Grassroots Institute for Fundraising Training
Thank you for purchasing the Creating an Annual Fundraising Plan Webinar on Demand!

These are the PPT slides. Please visit:

http://www.grassrootsfundraising.org/fundraisingplan/

to access the Audio (mp3) file.

The password to access the page is GIFT2013ph
The Grassroots Institute for Fundraising Training (GIFT) provides training, resources and analysis to help organizations raise more money and be accountable to their communities. We focus especially on groups working on social justice issues and based in communities of color.

Some of GIFT’s programs include:

• The Grassroots Fundraising Journal—a bimonthly magazine with tips, tools and inspiration to help you become a better fundraiser!

Call us today 510-452-4520 x303 to start your subscription for just $30!

You can also subscribe online at www.grassrootsfundraising.org/30. Just choose the $39 rate and enter the coupon code “30” on the second page to get the special intro rate.

• Training and Consulting Services

• Money for Our Movements: A Social Justice Fundraising Conference.
Creating an Annual Fundraising Plan

- Developing an organizational fundraising strategy
- Designing the planning process
- Starting with data
- Components of the plan
- Understanding your donor audience
- Pulling it together

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No shortage of strategies

Sources:
Government
Foundations
Donor-advised funds
Corporations
Major donors
Grassroots donors
Houses of worship
Unions
Nonprofit organizations
In-kind donations
Etc

Strategies:
Grantwriting
Mail appeals
Face to face asks
Online fundraising
Events
Passing the hat
Charging fees
Selling items or services
Cause-related marketing
Having a for-profit arm
Etc

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Questions to Ask

- Who should pay for the work your organization does (putting aside issues of whether they can or will)?

- What kind of funding does your organization need most?

- Who should be involved in fundraising for your organization?

- How should funders and donors be involved in the work of your organization?

- What strategy would most resonate with your constituents?
Honing Your Strategies

Program and Budget
Organizational Values
Stakeholders and Capacity

Fundraising Plan

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Looking at overall health

The Donor Pyramid
For a healthy individual donor base

% of Donors | % of Dollars
---|---
10% | 60%
20% | 20%
70% | 20%

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Designing the planning process

### Who

<table>
<thead>
<tr>
<th>Name/Groups</th>
<th>Decider</th>
<th>Accountable</th>
<th>Responsible</th>
<th>Consulted</th>
<th>Informed</th>
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</table>

### When

<table>
<thead>
<tr>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
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</thead>
<tbody>
<tr>
<td>Launch the new plan</td>
<td>Check-in and update</td>
<td>Check-in and update</td>
<td>Evaluate and create</td>
</tr>
</tbody>
</table>
The Planning Process

1. Temperature check with key stakeholders
2. Review or discuss organizational values
3. Evaluate last year’s plan and goals
4. Set goals for this year’s plan
   - Fundraising
   - Infrastructure
   - Relationship-building
5. Look at program events, special occasions, key opportunities
6. Identify main donor audiences
7. Decide on main activities
8. Create a loose calendar
9. Clarify the check-in and accountability process
10. Plan out details, tasks, deadlines
11. Run by key stakeholders
12. Finalize and adopt
Data to get started

- How much money do we need?
- How much money can we spend on fundraising?
- Are there times of the year that we really need funds?
- What are our typical giving ranges?
- How many donors do we have in each giving range?
- When are program events that we can connect to fundraising?

<table>
<thead>
<tr>
<th>Information that will help inform our fundraising plan</th>
<th>Have</th>
<th>Need</th>
<th>Not Applicable</th>
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<tbody>
<tr>
<td>Last fiscal year’s income and expense</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>This fiscal year’s budget</td>
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<td></td>
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<tr>
<td>Last year’s fundraising plan</td>
<td></td>
<td></td>
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<tr>
<td>Cash flow statement</td>
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<tr>
<td>Fundraising assessment</td>
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<tr>
<td>Grant proposal calendar</td>
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## Components of the Plan

<table>
<thead>
<tr>
<th>Category</th>
<th>Strategy &amp; Audience</th>
<th>Goal</th>
<th>Steps</th>
<th>Who</th>
<th>When</th>
<th>Cost</th>
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</thead>
<tbody>
<tr>
<td>Sources</td>
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<td></td>
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<tr>
<td>Infrastructure</td>
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<td>Relationship-Building</td>
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<td><strong>Individual Donors</strong></td>
<td></td>
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<tr>
<td>$100,000</td>
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<tr>
<td>Major Donor</td>
<td></td>
<td>$15,000 from 20 renewed major donors</td>
<td>1. Prep campaign materials, donor list, and board members</td>
<td>ED, DD, board chair</td>
<td>March, April</td>
<td>None</td>
</tr>
<tr>
<td>Campaign</td>
<td>All current major</td>
<td>$10,000 from 20 upgraded donors</td>
<td>2. Send renewal letters to current and letters announcing campaign to prospects</td>
<td>DD, board</td>
<td>April, May</td>
<td>$100</td>
</tr>
<tr>
<td></td>
<td>donors, all current</td>
<td></td>
<td></td>
<td>board</td>
<td>June</td>
<td></td>
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<tr>
<td></td>
<td>donors giving at</td>
<td></td>
<td></td>
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<td>$100 for food/mileage</td>
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<td>least $250</td>
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<tr>
<td>Membership Renewals</td>
<td></td>
<td>$10,000 from 500 renewed members</td>
<td>1. Prep letter and member list</td>
<td>DD, Organizer for all</td>
<td>August</td>
<td>None</td>
</tr>
<tr>
<td>All current members</td>
<td></td>
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<td>2. Send renewal letters to all</td>
<td></td>
<td>September</td>
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<td>3. Hold member phonebank</td>
<td></td>
<td>October</td>
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<td>4. Have all gifts secured</td>
<td></td>
<td>November</td>
<td></td>
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<td></td>
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<td>$500</td>
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</tbody>
</table>

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Starting with Audience

Impulse / New Donors (Acquisition)

Habitual / Current Donors (Retention)

Thoughtful / Major Donors (Upgrading)

Estate / Lifelong Donors (Planned Giving)
### Strategy Planning Guide

#### Strategy:
- **□** Acquisition
- **□** Retention
- **□** Upgrading

#### Audience description:
- **Number of prospects:**

#### Goals:
- **$**
- # of donors
- % response rate
- Other

#### Costs:

#### Gift Range Chart

<table>
<thead>
<tr>
<th>Gift amount</th>
<th>Donors needed</th>
<th>Prospects Needed</th>
<th>Total amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$5,000</td>
<td>1</td>
<td>3</td>
<td>$5,000</td>
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<tr>
<td>$1,000</td>
<td>5</td>
<td>15</td>
<td>$5,000</td>
</tr>
<tr>
<td>$500</td>
<td>15</td>
<td>45</td>
<td>$7,500</td>
</tr>
<tr>
<td>$100</td>
<td>25</td>
<td>75</td>
<td>$2,500</td>
</tr>
<tr>
<td>Under $100</td>
<td>100</td>
<td>300</td>
<td>$5,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>146</strong></td>
<td><strong>438</strong></td>
<td><strong>$25,000</strong></td>
</tr>
</tbody>
</table>

#### Tasks & Timeline:
Recommended Resources

Subscribers to the *Grassroots Fundraising Journal* get the online archive for free:

- **The Fundraising Summit: Creating a Shared Vision** by Ari Wohlfeiler
- **Shaping the Future: Fundraising Evaluation to Build Capacity & Involvement** by Judy Levine
- **Just Tell Me: What’s the Best Way to Raise Money?** by Jan Masaoka
- **How to Plan Your Fundraising Strategy: Keep Your Organization Financially on Track with a Year-Round Plan** by Pat Munoz and Liz Raisbeck
- **Grassroots Fundraising Strategy Chart** by Mimi Ho
- **Fundraising Planning Worksheet** by Stephanie Roth, Mimi Ho, and Priscilla Hung
- **Creating a Budget for Fundraising** by Octavia Morgan

[Recommended Resources](www.grassrootsfundraising.org)