



FUNDRAISING ACTION PLANNING

Presented by **Fundraising Academy**



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2023 | APRIL 16-18

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**YOU'VE GOT A CAUSE.
LEARN HOW TO **FUND** IT.**

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PRESENTERS



Jack Alotto, MA, CFRE
Consultant-Trainer
Fundraising Academy
National University



LaShonda Williams, MPA, CFRE
Consultant-Trainer
Fundraising Academy
National University



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Objectives

- Review the importance of planning.
- Understand how planning contributes to accomplishing goals.
- Elements of a meaningful plan.
- Apply knowledge gained to create your development plan.



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Talking Points

There are three Essential plans every organization should have to support long-term sustainability: Strategic – Development – Marketing and Communications

Jack – I updated the copy on the slide. The original copy is below. Let me know your thoughts.

Original:

1. Why Plan?
2. What Planning accomplishes (enables).
3. Factors that help you make meaningful plans [SMART Goals]
4. Creating your development plan- we will review the essential elements to prepare you to develop or update your organization's plan

5. Development Plan example – There is no need to reinvent, philanthropy is applied science and we will share samples that will enable you to adapt some of the elements to meet your organization’s goals.



COMMUNITY SHARE

What plans do you currently have at your organization?

When was the last time the plan was updated?

How frequent are your organization's plans updated?



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Talking Points

Before we dive into the presentation, let's get started with baseline information about the level of preparation your organization has in place.

Please raise your hands if your organization currently has

- Strategic Plan
- Development Plan
- Communications & Marketing Plan

All of these plan contribute to achieving your organization's goal. Today we will discuss how they will contribute to enhancing your fundraising efforts



Why Plan?

Establish foundation for success

Outline strategies

Identify resources needed

Monitor progress

Strengthen accountability

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Talking Points: JACK – Select 3 to focus on.

But first – Why Plan? And what does it accomplish?

Planning is a process of determining how to best achieve desired outcomes. A good plan:

- Determines your **focus**- where you are going. **Focus** -- Planning allows the organization to set a course for a period of time. It is the roadmap, and it forces us to examine the environment in which we operate.
- **Outlines strategies for how you will get to where you are going.**
- Creates an awareness of **what resources are needed** to design, implement, monitor and evaluate the organization's programs and strategies.
- Helps you monitor your progress.
- Strengthens **accountability**, who is going to do what by when.



Why Plan?

Ensure organization
is meeting the need

PHO

Provide framework
for management

Position
organization for
success

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Slide 7

PHO [@Jack Alotto] I changed this from "foundation" to "framework" - that ok?
Pearl Hoeglund, 2023-03-15T23:11:04.492

JA0 0 [@Pearl Hoeglund] Yes,
Jack Alotto, 2023-03-16T02:10:41.780



What Does A Plan Accomplish?

- Think at a **macro level**
- Examine your market **niche**
- Look at all **external** forces
- Clarify **mission, vision** and **values**



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Talking Points: JACK – Select 3 to focus on.

B And what does it accomplish?

Planning is a process of determining how to best achieve desired outcomes. A good plan:

What planning Accomplishes

- Planning is a **process** and a product, an attitude and behaviors. The process is as important as the product.
- Strategies to improve progress and enhance outcomes.
- Clarifies values. Tests your mission. Articulates a vision.
- Engages the hearts and minds of staff and board to share the joy of giving



What Does A Plan Accomplish?

- Define **measurable goals**
- Outline **responsibilities**
- Engage **stakeholders** to support the organization's future



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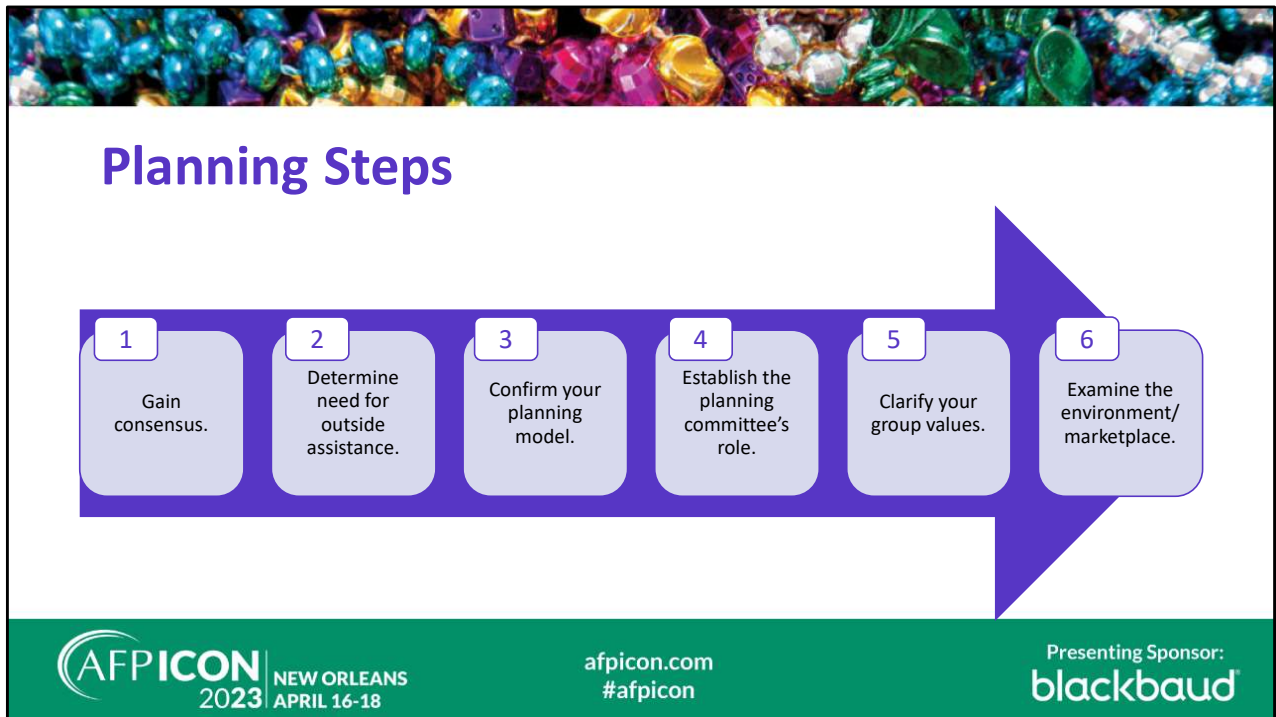
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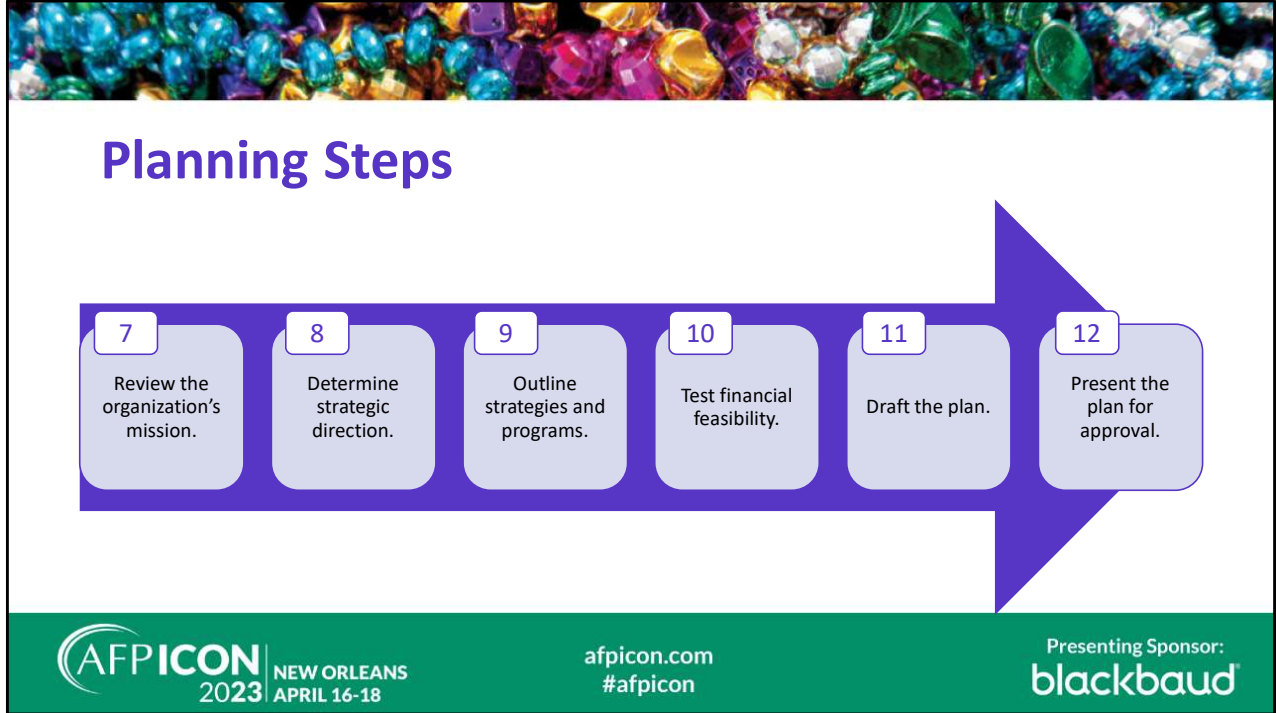
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Talking Points: JACK – Select 3 to focus on.

Planning Steps:

- Consensus that the organization should engage in a planning process, [Board, Executive, Administrative, and Support staff should be included in the process. They all play a vital role in the implementation and overall success.
- Assess organization readiness and skill set to determine if see if you need outside assistance. Enlisting a consultant or facilitator to guide the process may increase the effectiveness.
- Which planning model will you use? There are several options to choose, however you must choose the type based on your organization’s structure. Which planning model will you use?
- The Planning Committee Role will set the standard for expectations on the development process and effective execution of the plan.
- Engaging in meaningful, open dialogue will help clarify group values,
- examine the environment/marketplace,



Talking Points: JACK – Select 3 to focus on.

Planning Steps:

- Reviewing the org’s mission, will remind everyone of the purpose and impact of your organization on the community it serves. It is also an opportunity to inspire the team to amplify their efforts.
- Determining strategic direction, will foster a culture of focus on greater impact.
- Outline strategies or programs, this is also an opportunity to evaluate and redefine programs based on the current needs of those your organization serve.
- test financial feasibility of the plan, sharing the plan with a focus group of those who are closest to the organization and Key Community Stakeholders
- Draft the plan understanding that is provides guidance and may be refined as needed.
- Present it for approval.



Creating Your Fundraising Action Plan





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Talking Points:

Strategic, Development and Marketing and Communication

Process

Direction: Where are we going, how will we get there, and why gifts will help.

- The strategic plan is a vision and a blueprint for the future?
- Answers the big picture questions like What are we doing now? Who are our constituents? What do they value? Why?
- What is happening in the world outside of our organization?
- What is our unique position? What is our vision for the future? What will be the outcome of our work?
- How much will it cost? How will we ensure that we are accountable?

Foundation: The Strategic Plan is the foundation for fund development

The fund development plan must be partnered with your strategic plan. In fact, it is the second stage in planning.

Just like the SP the board formally adopts the DP. The board adopts the fund

development strategy when it approves the budget. The board has to understand how to raise money and board members have to accept their obligation to participate.

Questions to Ask & Guide The Process

Examine the past

- Annual Revenue & Sources
- Successes
- Challenges

Goals

- New donors
- Recurring donors

Resources

- Existing
- Gaps

Other Questions

- Board involvement
- Review Mission, Vision, Values
- Donor acceptance policies
- Etc.!

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Talking Points:

Questions to Ask before you write your development plan:

What do you need the money for? And remember it's not just about money: marketing and communications, board fundraising, monitoring and evaluating your fund development program.

What happened in the past, what was most successful? And what were your challenges?

What are your goals:

- Financial Goals, what are your revenue streams and asses prior year performance
- New donors, what resources are available for new donor acquisition
- Renewing donors; how will you renew an upgrade existing supporters
- What resources do you have?
- What resources do you need?
- How will you acquire donors?
- Will board members assist with fundraising?

Other:

- Do we need to update our mission, vision, values
- Do we have donor acceptance policies?

For Goals introduce Cause Selling – aside from your monetary goals your development plan must include strategic goals this is where cause selling comes in:

Prospecting: Methods of prospecting

Pre-Approach: What needs to be done before you meet with a prospect or donor.

Approach: Make a right first impression

Need Discovery: Cultivation/ asking the right questions, what questioning techniques will you be using. You can create a subset of your fundraising plan that incorporates many of the techniques articulated here.

What is your presentation – with major donors is your presentation style memorized, impromptu, or will you use an outline.

Handling Objections: how to understand objections, how to handling them, when to respond.

The Ask: when by whom, how, etc.

Stewardship: again another potential plan

The Development Plan

- Tells you where to focus your attention
- Helps control workflow
- Protects you from the “good idea”
- Moves you from reactive to proactive
- Builds confidence in your Fundraising Program
- Enables you to raise more \$\$

The Cause Selling Cycle



Phase One
Phase Two
Phase Three

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Talking Points:

- There are three distinct phases:
 - Phase 1 – All the work necessary to prospect for qualified potential donors!
 - Phase 2 – is the face-to-face time with prospective donors!
 - Phase 3 – Includes everything after the gift is given!



Fundraising Narrative Plan

Annual Gifts:

- Goal --raise \$250,000 on Giving Tuesday (raised \$13,000 in 2020)
- Tasks: Write Annual Letter

Events:

- Secure sponsorship for the event (\$50,000)
- Tasks: Create Sponsorship Package

Other gifts to include:

- Major Gifts
- Endowment
- Planned Giving
- Foundation Giving
- Corporate Giving



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Talking Points:

A Fundraising Action Plan should include:

1. The Written plan includes your narrative and your operational plan.
2. Balance the sufficient strategic direction and operational detail.
3. This document is used by staff, development committee and the board of directors.
4. Use this to monitor progress, report on achievements, and development interventions as necessary.
5. Decide content areas of the plan by facilitating a conversation with the development committee and also engage staff and colleagues to decide content and scope of the plan.
6. Fund development must be both realistic and manageable.
7. You have to have a dialogue with key parties throughout the year to build understanding and ownership. These conversations ensure that the draft plan is familiar rather than a surprise.
8. fundraising plans should be a direct result of the organizations strategic plan period.

Staff decides format – typically a narrative section and an outline of action steps/strategies (operational plan) and financial information. Invent what works for you but include key elements like relationship building, solicitation strategies, measures, assignments of accountability, and some form of a calendar or timetable.

Contents of your written development plan

- Mission vision values -- A great way to start your written fund development plan is to reiterate your mission vision and values.
- Strategic goals -- remember these are not financial goals these goals focus on things like improving your board recruitment increasing your acquisition numbers best practices in fund direct development
- Financial Goals -- summarize the charitable revenue goals presented in your budget; include financial goals for each solicitation strategy
- Relationship building strategies-- this is a critical component of your fund development plan remember relationship building nurtures donor loyalty, ensuring profitable relationships that last, includes donor centric communications and donor centric cultivation, this section could also include retention and acquisition strategies.
- Solicitation strategies--all too often this is the only element included in fund development plans. Usually, each solicitation strategy is targeted to a particular audience.
- Retention acquisition and upgrading strategies: Some plans include a separate section to describe these activities.
- Case for support – key messages: in this section of your written plan, you can include key messages from your case for support. You may also include fund development themes targeted to certain audiences. Or used with specific solicitation strategies.
- Measures and benchmarks -- this is where you create benchmarks that refer to the results youth targeted for your measures.
- Assignments of responsibility --in this section you distinguish between the responsibilities of staff and board.
- Timetable calendar --This part of the plan stipulates specific benchmarks for each measure (in your operational plan).
- Resources -- Here is where you describe the resources need it to do the work. Here is where you might describe hiring a new staff person, a consultant,.
- Monitoring progress and evaluating performance: --Describe how you will monitor performance what will staff do? When and how what is the role of the development committee? Remember monitor and evaluate the plan as you implement it.

Remember there's lots of stuff in the plan that doesn't focus on money, lots of this

plan will focus on organizational development what organizational development issues need to be included in your fund development plan?

Goal: professionalize the process a fund development within the organization.

Strategies: put in place systems policies and procedures to support the fund development program.

provide training and coaching of all staff.

Establish a board level strategic fund development committee.


Build a culture of philanthropy.

Set up management information system


Goal: improved board support for fundraising and fund development.

strategies:

- adopt policies defining the role of the board in fundraising
- ensure that screening interviews with candidates clearly communicate the philanthropy and fun development expectations for board members
- provide training opportunities for board members around fund development
strengthen Staffs capacity to enable board members to participate in fund development



Development Work Plan: Oct 2021 - Dec 2022														
Fundraising Vehicle	Goal	Deliverables and/or Critical Tasks	Status	Team Lead	22-Apr	22-May	22-Jun	22-Jul	22-Aug	22-Sep	22-Oct	22-Nov	22-Dec	Measures of Success
Annual Campaign	\$250,000	1. Write Annual Letter			Write annual letter									Achieve goal of \$250,000
		2. Create Response Envelope												
		3. Create Response Card												
		4. Select Mailing List												
Strategies	Goal	Deliverables and/or Critical Tasks	Status	Team Lead	22-Apr	22-May	22-Jun	22-Jul	22-Aug	22-Sep	22-Oct	22-Nov	22-Dec	Measures of Success
Acquiring New Donors	\$500,000	Prospecting: Cause Selling			Ask Board members for Referrals									Achieve goal of \$500,000
		1. Referrals (board, donors,...)												
		2. Networking (Chamber, Rotary, ...)												
		3. Events												



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Talking Points:

- The table reflects a sample Development Plan. This document provides an overview of the essential elements:
- Fundraising Goals
- Revenue Streams: Understanding the effectiveness of your organization’s revenue streams is critical to achieve your goals. The number of prospects/ donor pool will also impact your outcomes.
- Roles/ Responsibilities
- Timeline for the various deliverables
- Measuring Success

Translate your written plan into an operational plan a work plan like in this brief example.



Marketing and Communications Plan

What is a Marketing Plan and why is it important?

What are the activities associated with a Marketing Plan?

What are the essential elements of an effective Marketing Plan?

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The marketing plan emerges from the strategic and development plans. Marketing doesn't ask what's in it for me, **it asks what's in it for the donor**. Good marketing means your donors, volunteers and users will know what you are offering them what **they need** and how it will affect her/him.

The Marketing Plan. The marketing plan starts with a broad and unbiased (1) situational **analysis** of the nonprofit organization and the environment in which it operates typically this is conducted by a **SWOT analysis**. (2) the second part of the marketing plan is to define the

marketing objectives after the objectives, then **on SMART goals**(specific, measurable, achievable, realistic, and timely), are decided then we (3) choose strategies that help us achieve our objectives, then comes tactics that will lead us to the accomplishment of the strategies. (4) You need a budget for the tactics. And (5) define controls, review processes, and identify metrics. (6) Then evaluation!!!

Communication: Building Awareness and Motivating Action

When a nonprofit organization wants to maximize their contributed income, they need a coherent and executable development plan. Development plans need communication strategies that help them carry out their mission. When deciding a communication strategy, you need to consider the following critical questions 1. what is the desired message 2. who will receive this message 3. what is the action we desire 4. how will the message be delivered?

Communicating messages with a purpose; there are two types of communication messages 1. **those intended to influence attitude** and 2. **those intended to influence actions**. Those intended to influence attitudes are based on public or media relations activities. Those intended to influence actions or communications generally based on advertising and promotional initiatives. Direct response marketing and direct response fundraising.

Planning A Communication Campaign: 1. Defining the market, determining the recipients of the message is probably the most important part of the development communication strategy, Number 2 defining the message the goal of any communication is to generate action and 3. the goal is to be concise clear and direct as possible. A personalized message will have the greatest impact. Testing messages: online focus groups have increased the ability to pretest messages colors design and text using prior to the production. Defining the media: the next step is to choose the media that will offer the greatest access at the best cost. Typically, media is selected based upon demographics.

1. Activities that are a part of Marketing Plan

Research about prospects, programs to offer, how the org is viewed by stakeholders

TalkiSegmenting markets and prospects for different approaches (SS agency, homelessness, feeding programs, anti-gang violence, etc.)

Setting marketing goals

Planning institutional strategies – planning marketing strategies

Budgeting and resource allocation

Communication strategies (messaging, channels, etc.)

Public relations – image building

Evaluation – were marketing goals achieved

Elements of a Good Marketing Plan

1. Positioning— set achievable goals, identify target markets (based on research); articulate the messages you want to convey, outline specific strategies, assign resources, set realistic time frames., establish indicators of success and determine how progress will be monitored.
2. Matrix of marketing elements
3. Positioning statement: describes in a few concise words how the organization is unique, making its mission simple and compelling
4. Marketing online: these are direct links to your supporters, donors and the larger community: Website-- easy to use, open access, allows users to donate, allows users to volunteers. You should put your URL in every communication piece Email Marketing: enables you to contact both individuals and segmented groups. Social Networking: free to join, build a loyal following by keeping supporters up to date, easy to use.
5. Multichannel Marketing: use all channels, online



Community Share

Which do you plan to share with your organization to enhance your current fundraising efforts?

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Questions?

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Talking Points:

A Fundraising Action Plan should include:

Written Plan is a narrative that describes the fundraising goals, strategies to achieve those goals, etc.

Operational plan that outlines goals (like the narrative plan) timelines, who's responsible, and tactics. This is the plan that you will follow



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