

FUNDRAISING PLAN TRAINING GUIDE

How to Create Your Ultimate Annual Fundraising Plan to Raise More Money!

“There are dreamers and there are planners; the planners make their dreams come true.”

– Edwin Louis Cole

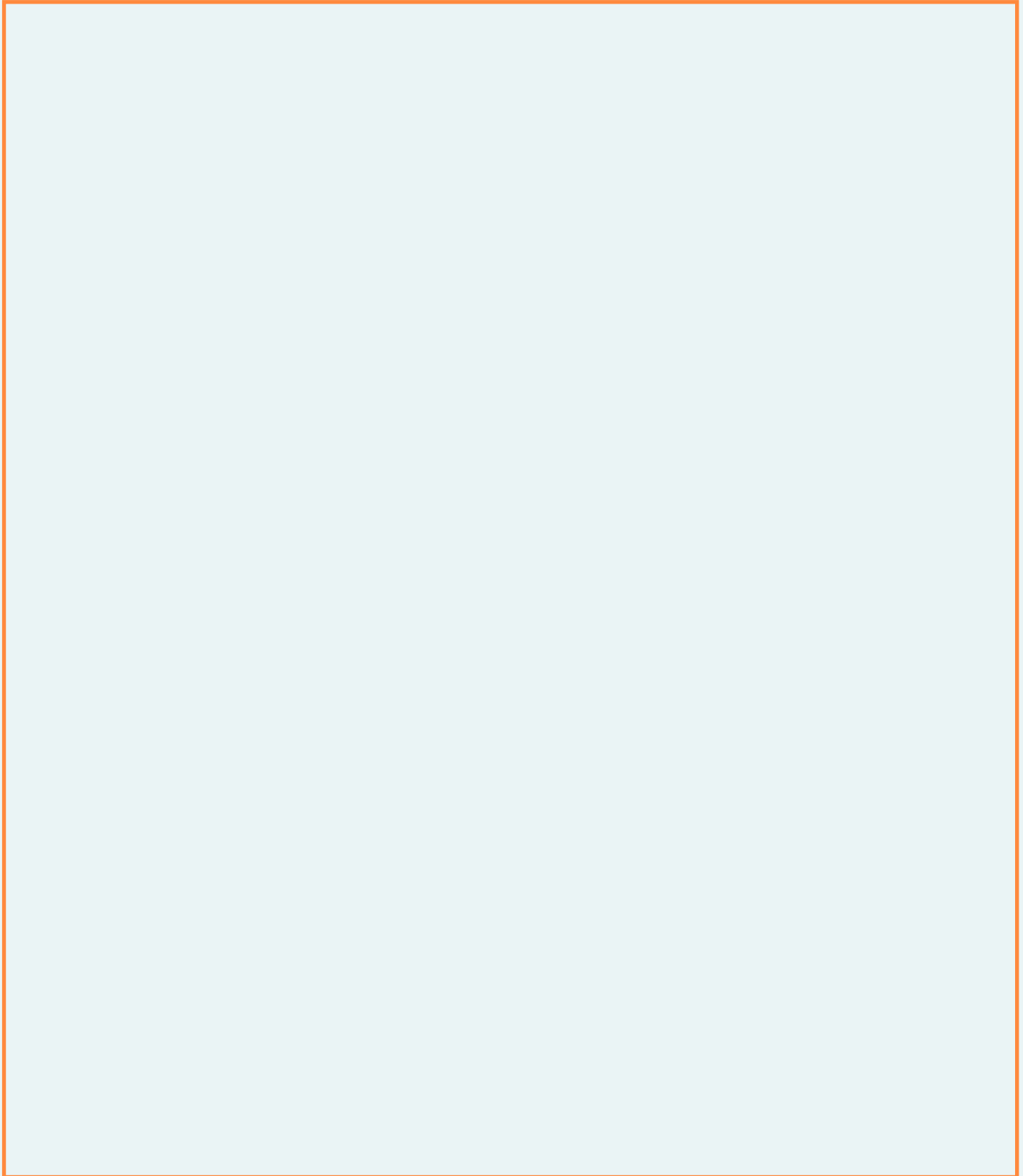
created by
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*Fundraising Strategist
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TAMMY ZONKER'S PROVEN 6-STEP FRAMEWORK



WHAT DO I WANT *FOR MYSELF* AND *MY ORGANIZATION* AS A RESULT OF CREATING A SUCCESSFUL ANNUAL FUNDRAISING PLAN?



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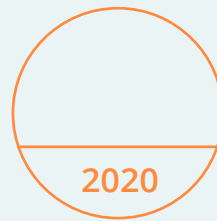
ASSESS YOUR DONOR DATA, FUNDRAISING PERFORMANCE & TRENDS

1. REVENUE & RETENTION

2023 2022 2021 2020 2019

A. Total Contributions from all channels:	_____	_____	_____	_____	_____
1. Individual contributions:	_____	_____	_____	_____	_____
2. Private/Public Foundations:	_____	_____	_____	_____	_____
3. Donor-Advised Funds:	_____	_____	_____	_____	_____
4. Corporations/Businesses:	_____	_____	_____	_____	_____
5. Planned Gifts:	_____	_____	_____	_____	_____

Calculate and draw your annual percentage of contributions by source for each of the past five years.



2023 2022 2021 2020 2019

B. Overall donor retention:	_____	_____	_____	_____	_____
1. 1st time donor retention:	_____	_____	_____	_____	_____
2. Monthly giving donor retention:	_____	_____	_____	_____	_____
3. Other affinity groups:	_____	_____	_____	_____	_____
4. Retention of donors \$10-\$499:	_____	_____	_____	_____	_____
5. Retention of donors \$500-\$999:	_____	_____	_____	_____	_____
6. Retention of donors \$1K-\$4,999:	_____	_____	_____	_____	_____
7. Retention of donors \$5K-\$9,999:	_____	_____	_____	_____	_____
8. Retention of donors \$10K+:	_____	_____	_____	_____	_____
C. Your median gift value:	_____	_____	_____	_____	_____
D. Your average donor LTV value:	_____	_____	_____	_____	_____

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ASSESS YOUR DONOR DATA, FUNDRAISING PERFORMANCE & TRENDS

	2023	2022	2021	2020	2019
E. Number of donors giving by gift value	_____	_____	_____	_____	_____
1. Total number of donors giving:	_____	_____	_____	_____	_____
2. 1st-time donors:	_____	_____	_____	_____	_____
3. Recurring monthly givers:	_____	_____	_____	_____	_____
4. Other affinity groups:	_____	_____	_____	_____	_____
5. Individual donors giving < \$10:	_____	_____	_____	_____	_____
6. Individual donors giving \$10-\$499:	_____	_____	_____	_____	_____
7. Individual donors giving \$500-\$999:	_____	_____	_____	_____	_____
8. Individual donors giving \$1K-\$4,999:	_____	_____	_____	_____	_____
9. Individual donors giving \$5K-\$9,999:	_____	_____	_____	_____	_____
10. Individual donors giving \$10K+:	_____	_____	_____	_____	_____
11. Corporate donors giving \$1K-\$4,999:	_____	_____	_____	_____	_____
12. Corporate donors giving \$5K-\$9,999:	_____	_____	_____	_____	_____
13. Corporate donors giving \$10K+:	_____	_____	_____	_____	_____
14. Foundation giving \$1K-\$4,999:	_____	_____	_____	_____	_____
15. Foundation giving \$5K-\$9,999:	_____	_____	_____	_____	_____
16. Foundation giving \$10K-\$49,999:	_____	_____	_____	_____	_____
17. Foundation giving \$50K+:	_____	_____	_____	_____	_____
18. Legacy Letter of Intent:	_____	_____	_____	_____	_____

“A 10% improvement in donor attrition can yield up to a 200% increase in projected donor lifetime values.”

– Dr. Adrian Sargeant, Co-Founder, Institute for Sustainable Philanthropy

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ASSESS YOUR DONOR DATA, FUNDRAISING PERFORMANCE & TRENDS

F. Channel Performance Evaluation Framework

Cost-Per-Dollar-Raised Best Practice: (excluding staff time)
Events .50 cents to raise \$1.00.
Direct mail renewal/upgrade .20 to .25 cents to raise \$1.00.
Direct mail acquisition \$1.00 to \$1.25 to raise \$1.00 in first year.
Corporate giving .20 to raise \$1.00.
Major gift fundraising .05 to .10 cents to raise \$1.00.
Legacy gift fundraising .25 cents to raise \$1.00.
Grant funding .05 cents to raise \$1.00.

	Event Name	\$ Ticket Rev.	\$ Sponsorship	Additional \$	\$ Gross Rev.	\$ Exp.	\$ Net Rev.	\$ CPDR
2023	_____	_____	_____	_____	_____	_____	_____	_____
2022	_____	_____	_____	_____	_____	_____	_____	_____
2021	_____	_____	_____	_____	_____	_____	_____	_____
2020	_____	_____	_____	_____	_____	_____	_____	_____
2019	_____	_____	_____	_____	_____	_____	_____	_____

	Appeal	\$ Gross Rev.	\$ Match	\$ Total Gross	\$ Expenses	\$ Net Rev.	\$ CDPR
2023	_____	_____	_____	_____	_____	_____	_____
2022	_____	_____	_____	_____	_____	_____	_____
2021	_____	_____	_____	_____	_____	_____	_____
2020	_____	_____	_____	_____	_____	_____	_____
2019	_____	_____	_____	_____	_____	_____	_____

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DETERMINE WHAT'S WORKING AND COULD BE ENHANCED OR SCALED

3

DETERMINE WHAT'S NOT WORKING AND COULD BE RE-IMAGINED OR RETIRED AND WHAT'S MISSING

4

STRENGTHEN YOUR FUNDRAISING FOUNDATION: ANNUAL FUND, MAJOR GIFTS AND PLANNED GIVING

A. FIVE MOST IMPORTANT INITIATIVES YOU WILL INCLUDE IN YOUR ULTIMATE FUNDRAISING STRATEGY AND PLAN

Think of your fundraising strategy and plan as a three-legged stool. The legs that support the stool are Annual Fund, Major Gifts and Legacy Giving.

The data analysis you performed in steps 1, 2 and 3 of our proven process illuminated insights to what's working and could be scaled, what's not working and could be re-imagined or retired, and what's missing for each leg of your stool. Based on those insights and the associated opportunities:

- 1. What are the three to five most important initiatives you will include in your Ultimate Fundraising Strategy and Plan?*
- 2. What investment in resources will you need to execute each initiative with excellence?*
- 3. What's the anticipated impact on contributions?*

4

STRENGTHEN YOUR FUNDRAISING FOUNDATION: ANNUAL FUND, MAJOR GIFTS AND PLANNED GIVING

B. YOUR ULTIMATE FUNDRAISING PLAN REVENUE PROJECTION WORKSHEET

Annual Fund Program:	Ticket Sale Revenue	Sponsorship Revenue	*Auxiliary Revenue	Total Gross	Expenses	Net Revenue
Event #1 (Name)	_____	_____	_____	_____	_____	_____
Event #2 (Name)	_____	_____	_____	_____	_____	_____
Event #3 (Name)	_____	_____	_____	_____	_____	_____
Third-party Events	_____	_____	_____	_____	_____	_____
Multi Campaign Q1	_____	_____	_____	_____	_____	_____
Multi Campaign Q2	_____	_____	_____	_____	_____	_____
Multi Campaign Q3	_____	_____	_____	_____	_____	_____
Multi Campaign Q4	_____	_____	_____	_____	_____	_____
Newsletter Giving	_____	_____	_____	_____	_____	_____
Memorials/Tributes	_____	_____	_____	_____	_____	_____
Monthly Giving (New Members)	_____	_____	_____	_____	_____	_____
Monthly Giving (Upgrades+Additional 1x gifts)	_____	_____	_____	_____	_____	_____
Monthly Giving (Current Member Projections)	_____	_____	_____	_____	_____	_____
Peer-to-Peer Campaign(s)	_____	_____	_____	_____	_____	_____
Giving Tuesday	_____	_____	_____	_____	_____	_____
Service Clubs	_____	_____	_____	_____	_____	_____
Affinity Group Giving:						
• Faith Groups	_____	_____	_____	_____	_____	_____
• Alumni Communities	_____	_____	_____	_____	_____	_____
• Women of Philanthropy	_____	_____	_____	_____	_____	_____
• Young Professionals	_____	_____	_____	_____	_____	_____
• Others _____	_____	_____	_____	_____	_____	_____
Corporate Giving (Non-events)	_____	_____	_____	_____	_____	_____
Grants (Priv/Pub Foundations)	_____	_____	_____	_____	_____	_____
Grants (Federal)	_____	_____	_____	_____	_____	_____
Other (Specify)	_____	_____	_____	_____	_____	_____

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STRENGTHEN YOUR FUNDRAISING FOUNDATION: ANNUAL FUND, MAJOR GIFTS AND PLANNED GIVING

B. YOUR ULTIMATE FUNDRAISING PLAN REVENUE PROJECTION WORKSHEET (continued)

Annual Fund Program:	Ticket Sale Revenue	Sponsorship Revenue	*Auxiliary Revenue	Total Gross	Expenses	Net Revenue
Major Donor Program:						
<ul style="list-style-type: none"> • Donor-Advised Funds <i>(Typically given through community foundations or other charitable fiduciaries)</i> 	_____	_____	_____	_____	_____	_____
<ul style="list-style-type: none"> • Major Gifts <i>(Specify the dollar value you define as a major gift)</i> 	_____	_____	_____	_____	_____	_____
<ul style="list-style-type: none"> • Leadership Giving <i>(Typically valued at \$1K up to your major gift threshold)</i> 	_____	_____	_____	_____	_____	_____
Planned Giving Program**:						
<ul style="list-style-type: none"> • Realized Legacy Gifts 	_____	_____	_____	_____	_____	_____

*Auxiliary revenue is defined as revenue that supplements the event, campaign or initiative. For example: raffles, live or silent auctions, contributions from people who did not purchase event tickets — but want to contribute.

**Most organizations do not budget projected revenue from bequests and/or life insurance beneficiary contributions (which account for more than eighty percents of all planned gifts). For mature planned giving programs, some organizations will project revenue based on a three year rolling average of realized gifts. Consult your Chief Financial Officer or Director of Finance to determine your best approach.

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STRENGTHEN YOUR FUNDRAISING FOUNDATION: ANNUAL FUND, MAJOR GIFTS AND PLANNED GIVING

C. SUCCESS ACCELERATORS

Success accelerators are elements that inspire and/or drive increased giving. Examples of success accelerators may include (*but not limited to*):

- A clear, compelling and urgent need
- Social proof your solution works (*testimonials, stories and/or quotes*)
- Matching gift challenges
- Sponsorships that underwrite or over-underwrite all expenses
- Endorsement from key community leaders and influencers
- Media interviews, and/or op-eds to build credibility and community awareness
- Peer-to-peer participation in the donor development process on-and-offline
- Recognition opportunities and/or premiums (*use cautiously*)

The more success accelerators you can stack for any given event, campaign or initiative, the more excitement and momentum you'll create.

Define Your Success Accelerators Stack for _____ (event, campaign or initiative):

1. _____
2. _____
3. _____
4. _____
5. _____

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INVEST IN INNOVATION TO ENHANCE YOUR FUNDRAISING RESULTS

(CHECK ALL THAT APPLY)

AI Powered Prospect Research

Wealth Screening

Behavior Modeling & Analytics

Donor Advised Funds Prospecting

Automated Workflows/Segmentation

AI Assisted Copywriting

Hybrid Event Strategies

Video and/or Text Messaging

Other

Other

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CREATE A STRUCTURE FOR ACCOUNTABILITY, PERFORMANCE MEASUREMENT & REPORTING

1. CREATING YOUR SUCCESSFUL FUNDRAISING PLAN AND BUDGET

- A. Understand your organization's budget process and timeline.
- B. Develop data-informed gross and net revenue projections.
- C. Determine what investments and innovations you are proposing, and what's the anticipated ROI for each event, campaign and initiative for annual fund, major gifts, and planned giving.
- D. Identify the resources needed to enhance/scale what's working and quantify the anticipated impact on the bottom line.
- E. Propose solutions for fundraising initiatives that aren't currently working and quantify the impact on your bottom line.
- F. Identify which fundraising strategies and/or tools should be integrated into your annual fundraising plan and the anticipated impact.
- G. Assess staffing levels, skills and professional development.
- H. Develop a detailed calendar of fundraising activities to support strategy and plan.
- I. When/if budget negotiations threaten cuts to your fundraising success plan, connect those expense cuts to impact on net revenue.

2. ACCOUNTABILITY, PERFORMANCE MEASUREMENT & REPORTING

- A. Identify a team member who will be the accountability champion for each key initiative and which team members will support the effort.
- B. Ask the team to identify key performance indicators and benchmarks for each key initiative.
- C. Identify key reports for influencers/decision makers and the required cadence.
 1. Board of Directors and/or Development Committee
 2. Executive Leadership Team and/or Chief Financial Officer
 3. Development Team and/or Workgroups
 4. Management Dashboards

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CREATE A STRUCTURE FOR ACCOUNTABILITY, PERFORMANCE MEASUREMENT & REPORTING

3. ACCOUNTABILITY, PERFORMANCE MEASUREMENT & REPORTING (CONTINUED)

KEY INITIATIVE (Channel Strategy)	ACCOUNTABILITY (Champion + Team)	MEASUREMENT (KPIs + Smart Numbers)	REPORTING (What/By When)

“A goal without a plan is just a wish.”

– Antoine de Saint-Exupéry, *The Little Prince* Author

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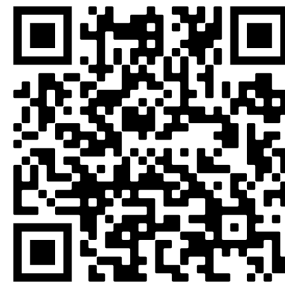
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