



# YEAR-ROUND FUNDRAISING PLANNING

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May 23, 2023

Qgiv



# Rachel Muir, CFRE

- Founder: Girlstart
- Featured on: Oprah,
- CNN, the Today Show
- What Rachel does: online workshops & classes, custom training, board retreats

Town crier for donor love



Weaknesses: chips, queso



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## What Rachel does:

Online classes

Workshops

Board retreats

Webinars

Keynotes

Coaching

*All on fundraising...  
...all virtual!*

[www.rachelmuir.com](http://www.rachelmuir.com)



3 ingredients  
to a “no tears”  
fundraising  
plan

Making  
sure you  
FOLLOW  
it

How to  
make  
S.M.A.R.T  
goals

Eye candy  
examples of  
plans &  
templates

Q&A

## Year-Round Fundraising Plans

Get today's slides at  [rachelmuir.com/handouts](http://rachelmuir.com/handouts)



# Want more help from Rachel?

**Launch a  
Capital  
Campaign**



**May**

**How to Do a  
Donor Survey**



**June**

**Makeover My  
Board**



**July**

Sign up at 

[LeagueofExtraordinaryFundraisers.com](https://LeagueofExtraordinaryFundraisers.com)



# Tell me more about you...



**What kind of fundraising planning do you do?**

**Give yourself 1 point for each item that describes you.**

- We have a strategic plan that is current.
- We follow our strategic plan.
- We made a fundraising plan last year.
- We involved key staff in creating our fundraising plan.
- We set goals that were realistic and measurable, with clear deadlines.
- We followed our fundraising plan.
- The goals of the fundraising plan were included in employee performance goals in their employee goals for the year.
- Staff members were evaluated in their performance review in part on how they did reaching these goals.
- I'm satisfied and happy with how we handle fundraising planning.

Type in your  
score 0-9



What % of fundraisers  
DON'T have a  
written fundraising plan?

30%

45%

55%

57%





Let's learn about you...







“Organizations with a written fundraising plan consistently outperform organizations without one.”

Adrian Sargeant, Co-Founder and Co-Director  
Institute for Sustainable Philanthropy

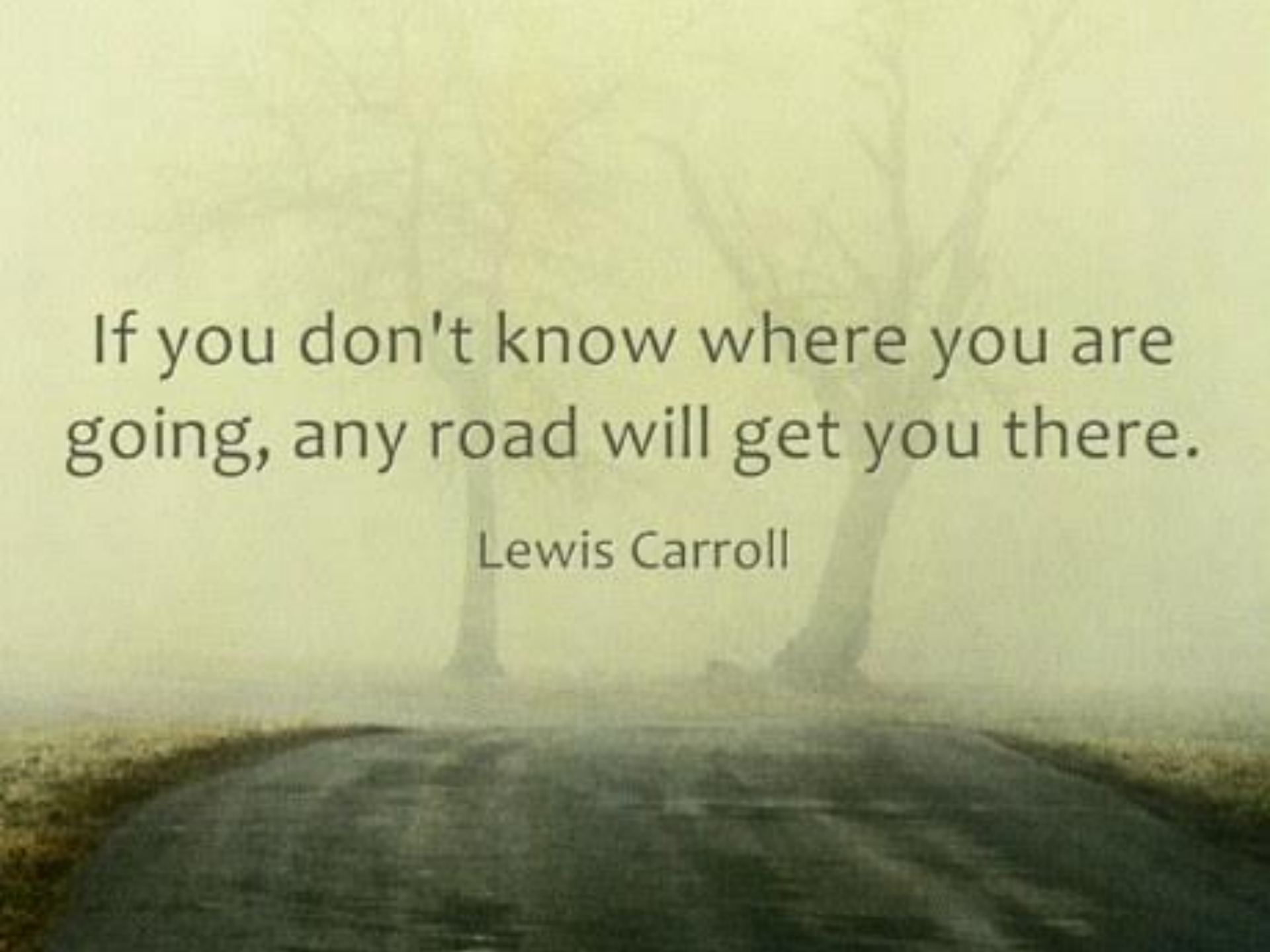
Slides  [RachelMuir.com/handouts](https://RachelMuir.com/handouts)



Fundraising without a plan looks like:





A misty, foggy road with bare trees in the background. The scene is atmospheric and somewhat somber, with a path leading into the distance. The text is overlaid on the upper half of the image.

If you don't know where you are  
going, any road will get you there.

Lewis Carroll



A decorative graphic on the left side of the image consisting of light blue lines and circles, resembling a circuit board or a network diagram.

BY FAILING TO  
PLAN YOU ARE  
PLANNING TO FAIL.

BENJAMIN FRANKLIN



# 3 Ingredients to No Tears Fundraising Plan

**2. CALENDAR**

**1. MEASURABLE GOALS**

**3. OWNERS**







**STEP ONE:**  
**LOOK BACK**



# Use the questionnaire to take stock

3 pages!



## YOUR FUNDRAISING YEAR IN REVIEW

What worked?

What didn't?

How did we hold ourselves accountable and measure our progress this year?

How should we measure it next year?

What should we do differently next year?

Did we have the staff, resources and tools to reach our goals this year?

If not, what was missing?

Do we have the staff, resources, tools & training to successfully meet our goals next year?

If not, what are we missing?

What is one new thing we experimented with this year?

[www.rachelmuir.com/review](http://www.rachelmuir.com/review)





WHERE DO YOU GET YOUR  
**BEST DONORS?**





WHICH FUNDRAISING SOURCES OFFER  
**THE BEST ROI?**





WHO ARE MY MOST LOYAL DONORS?







**WHAT DO WE WANT TO LEARN FROM THEM?  
HOW WILL WE ASK?**





**STEP TWO:**  
**WRITE SMART GOALS**



# Rally the troops & make it fun (prizes)





# The power of goal writing

**How much does  
writing your goal  
down boost your  
odds of  
achieving it?**

**= +42%**

**Why?**

- 1. Forces you to get clear**
- 2. Motivates you to complete necessary tasks**
- 3. Makes you strategize and brainstorm your plan of attack**



# Writing S.M.A.R.T. goals

Specific

**S**  
**G**

What *exactly* are you trying to achieve?



Measurable

**M**  
**O**

How will you know when you've achieved it?



Attainable

**A**  
**A**

Is it genuinely possible to achieve it?



Relevant

**R**  
**L**

Does it contribute to your agency's revenue growth?



Time-bound

**T**  
**S**

When do you want to achieve this by?





# Sample S.M.A.R.T. fundraising goals

- ★ Plan and launch a monthly giving program by March 31, 2021.
- ★ Create a culture of philanthropy among the board and staff where everyone embraces and respects the important role fundraising plays in fulfilling our mission. To accomplish this goal, we will actively train staff and board on fundraising. Next, we will articulate what behavior constitutes a healthy culture of philanthropy and include it in our core values, employee and board orientations and handbooks. Success meeting this goal will be measured in staff's annual performance reviews or board self-assessments.
- ★ Recruit 2 volunteers to join the board development committee. Orient them and have them in place by April 15.
- ★ Grow our donor base by 10% by June 1, 2021 using appeals, Facebook, and our local giving day.
- ★ Improve overall donor retention by 5% (to 50% overall) by creating and implementing a donor-centered stewardship plan. This plan will include at least 7 meaningful, personal thank you touches in a 6-month period.





## STEP THREE: ASSIGN OWNERS





Put your goals in employees' work plan and evaluate them on goal accomplishment





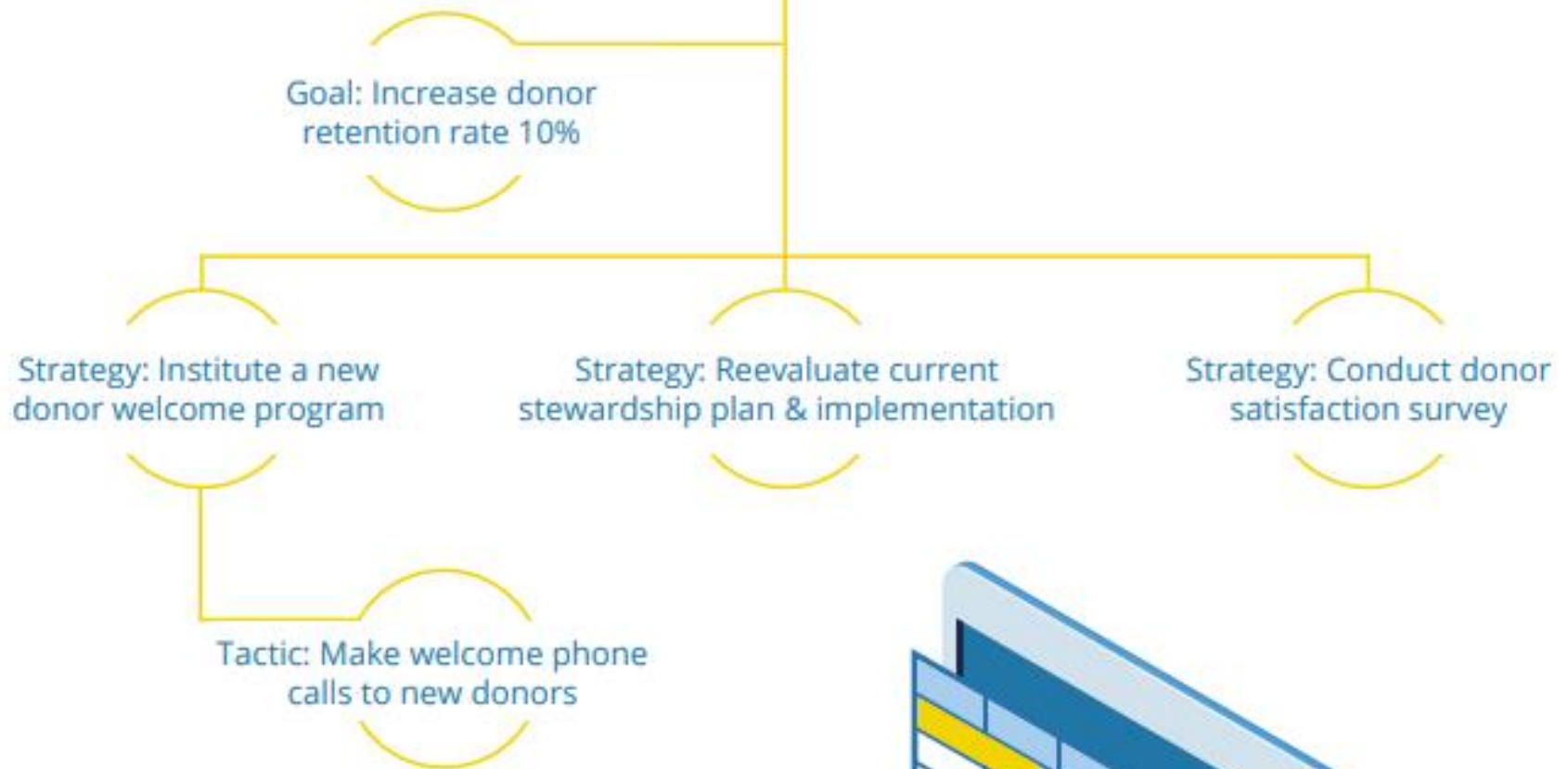
# Sample Fundraising Plans

Slides  [RachelMuir.com/handouts](https://RachelMuir.com/handouts)



# 2021 Fundraising Plan

Flow chart





## A close-up photograph of a brown and white pit bull dog standing on a sandy beach. The dog has a white blaze on its face and is wearing a yellow collar. It is looking directly at the camera with a calm expression. The background shows the sand and some green foliage on the right.

- 2:** Share this [pet travel bag](#) checklist with your community so pets are ready to safely hit the road at a moment's notice.
- 4:** Partner with a local Italian restaurant on a portion of sales to benefit your organization—or recreate the iconic pasta scene from *Lady and the Tramp* and share on social media.
- 10:** Alert your followers to these [17 plants that are toxic for pets](#).
- 11-15:** Register for the [Maddie's Fund No Place Like Home Challenge](#)
- 21:** Ask your community to donate squeaky toy squirrels to your pups!
- 22:** Profile a few felines on your social media and ask fans to submit questions to them. Have fun responding on behalf of the cats and maybe land them a new home!
- 24:** Slather some xylitol-free peanut butter on paper plates or frisbees and hang from canine kennels to entertain your dogs and visitors alike.

- Make funny videos of your cats and dogs for Belly Laugh Day or Opposite Day and post them on **TikTok**.
- Check out what **hashtags are trending** in 2021 and hop on the bandwagon!

- Subscribe to [ASPCApro news](#) for weekly shelter updates.
- Take [free online courses](#) from the ASPCA's Learning Lab at the Behavior Rehabilitation Center.
- See how your protocols compare to [Association of Shelter Veterinarians' Guidelines](#).

- S/N Awareness Month
- The Big Game
- Valentine's Day

## This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper appears to be a standard notebook page or a sheet of stationery.

ASPCApro



# 12-month fundraising calendar

## Sample 2024 Development Plan - Save the Unicorns

	Activity	Owner	Cost detail	Projected expenses	Projected donations	Prior year results	Goal	Tasks
<b>Q1</b>								
<b>January</b>	Online/offline Supporter Connection Survey	Development Director (DD)/Executive Director (ED)	Design:\$5k Print:\$2k	\$7,000	\$5,000	\$3000 in donations	Deepen Donor Relationships	Discover interests, reveal planned gifts & planned giving prospects
<b>February</b>	Donor "thank a thon" phone calls	DD/ED/Board	Food & prizes for staff & board \$150	\$150	\$0	100 calls	250 calls/ Steward donors/ Engage board	Give board members scripts to make calls.
<b>March</b>	Giving Day	DD/ED/Board	FB ad budget: \$1,000	\$1,000	\$10,000	\$5,000 in donations	Acquire	Recruit celebrity influencers/supporter/board to promote & do match. Everyone wears unicorn onesies
<b>Q2</b>								
<b>April</b>	Monthly giving direct mail & email campaign	DD	Print: \$5k Postage: \$1k Copywriting: \$3,000	\$9,000	\$3,500 (30 monthly donors)	15 monthly donors	Acquire/ Upgrade	Secure a gift match for the month (ask Board), make new donor welcome calls
<b>May</b>	Launch Donor Print Newsletter	DD	Print: \$1500 Postage:\$500 Copywriting & Design: \$1500	\$3,500	\$10,000		Steward	Give newsletter a donor-centered makeover and include reply device
<b>June</b>	Planned Giving appeal letter & email	DD/ED/Board	Print: \$1500 Postage:\$500 Copywriting & Design: \$1500	\$3,500	\$100,000 in unrealized pledges	\$50,0000 in unrealized pledges	Acquire/ Upgrade	Get testimonials from donors/board members who named us in their will

Get calendar at  [rachelmuir.com/review](https://rachelmuir.com/review)



# 12-month fundraising calendar

Q3								
July	Invites for Fall Fundraiser / Recruit Sponsors	DD/ED/Board	Print: \$1500 Postage:\$500 Copywriting & Design: \$1000	\$3,000	\$10,000 in sponsorships	\$10,000 in sponsorships	Acquire/ Retain	Recruit sponsors, auctioneer, silent & live auction items, board sells tickets
August	Report back to donors (letters & email series)	DD	Print: \$500 Postage:\$250 Copywriting & Design: \$1000	\$1,750	\$0	\$0	Steward	Write donor centric letter & email series w/photos & immersive storytelling
September	"Help the Herd" Barn Raising Fundraiser	DD/ED/Board	Food & drink: 10k Decor: 1k AV: 1k Auctioneer: 5k	\$17,000	\$50,000 from auction, ticket sales and fund-a-need	\$40,000	Acquire/ Upgrade	Recruit sponsors/influencer to promote & do match(es)
Q4								
October	Fall Donor Print Newsletter	DD	Print: \$1500 Postage:\$500 Copywriting & Design: \$1500	\$3,500	\$10,000		Steward	Mail donor-centered donor newsletter with reply envelope
November	#GivingTuesday email & social blitz	DD	Design assets: \$500 Copywriting: \$1,500 Facebook Ads: \$1000	\$3,000	\$7,000	\$5,250	Acquire/ Upgrade	Begin recruiting influencers & matches early Aug, re-use and refresh last year's Giving Tuesday campaign
December	Year-End email, mail and social media appeal	DD/ED/Board	Print: \$1500 Postage: \$500 Copywriting: \$1,500	\$3,500	\$50,000	\$40,000	Acquire/ Upgrade	1 direct mail drop, 13 -15 emails, 3-5 social posts per week
				Expenses	Income			
Total				\$55,900	\$	255,500		

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# 12-month fundraising calendar

## 2024 Development Plan - [nonprofit's name goes here]

	Activity	Owner	Cost detail	Expense	Donations	Prior year results	Goal	Tasks
Q1								
January								
February								
March								
Q2								
April								
May								
June								
Q3								
July								
August								
September								
Q4								
October								
November								
December								
Total								

Get calendar at  [rachelmuir.com/review](https://rachelmuir.com/review)



# Sample CommunicationsCalendar

Boy Scouts Sample Calendar

## Engagement Campaign: Scouts stepping up in crisis

### Email

Subj. Line

Messages

CTA

Nominate a scout today

Notes

CTA drives clickers to the form

## Digital Scouting Story

### Email

Subj. Line

Messages

CTA

Notes

## Engagement Campaign: What scouting means to me

### Email

Subj. Line

Messages

CTA

Tell us your story

Notes

## Appeal or announcement: Virtual Summer Camp

### Email

Subj. Line

Messages

CTA

GIVE or REGISTER

Notes

## Social Posts/Tweets

Content

CTA

READ MORE

Notes

## Social Posts/Tweets

Content

CTA

SEE LIST

Notes

## Social Posts/Tweets

Content

CTA

DOWN

Notes

## Social Posts/Tweets

Content

CTA

REGISTER

Notes

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Questions?



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