

# FUNDRAISING BLUEPRINT

## VIRTUAL WORKSHOP

Sandy Rees  
Chief Encouragement Officer

GET **FULLY**  
FUNDED



# TODAY'S SCHEDULE

*(all in eastern time)*

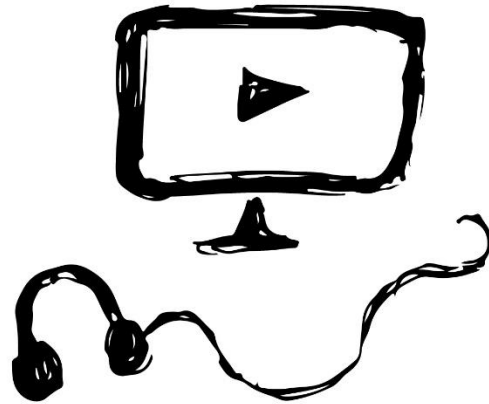
10 am Begin

Noon - 12:45 Lunch

2:15-ish pm Bio break

4 pm Wrap up

# WITHOUT A PLAN...



# YOU'RE IN THE RIGHT PLACE IF...

You have a BIG vision and want



# NOT THIS



# WHAT YOU'LL GET TODAY:

7 steps for successful planning

3 main goals you **MUST** include

How to create an Impact Goal

How to choose the right  
strategies for YOU

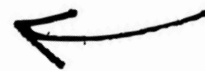
A bunch more!

# ABOUT ME



- Fundraising Coach
- Trainer
- Author
- Animal Lover

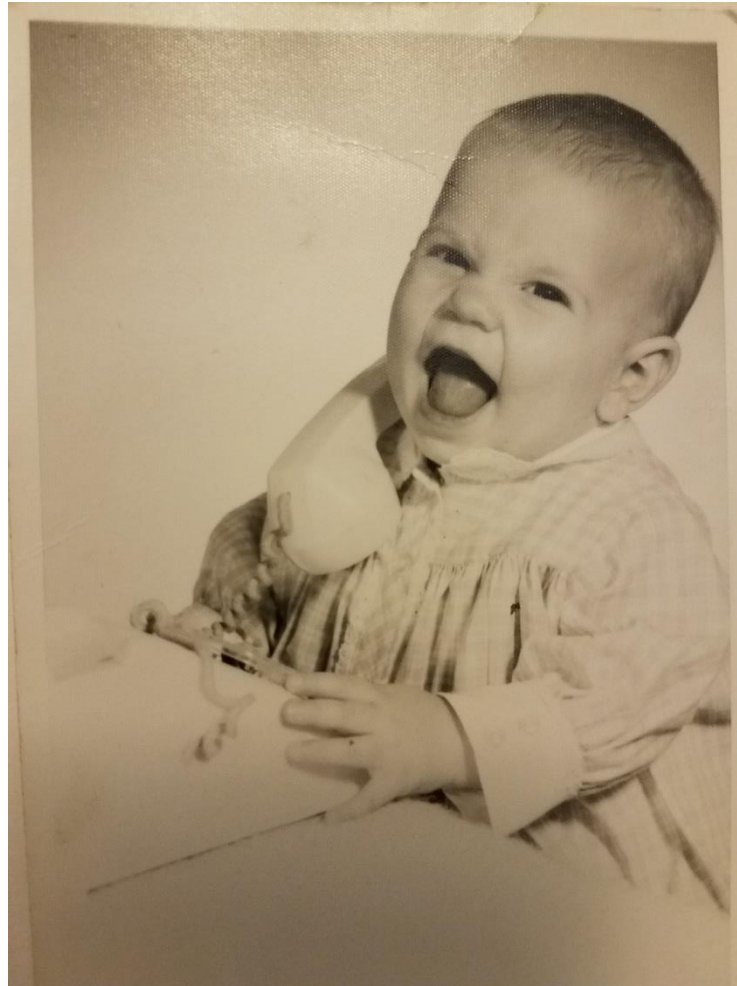
Me and Lucy



HERE'S MY STORY...



***I WASN'T BORN WITH  
FUNDRAISING SKILLS...***



# I DIDN'T SIGN UP FOR FUNDRAISING AT CAREER DAY



# WHERE I LEARNED IT WAS...



# THEN THIS HAPPENED:

## February 2000

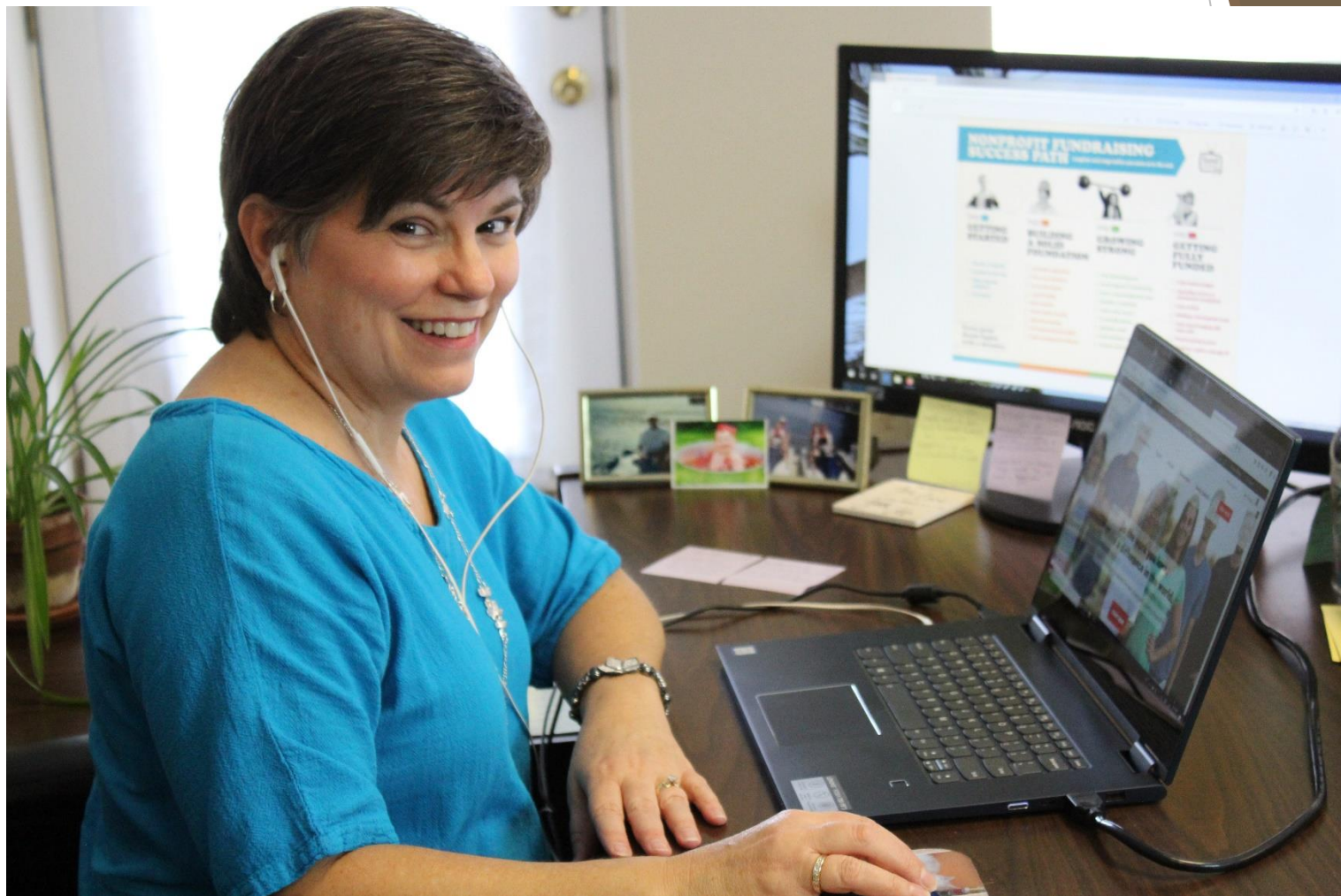
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1 Update Website & thank you letters	2 Mail Winter appeal	3	4 grant deadline <del>X 2</del>	5
6	7	8 Finance committee mtg	9	10	11 grant deadline	12
13	14 Mail Valentine's Day Cards	15 Board mtg	16	17 Event committee	18	19
20	21 grant deadline	22	23	24 Find event sponsors	25 grant deadline	26
27	28 Mail Newsletter	29				

yikes!

www.oldcalendars.com



# TODAY...



# LET'S JUMP IN!

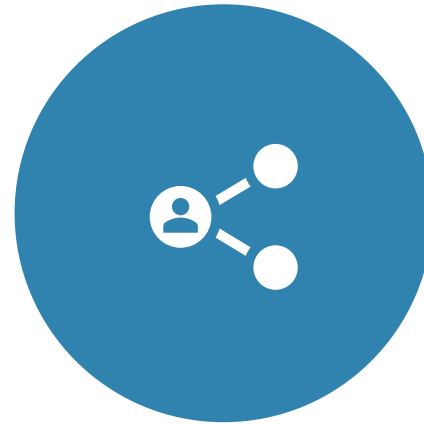


\$ your  
number  
here

## TRUTH #1:



WHEN YOU RAISE  
MORE MONEY,



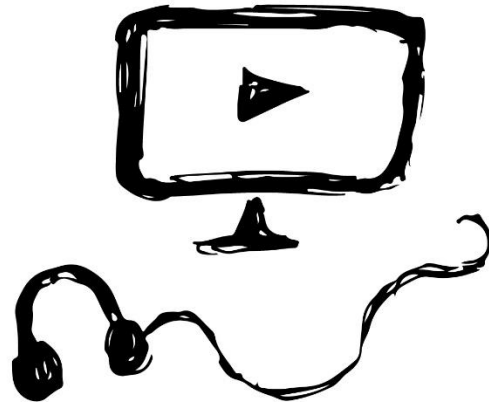
YOU CAN CHANGE  
MORE LIVES.

## TRUTH #2:

Working from a PLAN makes fundraising easier.

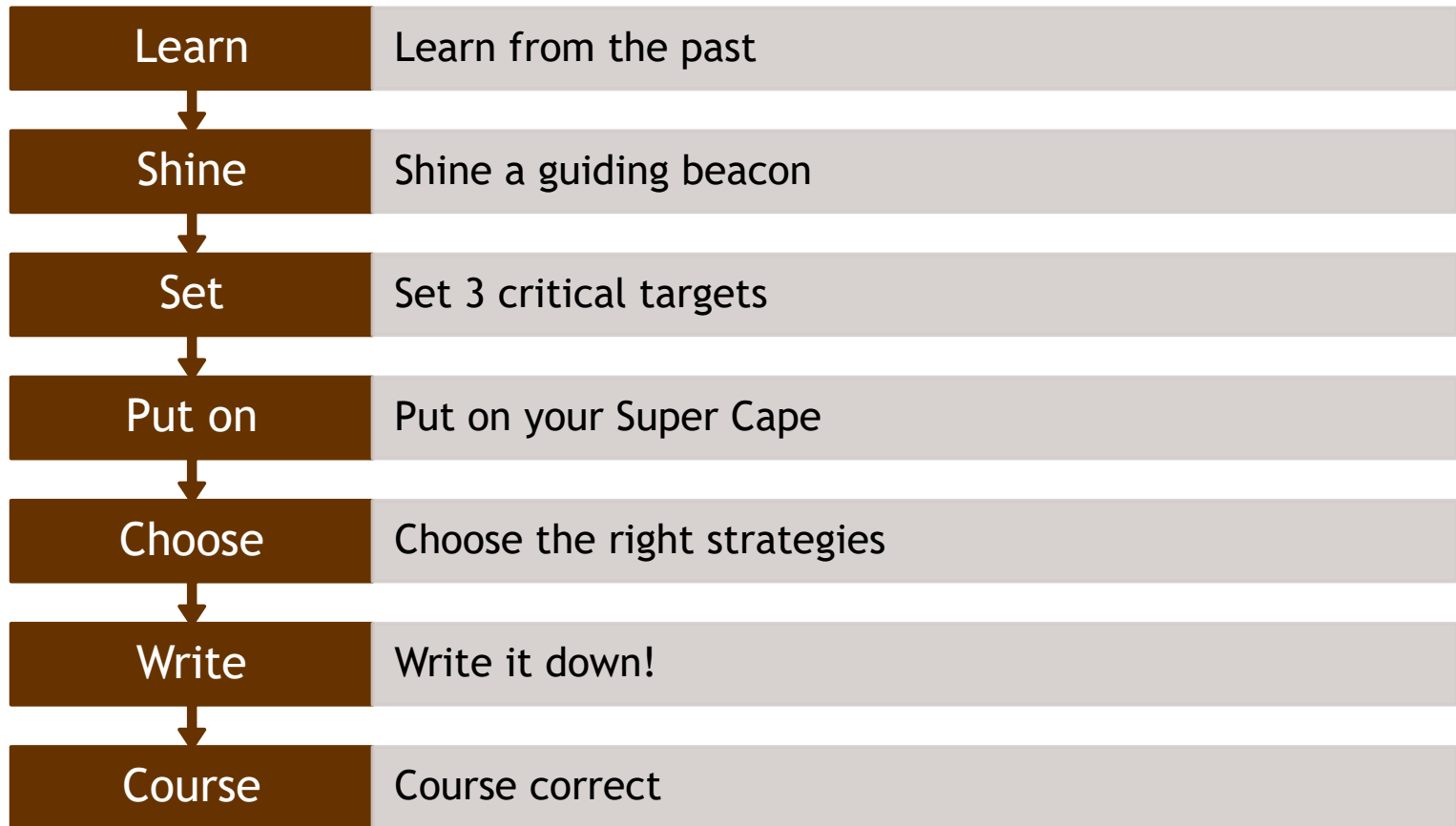


# MEET LIDA



# 7 steps to a simple, successful fundraising plan

# 7 STEPS TO A FUNDRAISING PLAN:



# Step 1: Learn from the past



# HISTORICAL REVIEW



How much did you raise last year?



Was it enough to fund your budget?



What was the ROI?



Did your Board give? 100%?



What was your donor retention rate?

# LOOK AT EACH PAST ACTIVITY



DID WE GET  
ENOUGH ROI?



CAN WE  
IMPROVE IT?



HAS IT RUN  
ITS COURSE?

**REVIEW  
YOUR LIST  
AND ASK**

What should you  
**KEEP?**

What should you  
**TWEAK?**

What should you  
**DUMP?**



Never do something just because  
you always have.

**Do it because it WORKS!**

# LESSONS FROM THE HOMEWORK

- ▶ If your donor family is less than 1,000, add donor acquisition activities to your plan
- ▶ If less than half of your donors last year were new, add donor acquisition activities to your plan
- ▶ If your retention rate is less than 50%, add donor renewal activities to your plan
- ▶ If one slice of your fundraising pie is more than 25% of the total, beef up other fundraising activities
- ▶ If your Board gives less than 10% of your total revenue OR if less than ALL of them give money, work on a Board giving plan

# Step 2: Shine a Guiding Beacon



# SET AN IMPACT GOAL

What **impact**  
will your nonprofit have  
this year?

# SET AN IMPACT GOAL

What **impact** will your nonprofit have this year?

For example,

- ▶ We'll double the number of animals we save this year.
- ▶ We'll eliminate our waiting list.
- ▶ We'll serve 10% more veterans.

**It must be measurable!**

# SET AN IMPACT GOAL

Andy Perkins, BESTWA -

“Our goal was to get 1,000 kids in school. Now, we have a new problem - we have more money than schools to place kids!”



# Step 3:

## Set 3 Critical Targets



# 3 CRITICAL TARGETS

1. # dollars to raise



\*Use an exact number - no ball parking

# 3 CRITICAL TARGETS

1. # dollars to raise
2. # donors to renew



\*Average donor retention is 47%

# 3 CRITICAL TARGETS

1. # dollars to raise
2. # donors to renew
3. # donors to acquire



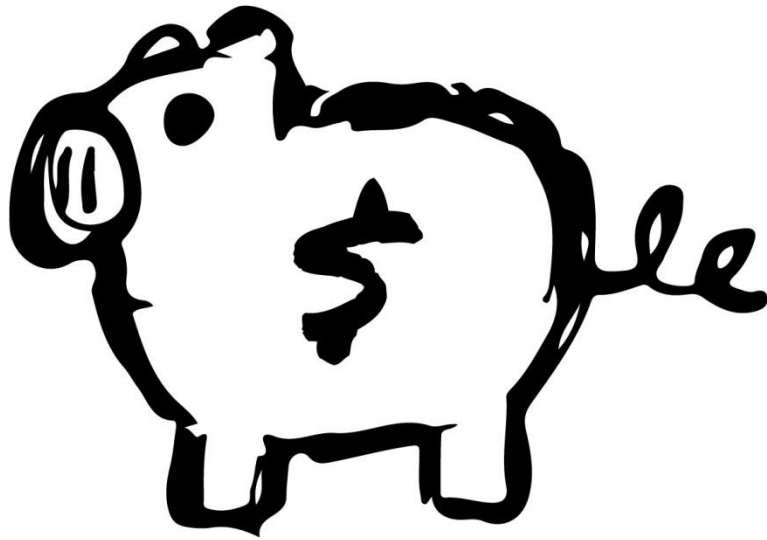
\*Focus on *net* new donors

## FOR EXAMPLE,

- ▶ Raise \$225,575 this year
- ▶ Increase donor retention from 53% to 57%
- ▶ Acquire 500 new donors this year, growing our donor base from 750 to 1250

# Step 4: Put on your Super Cape

# ORGANIZATIONAL ASSETS



# ORGANIZATIONAL ASSETS



NAME RECOGNITION



STRONG BRAND



WELL-KNOWN  
LEADERS



BROAD-REACHING  
OR WELL-LOVED  
CAUSE



GREAT FACILITY OR  
LOCATION



BIG DONOR BASE



DEDICATED  
VOLUNTEER BASE

# FOR EXAMPLE,

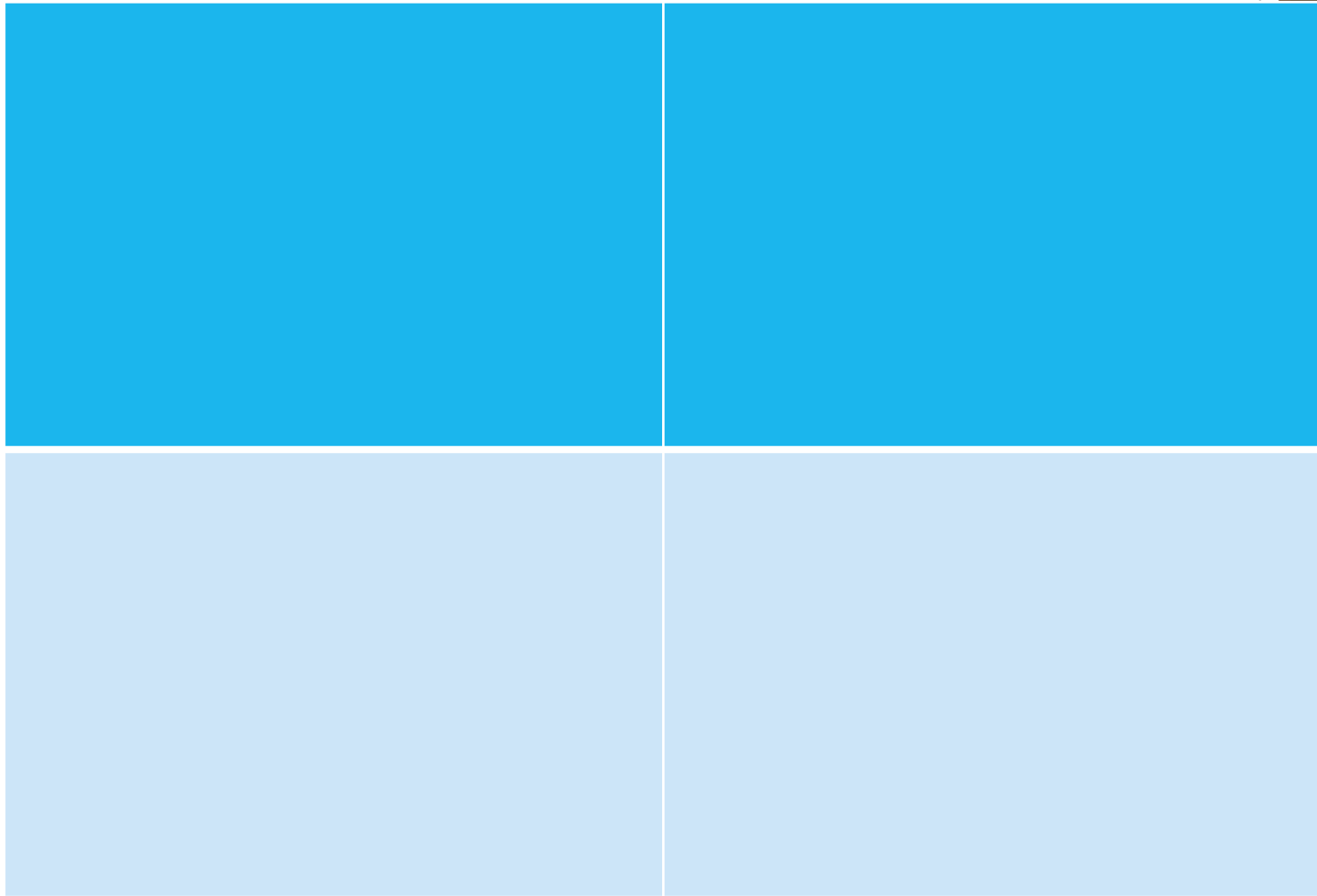
- ▶ **Name recognition:** direct appeal or community-wide fundraiser
- ▶ **Strong brand:** 3<sup>rd</sup> party fundraiser or co-hosted fundraiser with a business
- ▶ **Well-known leaders:** Dinner/event hosted by them, news interviews with them, guest blog post from them, social media takeover by them
- ▶ **Great facility:** virtual or in-person tours



# PERSONAL STRENGTHS



# UNIQUE BRILLIANCE



# UNIQUE BRILLIANCE

Unique Brilliance	

# UNIQUE BRILLIANCE

Unique Brilliance	Excellence

# UNIQUE BRILLIANCE

Unique Brilliance	Excellence
Competence	

# UNIQUE BRILLIANCE

Unique Brilliance	Excellence
Competence	Incompetence

# UNIQUE BRILLIANCE

Unique Brilliance	Excellence
Competence	Incompetence

# FOR EXAMPLE,

- ▶ **Writing:** blog, story telling, news stories
- ▶ **Speaking:** civic club presentations, Facebook Live, TV news stories
- ▶ **Problem solving:** strategic planning, SEO, grant research/writing
- ▶ **Nurturer:** Individual donor development, major gifts, volunteer management



# NOW, DECIDE:

- ▶ What do you need to LEAN INTO to fully leverage?
- ▶ What do you need to STOP doing that is below the line for you?

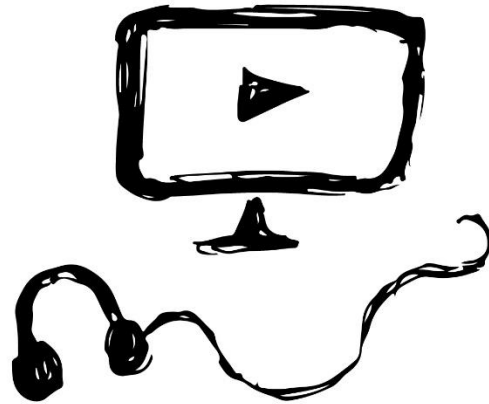


# Lunch Break!

# Step 5:

## Choose the right strategies

# WITHOUT GOOD STRATEGIES...



# CHOOSE STRATEGIES



Keep  
everything



donor  
focused.

# 3 tools to help you choose the right strategies

# TOOL #1: 1-10-10000 RULE

- ▶ 1 signature event





# TOOL #1: 1-10-10000 RULE

- ▶ 1 signature event
- ▶ 10 grants



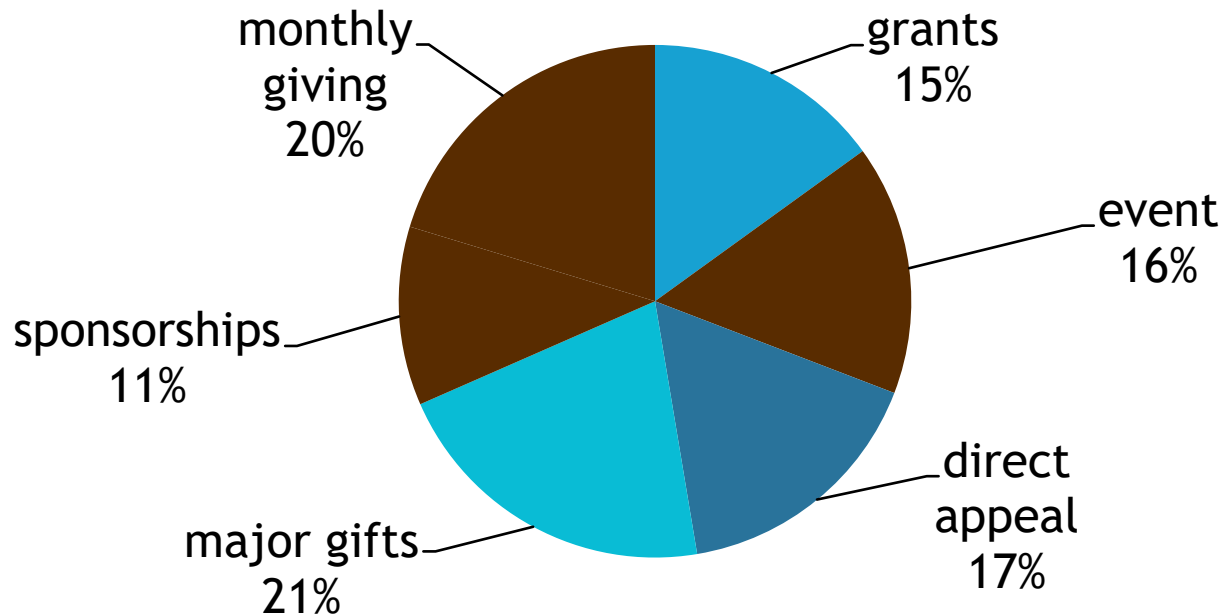
# TOOL #1: 1-10-10000 RULE

- ▶ 1 signature event
- ▶ 10 grants
- ▶ 1,000 donors



## TOOL #2: 25% LIMIT


No single revenue stream (donor, event, or grant) should make up more than 25% of total revenue




# TOOL #3: TYPE BALANCE

Transactional	Transformational
Selling candy bars, T-shirts, & calendars	Direct appeal
Golf tournaments, walks, runs	Monthly giving
Live or silent auctions	Sponsor a child/animal
Buffalo Wild Wings night	Major gifts
	Matching gifts







# VIRTUAL EVENTS


 auctions

Help Login



**COPPER'S CAT COMMUNE 2022 SPRING AUCTION**

  0  0  All Items (132)  Search  [Donate](#)



[View All Items](#)

START

08

May 2022

01:00 PM CDT

END

21

May 2022

08:00 PM CDT

RAISED

**\$2,448.75**

GOAL \$2,000.00

122.4%

REACHED!

## 2022 Spring Auction

Everything is coming up cats this spring. We are raising funds to keep our wallflowers and hothouse kittens blooming here at Copper's Cat Commune where we provide the highest quality care for special needs cats. You can shower the cats with love by participating in our budding auction. Funds will be used to improve our greenhouses, employ quality kitten gardeners, and provide water and fertilizer for every cat in our care.

## About Copper's Cat Commune

Copper's Cat Commune is a sanctuary for special needs cats. We take care of paralyzed cats, incontinent cats, cats with behavioral issues, basically any cat that would be unsuited for a normal home environment.

All our cats live cage free, except our paraplegics sleep in cages at night. It gives them a break from the more ambulatory cats.

All our cats have access to the outdoors. Those that live in the house have enclosures attached to the house with access through cat flaps. We also have 4 additional outdoor enclosures that each have their own shelter - like garden sheds - that house anywhere from 3 to 30 cats.

We currently care for 138 cats. 56 of these cats are feral with 43 housed in our 2 feral enclosures. Some of our feral cats live with friendly cats in our other two enclosures. We also have more ferals in our main environment.

We do get adoptable cats occasionally but we try to move them out through other rescues. Our special needs cats are technically available for adoption, but it takes a special person to take a special needs cat into a home environment.

Our goal is to give shelters, veterinarians, and other rescues an option for these cats other than euthanasia.

Every cat deserves a chance at a happy life. We try to provide that.

[Learn More](#)

[View All Items](#)



# VIRTUAL EVENTS



Event details

Fundraising leaderboards

Clubhouse  
Guatemala

Learn more



Clubhouse Guat...

Followed



Clubhouse  
Guatemala



## Run for a Cause!

Together we will Bring Hope, to those that need it most!

July 21 - October 31st, 2020

The Clubhouse Virtual runs is a challenge that the entire family can do to impact lives in Guatemala. With a Virtual run you get to choose your course, the time you want to run, and the day you want to run. Complete the race of your choice and get an awesome shirt, and medal!

The person that raises the most funds by September 30th will receive a free trip to Guatemala. (Minimum of \$2000 raised)

Top prize - an all expense paid trip to Guatemala.

1) Raise more than \$1000 and receive a 25% discount on grounds fees for 2021



CLUBHOUSE VIRTUAL RUN

ONLINE REGISTRATION  
CLOSED



Follow 4.4K

Share

# VIRTUAL EVENTS



## 6-Day Laugh Tracker: COUNT AND RE-LIVE YOUR LAUGHS

MON	TUES	WED	THURS	FRI	SAT
Count <input type="text"/>	Count <input type="text"/>	Count <input type="text"/>	Count <input type="text"/>	Count <input type="text"/>	Count <input type="text"/>
Funniest thing all day <input type="text"/>	Funniest thing all day <input type="text"/>	Funniest thing all day <input type="text"/>	Funniest thing all day <input type="text"/>	Funniest thing all day <input type="text"/>	Funniest thing all day <input type="text"/>

**Let's crack up together!**

**Count.** How many times a day are you laughing? Yes, even a chuckle counts!

**Funniest thing all day.** When did you laugh hardest? Write down your funniest moment of the day.

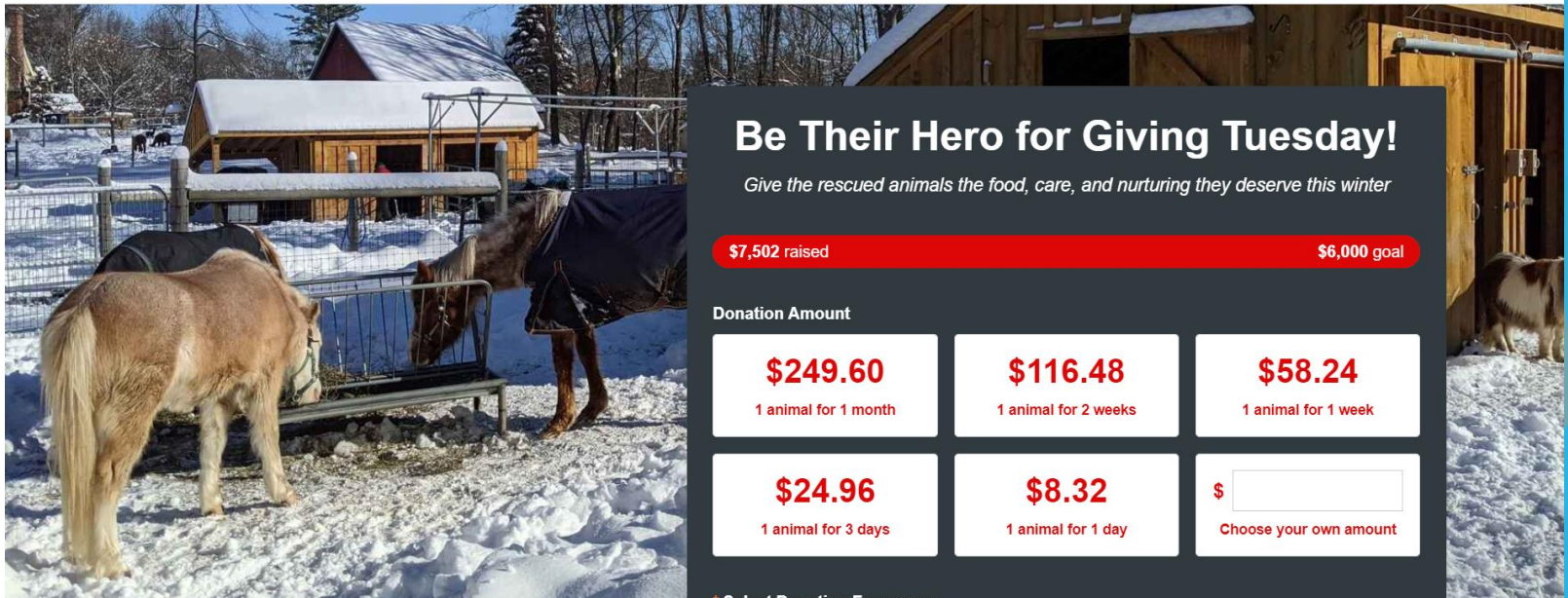


# IN BETWEEN THE BIG ONES...

## ► Mid-Size Fundraisers



Log In



**Be Their Hero for Giving Tuesday!**  
*Give the rescued animals the food, care, and nurturing they deserve this winter*

**\$7,502 raised** **\$6,000 goal**

Donation Amount

<b>\$249.60</b> 1 animal for 1 month	<b>\$116.48</b> 1 animal for 2 weeks	<b>\$58.24</b> 1 animal for 1 week
<b>\$24.96</b> 1 animal for 3 days	<b>\$8.32</b> 1 animal for 1 day	\$ <input type="text"/> Choose your own amount

\* Select Donation Frequency



# ALSO ADD...

- ▶ Mid-Size Fundraisers
- ▶ Tiny Fundraisers

**Kids Connection Haiti** is 🍌 asking for donations.  
Published by Astrid de Vries · January 22 at 12:31 PM · 🌐

Update 1/26/21: On behalf of our four new students we're sending a HUGE thank you to all the people who have contributed to the essential needs for their new home. We reached our goal and all items can be bought. MESI AMPIL!

Update 1/24/21: two beds/matresses/sheets covered! Only \$878 more to go... (you can also donate on our website <https://www.kidsconnectionhaiti.org>).

Hopeful smiles of Modieu and Martial, 2 of the 4 new students who grew up at an orphanage and are ready ... [See More](#)



 **\$811 raised for Kids Connection Haiti**  
12 people donated.

Donate

# ANOTHER EXAMPLE...

- ▶ Mid-Size Fundraisers
- ▶ Tiny Fundraisers



NEEDLE  
MOVERS  
.ORG

*We just want to say*  
**THANK  
YOU SO  
MUCH!**

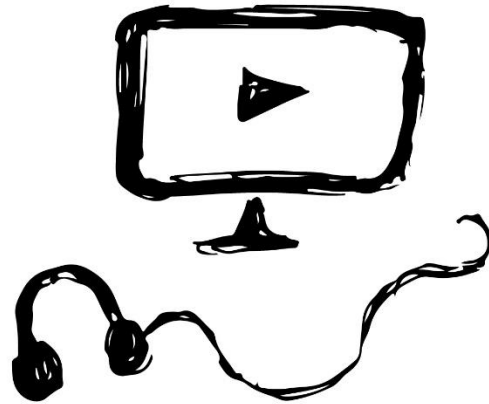
Your generosity  
is incredible!

**FUNDED**  
**\$1,100 raised!**

**\$5**  
FRIDAY

We can complete our 2022-2023  
curriculum with your donations!

# MEET ANDEE



# Step 6: Write it down!

If it's not in writing, it's not real!



GET **FULLY**  
FUNDED

Revenue Expenses Sheet3

# LET'S LOOK AT THE TEMPLATE!

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	[Organization Name] 2023 Fundraising Plan													
2														
3	Top Goals:								color-coding key					
									Donor Love	New Donor Acquisition	Current Donor Renewal	Raise Awareness		
4	Fundraising Goal: \$		-		Impact goal: This year, we plan to (increase service, reduce problem, eliminate a waiting list, etc.)									
5	New Donor Goal:		0											
6	Donor Retention Goal:		0%											
7	newsletter send date:													
8	Signature Event	Grant Deadlines	Direct Appeals	Mid-Size Fundraisers	Tiny Fundraisers	Major Giving	Monthly Giving Recruitment	Major Donor and Monthly Donor Thank You	General Donor Communications	General Warm Touches	Marketing	Social Media	Grow the Audience	Cause
9	Jan		Board campaign		\$5 Friday Wish List	Donor:	Add monthly giving page to website Recruit new givers appeal		newsletter (link to Annual Report on website)	Tax Summary Letter	Annual Report Facebook Live Look for online speaking gigs	Share Annual Report		
10	Feb			potential date	\$5 Friday Wish List	Donor:		Send special Valentine's Day card with handwritten	newsletter	Valentine's Day card	Facebook Live Research podcasts to pitch	Share a photo montage video		
11	Mar			potential date	\$5 Friday Wish List	Donor:			newsletter		Facebook Live Pitch a news story	Link to news story		
12	Apr	potential date		potential date	\$5 Friday Wish List	Donor:			newsletter		Facebook Live Letter to the Editor thanking	Thank volunteers and tag them		
13	May	potential date	Spring appeal		\$5 Friday Wish List	Donor:	Recruit new givers through Spring appeal		newsletter		Facebook Live Pitch a news story	Link to news story		
14	Jun	potential date			\$5 Friday Wish List	Donor:			newsletter		Facebook Live			
15	Jul			potential date	\$5 Friday Wish List	Donor:		Send mid-year update with handwritten note	newsletter	Mid-Year Update Postcard	Facebook Live			
16	Aug			potential date	\$5 Friday Wish List	Donor:			newsletter		Facebook Live			
17	Sep	potential date		potential date	\$5 Friday Wish List	Donor:			newsletter		Facebook Live Pitch a news story	Link to news story		
18	Oct	potential date	Fall appeal		\$5 Friday Wish List	Donor:	Recruit new givers through Fall appeal		newsletter		Facebook Live			
19	Nov				Giving Tuesday (11/28)				Send Thanksgiving Card	newsletter	Thank-a-thon Generalized ty video	Facebook Live Pitch a news story	Link to news story Share your thank-you video	
20	Dec		Last Chance appeal						Personalized thank-you video	newsletter	Holiday card	Facebook Live Pitch a news story	Link to news story Last Chance appeal	
21														
22														
23	# Asks:													
24	# Warm Touches:													
25	3:1 Ratio Met?													
Summary Calendar														
Revenue Projections   Dashboard   Signature Event Plan   Grant Deadline Calendar   Appeals   Mid Size   Tiny   Major Don ...														

# TAKE IT ONE STEP AT A TIME

- ▶ Start with the “knowns”
- ▶ Fill it out one “bucket” or color at a time
- ▶ Make sure there are 3 times more pink than green
- ▶ Add enough yellow to reach new audiences
- ▶ Add relevant holidays you can leverage
- ▶ Add time off and self care!



# CONTAIN THE OVERWHELM!

- ▶ Know what you can manage successfully
- ▶ Ignore the other tabs for now (if needed)
- ▶ Get help with things you're not good at

Introducing:

**SPRING** GOAL BUSTER'S CLUB



# RESULTS WE WANT FOR YOU -



# LEARN THROUGH DOING!

---

**Monthly Challenges**

---

**Monthly Deep Dive Workshops**

---

**Weekly Office Hours**

---

**Weekly Accountability**

---

**Members-Only Community**

# BONUSES:

Fundraising TV membership (*\$156.00 value*)



# BONUSES:

Fundraising TV membership (*\$156.00 value*)



Recommended Reading List (and gift card!) (*\$120.00 value*)



# BONUSES:

Fundraising TV membership (\$156.00 value)



Recommended Reading List (and gift card!) (\$120.00 value)

***Fast Action Bonus!*** First 10 people to join get a Donation Page Test! (\$497.00 value)



## WHAT THEY SAID...

Astrid - I participated in both Spring and Fall Goal Buster's last year and raised \$40,000 more than the previous year!

Lee Ann - Among other things, we raised \$5,000 for our emergency shelter activities (these are the HARDEST to raise money for!).

Sam - Goal Buster's gave us a personal cheerleader/coach/friend all rolled into one. With half the work, we raised double over last year!





Andee Bingham

May 17, 2022 · 🐾



Last month I sent out these postcards to donors. I posted about them when I sent them out but just wanted to follow up because the reaction has been great! Donors have LOVED them! Several have told me they've hung them in their home or taken them to put on their desk in the office. And today a donor gave us \$10k in part because he loved this so much! Needless to say, I will be sending these out quarterly 😊



Thanks to you, in the first three months of this year **82 animals** have been given a **second chance** including:

- nursing/pregnant mamas
- unweaned kittens
- unweaned puppy
- animals who were less than a week old when they arrived
- kittens who were critically sick when they arrived

**YOU'RE A LITERAL LIFESAVER**



Esther Neonatal Kitten Alliance  
PO Box 2161 • Asheville  
www.kittenalliance.org  
info@kittenalliance.org

Send to:

# **SPRING GOAL BUSTER'S CLUB**

**Your investment:**

**\$397/month for 4 months**

**Or pay-in-full \$1,497**

**[www.GetFullyFunded.com/club](http://www.GetFullyFunded.com/club)**

# WHAT HELP DO YOU NEED?



# Step 7: Course correct



# COURSE CORRECT

How will you stay on track?



# STAY ON TRACK...

- ▶ Monthly Review Checklist (*on the Downloads page*)
- ▶ Dashboard (*in the Plan*)
- ▶ Adjust as needed



## FUNDRAISING MONTHLY CHECKLIST

Use this checklist to review the previous month to see where you are and if you're on track to meet your annual goals or if adjustments are needed. Use the extra lines to add things specific to your nonprofit.

Month/Year:

Date Completed	Item
1.	<b>Fundraising Management</b>
2.	1. Compare actual revenue from the previous month to budget. Was it over or under? Why?
3.	2. Compare actual expenses from the previous month to budget. Was it over or under? Why?
4.	3. What adjustments need to be made for the coming month?
5.	4. Review your Fundraising Plan. What are the main things you need to focus on in the coming month? What projects need to be started?
6.	5. Is your 3:1 Ratio on track?
7.	6. What additional help or resources may be needed in the coming month?
	7.
1.	<b>New Donors</b>
2.	1. How many new donors made gifts this month? How many total donors do you have now that have made a donation in the past 12 months?
3.	2. Did your New Donor Welcome Kit go out to all new donors?
4.	3. Are you on track to hit your Donor Acquisition Goal for the year?
	4.
1.	<b>Donor Acknowledgement</b>
2.	1. Update your general "thank-you" letter text.
	2. Check your Donor Acknowledgement Plan for action items including emailing Board members or volunteers to get their help in thanking

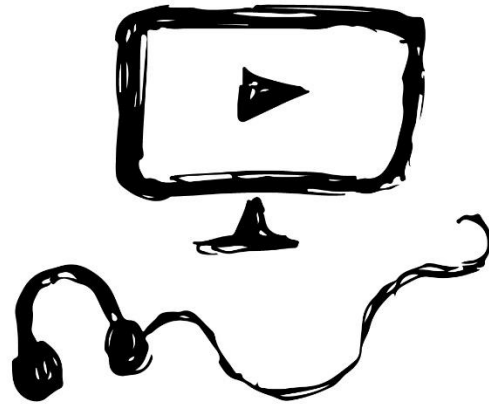
NOW  
WHAT?

# NEXT STEPS

- ▶ Fill in the details on your plan, one layer at a time.
- ▶ Get help to implement.
- ▶ Work the plan.
- ▶ Celebrate EVERY win!



ARE YOU READY TO BE THE  
BEST FOR THE WORLD?



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**Or pay-in-full \$1,497**

**[www.GetFullyFunded.com/club](http://www.GetFullyFunded.com/club)**

# BINGO WINNERS!



FUNDRAISING BLUEPRINT BINGO				
I added a warm touch to my plan	I got an idea to improve my donor retention	I'm confident my new plan will WORK!	I chose an unproductive fundraiser to DUMP	Donor Journey
I started my plan	My video is on!	"Warm Touch"	I know what help I need to make my plan work	I got a BIG aha!
I got an idea from a breakout session	I'm excited to share this plan with my team!	Bio Break!	I commented in the Zoom chat!	I met someone really cool!
I know my Unique Brilliance!	I know exactly how much money I need to raise!	I laughed!	I set a goal for donor retention	I added an idea to my plan to grow my audience
I set a goal for the number of new donors	"1-10-1000 Rule"	I got an idea for a virtual	I have a new idea for	I wrote my Impact goal

*THANK YOU!*