


SlideShare Explore Search You



- [Upload](#)
- [Login](#)
- [Signup](#)

- [Home](#)
- [Explore](#)
- [Presentation Courses](#)
- [PowerPoint Courses](#)
- [by LinkedIn Learning](#)

Successfully reported this slideshow.

We use your LinkedIn profile and activity data to personalize ads and to show you more relevant ads. [You can change your ad preferences anytime.](#)



1 of 46

# 6 Simple Steps to Creating a Written Fundraising Plan

60,065 views

- 
- 
- 
- ...



**Sandy Rees**, Chief Encouragement Officer

[Follow](#)

Published on June 6, 2020

Many nonprofits struggle to create a fundraising plan and put it in writing.



Published in: [Business](#), [News & Politics](#)

• [12 Comments](#)

• [64 Likes](#)

• [Statistics](#)

• [Notes](#) Sandy Rees, Fundraising Coach



Full Name

Comment goes here.

12 hours ago [Delete](#) [Reply](#) [Block](#)

Are you sure you want to? [Yes](#) [No](#)

Your message goes here



Share your thoughts...

[Post](#)



[SEWDRANLETENE](#)

DOWNLOAD THE BOOK INTO AVAILABLE FORMAT (New Update)

Download Full PDF EBOOK here { <https://urlzs.com/UABbn> }

Download Full EPUB Ebook here { <https://urlzs.com/UABbn> }

Download Full doc Ebook here { <https://urlzs.com/UABbn> }

Download PDF EBOOK here { <https://urlzs.com/UABbn> }

Download EPUB Ebook here { <https://urlzs.com/UABbn> }

Download doc Ebook here { <https://urlzs.com/UABbn> }

..... eBook is an electronic version of a traditional print book THE can be read by using a personal computer or by using an eBook reader. (An eBook reader can be a software application for use on a computer such as Microsoft's free Reader application, or a book-sized computer THE is used solely as a reading device such as Nuvomedia's Rocket eBook.) Users can purchase an eBook on diskette or CD, but the most popular method of getting an eBook is to purchase a downloadable file of the eBook (or other reading material) from a Web site (such as Barnes and Noble) to be read from the user's computer or reading device. Generally, an eBook can be downloaded in five minutes or less

..... Browse by Genre Available eBook

The fundraising plan is a blueprint for success: ..... Art, Biography, Business, Chick Lit, Children's, Christian, Classics, Comics, Contemporary, CookBOOK, Manga, Memoir, Music, Mystery, Non Fiction, Paranormal, Philosophy, Poetry, Psychology, Religion, Romance, Science, Science Fiction, Self Help, Suspense, Spirituality, Sports, Thriller, Travel, Young Adult, Crime, EBOOK, Fantasy, Fiction, Graphic Novels, Historical Fiction, History, Horror, Humor And Comedy, .....

..... BEST SELLER FOR EBOOK

RECOMMEND ..... Blowout: Corrupted Democracy, Rogue State Russia, and the Richest, Most Destructive Industry on Earth,-- The Ride of a Lifetime: Lessons Learned from 15 Years as CEO of the Walt Disney Company,-- Call Sign Chaos: Learning to Lead,-- StrengthsFinder 2.0,-- Stillness Is the Key,-- She Said: Breaking the Sexual Harassment Story THE Helped Ignite a Movement,-- Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones,-- Everything Is Figureoutable,-- What It Takes: Lessons in the Pursuit of Excellence,-- Rich Dad Poor Dad: What the Rich Teach Their Kids About Money THE the Poor and Middle Class Do Not!,-- The Total Money Makeover: Classic Edition: A Proven Plan for Financial Fitness,-- Shut Up and Listen!: Hard Business Truths THE Will Help You Succeed,

1 week ago [Reply](#)

Are you sure you want to? [Yes](#) [No](#)

Your message goes here



[wassereinwassereinw](#)

DOWNLOAD THE BOOK INTO AVAILABLE FORMAT (New Update)

Download Full PDF EBOOK here { <https://soo.gd/irt2> }

Download Full EPUB Ebook here { <https://soo.gd/irt2> }

Download Full doc Ebook here { <https://soo.gd/irt2> }

Download PDF EBOOK here { <https://soo.gd/irt2> }

Download EPUB Ebook here { <https://soo.gd/irt2> }

Download doc Ebook here { <https://soo.gd/irt2> }

..... eBook is an electronic version of a traditional print book THE can be read by using a personal computer or by using an eBook reader. (An eBook reader can be a software application for use on a computer such as Microsoft's free Reader application, or a book-sized computer THE is used solely as a reading device such as Nuvomedia's Rocket eBook.) Users can purchase an eBook on diskette or CD,



but the most popular method of getting an eBook is to purchase a downloadable file of the eBook (or other reading material) from a Web site (such as Barnes and Noble) to be read from the user's computer or reading device. Generally, an eBook can be downloaded in five minutes or less

..... Browse by Genre Available eBook

..... Art, Biography, Business, Chick Lit, Children's, Christian, Classics, Comics, Contemporary, CookBOOK, Manga, Memoir, Music, Mystery, Non Fiction, Paranormal, Philosophy, Poetry, Psychology, Religion, Romance, Science, Science Fiction, Self Help, Suspense, Spirituality, Sports, Thriller, Travel, Young Adult, Crime, EBOOK, Fantasy, Fiction, Graphic Novels, Historical Fiction, History, Horror, Humor And Comedy, .....

..... BEST SELLER FOR EBOOK

RECOMMEND..... Blowout: Corrupted Democracy, Rogue State Russia, and the Richest, Most Destructive Industry on Earth,-- The Ride of a Lifetime: Lessons Learned from 15 Years as CEO of the Walt Disney Company,-- Call Sign Chaos: Learning to Lead,-- StrengthsFinder 2.0,-- Stillness Is the Key,-- She Said: Breaking the Sexual Harassment Story THE Helped Ignite a Movement,-- Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones,-- Everything Is Figureoutable,-- What It Takes: Lessons in the Pursuit of Excellence,-- Rich Dad Poor Dad: What the Rich Teach Their Kids About Money THE the Poor and Middle Class Do Not!,-- The Total Money Makeover: Classic Edition: A Proven Plan for Financial Fitness,-- Shut Up and Listen!: Hard Business Truths THE Will Help You Succeed,

A plan Moves you from reactive to proactive. Provides a roadmap for your fundraising. Gets everyone on the same page.

1 month ago [Reply](#)

Are you sure you want to Yes No

Your message goes here



[blattanfangblattanfa](#)

DOWNLOAD THE BOOK INTO AVAILABLE FORMAT (New Update) .....

Download Full PDF EBOOK here { <https://soo.gd/irt2> }

Download Full EPUB Ebook here { <https://soo.gd/irt2> }

Download Full doc Ebook here { <https://soo.gd/irt2> }

Download PDF EBOOK here { <https://soo.gd/irt2> }

Download EPUB Ebook here { <https://soo.gd/irt2> }

Download doc Ebook here { <https://soo.gd/irt2> }

..... eBook is an electronic version of a traditional print book THE can be read by using a personal computer or by using an eBook reader. (An eBook reader can be a software application for use on a computer such as Microsoft's free Reader application, or a book-sized computer THE is used solely as a reading device such as Nuvmedia's Rocket eBook.) Users can purchase an eBook on diskette or CD, but the most popular method of getting an eBook is to purchase a downloadable file of the eBook (or other reading material) from a Web site (such as Barnes and Noble) to be read from the user's computer or reading device. Generally, an eBook can be downloaded in five minutes or less

..... Browse by Genre Available eBook

..... Art, Biography, Business, Chick Lit, Children's, Christian, Classics, Comics, Contemporary, CookBOOK, Manga, Memoir, Music, Mystery, Non Fiction, Paranormal, Philosophy, Poetry, Psychology, Religion, Romance, Science, Science Fiction, Self Help, Suspense, Spirituality, Sports, Thriller, Travel, Young Adult, Crime, EBOOK, Fantasy, Fiction, Graphic Novels, Historical Fiction, History, Horror, Humor And Comedy, .....

☐ I forgot a plan and it's coming! ☐ I have a plan, but it's in my head ☐ Plan? What plan?

..... BEST SELLER FOR EBOOK

RECOMMEND..... Blowout: Corrupted Democracy, Rogue State Russia, and the Richest, Most Destructive Industry on Earth,-- The Ride of a Lifetime: Lessons Learned from 15 Years as CEO of the Walt Disney Company,-- Call Sign Chaos: Learning to Lead,-- StrengthsFinder 2.0,-- Stillness Is the Key,-- She Said: Breaking the Sexual Harassment Story THE Helped Ignite a Movement,-- Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones,-- Everything Is Figureoutable,-- What It Takes: Lessons in the Pursuit of Excellence,-- Rich Dad Poor Dad: What the Rich Teach Their Kids About Money THE the Poor and Middle Class Do Not!,-- The Total Money Makeover: Classic Edition: A Proven Plan for Financial Fitness,-- Shut Up and Listen!: Hard Business Truths THE Will Help You Succeed,

2 months ago [Reply](#)

Are you sure you want to Yes No

Your message goes here



[Helene Carter](#)

Tattoo surgery too expensive? Lemon + this ingredient can take it off, Safe, effective, and inexpensive. ▲▲▲ <https://bit.ly/2TliUmG>

3 months ago [Reply](#)

Are you sure you want to Yes No

Your message goes here



[Deloris Blackwell](#)

Get access to 16,000 woodworking plans, Download 50 FREE Plans... ♣♣♣ <https://bit.ly/2SyPceJ>

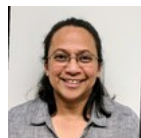
3 months ago [Reply](#)

Are you sure you want to Yes No

Direction? If you don't know where you're going, then any road will get you there.

Your message goes here

[Show More](#)



[Tracy Burrige, Business Analyst at Oregon Mutual Insurance at Sr. SQA/ Business Analyst](#)

3 months ago



[RPM Consulting at RPM Consulting](#)

 [9 months ago](#)

[Kendra Anderson](#)  
[1 year ago](#)

[David Puls](#), [Solving problems & planning strategies with people and businesses to create social change. MBA, BBus, recovering lawyer at Adviser](#)

6 Simple Steps to a Fundraising Plan 1. Identify your assets. 2. Set your goals. 3. Create a plan of action. 4. Work the plan. 5. Monitor the plan. 6. Celebrate!


[chomanbarzaji](#)  
[1 year ago](#)
[Show More](#)

No Downloads

**Views**

Total views

60,065

On SlideShare

0

 From Embeds

0

Number of Embeds

129

**Actions**

Shares

0

Downloads

1,901

Comments

12

Likes

64 How much money do you need? Ask yourself, "What will it take to deliver service this year?"

**Embeds 0**

No embeds

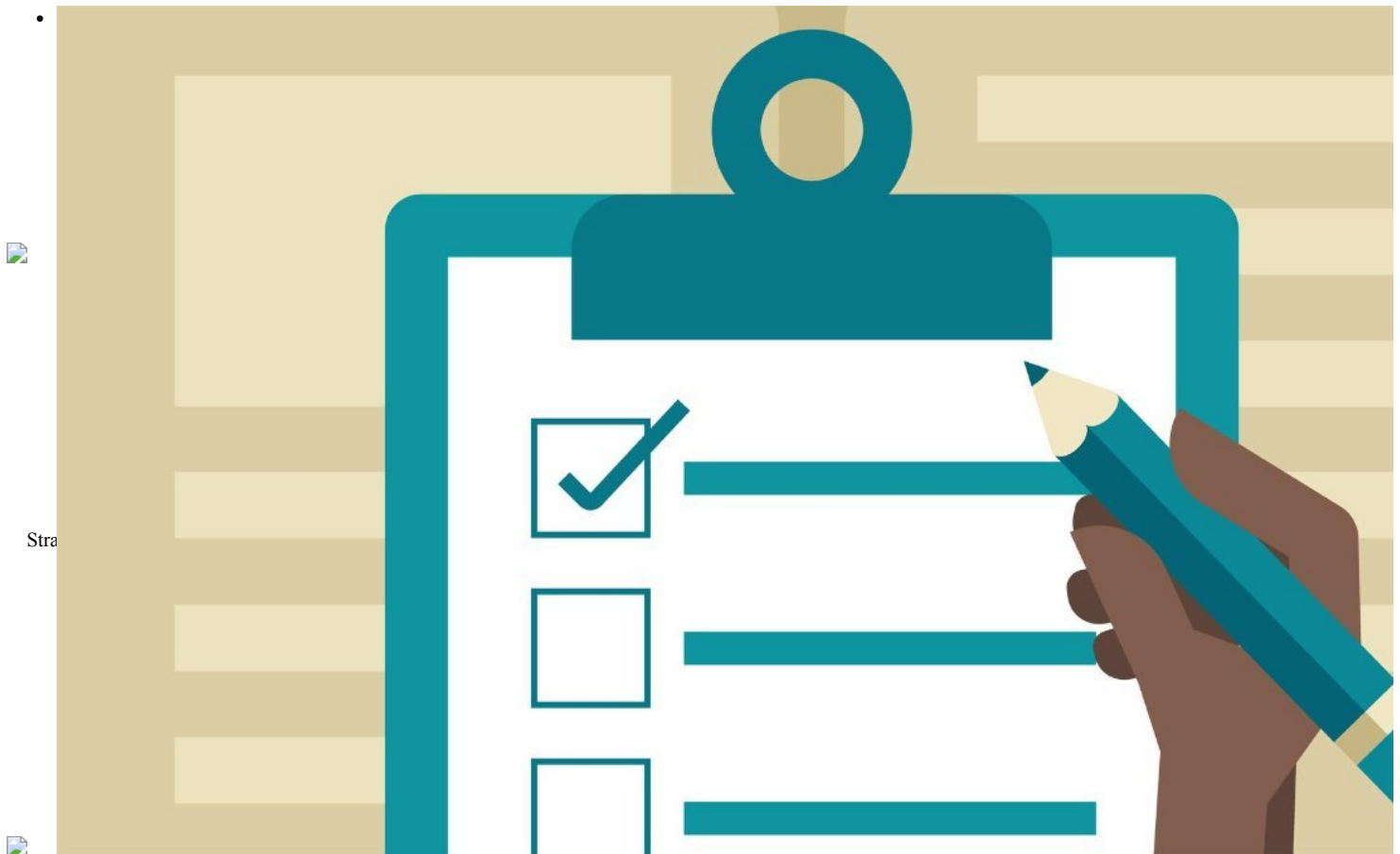
No notes for slide

**6 Simple Steps to Creating a Written Fundraising Plan**

1. 1. Six Simple Steps to Creating a Written Fundraising Plan Sandy Rees, Fundraising Coach
2. 2. The fundraising plan is a blueprint for success.
3. 3. A plan • Moves you from reactive to proactive. • Provides a roadmap for your fundraising. • Gets everyone on the same page.
4. 4. ☐ Yes, got a plan and it's in writing! ☐ I have a plan, but it's in my head ☐ Plan? What plan?
5. 5. Direction? If you don't know where you're going, then any road will get you there.
6. 6. 6 Simple Steps to a Fundraising Plan 1. Identify your assets. 2. Set your goals. 3. Create a plan of action. 4. Work the plan. 5. Monitor the plan. 6. Celebrate!
7. 7. How much money do you need? Ask yourself, "What will it take to deliver service this year?"
8. 8. ☐ Yes, down to the penny ☐ We have a ballpark amount ☐ We just raise whatever we can then figure out how to spend it
9. 9. Evaluate the past • How did it go last year? • What about the previous years? • What worked well? • What didn't work?
10. 10. Strategy Last Year Two Years Ago Include in This Year's Plan? Notes Grants \$ \$ Special Events \$ \$ Direct Mail \$ \$ Major Gifts \$ \$ Monthly Giving \$ \$ Lapsed Donors \$ \$ Online Giving \$ \$ Memberships \$ \$ Corporate sponsorships \$ \$ Product sales \$ \$ Other \$ \$ Total \$ \$
11. 11. Step 1 Identify your assets.
12. 12. What are assets? Organizational assets are things you have going for you that make fundraising easier. Fundraising assets raise good money for your nonprofit.
13. 13. Organizational Assets • Compelling mission • Large public base of support • Name recognition • Well-known staff or Board members • Great facility • Others?
14. 14. Fundraising assets • Great relationships with donors • High traffic to your website • Large list of responsive supporters • Something else?
15. 15. Choose assets Pick the ones you can best use to raise money with this year.
16. 16. Summary Calendar Grants Events Direct mail Major gifts Marketing Comm. Other Jan Feb Mar Apr May Jun July Aug Sep Oct Nov Dec
17. 17. Step 2 Set your goals.
18. 18. 3 Fundraising Targets 1. Number of dollars to raise 2. Number of current donors to renew 3. Number of new donors to acquire
19. 19. ☐ Yes, we are ☐ We need to
20. 20. Decide on strategies Which fundraising strategies will you use? • Grant writing • Special events • Direct Mail • Major Gifts • Online fundraising • Others?
21. 21. Make sure it works Strategy Goal Dollar to raise # Renewed Donors # New Donors Grant writing Special events Direct mail Major gifts Online fundraising Others? Totals \$
22. 22. Step 3 Create a plan of action.
23. 23. Start putting it together
24. 24. For example
25. 25. Strategy Details Strategy Description Target Audience \$ Goal Cost? Who will do? By when? Grants Events Direct mail Major gifts Online giving Other?
26. 26. For example Strategy Description Target Audience \$ Goal Cost? Who will do? By when? Grants Write grants Private foundations \$25,000 \$0 Me Deadlines Events Fundraising dinner Current and prospective donors \$10,000 \$2,500 Me, committee Planning calendar Direct mail Back to school appeal Current donors \$10,000 \$2,500 Me Sep 1 Major gifts Cultivate and ask for major gifts Current and prospective major donors \$50,000 \$0 Me, Board 2 each month Online giving Raise money online Current and prospective donors \$5,000 \$0 Me Nov 1 Other?
27. 27. Action Steps Action Step Who will do it? When will it happen? What resources are needed? 1. 2. 3. 4. 5. 6.
28. 28. For example Strategy: Grant writing Action Step Who will do it? When will it happen? What resources are needed? 1. Research opportunities Me By May 1, 2013 Time 2. Prioritize the opportunities Me By May 7, 2013 Time 3. Create a deadline calendar Me By May 10, 2013 Time 4. Write proposals Me Before deadline Time
29. 29. Step 4 Work the plan.

30. [30.](#) Step 5 Monitor the plan.
31. [31.](#) ☐ Yep, we are ☐ We need to
32. [32.](#) Regular review At least monthly, review your plan to see how you're doing. Course-correct if needed.
33. [33.](#) Monthly Checklist • Total dollars • Renewed donors • New donors • Goals
34. [34.](#) Planned versus actual Review each strategy and goal. Ask yourself: • How are we doing versus what we planned? • What do we need to adjust?
35. [35.](#) Like this:
36. [36.](#) Step 6 Celebrate when things go well!
37. [37.](#) Tip! Focus on the fundraising activities that will give you the most "bang for the buck."
38. [38.](#) Tip! Individual donors are the largest source of untapped potential.
39. [39.](#) Tip! Focus on what your donors and supporters are interested in, not what your nonprofit needs.
40. [40.](#) Download today's worksheets at [www.GetFullyFunded.com/FreeGiftFromSandy](http://www.GetFullyFunded.com/FreeGiftFromSandy)
41. [41.](#) Connect with me! Sandy Rees, CFRE Fundraising
- Coachsandy@GetFullyFunded.com [www.GetFullyFunded.com](http://www.GetFullyFunded.com) [www.facebook.com/GetFullyFunded](https://www.facebook.com/GetFullyFunded) [www.twitter.com/SandyRees](https://www.twitter.com/SandyRees)
- Evaluate the past • How did it go last year? • What about the previous years? • What worked well? • What didn't work?

#### Recommended



[Teaching Techniques: Writing Effective Learning Objectives](#)  
[Online Course - LinkedIn Learning](#)

Step 1 Identify your assets.





Wh



[Common Core: Exploring K-12 Standards](#)  
[Online Course - LinkedIn Learning](#)

Org



Fun

[PowerPoint: Designing Better Slides](#)  
[Online Course - LinkedIn Learning](#)



[Fundraising Strategy](#)  
[anuptiwari](#)



**Political Framework**  
Government organizations should be "owned" by the government and should not be "run" by the government. The government should provide significant support to the organization. The government should support various forms of communication, and should take the form of monetary and other contributions.  
Social Change requires more than "monetary" support from government. It requires a changing of the social system for the environment, marginalization and poverty.



[Fundraising Presentation](#)  
[Marta A. Segura MPH Public Affairs, Strategist, Management](#)

- Choose the ones you can best use to raise money with this year.

|                 | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
|-----------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| Direct Mail     |     |     |     |     |     |     |     |     |     |     |     |     |       |
| Major Gifts     |     |     |     |     |     |     |     |     |     |     |     |     |       |
| Events          |     |     |     |     |     |     |     |     |     |     |     |     |       |
| Marketing Comm. |     |     |     |     |     |     |     |     |     |     |     |     |       |
| Other           |     |     |     |     |     |     |     |     |     |     |     |     |       |

[Fundraising Planning Worksheet](#)  
[4Good.org](#)



[6 Easy Steps to Creating a Written Fundraising Plan](#)  
[Abila](#)



[Fundraising For For-Profits PowerPoint Presentation](#)  
[Andrew Schwartz](#)



SunMonTueWedThuFriSatEventsDirect mailMajor giftsMarketing Comm. OtherJanFebMarAprMayJunJulyAugSepOctNovDec

[Developing a Fundraising Plan](#)  
[Grace Dunlap](#)



[PledgeGo Pitch Deck](#)  
[Robert Baca](#)



- [English](#)
- [Español](#)
- [Português](#)
- [Français](#)
- [Deutsch](#)
- [About](#)
- [Dev & API](#)
- [Blog](#)
- [Terms](#)
- [Privacy](#)
- [Copyright](#)
- [Support](#)

Step 2Set your goals.



Share Clipboard



- Facebook
- Twitter

 • LinkedIn

Link

Public clipboards featuring this slide


×

3 Fundraising Targets1.Number of dollars to raise2.Number of current donors to renew3.Number of new donors to acquire

No public clipboards found for this slide

Select another clipboard

×



Looks like you’ve clipped this slide to already.

Create a clipboard

☐ Yes, we are ☐ We need to  
**You just clipped your first slide!**

Clipping is a handy way to collect important slides you want to go back to later. Now customize the name of a clipboard to store your clips.

Name\*

Description

Visibility

Others can see my Clipboard ☐

Cancel

Save

Save this presentation



Decide on strategiesWhich fundraising strategies will you use?• Grant writing• Special events• Direct Mail• Major Gifts• O...





Make sure it worksStrategy Goal Dollarsto raise# RenewedDonors# NewDonorsGrant writingSpecial eventsDirect mailMajor gifts...



Step 3Create a plan of action.



Start putting it together



For example



Strategy DetailsStrategy Description TargetAudience\$ Goal Cost? Who willdo?Bywhen?GrantsEventsDirectmailMajorgiftsOnlinegi...



For exampleStrategy Description TargetAudience\$ Goal Cost? Who willdo?Bywhen?Grants Write grants Privatefoundations\$25,000...



Action Steps  
Action Step Who will do it? When will it happen? What resources are needed?  
1. 2. 3. 4. 5. 6.



For example  
Strategy: Grant writing  
Action Step Who will do it? When will it happen? What resources are needed?  
1. Research opportunities...



Step 4  
Work the plan.



Step 5 Monitor the plan.



☐ Yep, we are ☐ We need to



Regular review At least monthly, review your plan to see how you're doing. Course-correct if needed.



Monthly Checklist• Total dollars• Renewed donors• New donors• Goals



Planned versus actualReview each strategy and goal.Ask yourself:• How are we doing versus what we planned?• What do we need...



Like this:



Step 6Celebrate when things go well!



Tip!Focus on the fundraising activities that will give you themost “bang for the buck.”



Tip!Individual donors are the largest source of untappedpotential.





Tip! Focus on what your donors and supporters are interested in, not what your nonprofit needs.



Download today's worksheets at [www.GetFullyFunded.com/FreeGiftFromSandy](http://www.GetFullyFunded.com/FreeGiftFromSandy)



Connect with me! Sandy Rees, CFRE Fundraising Coach [sandy@GetFullyFunded.com](mailto:sandy@GetFullyFunded.com) [www.GetFullyFunded.com](http://www.GetFullyFunded.com) [www.facebook.com/GetFullyFunded/](https://www.facebook.com/GetFullyFunded/)



6 Simple Steps to Creating a Written Fundraising Plan



6 Simple Steps to Creating a Written Fundraising Plan



6 Simple Steps to Creating a Written Fundraising Plan



## 6 Simple Steps to Creating a Written Fundraising Plan



## 6 Simple Steps to Creating a Written Fundraising Plan

Upcoming SlideShare

Loading in ...5

×