



FUNDRAISING BLUEPRINT HANDOUTS

Print these pages to use during the workshop

GET **FULLY**
FUNDED

GENERAL INFORMATION

Welcome!

I'm sooooo glad you're here! Get ready for a full day of ideas you can use! Here are a few tidbits that will make your experience a great one.

HELP DESK:

The Fundraising Blueprint support team is available throughout the day. Feel free to use the chat box to ask content-related questions. For technical help, email support@getfullyfunded.com and we'll get right back to you.

DOWNLOADS:

Everything you need to fully enjoy your workshop experience is downloadable from www.GetFullyFunded.com/Blueprint-Downloads.

BACKGROUND NOISE AND DISTRACTION:

Please join in from a quiet place and minimize any background distractions. Turn off the radio or tv, close the door, and put the dog in the other room. Also, since you'll be on video, minimize any activity behind you so others aren't distracted by activity in the background. That means close the blinds behind you if your window faces a busy road. Ask co-workers or family members not to disturb you so you can focus.

QUESTIONS AND COACHING:

We'll have designated Q&A time throughout the day so that I can address your questions along the way. Feel free to type your questions into the chat box at any time and our team fundraising coaches will help you.

STAYING ON SCHEDULE:

Please be respectful of the event, the speakers, and fellow attendees. Be in your seat and ready to go before each session begins, play full out and stay focused so you can get the most from your experience. I will do my best to make sure you get time for quick bio breaks. Make sure to have drinks and snacks handy so you'll have them as you need them.

RECORDING:

Please don't record the sessions in either audio or video. We're recording everything and will share after the workshop is over.

EVENT SCHEDULE

**times are listed in Eastern time*

9:40 - 10 am	Log in, settle in, and listen to some Dad jokes!
10 – 10:15 am	Welcome and introductions and how the day will flow.
10:20– Noon	<p>Step 1: Learn From the Past. Grab your homework and let’s review your historical results.</p> <p>Step 2: Set an Impact Goal. This one goal guides all the rest.</p> <p>Step 3: Set 3 Critical Targets. There are 3 targets or goals your fundraising plan MUST address.</p> <p>Step 4: Put On Your Super Cape. Make your plan play to your strengths.</p>
Noon – 12:45 pm	Lunch break
12:45 - 2:15 pm	Step 5: Choose the RIGHT Strategies. Pick fundraising activities because they work and move you toward your goals.
2:15 pm	Bio break!
2:30 – 3:30 pm	<p>Step 6: Get it in Writing. Time to fill in the template!</p> <p>Step 7: Course Correct. Stay on track as you implement.</p>
3:30 – 4 pm	Q&A, Next Steps

UNDER FUNDED VS FULLY FUNDED

Under funded	Fully Funded
Focused on “fundraisers”	Focused on donors
Makes decisions based on what’s in the bank	Makes decisions based on vision and plans
Lives from one cash infusion to the next	Has a steady stream of revenue all year long
Sole-source revenue	Diversified revenue
Poverty mentality	Committed to doing whatever it takes to be successful
Settles for whatever they get	Not good with status quo and finds a way to overcome it
All about the \$\$ - transactional	All about the relationship and future donations

Which side are you operating from? What changes do you need to make?

HISTORICAL REVIEW



Grab your homework worksheets for this part. (If you don't have them filled out, grab them anyway and do the best you can.)

1. How much money did you raise last year?
2. Did you raise enough to fund your budget? Why or why not?
3. What was the return on investment (ROI) for each line item (grants, events, direct mail, major gifts, etc.)? Which ones were “worth the squeeze?”



4. Did your Board give last year? Did you have 100% Board giving?
5. What was your donor retention rate?

IMPACT GOAL WORKSHEET

When you can verbalize the impact your nonprofit is trying to make this year and share it with donors, it helps them understand how their gift will help make a difference.

Choose an Impact Goal that is easily understood and measurable, and will

- Double the number of people served,
- Eliminate a waiting list, or
- Reduce or completely solve a community problem.

Examples of Impact Goals

“We’ll double the number of animals we save this year.”

“We’ll eliminate our waiting list of 20 kids waiting to get into our program.”

“We’ll reduce crime in our town by 20%.”

What impact will your nonprofit have this year?



WHAT WILL IT COST TO FUND THAT IMPACT??

MY 3 BIG TARGETS FOR THE YEAR

These three targets will make my fundraising successful this year:



Total dollars I need to raise: _____



Number of donors I need to renew: _____



Number of new donors I need to acquire: _____

ORGANIZATIONAL ASSETS

What does your organization have going for it that you can leverage to raise more money?
Check all that apply. Add more if needed.

- Incredible organization name recognition (like ASPCA)
- Great branding with well-known logo (like Habitat for Humanity)
- Compelling mission (like eliminating hunger or homelessness in your community)
- Good, positive reputation in the community
- Well-known staff or Board members
- Facility that lends itself well to a tour (like a clinic or shelter)
- Organizational vehicles that are driven around town regularly, with great signage
- Website with LOTS of daily visitors
- Large, interactive Facebook community
- Opportunity for earned income (like a thrift store or gift shop)
- Well-known local, regional, or national celebrity who supports your organization
- Large public base of support, generating consistent revenue
- Great relationships with key donors
- Monthly giving program, generating consistent revenue
- Strong signature event that draws a large crowd every year
- Strong, active volunteer base
- Great relationships with local news media – easy to get a story placed
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THIS IS ABOUT YOU

Unique Brilliance	Excellence
Competence	Incompetence

TOOLS TO HELP CHOOSE THE RIGHT STRATEGIES

1-10-1000 Rule

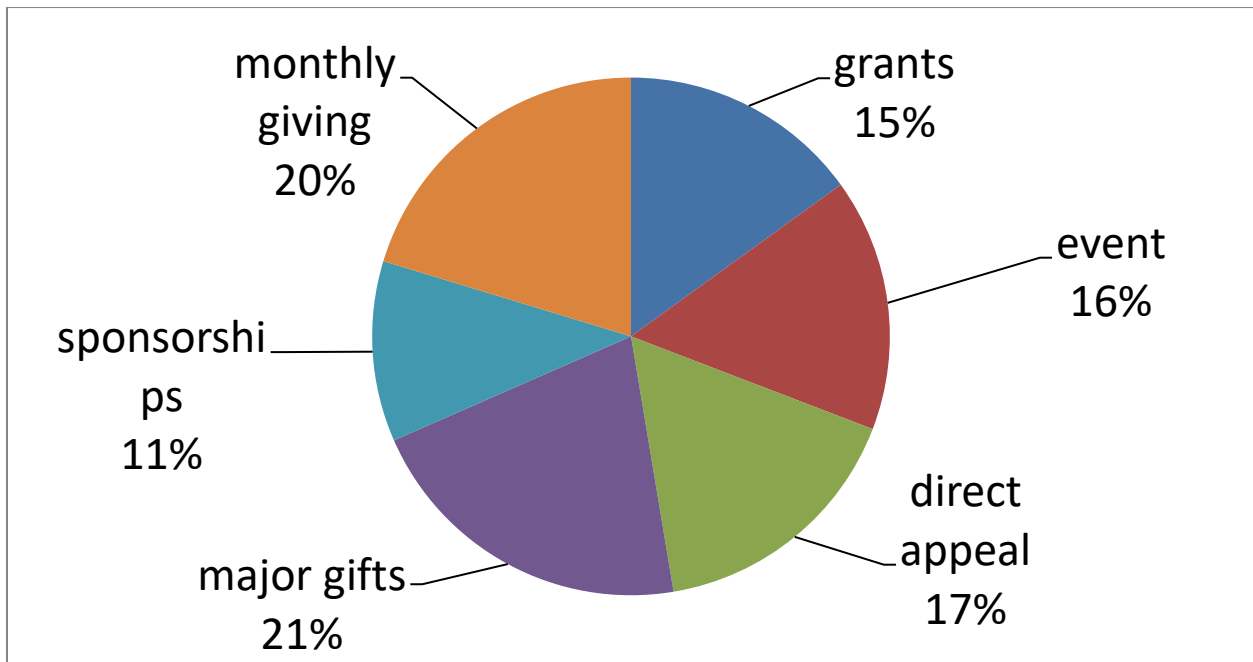
1 _____

10 _____

1,0000 _____

25% Limit

No single revenue stream (donor, event, or grant) should make up more than 25% of your total revenue. A healthy fundraising pie looks like this:



TRANSACTIONAL VS TRANSFORMATIONAL FUNDRAISING ACTIVITIES

Transactional fundraising is usually a one-shot exchange of money for something that the donor wants. Transformational fundraising is about the donor's desire to change a life. Make sure you have a good balance of fundraising activities. Here are some examples of both.

Fundraising activity	Type	Notes
Selling candy bars	Transactional	Buyer receives candy in exchange for their money.
5K run or walk	Transactional	Most people who participate in a 5K are runners. They're there to get a T-shirt and see if they can improve their run time. Walkers are usually there for the exercise, the T-shirt, or whatever else you're offering. They may care about your nonprofit, but this is not the best way to cultivate them or the best way for them to support your work.
Golf Tournament	Transactional	Most people who play in your golf tournament are there because they want to play golf.
Dinner or gala	Transactional	Most people who attend your gala are there because it's an event they want to attend. These same people may be good donors otherwise, but this is not the best way to cultivate them individually. It can actually do harm if they view their ticket purchase as their contribution for the year.
Live or silent auctions	Transactional	Even if attendees love your organization, they usually come to auctions to get a good deal.
Direct mail	Transformational	Done well, your direct mail letter will tell a story about someone who has been helped by your nonprofit. People will give because they are moved by the story you have told.
Major gifts	Transformational	As you cultivate individual donors, you are developing a relationship, learning why the prospect cares about your nonprofit, and what exactly fires them up.
Grants	Transformational	Foundations usually give grants because they care about the result you are working to achieve with the grant.
Monthly giving clubs	Transformational	Usually if someone signs up to give a regular gift, they really care about the work your nonprofit is doing.
Matching gift	Transformational	People will get doubly excited about the prospect of their gift being matched.

FUNDRAISING TYPE BALANCE WORKSHEET

Make a list of your fundraising activities that you have planned for the next year.

It's important that you have plenty of transformational activities so that you're engaging people in the work you are doing. This is what creates long-term sustainability. If you have too many transactional activities, you'll find yourself on a fundraising hamster wheel, constantly working, but not really gaining ground.

If you don't have any planned yet, list those you've used in the past year or two. Mark them either Transactional or Transformational.

Fundraising Activity	Transactional	Transformational

3 KINDS OF VIRTUAL FUNDRAISING

These 3 kinds of virtual fundraising vary in size by the amount of time and planning they take to execute and also in the amount of money they generate. There's a place in your plan for all 3 if you space them out correctly.

1. Virtual events

2. Mid-Size Fundraisers

3. Tiny Fundraisers

IDEAS FOR WARM TOUCHES

Warm touches are little things you do just to make donors feel warm and fuzzy about supporting your nonprofit. They're easy, thoughtful touchpoints that usually don't cost anything.

Here are some ideas to get you started planning YOUR warm touches for the year.

- Handwritten note from you
- Handwritten note from a Board member or volunteer
- Handwritten note from a program participant
- Phone call from you
- Phone call from Board member or volunteer
- Photos of your program in action (if appropriate)
- Birthday or Anniversary cards
- Holiday cards
- Update video
- Mid-year update postcard
- Generalized thank-you video
- Personalized thank-you video
- Personal tour of your program
- Special volunteer opportunities
- Invitation to special reception, open house, VIP experience, etc.
- Small, relevant gifts (something made by program participants)

IDEAS FOR MARKETING

Incorporate marketing activities into your plan to spread the word and grow your audience.

News Media

Pitch a story to the news several times each year. Once you develop a relationship with the right person, it's easy to place a good story.

List of newspapers: https://en.wikipedia.org/wiki/List_of_newspapers_in_the_United_States

List of television stations:

https://en.wikipedia.org/wiki/Lists_of_television_stations_in_North_America

Podcasts

Find podcasts where the listening audience is the same audience you're trying to reach. Write a short proposal to the producer and ask to be a guest on the podcast.

Podcast directories: <https://www.buzzsprout.com/learn/podcast-directory>

Speaking Gigs

Find places to speak where the audience is your audience. Rotary clubs, other civic clubs, and church groups can be a good place to start.

Find a Rotary club near you: <https://www.rotary.org/en>

Facebook Live

Go live on your nonprofit's Facebook page at least once per month to attract attention and educate people about your organization's work.

IDEAS TO GROW THE AUDIENCE

Growing your audience is an ongoing activity. You need to add new people every month to your email list and your social media. Here are some ideas to help you grow your audience:

- Pop-up on your website inviting people to join the email list
- Opt-in form at the bottom of every page on the website
- Note at the bottom of every newsletter asking people to share with friends
- Add link in your email signature to your opt-in page
- Add teaser on social media about upcoming newsletter and invite people to opt in
- Add link in Instagram bio to opt-in page
- Add link to Facebook page “About” section
- Add link to opt-in page to every YouTube video description
- Add notes to physical mailings inviting people to opt in
- Ask volunteers to invite friends to opt in
- Ask Board members to invite friends to opt in
- Hold a Facebook contest periodically to invite people to like/comment on a post to win a small prize.
- What else can you think of?