

Strategy vs. Plan

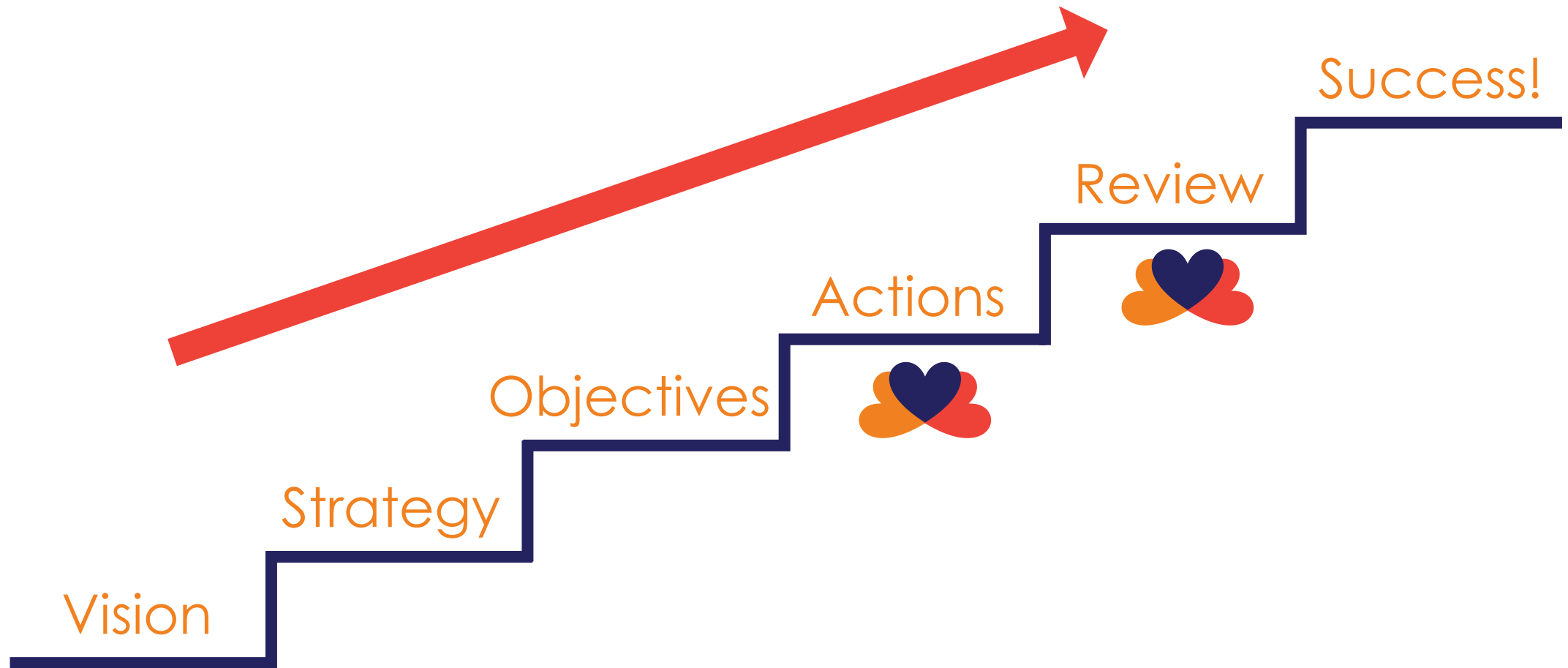
Understanding the role and differences of these tools when creating your fundraising goals



Presented by Kimberly Perron, MBA
Customer Success Instructor



Steps to Fundraising Success



Strategy vs Plan



STRATEGY

- Long-term view 3 – 5 years
- Incorporates vision, values, and mission
- Examines internal and external factors
- Attempts to determine “why”
- Creates major objectives to help achieve vision


ACTION PLAN

- Short-term view - 1 year max
- Create steps to achieve goals
- Assigns responsibilities
- Due dates
- Measure progress
- Ensures resources are distributed evenly

STRATEGY – Team Members

- Executive team
- Fundraising team
- Board of Directors
- Other key stakeholders

1 of 15


Fundraising Strategy and Annual Action Planning Worksheets

Fundraising Strategy - Helping the Kids

Team Members

Name	Role
Helen Burns	Executive Director
Gretchen Wolinzski	Board President
Mark Suarez	Treasurer
Candice Olsen	Board Member
Betty Bruin	Board Member
Jason Bennett	Board Member
Mary Hornsby	Board Member
Javier Mendez	Donor Care Coordinator
Petra Eli	Administrative Assistant
Sue Wong	Development Director
Greg Washington	Development Assistant

STRATEGY – Guiding Principles

- Vision
- Mission
- Values

Guiding Principles
Vision Statement A world in which every child has access to quality education and healthcare to be able to reach their full potential.
Mission Statement We are a non-profit organization dedicated to helping children, families, and communities across the country reach their full potential by enabling them to overcome poverty and injustice to fulfill their dreams and ambitions.
Values Statement We help children, families, and communities break the cycle of poverty by empowering people of all ages to dream, aspire and achieve. We value: Education - Teaching children today allows for a brighter future, one in which they can both learn and teach. Health - Vaccinating children against preventable disease enables them to live a healthy, productive life. Community - It takes an entire community to raise a child. Once that community is formed, anything can be achieved.

STRATEGY – Financial Situation

- Operating Budget
- Capital Projects
- Complete after SWOT & priorities

Financials				
Annual Operating Budget				
	Revenue	Expenses	Net Assets	Comments
Current	\$ 5,500,000	\$ 6,100,000	\$ (600,000)	
Year 1	\$ 5,800,000	\$ 6,200,000	\$ (400,000)	
Year 2	\$ 6,000,000	\$ 6,300,000	\$ (300,000)	
Year 3	\$ 6,300,000	\$ 6,300,000	\$ -	Break even year
Year 4	\$ 6,600,000	\$ 6,500,000	\$ 100,000	
Year 5	\$ 7,000,000	\$ 6,800,000	\$ 200,000	
Capital Projects				
Project Name	Project Budget	Target Year	Progress	
Picnic and Outdoor Pavillion	\$ 750,000	2025	\$ 200,000	
Renovate South Hampton Building	\$ 200,000	2026	\$ 40,000	
	\$ -			
	\$ -			
	\$ -			

STRATEGY – Potential Issues

- Can identify known issues
- Stay focused on fundraising
- Be sure to include in SWOT Analysis

Potential Issues	
Area	Description
Development	Staff utilizing outdated technology, multiple software platforms that do not communicate.
Development	Lost key staff member, new employees have drive, but little experience.
Board	Board members not meeting personal fundraising goals.
Grants	New state funding priorities may reduce grant allotment.
Partnerships	School budget cuts may eliminate afterschool buses.

STRATEGY – SWOT Analysis

- Internal
 - Strengths
 - Weaknesses
- External
 - Opportunities
 - Threats

SWOT ANALYSIS			
Internal			
Priority	Strengths	Priority	Weaknesses
1	Enthusiastic staff	4	Lost key development staff member, lack of training and experience with new staff
1	Solid donor base	3	Two large capital projects taking attention from annual giving
1	Effective programs with measurable outcomes recorded for many years	1	Lack of board participation - especially with fundraising
3	Strong social media presence	1	Heavy dependence on state grant
1	Sold out annual fundraising event	1	Need new technology to support expansion efforts
2	Several volunteers willing to help with data entry	2	Direct mail costs increasing and ROI decreasing
		2	Website needs updating
		1	No formal moves management process
External			
Priority	Opportunities	Priority	Threats
2	Several organizations have reached out about partnerships	1	Potential loss of after school buses
1	New peer to peer campaigns	1	Fewer government grant opportunities available
1	Donor wealth analysis	4	Boys & Girls Club in neighboring county is planning to expand into our area
1	Free training available from local AFP	2	Changes to Medicare may affect delivery of health services
	Have resources to support 100 additional		

STRATEGY – SWOT: Strengths

- Review your fundraising processes
 - Workflows
 - Good KPIs
- What are you doing well
- Extra resources
- Skills & experience

STRATEGY – SWOT: Weaknesses

- Identified internal issues
 - Poor Workflows
 - Unsatisfactory KPIs
- Lack of technology/resources
- Training
- Staffing

STRATEGY – SWOT: Opportunities

- Trends
- Funding sources
- Partnerships
- Technology
- Prospect research
- Services

STRATEGY – SWOT: Threats

- Competition
- Vulnerabilities
- Negative trends – politics/economy
- Government regulations
- Donor/volunteer loss

STRATEGY – SWOT: Prioritize

- Prioritize
- Get stakeholder's input
- Validate with guiding principles

Priorities	
Focus Area	SWOT Items
New fundraising	New peer to peer campaigns
Existing donors	Donor wealth analysis
Staff Development	Free training available from local AFP
New fundraising	Potential loss of after school buses - find grant or donor to sponsor
New fundraising	Fewer government grant opportunities available - seek out new grant opportunities
Existing donors	Sold out annual fundraising event - investigate having an additional event or expanding the existing event
Technology	Research and select new all-in-one CRM platform
Existing donors	Implement a moves management process.
Existing donors	Add matching gift program

STRATEGY – Key Performance Indicators

- Mix of KPIs
 - Leading
 - Lagging
- Track with CRM
- Validate with guiding principles

Key Performance Indicators			
Indicator	Current	Target	Delta
Donor Retention	55%	70%	15%
Donor growth rate	4%	20%	16%
Cost per dollar raised	0.18	0.12	0.06
Matching gift rate	0	5%	5%
Average gift size	\$92.56	\$150	\$57.44
Number of donors >\$5000/year	40	60	20
Number of corporate sponsors	3	10	7
Recurring gift percentage	10%	20%	10%
Board member participation rate	85%	100%	15%

STRATEGY – Analysis

To be address in next webinar:

- Root cause analysis
- Find the “why’s”
- Evaluating options

STRATEGY – Strategic Objectives

- Create an objective for each priority
- Verb + Activity + Measurable Outcome
- Connects to Action Plan

Strategic Objectives			
Priority	Action	Detail	Outcome
1	Create	new peer to peer campaign for camp programs	to raise at least \$10,000 by April 2024.
2	Implement	donor wealth screening and moves management program	to acquire at least 20 new major donors by Feb 2024.
3	Purchase	new all-in-one CRM software	to manage new fundraising programs by Dec 2023.
4	Update	donation forms to add matching gift information	to increase matching gift rate to at least 5% by 2023.
5	Train	all fundraising staff and board members in AFP Fundamentals of Fundraising program	to ensure everyone has necessary skills by Dec 2023.
6	Apply	for new grants of at least \$200,000	to replace lost income from state grants by Sept 2023.
7	Invite	20 local business to the facility and share sponsorship opportunities	to gain at least 7 new sponsors by Oct 2023.
8	Interview	potential consultants to take over captial campaigns	to provide captial project focus by July 2023.

ACTION PLAN – Annual Goals

- Impact Goal
- Financial Goals
- Target KPIs

Fundraising Plan					
YEAR GOALS					
Impact Goal	Provide 300,000 hours of safe, educational, and healthy after school and summer programs to local children to help them succeed in school and a home.				
Overall Fundraising Goals					
Operating	\$	5,800,000	Capital	\$	200,000
Annual KPI Targets					
Donor retention	60%	Number of corporate sponsors	6		
Donor growth rate	10%	Board member participation	100%		
Matching gift rate	3%				
Average gift size	\$110				
Number of major donors	50				

ACTION PLAN – Implement Objectives

- Add action steps for each objective
 - Month
 - Method
 - Activities
 - Responsibility
 - Due 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 management 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	Identify 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

ACTION PLAN – Revenue Sources

- Operating
 - Current Revenue
 - Projected Revenue
 - Percentages
 - Expenses
- Capital Projects

Revenue Sources						
Operating						
Source	Constituents	Current Revenue	Percent	New Revenue	New Percent	New Expenses
Annual Gifts	Individuals	\$ 360,000	7%	\$ 510,000	9%	\$ 50,000
Special Appeals	Individuals	\$ 20,000	0%	\$ 80,000	1%	\$ 30,000
Major Gifts	Individuals	\$ 800,000	15%	\$ 1,000,000	17%	\$ 40,000
Online Giving	Individuals	\$ 20,000	0%	\$ 30,000	1%	\$ 5,000
P2P Campaigns	Individuals	\$ -	0%	\$ 10,000	0%	\$ 2,000
Membership Dues	Individuals	\$ 15,000	0%	\$ 15,000	0%	\$ 2,000
Planned Giving	Individuals	\$ 25,000	0%	\$ 25,000	0%	\$ 1,000
Corporate Sponsorship	Corporate	\$ 30,000	1%	\$ 200,000	3%	\$ 5,000
Event Sponsorships	Corporate	\$ 100,000	2%	\$ 200,000	3%	\$ 5,000
Event Sales	Individuals	\$ 100,000	2%	\$ 200,000	3%	\$ 80,000
Grants	Foundations	\$ 4,000,000	73%	\$ 3,500,000	60%	\$ 40,000
Service Fees	Clients	\$ 30,000	1%	\$ 30,000	1%	\$ 5,000
Other	Other	\$ -	0%	\$ -	0%	\$ -
	TOTAL	\$ 5,500,000		\$ 5,800,000		\$ 265,000
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 PLAN – Revenue Actions

- Identify milestone activities for each revenue source
- Can include KPIs

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		
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	Peters	11/4/2023		
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		

ACTION PLAN – Major Gifts/Sponsors/Grants

- Proposals
- Moves management
- Get specific

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
Benjamin	\$ 100,000	Wong & Board	General Operating	Cultivate	11/4/2023
Hassid	\$ 100,000	Wong & Board	General Operating	Identify	11/6/2023
Falk	\$ 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
Skinner	\$ 25,000	Wong & Board	Healthcare	Cultivate	12/6/2023
James	\$ 25,000	Wong & Board	Healthcare	Solicit	12/9/2023
Johnson	\$ 25,000	Wong & Board	Healthcare	Solicit	11/4/2023
Smithe	\$ 25,000	Wong & Board	General Operating	Identify	11/8/2023
Conrades	\$ 25,000	Wong & Board	General Operating	Qualify	11/12/2023
Fields	\$ 25,000	Wong & Board	Healthcare	Cultivate	11/15/2023
Kroser	\$ 25,000	Wong & Board	Summer Camp	Cultivate	11/16/2023

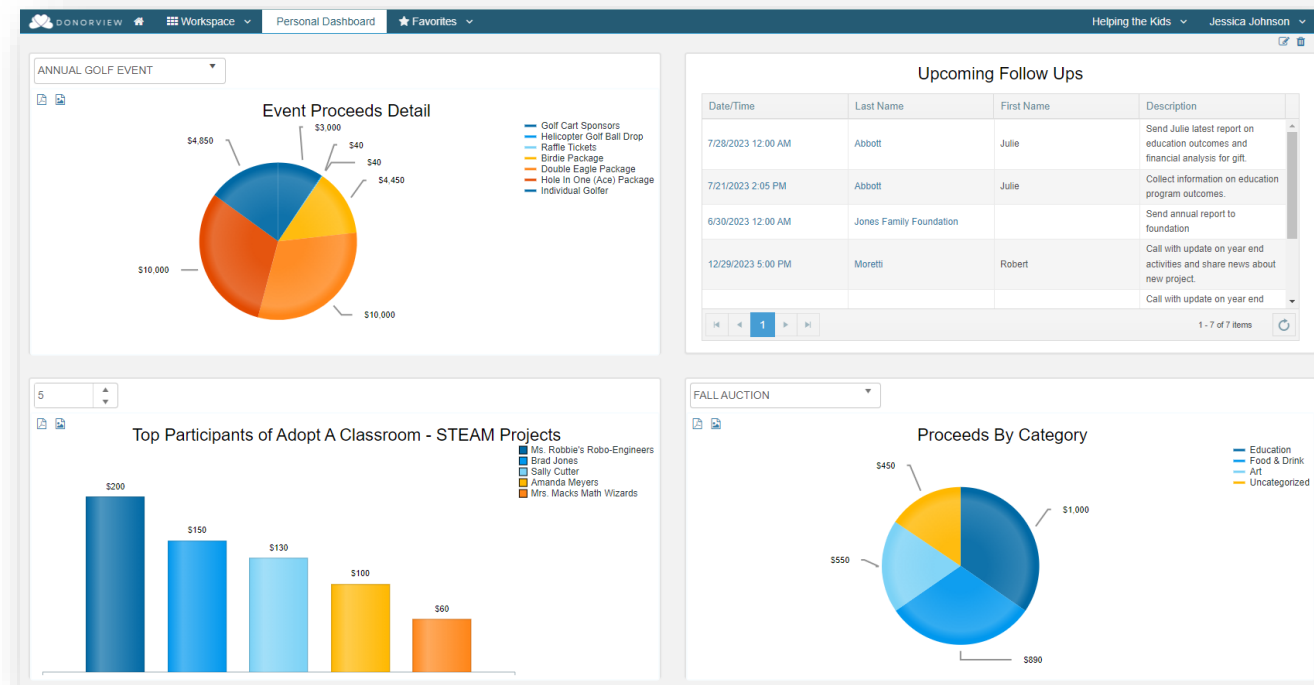
ACTION PLAN – Calendar

- From action plans
- Add details
 - Communications
 - Meetings
 - Reports
- Distribute resources

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
Feb	Mail	Send member renewal reminders to lapsed	Kali	2/23/2023
Feb	Research	Investigate different types of mm processes	Mendez	2/23/2023
Feb	Plan	Team leader to training & planning	Jefferson	2/26/2023
Feb	Design	Design invitation and posters	Jacobs	2/28/2023
Feb	Interview	Set up demos to test software	Wong and Eli	2/28/2023
Mar	Research	Identify grant prospects	Washington	3/7/2023
Mar	Research	Identify potential new members	Kali	3/15/2023
Mar	Implement	Create event sponsorship packages	Smith	3/15/2023
Mar	Research	Identify potential grant sources for busing	Washington	3/15/2023
Mar	Launch	Launch campaign for summer camp	Jefferson & Peters	3/22/2023
Mar	Implement	Create event invitation list	Smith	3/31/2023
Mar	Email	Send follow up email to lapsed donors	Washington	3/31/2023
Mar	Research	Ensure desired process works with new CRM	Wong & Mendez	3/31/2023
Mar	Present	Present short list of top 3 candidates and evaluate	Wong and Eli	3/31/2023
Apr	Research	Develop plan for launching new legacy society	Wong	4/17/2023
Apr	Implement	Develop schedule for applications	Washington	4/25/2023
Apr	Mail	Send invitations for new memberships	Kali	4/29/2023
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
May	Social	Run Facebook campaign for vaccination clinic	Peters	5/29/2023
May	Convert	Begin cleaning data to prepare for conversion	Wong and Eli	5/31/2023

ACTION PLAN – CRM Software

- Track activities
- Plan contacts
- Calculate KPIs
- Communications
- Reports



Next Steps

Watch the video and download the free Excel worksheet

Donorview.com/AFPwebinar

**Register for next webinar on July 11th
Strategy Planning Deep Dive**

THANK YOU!



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