

## Components of a Good Annual Fundraising Plan

A Fundraising Plan – be it short-term (i.e., for a specific event), annual, or long-range (multi-year), is an essential tool for any successful non-profit organization. Without it, is like driving a cross-country road trip with no map or compass or destination in mind – you’re just blowing in the wind. Your Fundraising Plan should contain the ways you intend to raise donations to support your work. It should be linked with any fee for service structure you have (ticket sales, program ads, etc.), and for maximum impact, a Marketing and Outreach Plan.

Your comprehensive Annual Fundraising Plan should at a minimum include:

1. **Database Management System:** Expand, improve, and combine your organization’s data management tool(s). Make sure there is a written plan in place for managing incoming data (who will enter data), when it is entered (i.e., within a week), what data is logged, how entries are classified, etc.
2. **Donor Acquisition Plan:** Always infuse new people into your database (special event sign ups, names from board members, mail list purchase, contacts from meetings and conferences, etc.)
3. **Direct Appeal to Individual Donors/Potential Donors:** A minimum of two times a year to individual donors (asking only – no other inserts or distractions). This should reflect about 65-90% of money raised through fundraising (see #3 and #4 below).
4. **Major Gifts Plans:** Linked with #2 above, these are the gifts you plan to acquire through personalized, in-person asks. They are usually people identified through your research as those who can give at least above a set amount your organization defines as a “major gift” (i.e., \$500, \$5,000). This should be a part of the 65-90% raised above in #2.
5. **Planned Gifts:** Start with creating a plan for wills and bequests. Monies that come in here should be a part of the 65-90% raised above in #2.
6. **Corporate/Business Giving Plan:** Once or twice a year to specific businesses for specific things (money, in-kind support, etc.). This should reflect approximately 3-10% of money raised through fundraising.

7. **Direct Communication:** A minimum of two times per year to all constituents (i.e., newsletter, postcards, etc.).
8. **Special Events:** One-two times per year with special, measurable non-fundraising goals (attendance, sign-ups, etc.). Special events should rarely have “raising money” as a goal or the only goal. This should be a very small total of money raised through fundraising.
9. **Grants:** As needed per project. This should be a about 10-15% of money raised through fundraising.
10. **In-kind Gifts:** Non-cash (in-kind) gifts (what do you need, when, who will you ask).
11. **Online Giving:** Create a more pro-active tool for giving opportunities on-line. Falls under individual and corporate giving percentages, depending on gift source.
12. **Special Projects:** (i.e., capital campaigns) As needed.

This Fundraising Plan should be merged with the plans you should already be creating for your program needs. It should also eventually be merged with a Marketing and Outreach (PR) Plan for maximum synergistic impact.