

6 FIGURE FUNDRAISING PLAN

Sandy Rees
Chief Encouragement Officer

GET **FULLY**
FUNDED







NOT THIS:



WHAT YOU'LL GET TODAY:

- ▶ 5 ways people get stuck with planning
- ▶ 3 main goals you *MUST* include
- ▶ How to create an Impact Goal
- ▶ How to choose the right strategies for YOU
- ▶ Simple tool to get started planning

ABOUT ME



- Fundraising Coach
- Trainer
- Author
- Animal Lover

Me and Buddy





HERE'S MY STORY...

I WASN'T BORN WITH FUNDRAISING SKILLS...



I DIDN'T SIGN UP FOR FUNDRAISING AT CAREER DAY



WHERE I LEARNED IT WAS...



TODAY...



ALSO TODAY...



LET'S JUMP IN!



\$100,000!!

TRUTH #1:

When you raise more money,

You can change more lives.

TRUTH #2:

Working from a PLAN makes fundraising easier.

5 surprising reasons people don't plan

5 REASONS PEOPLE DON'T PLAN:

▶ Should-ing

5 REASONS PEOPLE DON'T PLAN:

- ▶ Should-ing
- ▶ Perfectionism

5 REASONS PEOPLE DON'T PLAN:

- ▶ Should-ing
- ▶ Perfectionism
- ▶ Rigidity

5 REASONS PEOPLE DON'T PLAN:

- ▶ Should-ing
- ▶ Perfectionism
- ▶ Rigidity
- ▶ Inadequacy

5 REASONS PEOPLE DON'T PLAN:

- ▶ Should-ing
- ▶ Perfectionism
- ▶ Rigidity
- ▶ Inadequacy
- ▶ Imposter Syndrome

BIG TAKEAWAY

Done is better than perfect.

Imperfect action will always win over inaction.

WITH A PLAN YOU'LL HAVE

- ▶ Focus
- ▶ Productivity
- ▶ Confidence
- ▶ Leverage



WITHOUT A PLAN...



7 steps to a simple, successful fundraising plan

7 STEPS TO A FUNDRAISING PLAN:

1. Learn from the past
2. Shine a guiding beacon
3. Set 3 critical targets
4. Put on your Super Cape
5. Choose the right strategies
6. Write it down!
7. Course correct

Step 1: Learn from the past



LOOK AT EACH PAST ACTIVITY

1. Did we get enough ROI?
2. Can we improve it?
3. Has it run its course?

REVIEW YOUR LIST AND ASK

- ▶ What should you **KEEP?**
- ▶ What should you **TWEAK?**
- ▶ What should you **DUMP?**

Never do something just because
you always have.

Do it because it WORKS!

Step 2: Shine a guiding beacon



SET AN IMPACT GOAL

What impact will your nonprofit have?

SET AN IMPACT GOAL

What impact will your nonprofit have?

For example,

“We’ll double the number of animals we save this year.”

Step 3: Set 3 critical targets

3 CRITICAL TARGETS

1. # dollars to raise



3 CRITICAL TARGETS

1. # dollars to raise
2. # donors to renew



3 CRITICAL TARGETS

1. # dollars to raise
2. # donors to renew
3. # donors to acquire



3 CRITICAL TARGETS

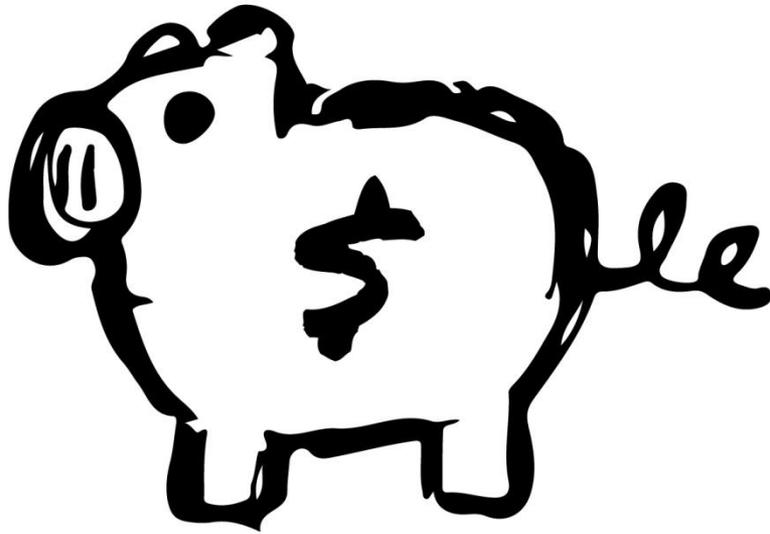
1. # dollars to raise
2. # donors to renew
3. # donors to acquire

How will each fundraising strategy help us reach these?



Step 4: Put on your Super Cape

ORGANIZATIONAL ASSETS



ORGANIZATIONAL ASSETS

- ▶ Name recognition
- ▶ Strong brand
- ▶ Well-known leaders
- ▶ Broad-reaching or well-loved cause
- ▶ Great facility or location
- ▶ Big donor base
- ▶ Dedicated volunteer base

PERSONAL STRENGTHS



UNIQUE BRILLIANCE

| | |
|--|--|
| | |
| | |

Step 5: Choose the right strategies

CHOOSE STRATEGIES



Keep everything
donor focused.



3 tools to help you choose the right strategies

TOOL #1: 1-10-10000 RULE

- ▶ 1 signature event



TOOL #1: 1-10-10000 RULE

- ▶ 1 signature event
- ▶ 10 grants



TOOL #1: 1-10-10000 RULE

- ▶ 1 signature event
- ▶ 10 grants
- ▶ 1,000 donors

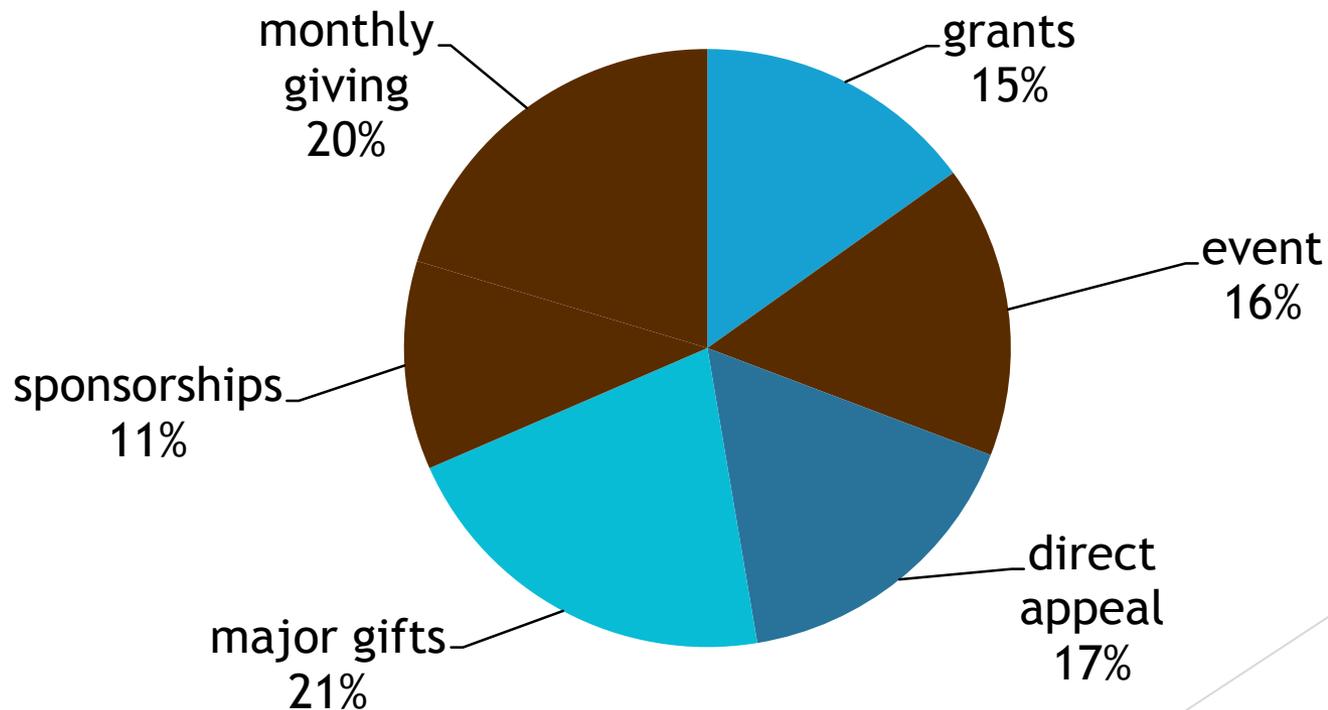


FUNDRAISING MATH

| | |
|----------------------------|-----------------|
| ▶ 1 Signature Event | \$25,000 |
| ▶ 10 Grants @ \$2,500 each | \$25,000 |
| ▶ 1,000 Donors @ \$50 each | <u>\$50,000</u> |
| | \$100,000 |

TOOL #2: 25% LIMIT

No single revenue stream should make up more than 25% of total revenue



TOOL #3: TYPE BALANCE

| Transactional | Transformational |
|---|------------------------|
| Selling candy bars, T-shirts, & calendars | Direct appeal |
| Golf tournaments, walks, runs | Monthly giving |
| Live or silent auctions | Sponsor a child/animal |
| Buffalo Wild Wings night | Major gifts |
| | Matching gifts |

Step 6:
Write it down!

If it's not in writing, it's not real!



WRITE IT DOWN!

FUNDRAISING PLAN TEMPLATE

GET FULLY FUNDED

FY: _____

Impact goal: _____

Targets:

1. _____
2. _____
3. _____

Fundraising Plan Summary

| Strategy | SMART GOAL | Projected dollars raised | # reserved donors | # new donors |
|-------------------|------------|--------------------------|-------------------|--------------|
| Events | | | | |
| Events | | | | |
| Individual donors | | | | |
| Major gifts | | | | |
| Other fundraising | | | | |
| Marketing | | | | |
| Communications | | | | |
| TOTAL | | | | |

©2011 Study Res. www.getfullyfunded.com
Fundraising Strategies Annual Fundraising Plan template

| | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Total |
|---|------|------|------|-------|-------|-------|-------|-------|-------|-------|-------|------|---------------|
| Public Support | | | | | | | | | | | | | 78500 |
| 4400 General Public Contributions | 2000 | 5000 | 4000 | 2500 | 8000 | 25000 | 20000 | 5000 | 2500 | 2000 | 2000 | 2000 | 80000 |
| 4415 Newsletter Contributions | 250 | 250 | 500 | 300 | 500 | 500 | 500 | 250 | 500 | 200 | 500 | 200 | 4450 |
| 4416 Local Direct Mail Contributions | 2000 | 5500 | 4000 | 2500 | 50000 | 25000 | 15000 | 5000 | 2000 | 2500 | 10000 | 1500 | 125000 |
| 4418 Hunger's Hope | 1000 | 1000 | 1000 | 1000 | 1000 | 1000 | 1000 | 1500 | 1500 | 1500 | 1500 | 1500 | 14500 |
| 4419 Major Donors | | | | | | | | | | | | | 0 |
| 4420 Other Misc Contributions | | 100 | 100 | 250 | 250 | 500 | 100 | | 100 | 100 | | | 1500 |
| new Lapsed Donor Renewals | | 100 | 200 | 500 | 500 | 1000 | 100 | 100 | | | | | 2500 |
| new Thank You Letter Contributions | 500 | 500 | 500 | 1000 | 2500 | 6000 | 3500 | 2500 | 1000 | 1000 | 500 | 500 | 20000 |
| Total | | | | | | | | | | | | | 247950 |
| Food Drive Projects | | | | | | | | | | | | | 8500 |
| 4405 Food Drive Contributions | | | | 100 | 5000 | 2500 | 500 | 100 | 100 | 100 | 100 | | 8500 |
| 4406 HSFC Contributions | | 500 | 1000 | 1000 | 5500 | | | | | | | | 8000 |
| 4410 Can Hunger | | | | 500 | 1500 | 1000 | | | | | | | 3000 |
| 4430 Tim Kerin Food Drive Contributions | | | | 25000 | | | | | | | | | 25000 |
| 4437 Construction | | | | | | 1000 | | | | | | | 1000 |
| Total | | | | | | | | | | | | | 45500 |
| Other Development Projects | | | | | | | | | | | | | 16000 |
| 4432 Hams for the Hungry | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 5000 | 10000 | 100 | 100 | 100 | 16000 |
| 4434 FICAH | | | | | | | | | | | | 1500 | 1500 |
| 4436 Pampered Chef | | | | | | | 1500 | | 1500 | | | | 3000 |
| new Holiday Ornement Contributions | | | | 2500 | 7500 | 5000 | | | | | | | 15000 |
| 4440 Food Procurement Campaign | | | | | | | | 5000 | | | | | 5000 |
| 4450 Other Development Projects | | | | 1000 | 1000 | 1000 | 1000 | 1000 | | | | | 5000 |
| Total | | | | | | | | | | | | | 46500 |
| Special Events | | | | | | | | | | | | | 90000 |
| 4501 Without Reservations | | | | | | 5000 | 5000 | 15000 | 20000 | 20000 | 20000 | 5000 | 90000 |

©2011 Study Res. www.getfullyfunded.com
Fundraising Strategies Annual Fundraising Plan template

1 PAGE FUNDRAISING PLAN

HORSE HAVEN FUNDRAISING CALENDAR

August-December 2017

| | Grants | Special Events | Individual donors (monthly giving, appeals, etc.) | Major gifts | Marketing (public speaking, news media, etc.) | Communications (newsletter, annual report, etc.) | Other (vacations, conferences, etc.) |
|-----|---|--------------------------------------|---|-------------------------|---|---|---|
| Aug | Scaife Fdn (9/1) | Back to School at the Barn | | 1-3 visits | | Email newsletter 8/31 | ACAT conference 8/14-15 |
| Sep | Aslan Foundation Doris Day (10/1) | TY video to 2017 Dancing sponsors | | 1-3 visits, 2-3 asks | TY Akima | Email newsletter 9/30 Print newsletter 9/5 TY video-horse sponsors New website live | Homes for Horses conference |
| Oct | | Boo at the Barn | Segmented appeal 10/16 | 1-3 visits, 2-3 asks | Pitch story | Email newsletter 10/31 | |
| Nov | Gus Hawthorne (11/20) | | Giving Tuesday 11/28 | 1-3 visits, 2-3 asks | Pitch story | Email newsletter 11/30 Thankathon 11/18 | |
| Dec | Brennan Equine Welfare Fund (1/1) Kenneth Scott (12/15) | | Year-end campaign (12/26-12/31) | 1-3 visits, 2-3 asks | Pitch story | Email newsletter 12/30 Holiday postcard | |

1 PAGE FUNDRAISING PLAN

HORSE HAVEN FUNDRAISING CALENDAR

ONE event

Spread the word
Big Bucks!

August-December 2017

Sharpen
the saw

| | Grants | Special Events | Individual donors (monthly giving, appeals, etc.) | Major gifts | Marketing (public speaking, news media, etc.) | Communications (newsletter, annual report, etc.) | Other (vacations, conferences, etc.) |
|-----|---|--------------------------------------|---|-------------------------|---|---|---|
| Aug | Scaife Fdn (9/1) | Back to School at the Barn | | 1-3 visits | | Email newsletter 8/31 | ACAT conference 8/14-15 |
| Sep | Aslan Foundation Doris Day (10/1) | TY video to 2017 Dancing sponsors | | 1-3 visits, 2-3 asks | TY Akima | Email newsletter 9/30 Print newsletter 9/5 TY video-horse sponsors New website live | Homes for Horses conference |
| Oct | | Boo at the Barn | Segmented appeal 10/16 | 1-3 visits, 2-3 asks | Pitch story | Email newsletter 10/31 | |
| Nov | Gus Hawthorne (11/20) | | Giving Tuesday 11/28 | 1-3 visits, 2-3 asks | Pitch story | Email newsletter 11/30 Thankathon 11/18 | |
| Dec | Brennan Equine Welfare Fund (1/1) Kenneth Scott (12/15) | | Year-end campaign 12/26-12/31 | 1-3 visits, 2-3 asks | Pitch story | Email newsletter 12/30 Holiday postcard | |

Fill this pipeline

25% Rule,
Type Balance

Don't neglect this!

GRAB YOURS --

Sandy's 1 Page Fundraising Plan

www.GetFullyFunded.com/Plan

SUMMARY CALENDAR TEMPLATE

Fundraising goal: Donor Retention goal: Donor Acquisition goal:

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

© Sandy Rees, 2010. The 1-Page Quick-and-Simple Fundraising Plan
www.GetFullyFunded.com 6

Step 7: Course correct

COURSE CORRECT

How will you stay on track?



NOW
WHAT?

GO DEEPER...



WHAT YOU'LL LEARN:

- ▶ Formula for a big, loyal donor base
- ▶ Grant finding secrets
- ▶ Simple formula for a results-getting newsletter
- ▶ Template for a record-breaking appeal
- ▶ Social media calendar
- ▶ And more!

HOW IT WORKS:

- ▶ Monthly training webinar
- ▶ Handouts and worksheets
- ▶ Online community
- ▶ Live Q&A time
- ▶ Samples & examples
- ▶ Weekly motivational email

SIGN UP!

- ▶ Special conference price: **\$35/month**
- ▶ *BONUS!* Free ticket to Fundraising Blueprint webinar series (\$147 value)



STAY IN TOUCH!

www.Facebook.com/GetFullyFunded

www.YouTube.com/SandyRees1

@SandyRees

www.ARFClub.com

www.GetFullyFunded.com/plan



SUMMER CALENDAR TEMPLATES

| | Fundraising grant: | | | Door-to-door grant: | | Door-to-door Acquisition grant: | |
|-----|--------------------|---------------|---|---------------------|---|---|---------------------------------|
| | Season | Special Event | Individual donors (monthly giving, direct mail, event appeal, etc.) | Major gifts | Commissions (certificates, rebates, event report, etc.) | Marketing/public speaking events, advertising, etc. | Other (rewards, training, etc.) |
| Jul | | | | | | | |
| Aug | | | | | | | |
| Sep | | | | | | | |
| Oct | | | | | | | |
| Nov | | | | | | | |
| Dec | | | | | | | |
| Jan | | | | | | | |
| Feb | | | | | | | |
| Mar | | | | | | | |
| Apr | | | | | | | |
| May | | | | | | | |
| Jun | | | | | | | |
| Jul | | | | | | | |
| Aug | | | | | | | |
| Sep | | | | | | | |
| Oct | | | | | | | |
| Nov | | | | | | | |
| Dec | | | | | | | |

© Sandy Rees, 2009. All Rights Reserved. Paper Copies and Single Fundraising Plan: www.GetFullyFunded.com