

5 Steps to Develop a Fundraising Plan

1. IDENTIFY KEY COMPONENTS OF AN ANNUAL CAMPAIGN.

1

CHART:

START BY MAKING A CALENDAR OF YOUR FISCAL YEAR, IN A CHART FORMAT, WITH MONTHS ON THE LEFT AND ACTIVITIES ON THE TOP.

2

CREATE:

IDENTIFY ONE CORE THEME AND A TESTIMONIAL FOR EACH MONTH TO USE IN ALL ACTIVITIES.

3

FOCUS:

KEEP YOUR GOALS IN MIND. (NO GOALS? CREATE THEM AS PART OF THIS PLAN!)

2. IDENTIFY CHANNELS TO TARGET AND RELATIONSHIPS TO LEVERAGE.

- Donor engagement and recognition activities
- Planned Giving
- Corporate and Foundation Giving
- Social Entrepreneurism
- Major Gift Programs
- Annual Giving
- Email Campaigns
- Social Media
- Website Updates
- Grant Writing
- Capacity Building (process or system changes needed for success)
- Special Events
- Direct Mail
- Voice Broadcasting
- Text-to-give
- Instant Messaging
- Individual Donor Meetings

3. TELL YOUR STORY.

Figure out the best way to tell your story and leverage the appropriate channels to inspire donors to give and engage those previously disconnected. Optional: Consult with a nonprofit professional to determine how to best leverage your organization's unique value proposition throughout your story.

4. SET MEASURABLE GOALS.

Process Goals

Net Revenue Goals (per activity)

Overall Budget Revenue Goals

5. EVALUATE AND ADJUST THE PLAN.

What worked? What kind of worked? What needs improvement? Be critical and strategic. Adjust your fundraising plan accordingly for the coming year.



RAISE THE BAR
CONSULTING

520.982.5467

jennifer@raisethebarllc.com

 [@raisethebarconsulting](https://www.facebook.com/raisethebarconsulting)

 [@rtbsuccess](https://twitter.com/rtbsuccess)

 [@jennifer-m-tersigni](https://www.linkedin.com/in/jennifer-m-tersigni)