Fundraising Annual Plan

DONORVIEW

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The CLOUD Awards Celebrating 10 Years 2011 - 2021
FINALIST 2021-22

Software Suggest
Most Popular Software
WINTER 2022

AMERICA'S FASTEST-GROWING
Inc. 5000
PRIVATE COMPANIES

Capterra
SHORTLIST
2021

E EDISON AWARDS
2021 NOMINEE

GetApp
CATEGORY LEADERS
2021

The SaaS Awards
FINALIST 2021

Software Advice
FRONT RUNNERS
2021

Software Suggest
Best Usability
2021

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POLL – Annual Fundraising Plans

Has your organization created an annual fundraising plan in the past, and if so, how did that go?

1. No, this would be the first time we had a formal plan

2. Yes, we've had a plan, but didn't really use it

3. Yes, we've had a plan, but we didn't come close to any of our goals

4. Yes, we've had a plan, but we'd like to improve our process

5. Yes, we've had a plan and followed it with great success

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Annual Plans – What went wrong?

- Missing strategic plan and objectives
- Lofty goals
- Lack of action steps
- No analysis of previous results
- No schedule or accountability

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Annual Plans – Benefit

- Prioritize needs

- Assigns resources

- Team alignment

- Focuses attention

- Evaluate results for future improvement

Annual Goals

- ## Impact Goal

- ## Fundraising Goals
  - ### Operating
  - ### Capital

- ## KPI Targets

Impact Goal

- Clear objective everyone can rally around

- Easily demonstrates positive influence on community

- Measurable, specific, simple

- Stretch but achievable

Financial Goals

- Operating and Capital
- Based on objectives
- Projections for demand/need
- Fundraising usually focuses on revenue
- Don't lose sight of expenses

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Key Performance Indicators

- Chose a few related to objectives and revenue sources

- Evaluate previous KPIs and direction

- Identify the "whys"

- Utilize your CRM to generate reports

- Identify frequency of reports

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Implementation of Objectives

- Target month
- Method
- Activities
- Responsible
- Target date

Implementation of Objectives				
Objective	Purchase new CRM software			
Month	**Method**	**Activity**	**Responsible**	**Date**
Jan	Research	Provide short list of potential software to ED	Wong and Eli	1/31/2023
Feb	Interview	Set up demos to test software	Wong and Eli	2/28/2023
Mar	Present	Present short list of top 3 candidates and evaluate	Wong and Eli	3/31/2023
May	Convert	Begin cleaning data to prepare for conversion	Wong and Eli	5/31/2023
Jun	Convert	Turn over data for conversion and begin training	Eli	6/30/2023
Objective	Moves mangement program			
Month	**Method**	**Activity**	**Responsible**	**Date**
Feb	Research	Investigate different types of mm processes	Mendez	2/23/2023
Mar	Research	Ensure desired process works with new CRM	Wong & Mendez	3/31/2023
Jul	Implement	Begin new mm process and identify top candidates	Wong & Mendez	7/8/2023
Aug	Implement	Develop cultivation program for top donors	Mendez	8/24/2023
Objective	Apply for new grants			
Month	**Method**	**Activity**	**Responsible**	**Date**
Mar	Research	Indentify potential grant sources for busing	Washington	3/15/2023
Apr	Implement	Develop schedule for applications	Washington	4/25/2023
Jul	Implement	Apply schedule and grants to new CRM	Washington	7/26/2023
Sep	Implement	Report on grant status at board meeting	Washington	9/7/2023

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Sources of Revenue

- Source
- Constituent
- Current vs. New
- Delta

Revenue Sources						
Operating						
Source	Constituents	Current Revenue	Percent	New Revenue	New Percent	Delta
Annual Gifts	Individuals	$ 360,000	7%	$ 510,000	9%	42%
Special Appeals	Individuals	$ 20,000	0%	$ 80,000	1%	300%
Major Gifts	Individuals	$ 800,000	15%	$ 1,000,000	17%	25%
Online Giving	Individuals	$ 20,000	0%	$ 30,000	1%	50%
P2P Campaigns	Individuals	$ -	0%	$ 10,000	0%	New
Membership Dues	Individuals	$ 15,000	0%	$ 15,000	0%	0%
Planned Giving	Individuals	$ 25,000	0%	$ 25,000	0%	0%
Corporate Sponsorship	Corporate	$ 30,000	1%	$ 200,000	3%	567%
Event Sponsorships	Corporate	$ 100,000	2%	$ 200,000	3%	100%
Event Sales	Individuals	$ 100,000	2%	$ 200,000	3%	100%
Grants	Foundations	$ 4,000,000	73%	$ 3,500,000	60%	-13%
Service Fees	Clients	$ 30,000	1%	$ 30,000	1%	0%
Other	Other	$ -	0%	$ -	0%	0%
	TOTAL	$ 5,500,000	100%	$ 5,800,000	100%	

Sources of Revenue

- Large deltas?

- Is goal reasonable?

Revenue Sources

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		Operating				
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Other	Other	$ -	0%	$ -	0%	0%
	TOTAL	$ 5,500,000	100%	$ 5,800,000	100%	

Capital Projects

- Sources
- Projected Amounts
- Target Dates

Capital				
Project Name		**Project Budget**	**Amount Raised**	**Amount Needed**
Picnic and Outdoor Pavillion		$ 750,000	$ 200,000	$ 550,000
Funding Source	**Projected Amount**	**Target Date**		
Home Depot	$ 30,000	6/6/2023		
84 Lumber	$ 10,000	8/14/2023		
McMichaels	$ 15,000	8/14/2023		
Jensen	$ 25,000	8/14/2023		
	$ -			
Project Name		**Project Budget**	**Amount Raised**	**Amount Needed**
Renovate South Hampton Building		$ 200,000	$ 40,000	$ 160,000
Funding Source	**Projected Amount**	**Target Date**		
French	$ 5,000	7/15/2023		
Smith	$ 5,000	7/15/2023		
Johnson & Co	$ 10,000	12/31/2023		
	$ -			
	$ -			

Action Plans

- Month
- Method
- Activities
- Responsible
- Date
- Can add analytics

Action Plan					
Annual Gifts					
Month	**Method**	**Activity**		**Responsible**	**Date**
Sep	Email	Send 1st appeal for annual gift		Washington	9/10/2023
Oct	Email	Send 2nd appeal to those who haven't given yet		Washington	10/10/2023
Nov	Mail	Send 3rd appeal those who haven't given yet		Washington	11/10/2023
Nov	Phone	Call repeat donors who have not contributed yet		Wong	11/30/2023
Dec	Email	Send 4th appeal to those who haven't given yet		Washington	12/5/2023
Dec	Email	Send 5th appeal to those who haven't given yet		Washington	12/29/2023
Special Appeals					
Number Sent	5000	Target Response Rate	10%	Average Gift	$50
Month	**Method**	**Activity**		**Responsible**	**Date**
Feb	Mail	Send appeal to lapsed donors		Washington	2/10/2023
Mar	Email	Send follow up email to lapsed donors		Washington	3/31/2023

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POLL – Improving Response Rates

What is your favorite "tip" for improving direct mail annual and special appeal response rates?

1. Making the donor the hero – using "you" instead of "we"
2. Adding a great P.S. to the signature block
3. Adding stories from clients
4. Using a live stamp
5. Including a reply envelope
6. Hand addressed envelope

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Improving response rates – Make a plan

1. Making the donor the hero – using "you" instead of "we"
2. Adding a great P.S. to the signature block
3. Adding stories from clients
4. Using a live stamp
5. Including a reply envelope
6. Hand addressed envelope
7. Personalize your message
8. Update donors throughout the year
9. Try new channels
10. Add videos
11. Follow up with phone call

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Improving Response Rates – Make a plan

- Evaluate previous response rates

- Review your list

- Survey to identify their "why"

- Include your impact goal

- Focus on impact (more than outcomes)

- Don't forget the Call To Action (CTA)

- Use multiple tactics – letters, emails, texts, social

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Online Giving

- Choose your channel (surveys)

- Use channel analytics

- Identify your target

Online Giving					
# of Campaigns	4	Impressions	100000	Average Gift	$15
Clicks	400	Cost per Click	$0.30		
Month	**Method**	**Activity**		**Responsible**	**Date**
Feb	Social	Run Facebook campaign for summer camp		Peters	2/2/2023
May	Social	Run Facebook campaign for vaccination clinic		Peters	5/29/2023
Aug	Social	Run Facebook campaign for Back to School promo		Peters	8/1/2023
Nov	Social	Giving Tuesday campaign Facebook, Linkedin, TikTok		Peters	11/4/2023
Dec	Social	Year End campaign Facebook, Linkedin, TikTok		Peters	12/15/2023

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Online Giving – Improving Results

- Know your audience

- Establish purpose & goals (communications plan)

- Mobile Optimized

- Maintain branding – eye catching

- Impact goal & CTA

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Peer to Peer Campaigns

- Great for engagement
- Needs a PM
- Awards event

Peer to Peer Campaigns					
Number of Teams	20	**Number of Fundraisers**	100	**Average Gift**	$20
Number of Donors	500	**Target**	$10,000		
Month	**Method**	**Activity**		**Responsible**	**Date**
Jan	Invite	Identify 20 team leaders		Jefferson	1/25/2023
Feb	Plan	Team leader to training & planning		Jefferson	2/26/2023
Mar	Launch	Launch campaign for summer camp		Jefferson & Peters	3/22/2023
May	Wrap	Complete campagin		Jefferson & Peters	5/4/2023

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Peer to Peer Campaign Ideas

- Color Run/Walk/Ride

- Celebrity Chef

- Dance Competitions

- Christmas Tree Festivals

- Bowling/Kickball/Volleyball

- Park/Beach/Road Clean Up

- Trivia Nights

- Adopt-An-Animal/Classroom/Playground/Library

Planned Giving

Planned Giving						
Number of Committed Planned Gifts		10	**Asks**	20	**Response Rate**	50%
Month	**Method**	**Activity**			**Responsible**	**Date**
Apr	Research	Develop plan for launching new legacy society			Wong	4/17/2023
Jun	Present	Present options to Board for new legacy society			Wong	6/9/2023
Jul	Design	Design new legacy brochures and web page			Wong & Peters	7/31/2023
Aug	Mail	Send invitation for legacy society launch			Eli	8/30/2023
Oct	Implement	Host legacy society launch party at Harbor Bay			Board	10/12/2023

- Must have!

- Part of donor engagement program

- Can be simple or complex

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Memberships

Memberships					
Total # Members	600	**New Members**	50	**Renewal Rate**	75%
Month	**Method**	**Activity**		**Responsible**	**Date**
Jan	Email	Send member renewal reminders		Kali	1/15/2023
Feb	Mail	Send member renewal reminders to lapsed		Kali	2/23/2023
Mar	Research	Identify potential new members		Kali	3/15/2023
Apr	Mail	Send invitations for new memebrships		Kali	4/29/2023

- Benefits
- Visitors ➡ Members
- Members ➡ Donors

Corporate Sponsorships

Corporate Sponsorships					
Total # Sponsors		6	**New Sponsors**	3	**Renewal Rate** 100%
Month	**Method**	**Activity**		**Responsible**	**Date**
May	Research	Identify sponsor prospect list		Wong	5/2/2023
Jun	Present	Present sponsor prospect list to board		Wong	6/9/2023
Jun	Implement	Board assigns liason for sponsor prospects		Board	6/9/023
Aug	Implement	Board visits sponsor prospects		Board	8/14/2023
Sep	Implement	Board provide onsite tours for sponsor prospects		Board	9/19/2023

Corporate Sponsors				
Company Name	**Target Ask**	**Responsible**	**Project**	**Target Date**
Peters Hardware	$ 1,000	Board	General Operating	8/14/2023
Samsons	$ 2,500	Franklin	General Operating	8/16/2023
TFG Manufacturing	$ 5,000	Board	General Operating	8/14/2023
Galaxy	$ 1,000	Jimenez	General Operating	8/22/2023
Juris & Sons	$ 1,000	Board	Summer Camp	9/1/2023
Valley Hospital	$ 5,000	Board	Healthcare	9/6/2023
Sherman Oaks	$ 5,000	Ali	Healthcare	8/14/2023
Piper Aviation	$ 5,000	Board	Summer Camp	8/16/2023
All County Chamber	$ 1,000	Board	Summer Camp	8/22/2023
Casey Health Center	$ 5,000	Board	Healthcare	9/1/2023
Cornerstone Books	$ 1,000	Franklin	Winter Camp	9/5/2023
Jefferson Tire	$ 1,000	Board	Winter Camp	9/6/2023

Corporate Sponsorships

- Separate from events
- Identify organizations that have a natural connection
- In-kind vs. Cash
- Benefits –Deliverables
  - Access to your audience
  - Recognition and publicity

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POLL – Grants

What percentage of your annual revenue is from grants?

1. 0% - we receive no grant funding
2. Less than 10%
3. 11 – 30%
4. 30 – 50%
5. Greater than 50%

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Grants

Grants				
Month	**Method**	**Activity**	**Responsible**	**Date**
Mar	Research	Identify grant prospects	Washington	3/7/2023
Jul	Apply	Begin applying for grants	Washington	7/22/2023
Aug	Data	Enter data and status in new CRM	Washington	8/13/2023

Grant Applications			
Foundation	**Project**	**Ask**	**Due Date**
Community Foundation	Afterschool bus	$ 20,000	9/1/2023
Hunt Family Fnd	Afterschool bus	$ 5,000	11/14/2023
Johnson & Johnson	Afterschool bus	$ 40,000	9/1/2023
VITA Care	Afterschool bus	$ 30,000	9/1/2023
Able Family Fnd	Afterschool bus	$ 5,000	9/1/2023
REESSA	Afterschool bus	$ 10,000	12/1/2023
Catholic Charities	Afterschool bus	$ 5,000	9/1/2023
UMC Foundation	Afterschool bus	$ 8,500	9/4/2023
Frenchman's Cove	Afterschool bus	$ 6,000	9/15/2023
Impact 100	Afterschool bus	$ 100,000	10/1/2023
United Way	Afterschool bus	$ 4,500	10/15/2023

Grants – improving results

- Identify the right funders

- Ensure you are ready for funding

- Put the time in to prepare
  - Make it specific not generic
  - Tell a story
  - Demonstrate impact (no headcounts!)
  - Realistic budgeting and timelines
- Don't give up after 1st rejection

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Events

Events					
Attendees	300	**Return Attendees**	280	**Revenue**	$300,000
Donor Conversion	80%	**Sponsorships**	$100,000	**Expenses**	$80,000
Month	**Method**	**Activity**		**Responsible**	**Date**
Jan	Implement	Secure event location and place deposit		Smith	1/13/2023
Jan	Meet	Meet with volunteer team to create event theme		Smith	1/31/2023
Feb	Design	Design invitation and posters		Jacobs	2/28/2023
Mar	Implement	Create event sponsorship packages		Smith	3/15/2023
Mar	Implement	Create event invitation list		Smith	3/31/2023
Apr	Mail	Send event invitations to sponsors & guests		Smith	4/30/2023
July	Host	Host Evening Under the Stars		Smith	7/24/2023

Events – evaluating past results

- Invite response rates

- Repeat sponsors

- Event attendee feedback

- Auctions/Paddle Raise/Raffles/Pulls results

- Expenses

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Events – improving results

- Sponsorships
- Ticket sales
  - Bundle tickets
  - Early bird pricing
  - Table captains
- New sources of revenue
- Enticing entertainment
  - Raffles
  - Auctions

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POLL – *Moves Management*

Does your organization have a formal donor engagement or moves management process?

1. No, we don't solicit major gifts

2. Not yet, but we would like to

3. Yes, but it isn't producing the results we want

4. Yes, we have a formal process to cultivate donors for major gift fundraising

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Major Donors

Major Gifts				
Month	**Method**	**Activity**	**Responsible**	**Date**
Sep	Phone	Call major donor prospects to thank for support	Mendez & Board	9/25/2023
Nov	Meet	Set up meetings with major donor prospects	Mendez & Board	11/4/2023

Giving Pyramid			
	Gift Amount	**Number of Gifts**	**Sub-total**
	$ 100,000	2	$ 200,000
	$ 50,000	4	$ 200,000
	$ 25,000	8	$ 200,000
	$ 20,000	10	$ 200,000
	$ 10,000	20	$ 200,000
			$ -
		Grand Total	$ 1,000,000

Major Donors					
Donor Name	**Target Ask**	**Responsible**	**Project**	**Stage**	**Date**
Sculthorpe	$ 100,000	Wong & Board	General Operating	Cultivate	9/15/2023
Benjamin	$ 100,000	Wong & Board	General Operating	Cultivate	11/4/2023
Hassid	$ 100,000	Wong & Board	General Operating	Cultivate	11/6/2023
Folk	$ 50,000	Wong & Board	General Operating	Qualify	11/8/2023
Freeman	$ 50,000	Wong & Board	Healthcare	Solicit	11/12/2023
Basil	$ 50,000	Wong & Board	Summer Camp	Qualify	11/15/2023
Perez	$ 50,000	Wong & Board	Afterschool	Cultivate	11/16/2023
Irwin	$ 50,000	Wong & Board	Afterschool	Cultivate	11/18/2023
Han	$ 50,000	Wong & Board	Summer Camp	Cultivate	12/4/2023

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Major Donors – improving results

- Implement a donor engagement or moves management process

- Engage the board

- Evaluate previous responses to proposals

- Establish goals – giving pyramid

- Use CRM to track stage

- Schedule interactions

- Connect to donor's personal mission to customize proposals

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Calendar

Month	Method	Activity	Responsible	Date
Jan	Implement	Secure event location and place deposit	Smith	1/13/2023
Jan	Email	Send member renewal reminders	Kali	1/15/2023
Jan	Invite	Identify 20 team leaders	Jefferson	1/25/2023
Jan	Meet	Meet with volunteer team to create event theme	Smith	1/31/2023
Jan	Research	Provide short list of potential software to ED	Wong and Eli	1/31/2023
Feb	Social	Run Facebook campaign for summer camp	Peters	2/2/2023
Feb	Mail	Send appeal to lapsed donors	Washington	2/10/2023
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Apr	Mail	Send event invitations to sponsors & guests	Smith	4/30/2023
May	Research	Identify sponsor prospect list	Wong	5/2/2023
May	Wrap	Complete campaign	Jefferson & Peters	5/4/2023

- Add all milestones & key activities

- Can sort by date or responsibility

- Identify potential issues

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Next Steps

Download the free Fundraising Plan Excel worksheets

Donorview.com/AFPwebinar

Register at AFP Global for next webinars

- [ ] September 7th - "Improving Your Annual Fundraising Plan with Donor Engagement"

- [ ] December 6th - "Measuring and Evaluating the Results of your Fundraising Strategy and Plan with KPIs"

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THANK YOU!

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