set realistic goals.

Internal Factors	External Factors
What is happening inside your organization that could impact fundraising?	Are there economic factors that have or will affect your fundraising?
Are there opportunities that could be used for fundraising, such as a special anniversary or a new leader or program?	What other external factors could have an impact – tax laws, politics, giving trends among donors, environmental?
Have there been changes on your board?	
How much fundraising experience does your staff and board have?	
How much attention do you give donor relations?	
Do you have any prospects already in the pipeline or are you starting from scratch?	



Step 4: Who is on your team?

The more people you have helping you fundraise, the more capacity you will have to build high-quality relationships with donors, build engagement, and raise more funds. Use the chart below to start brainstorming who you can recruit for your fundraising team.

Everyone has a role in fundraising.

Who?	How many?	How could they help?
Staff – think broadly, there are roles for everyone		
Board members		
Volunteers – including former board and staff members, etc.		
Key donors		
Organizational allies		
Who else?		



Step 5: Set your goals

Background information helps in setting goals. Consider two kinds of goals for your fundraising plan: strategic goals and financial goals.

- **Strategic goals** – These are non-monetary goals related to your development program and could include purchasing donor database software or improving database practices so that donor reports are consistently correct, starting a quarterly e-newsletter or a monthly giving campaign, find one board member who is interested in fundraising, becoming less dependent on foundation funding, etc.



What are your strategic goals for the coming year?

- **Financial goals** – These are more traditional fundraising goals. How much do you hope to raise and from where? The rest of this document will help you answer these questions...



Step 6: What activities will be part of your plan?

When you consider fundraising activities for your plan, think about it from three perspectives: acquiring new funders, renewing current supporters, increasing the size of current donor gifts. Think about asking for funding in a variety of ways: in person, by phone, online, email, events, written proposal, etc. Integrate ongoing donor relations into your plan, not just at the time of solicitation.

Utilize team members' strengths to reach more donors, in better ways.

Financial/Solicitation	
Acquire	<p>How will you identify and acquire new donors?</p> <p>What has worked in the past?</p> <p>What new strategies might you consider?</p>
Renew	<p>How will you approach current donors about renewing their support?</p> <p>What methods will you use?</p>
Upgrade	<p>Motivating supporters to consider larger gifts usually requires a more personal touch, including individual letters, personal calls, and in-person meetings.</p> <p>What you consider a large gift will depend on your donor base?</p> <p>What will you do to move supporters to increase their donation?</p>

Donor Relations
<p>What will you do to build closer relationships with all categories of donors- prospects, new funders, and consistent supporters?</p> <p>Implement donor contacts and communications that don't include asking for money. Options include welcome kits for new donors, thank you calls and notes, invitations to no-cost events, surveys, and focus groups.</p>



Step 7: What will you do when?

Once you determine the strategies you plan to use, add them to a timeline. Some items will happen at certain times and others will be ongoing. In planning, consider workflow, special events or projects, holidays, and vacation times.

You're more likely to complete a task if you schedule it!

Month	Financial/Solicitation	Donor Relations
January		
February		
March		
April		
May		
June		
July		
August		
September		
October		
November		
December		



Step 8: Fill in the details

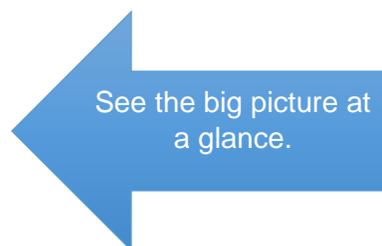
For each strategy that you plan to use, complete a page with the following information:

Strategy: _____

Projected gross income: _____

Total cost (use chart below): _____

Net income after expenses: _____



Goals strategy will meet (donor appreciation/acquisition, publicity, board engagement, etc.):

Number of staff needed _____

Number of volunteers needed _____

Expenses: Cost of executing this strategy

Expense	Cost	Notes
Staff time		
Consultant services		
Design		
Printing		
Travel/Transportation		
Food		
Materials		
Technology		
Other:		
Total		

Strategy steps to complete:

Deadline	Task	Person Responsible



Step 9: Compile the plan

Record all elements of your plan on one chart to show fundraising activities, how much you intend to raise, from whom, when, who will do what, and how much it will cost. The following worksheet starts with a few examples.

The full plan feels doable because you compiled all of the info to get here.

Strategy	Goal	Target Audience	Description	When	Who	Cost
Year-end crowdfunding campaign	\$25,000	Current donors, prospects, groups that have visit, neighbors, friends of organization	Crowdfunding campaign with mass and individualized email notes, social media posts that include video	Dec. 1 - 31	Philanthropy manager, consultant for social media, team members for identified outreach	\$4,500 - staffing, consulting, ads
Founders Circle campaign	\$100,000	Recurring, new donors at minimum \$3,600/yr.	Email/phone solicitations with program update, participant stories	Ongoing-solicitation made just prior to gift anniversary date	Philanthropy manager, executive director	\$15,000 - staff time
Community Foundation Grant	\$50,000	Program officer, review committee	Grant proposal on education program	Due April 1	Contract grant writer, philanthropy manager	\$1,800 – staff, contractor time
Total Income:					Total Cost:	



Step 10: How will you evaluate progress?

In fundraising, success is usually measured by how much money is raised, whether you are able to make budget, etc. There are other factors that could also be included in evaluating the success of your fundraising program and annual development plan.

This will make next

year's plan easier...

In addition to your financial goals, you can track and measure:

- Number of contacts with donors
- Number of donors who renew support compared to the year before (your donor retention rate; reverse is your donor attrition rate)
- Number of donors who increase support or give more than once a year
- Number of new donors
- Number of donors who attended events
- New volunteers and new board members involved in fundraising
- Number of first-time donors who become regular donors (your conversion rate)
- Number of prospects identified and the percent of those who become donors

The impact of donor relations can also be evaluated. You can measure:

- Frequency of contact with donors without asking for a gift
- Number of ways donors participate in your organization
- How often donors refer others to your organization
- Diversity and frequency of your contact with donors