

DESIGNING YOUR FUNDRAISING PLAN

*Setting A Course
for Sustainability*



AdvancementDesigns.com

Congratulations!

By asking for this workbook, you are saying that you no longer want to:

- **keep doing events** even though you are not sure they are **worth the time and effort**
- just send out your usual mail solicitation because **that is what you have always done**
- **be in the dark** about when people make gifts
- wonder who are your most consistent donors

Through measuring and evaluating your current efforts, you will be able to identify potential opportunities (*caution: with every opportunity comes potential obstacles*). Sometimes those opportunities come from **eliminating things that aren't as effective** as we might have thought.

This understanding will help you set more effective goals and develop the critical action steps that will help you:

- **feel less overwhelmed** by expectations and responsibilities
- focus on the key items that will **move your organization forward**
- have the data to **confidently make needed changes**
- **provide a better experience** for your donors and potential donors

AND most importantly, help you have **clarity, direction, and raise more money for your organization.**

If you have questions, are struggling with the forms, or not quite sure what to do with the data you have put together, please go to www.AdvancementDesigns.com and sign up for an Immediate Impact call.

Here's to your success,

Tom

Tom Brush
CEO/Founder
Advancement Designs
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Fundraising & Sustainability Plan

Organizational Mission

Overall Fundraising Goal

Events Goal

Individual Giving Goal

Corporate & Foundation Giving Goal

Stewardship Goal

Communications Goal

Event Worksheet

Event Name: _____

Goals: 1. _____

2. _____

3. _____

Outcomes: 1. _____

2. _____

3. _____

Financial Outcome: \$ _____

Staff Hours Invested: _____

Volunteer Hours Invested: _____

Evaluation: _____

Individual Giving – Top Donors

Directions: Enter Name – Amount or Years – Where they are in the donor cycle

Top Donors – Total Dollars

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____

Top Donors – Consecutive Giving (Years)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____

Top Donors – Largest Individual Gift

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

7. _____
8. _____
9. _____
10. _____
11. _____
12. _____

Individual Giving – Broad Outreach

Direct Mail

Email Appeal

Name of Appeal: _____

Date Sent: _____

Key Messaging: 1. _____

2. _____

3. _____

Target Audience: _____

How did you pick the target audience?

Total Mail/Email Sent: _____

Total # of Gifts Received: _____

Total Dollars Raised: _____

Largest Gift: _____

Average Gift: _____

Return Rate: _____

(Gifts/Total Sent)

Cost of Mailing:

Letter/flyer/brochure _____

Postage _____

Total Cost _____

Return on Investment: _____

(Gift Total – Total Cost)

Cost to Raise a Dollar: _____

(Cost of Mailing/Total Raised)

Individual Giving – Giving Statistics

2018	Gifts by Mail			Online Gifts	
Month	# of Gifts	Total Dollars		# of Gifts	Total Dollars
January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					

2017	Gifts by Mail			Online Gifts	
Month	# of Gifts	Total Dollars		# of Gifts	Total Dollars
January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					

Individual Giving – Giving Statistics

2016	Gifts by Mail			Online Gifts	
Month	# of Gifts	Total Dollars		# of Gifts	Total Dollars
January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					

2015	Gifts by Mail			Online Gifts	
Month	# of Gifts	Total Dollars		# of Gifts	Total Dollars
January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					

Corporate Giving

Donors or Prospects

Connection

Current Support

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____



Online Giving

How visible is the link to make a gift?

List all the methods you use to drive them to your site?

How many different giving levels do you offer on page? Why are they listed?

How many steps does it take to get from "Donate Now" to complete the gift?

How many fields do they have to fill out?

What does the page look like after they hit "Submit Gift"

Do they get an email thank you?
What does that look like?

Do they get an immediate receipt?
What does that look like?

Is there any additional follow-up?
What does that look like?

Stewardship Worksheet

Stewardship Item	Giving Level						

Opportunities & Obstacles Worksheet

Opportunities:

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

Obstacles:

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____



Goal Specific Action Plans

Overall Goal

Action Item

Action Item

Action Item

Action Item

Action Item



Prioritization Worksheet

(Can be used by month, week, or day)

Timeframe: _____

I. Things to help me complete action items:

(to be completed when you do your best work)

1. _____
2. _____
3. _____

II. Things that are required as a part of my role:

(to be completed when you are least productive)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

III. Things that are important, but not critical or required:

(to be completed in between the other two)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____





Tom Brush is a nonprofit consultant/coach who partners with nonprofit leaders and organizations to design strategies to further engagement with their constituencies, effectively manage volunteers and boards, increase donations from individuals, corporations, and foundations, and creatively steward donors. After spending nearly 25 years working in development and involvement with nonprofits, Tom knows what drives engagement and increases giving.

In that time, Tom has worked on four comprehensive fundraising campaigns which all achieved their goal; built and managed annual fundraising appeals that have increased giving; developed engagement and communications plans that increased participation; identified, cultivated, solicited and steward major gift prospects for gifts up to \$250,000; and created and directed events that increased net revenue.

As the founder of Advancement Designs, Tom has supported nonprofits of all sizes and has strong connections in the higher education advancement industry. Twice he has been on the planning committee of the CASE District II annual conference planning committee. He has regularly presented at conferences and in front of groups large and small.

Serving as an Associate Consultant with the Maryland Association of Nonprofits (MANO), Tom holds a Bachelor's degree, an MBA, and has served as president of two nonprofit boards.

Outside of his passion for consulting and coaching nonprofit professionals and organizations, Tom loves to network, connect with other professionals and officiate girls and women's lacrosse.

As a result of working with Tom, nonprofits have **focused their efforts enabling them to spend more time engaging, soliciting and steward their donors generating more support and revenue for their organization.**

[Click here to book an Immediate Impact session and find out how you too can design strategies to quickly focus your efforts and raise more resources for your organization.](#)



— ” —

Tom has a wealth of knowledge, which he is eager to share. Tom listened to and understood our current needs and provided feedback catered to our organization. He was very well prepared for the call, researching our organization in advance so that he had a good foundational understanding of our work. I know that our organization will benefit from Tom's feedback and suggestions!

— ” —

MAGGIE R., DIRECTOR
LORI'S HANDS



— ” —

As you probably remember the Board set my EOY fundraising goal at \$160,000 (operating burn to last until the gala in May). They themselves pledged \$10K. Taking your advice I leveraged that with about 10 donors and leveraged the matches against other matches and had a couple of "last minute" EOY type family foundations offer us grants. All in, all done, I raised (with my team and God's provision OF COURSE) \$239,000. VERY HAPPY – thank you for all your counsel & advice!!! It was SUPER helpful.

— ” —

SUELLEN D.
MEALS BY GRACE



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