# 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 through 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 <u>www.AdvancementDesigns.com</u> and sign up for an Immediate Impact call.

Here's to your success,

#### Tom

Tom Brush CEO/Founder Advancement Designs Tom@AdvancementDesigns.com



## Fundraising & Sustainability Plan

**Organizational Mission** 

**Overall Fundraising Goal** 

**Events Goal** 

**Individual Giving Goal** 

**Corporate & Foundation Giving Goal** 

**Stewardship Goal** 

**Communications Goal** 

ADVANCEMENT DESIGNS 2019

## **Event Worksheet**

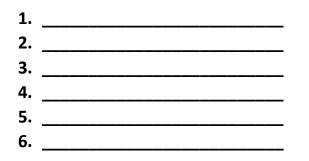
Event Name:		
Goals:		
	2	 
	3	 
Outcomes:	1	 
	2	 
Financial Outcom	e:	\$
Staff Hours Invest	ed:	
Volunteer Hours I	nvested:	 -
Evaluation:		 

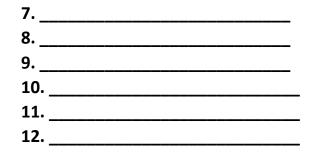
## **Individual Giving – Top Donors**

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

Top Donors – Total Dollars	<b>Top Donors – Consecutive Giving (Years)</b>
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	11
12	12
13	13
14	14
15	15
16	16
17	17
18	18
19	19
20	20

#### **Top Donors – Largest Individual Gift**







	•
Direct Mail	Email Appeal
Name of Appeal:	
Date Sent:	
Key Messaging:	1
	2
	3
Target Audience:	
How did you pick th	ie target audience?
Total Mail/Email Se	nt:
Total # of Gifts Rece	eived:
Total Dollars Raised	l:
Largest Gift:	
Average Gift:	
Return Rate: (Gifts/Total Sent)	
Cost of Mailing:	
Letter/flyer/b	rochure
Postage	
Total Cost	
Return on Investme (Gift Total – To	
Cost to Raise a Dolla (Cost of Mailing	

### Individual Giving – Broad Outreach

## Individual Giving – Giving Statistics

2018		ifts 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	G	ifts 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	G	ifts 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	G	iifts 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?	
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.	
0.	
4	
4.	
5.	
6.	
7.	
•••	

#### **Goal Specific Action Plans**

#### **Overall Goal**

#### **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.	
3.	
4.	
5.	



## **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 guickly focus your efforts and raise more resources for your organization.



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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 to 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.

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