Annual Fundraising Strategy Kit

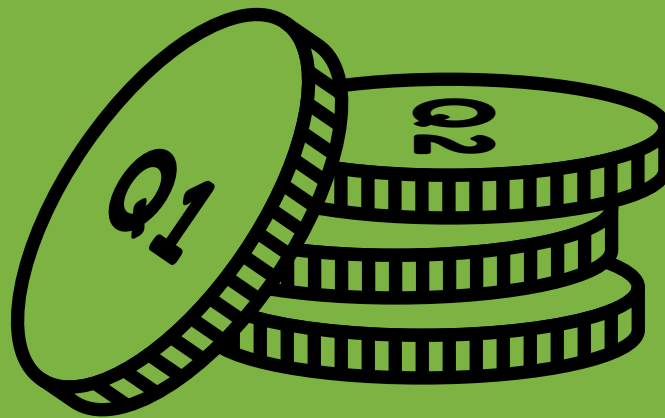# Table of Contents

Introduction

For smaller nonprofit organizations, it's easy to get caught up in the day-to-day operations and lose sight of your long-term vision. That's why having focused goals and a strategy to achieve them is so important. This kit gives you helpful tools, tips, and exercises to create your organization's fundraising plan for the next year.

A purposeful fundraising strategy helps to...

- Keep you and your team **organized**

- **Motivate you**

- **Ensure you do the prep work** before charging ahead

- **Hold you accountable**

- **Communicate goals** to the entire team

- **Unify your team** under larger goals

Use these exercises and resources to nail down your plan and identify the best tactics to achieve success. With your core goals in mind and a calendar of fundraising initiatives charted, you can avoid getting distracted by new recommendations that come your way over the course of the year.

1 | Understand Your Organization

Before you list out every fundraising initiative you want to pursue, it's extremely helpful to take a quick look at where your nonprofit stands. The exercises and tips in part one set you up for success by evaluating your nonprofit's opportunities and challenges, pinpointing your position in your cause sector, and reviewing your existing fundraising efforts.

Clarify Strengths, Weaknesses, Opportunities, and Threats

A SWOT analysis is generally presented in a four-quadrant chart. You will notice that each section of the chart can also be labeled as either internal or external, and favorable or unfavorable.

	FAVORABLE	UNFAVORABLE
INTERNAL	**STRENGTHS** • _____ • _____ • _____	**WEAKNESSES** • _____ • _____ • _____
EXTERNAL	**OPPORTUNITIES** • _____ • _____ • _____	**THREATS** • _____ • _____ • _____

STRENGTHS

- What is your organization amazing at?

- What differentiates you from other nonprofit organizations serving your cause?

- Do you have a novel approach?

WEAKNESSES

- What areas haven't you committed time to yet?

- Where did you fall short last year?

- What aspects of your strategy didn't have a positive ROI last year?

OPPORTUNITIES

- What fundraising trails do you have yet to blaze?

- Is your organization dedicated to fostering innovation and growth?

- What organizations might strengthen your value proposition through partnership?
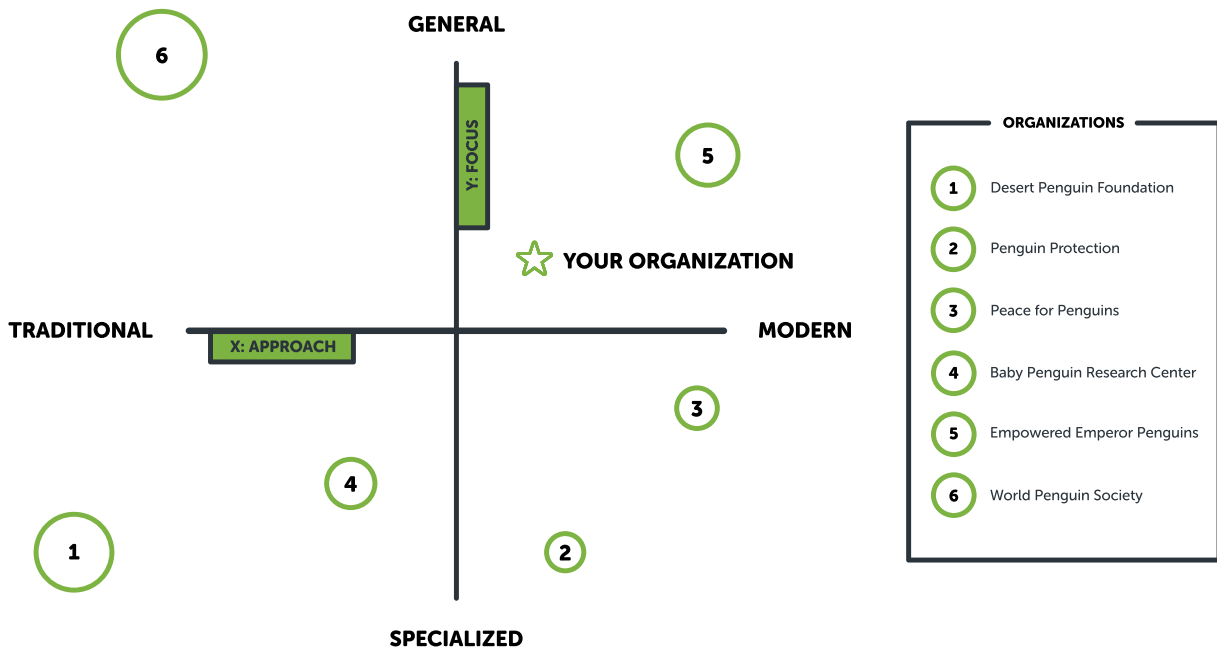
THREATS

- What factors put your organization at risk?

- What political or environmental issues, if any, surround your cause?

- Do you face any managerial challenges, such as high turnover, in your day-to-day operations?

# How Do You Compare to Others in Your Cause Sector?

A perceptual map is a tool you can use with varying degrees of complexity. It can be handwritten on a white board, or inputted in Excel. The map is a four-quadrant graph that illustrates the position of different brands or organizations in an industry according to overall perception of customers/donors. It's possible to create this map only using your staff's impressions of donor perception, but you might consider using a survey to poll how your donors view your organization.

For example, in this map, the y-axis indicates donor perception of how narrow the organization's focus is in serving their cause (from general to specialized). The x-axis represents a donor's perception of an organization's approach (from traditional to modern). Plot other organizations that work in your field to understand what sets your nonprofit apart. This will help you narrow in your audience or identify any disparities between how you want to be perceived and how the public perceives you.

GENERAL

Y: FOCUS

5

☆ YOUR ORGANIZATION

TRADITIONAL

X: APPROACH

MODERN

3

4

1

2

SPECIALIZED

6

ORGANIZATIONS

1 Desert Penguin Foundation

2 Penguin Protection

3 Peace for Penguins

4 Baby Penguin Research Center

5 Empowered Emperor Penguins

6 World Penguin Society

Evaluate Your Existing Fundraising Approach

It's important to consider what parts of your overall fundraising strategy may be in need of more attention. Today, your online strategy is an essential component of your initiatives. How does the amount of time you've devoted to your donor retention efforts stack up against the amount of time you've spent on your website, or social media strategy? By completing an assessment of your online fundraising initiatives, you can easily identify where to invest more time to round out your efforts.
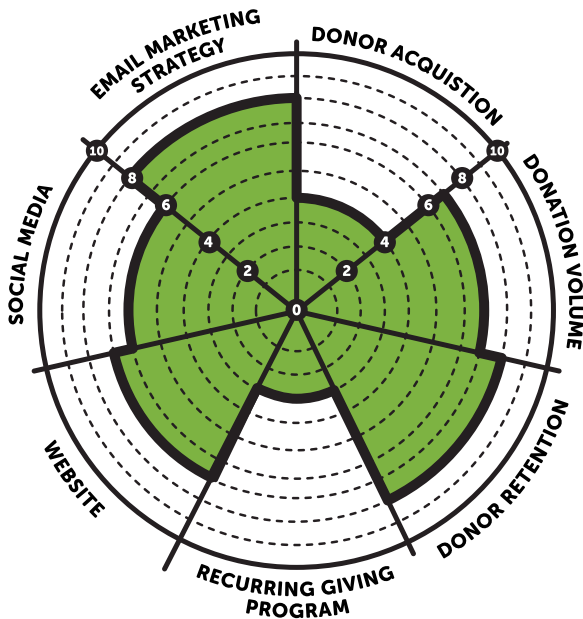
In this organization's example, their recurring giving program and donor acquisition need more attention in order to round out their wheel.
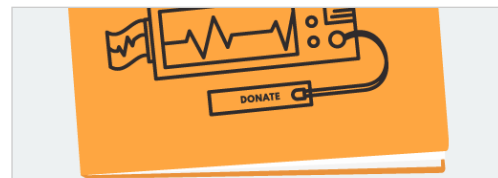
The Online Fundraising Assessment

To take a close look at what elements of your online fundraising strategy might be lacking, check out this online fundraising worksheet.

Download Now
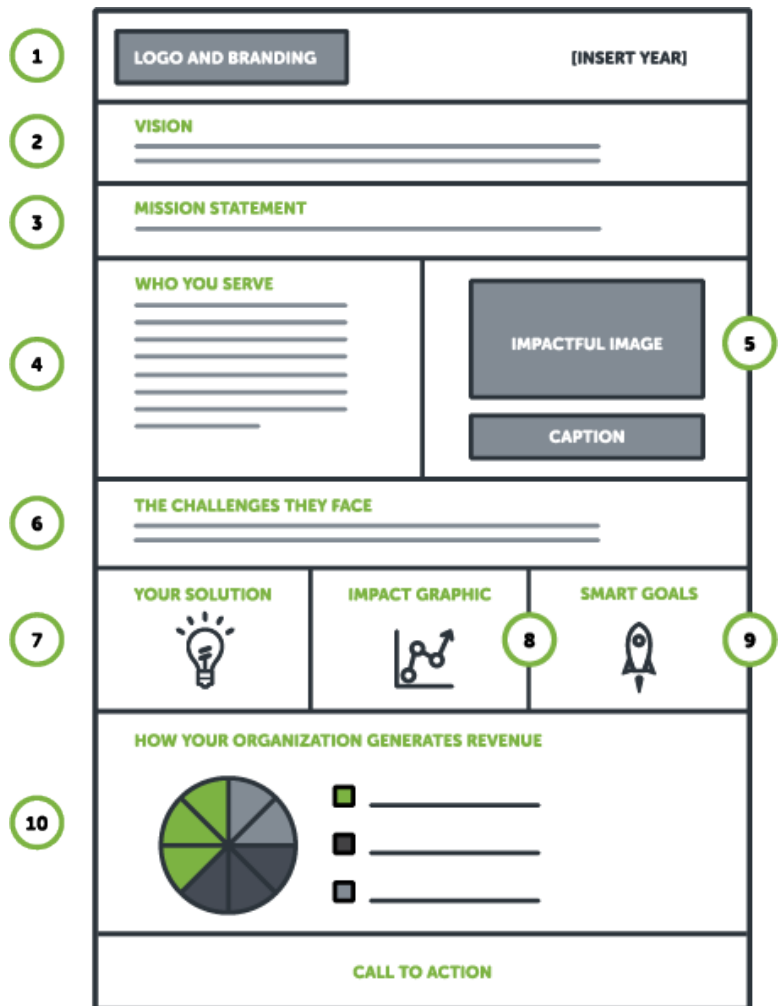
Key Questions From Part 1

Answer the following questions to gain insight and inspiration for part two, where you will create a concise annual strategy with SMART goals.

- **What are your organization's biggest opportunities in the coming year? What are your biggest threats?**

- **What sets you apart from other organizations in your region or cause sector? What audiences can you own?**

- **What fundraising gaps does your nonprofit need to fill for sustainability and growth?**

2 | Document Your Fundraising Goals and Strategy

Regardless of your age or size, all organizations can benefit from the creation of a one-page, one-year fundraising plan. The beauty of this document is that it can function as both the executive summary of your larger plan, and as a standalone communication tool. It's succinct and therefore easy to digest, which is important for a document that serves as a key external communication asset for meetings with potential donors, foundations, partners, and corporations.

Executive summaries, like a study's abstract, bring together the main findings of the larger document or experiment. Use the material you worked through in the last chapter and highlight key points here.

1. LOGO AND BRANDING — [INSERT YEAR]
2. VISION
3. MISSION STATEMENT
4. WHO YOU SERVE
5. IMPACTFUL IMAGE — CAPTION
6. THE CHALLENGES THEY FACE
7. YOUR SOLUTION
8. IMPACT GRAPHIC
9. SMART GOALS
10. HOW YOUR ORGANIZATION GENERATES REVENUE

CALL TO ACTION

(1) LOGO AND BRANDING

As this document will primarily be used externally, you'll want to put your best—and most attractive—foot forward. Use your logo and elements of your branding such as key colors, images, and fonts in order to give this document the same look and feel as your website and donation pages. According to Network for Good, branded donation pages raise seven times more money than standard pages, so be sure this document looks the part.[1]

(2) VISION

Describe the larger vision that motivates your organization. If your organization is fighting a battle that's part of a larger war, connect your work to the bigger picture and what's at stake.

(3) MISSION STATEMENT

This statement is typically 1 to 2 sentences and should include who you serve, what challenges they face, and how you serve them. In Top Nonprofit's study of 50 examples, the average word count, discounting references to the brand, was just 15.3.[2]

(4) WHO YOU SERVE

Details are key. Include personal stories with specific information to connect the lives of who you serve with donors. Donors tend to be twice as generous when they read about the stories of impacted individuals.[3]

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[1] Network for Good, "The Network for Good Digital Giving Index." http://www.networkforgood.com/digitalgivingindex/

[2] 3 Top Nonprofits , "50 Example Mission Statements." https://topnonprofits.com/examples/nonprofit-mission-statements/

[3] Network for Good, "Storytelling for Nonprofits." http://learn.networkforgood.org/storytelling-guide-for-nonprofits.html

(5) IMPACTFUL IMAGE

An image is a great way to humanize your cause. An image with a caption is even better. By providing the details behind the picture, you open the door for your donors to step inside the world the image represents.

(6) THE CHALLENGES THEY FACE

Describe the reasons why the people you serve need support. This section should make the situation real to your reader. Use descriptive language to paint a picture, rather than just tell a tale.

(7) YOUR SOLUTION

Time to shine. How is your solution helping your cause? Let your donors know why supporting your organization is a decision that makes a meaningful impact.

(8) IMPACT GRAPHIC

Speaking of impact, a graph or visual chart is a great way to present information in a way that translates and is easy to digest.

(9) SMART GOALS

Map out your overall fundraising goals and let your readers know you're not messing around. Show how you've carved out an effective strategy by making each goal specific, measurable, relevant, and time-bound. Be sure to provide the "why" behind your goals and connect them to the health of your programs.

10   HOW YOUR ORGANIZATION GENERATES REVENUE

Give your reader an idea of how your organization generates revenue. This will help individual donors understand how important contributions like theirs are to your success and your cause. Use this one-page, one-year document to communicate with potential donors, large and small, whenever you're meeting in person or need to personally send more information online. You might even tape it to the wall next to your desk. Let it be a high level guiding force as you work towards achieving your organization's goals.

Key Questions From Part 2

The answers to these questions will help you in part three, where you will create a fundraising calendar to execute your strategy.

- **What is your organization's vision of the future? What solutions do you want to enact?**

- **What are your primary fundraising goals for the next year?**

3 | Chart Your Fundraising Campaigns and Calendar

With your organization's position, along with your fundraising vision and goals, it's time to create some concrete plans for success.

A year-round fundraising calendar will help you...

- Prepare for existing campaigns and events

- Identify gaps in your fundraising plans

- Prevent donor fatigue

- Take advantage of holidays and seasonal events

- Create content in support of fundraising initiatives

Plus, you'll be able to effectively communicate internally with your staff and externally with your network of supporters.

1. Make a List

List out the key events, campaigns, and dates taking place throughout the year.

KEY DATES

Fill in the key dates you can leverage among your supporters. These include national cause days, landmark events such as your founding date, national giving days, holidays, etc. And don't forget to add Giving Tuesday!

CAMPAIGNS

Start thinking about what campaigns you want to launch this year. Do you have a recurring giving plan or peer-to-peer fundraising initative that you want to kick off? List out 3 to 4 campaign ideas:

EVENTS

Are you hosting an annual run or gala? Write down what events you plan on hosting throughout the year:

2. Map Out Your Calendar

Get a year-wide snapshot by mapping your list of events within the calendar included in this packet.

The hard part is over! Use your list of key events, campaigns, and communications for the year and organize them within this calendar spreadsheet. This will help you identify periods where you don't have much planned or maybe too many things going on at once. The next page is a sample calendar with some tips and tricks to get you on your way.

		Q1			Q2			Q3			Q4		
Quarter Goals													
		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
KEY DATES	Founding Anniversary				Founding Anniversary								
	National Cause Days										Breast Cancer Awareness Month		
	Giving Days												Giving Tuesday
CAMPAIGNS	Campaign #1	Introduce & Launch Recurring Giving Campaign											
	Campaign #2					Annual Peer-to-Peer Giving Campaign							
	Campaign #3										Year-End Giving Campaign		
EVENTS	Event #1			Annual Spring Run/Walk									
	Event #2								Annual Gala				
	Event #3												
COMMUNICATIONS	Email	Quarterly Newsletter			Quarterly Newsletter	Thank you to Run/Walk Participants		Quarterly Newsletter			Quarterly Newsletter	Year-End Fundraising Appeal	
	Newsletter	Thanks to Donors for their support						Mid-Year Impact Report					

Establish your **quarterly goals**! This is the easiest way to ensure your fundraising initiatives are aligned with what you want to achieve.

Take advantage of **cause months**! Launch a timely fundraising campaign to capitalize on the momentum.

Merge & center cells to indicate the entire time period of a campaign or event.

		Q1			Q2			Q3			Q4		
	Quarter Goals	Increase number of monthly donors by 10%											
		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
KEY DATES	Founding Anniversary				Founding Anniversary								
	National Cause Days										Breast Cancer Awareness Month		
	Giving Days												Giving Tuesday
CAMPAIGNS	Campaign #1	Introduce & Launch Recurring Giving Campaign											
	Campaign #2					Annual Peer-to-Peer Giving Campaign							
	Campaign #3										Year-End Giving Campaign		
EVENTS	Event #1		Annual Spring Run/Walk										
	Event #2								Annual Gala				
	Event #3												
COMMUNICATIONS	Email	Quarterly Newsletter			Quarterly Newsletter		Thank you to Run/Walk Participants	Quarterly Newsletter			Quarterly Newsletter	Year-End Fundraising Appeal	
	Newsletter	Thanks to Donors for their Support						Mid-Year Impact Report					
	Mailings												Holiday Deals

Are you **communicating** with your supporters on a regular basis? Keep in touch by sending a quarterly newsletter.

Be sure to have a **communication strategy** for every fundraising campaign or event.

Use **different shades** of the same color to make your calendar visually organized within each major section.

3. Start Achieving Your Yearly Goals!

You should now have a year long snapshot of what's to come. Use this tool as a map for how to achieve your goals.

And remember to keep an open mind. Did a certain communication strategy not achieve the expected results? Was there an event that just couldn't be planned in the time you allotted? Even the best laid plans need a bit of polish as you learn more about your yearly donation cycle. Revisiting and tweaking this calendar will only make your strategy stronger.

Key Questions From Part 3

Use the answers from the following questions to set your nonprofit up for fundraising success over the next year.

- **What past campaigns and events will you repeat this year? How will you grow and improve them?**

- **What holidays or seasonal events can your organization tap into for fundraising?**

- **What internal deadlines will help you execute your fundraising strategy?**

Conclusion

Just by working through this fundraising strategy kit, you're taking a big step toward lifting your nonprofit to greater heights. The exercises above are also valuable activities to do with your team. This can get everyone on the same page and unite you toward common goals.

If you want to dig even deeper, download the guide How to Create a Successful Year-Round Fundraising Strategy.