

The background of the page is a photograph of a wooden desk. On the desk, there is a silver laptop with a dark screen. To the left of the laptop is a white ceramic vase containing a plant with long, thin, brown stems and a few green leaves. To the right of the laptop is a large, leafy green plant with prominent veins. The desk is set against a light-colored wall.

The Quick and Simple Fundraising Plan

A one-page template to maximize your fundraising efforts all year long.

By Sandy Rees

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HEY THERE!



I'm thrilled to bring you my all-time favorite tool for creating a stellar fundraising plan!

I created this piece out of desperation – I desperately needed to get control of everything that was happening around me. And guess what? It worked! I was able to bring order to the chaos and lay out plans for moving forward.

Now, I'm super excited to share it with you.

Here's the secret sauce: you need to get those ideas and plans out of your head and onto paper. They need to be **WRITTEN DOWN**. If your plan is in your head, it's not real and it becomes incredibly challenging to follow through. Trust me, it'll quickly turn into mush and you'll find yourself winging it, which doesn't work when you're trying to raise big bucks to fully fund your nonprofit's work.

Get ready to dive into this tool and its supporting worksheets, which are not only practical but also immediately applicable. They'll help you gear up for the fundraising strategies and activities you'll tackle in the coming year. Modify them if that suits your needs, but the most important thing is to **TAKE ACTION!**

If you have questions, [join our Fundraising Made Easy Facebook community](#) and ask away. My team and I personally read everything that's posted there and respond as quickly as we can.

Sadly, way too many nonprofits don't plan to fail – they just fail to plan. Don't be one of them!

Warmly,

Sandy Rees
Chief Encouragement Officer

SUMMARY CALENDAR TEMPLATE

The Summary Calendar is a game-changer. It gives you a bird's-eye view of all your fundraising strategies so that nothing sneaks up on you.

It's like having a strategic roadmap in the palm of your hands. Trust me, if you fill it all out, this one-page wonder will be your guiding light throughout your fundraising journey – it's that powerful.



How to Use It

- Start by filling in the “knowns”** – those things you KNOW are coming up. Fill in your grant deadlines and fundraising or friend-raising events that are already planned.
- Next, fill in your Asks.** If you plan to do direct mail or email appeals, fill in the dates you plan to send those out. If you have specific Major Gift asks that you have an idea of when you'll be making, add those to the calendar.
- Then fill in any **stewardship or nurture activities** you want to do, like donor appreciation events, thank-a-thons, and mid-year update postcards.
- Fill in donor communications and marketing activities.** Add things like newsletters and your Annual Report release, plus scheduled speaking gigs. These are easier to plan out once you have the 'knowns' filled in. Use the times when nothing much is going on to send out press releases to try to get your organization in the news.
- Finally, add any vacations, trainings, or anything else pertinent to your nonprofit.** It's helpful to know when people will be out-of-pocket so you can plan for that.

Once you get this all filled out, put a copy in a place where you can see it regularly. Share it with your Board or Development Committee and talk with them about how they can support you and your plan.

SUMMARY CALENDAR

Fundraising goal:

Donor Retention goal:

Donor Acquisition goal:

	Event(s)	Grants	Individual donors (monthly giving, direct mail, email appeal, online fundraisers, etc.)	Major gifts	Communications (newsletter, website, annual report, etc.)	Marketing (public speaking, media, advertising, etc.)	Other (vacations, training, etc.)
Jan							
Feb							
Mar							
Apr							
May							
Jun							
Jul							
Aug							
Sep							
Oct							
Nov							
Dec							

Think It Through

Take a minute to answer these questions so you can create the best possible fundraising plan for the coming year.

1. **How much money do you need to operate your programs this year?** As you put together your fundraising plan, start thinking about how much you think each fundraising activity or campaign can raise, so you can see if you're capable of raising what you need.

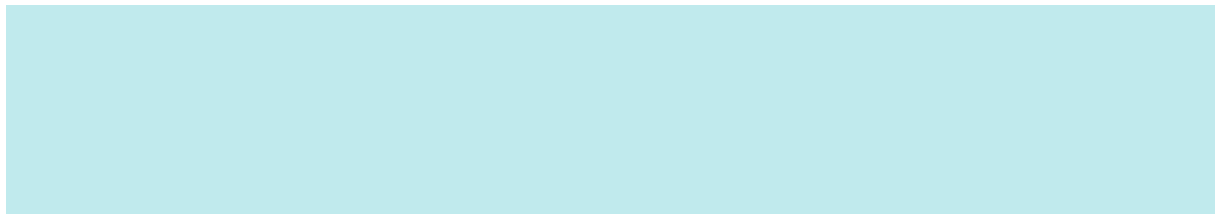
2. **What worked in the past that should be repeated?** Don't do something just because you always have – do it because it WORKS to get the results you want and because the data shows you that it was a good return on investment.



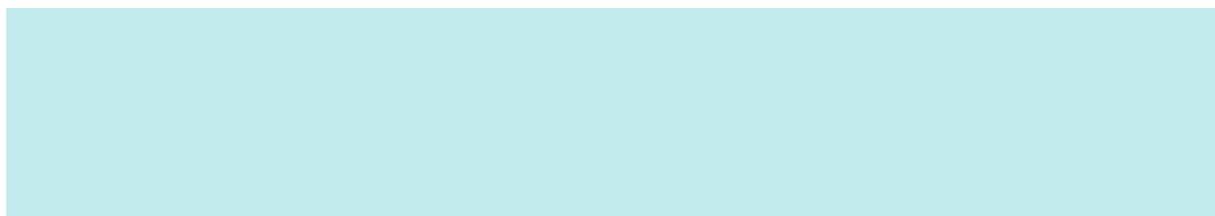
3. **What new ideas do you want to try this year?** Don't try more than 1 or 2 new things in a year – it's too much to implement at once.

4. **Where can you search for new donors?** The more donors you have, the more money you can raise. Set a goal for the number of new people you want to add to your donor family this year. Not sure? Shoot for doubling your donor base if it's less than 1,000. If it's more than 1,000, shoot for adding another 1,000 donors.

5. **How can you play to your strengths?** If you're a good writer, start a blog or write for a local publication about your cause. If you're a great speaker, visit all the local civic clubs and deliver a sparkling presentation about your nonprofit and its mission.



6. **Who can help you cast a wider net?** Who is already around you that can help you network or introduce you to influencers who can help you spread the word about your cause? Make a list of 10 people to focus on building a relationship with during the year.




7. **What support will you need to implement your plan?** Do you need more volunteers? A mentor? Donor tracking software? Something else? Think about 3 things that would make a huge difference in your ability to get better results this year, and work on putting those in place.



Now what?

This worksheet gives you the basis for a powerful, purposeful fundraising plan. But you can't just create it and leave it on your hard drive or in a file folder.

Monitor the Plan

1. **Make a plan for reviewing your plan regularly.** I suggest you pull it out at the beginning of each month to see how you're doing. 
2. **Get input from your team.** If you have other staff, volunteers, or Board members helping you to execute the plan, involve them in the regular review. They may have valuable input for changes that need to be made.
3. **Modify as needed.** This plan is NOT set in stone. Things change, and you need to be flexible and ready to change as needed to leverage opportunities and weather the storms.

Don't be afraid to stretch for big goals. Your nonprofit is capable of great things, and with a good, solid, well-thought-out plan, you can accomplish them.

Got questions? Stop by [Fundraising Made Easy](#) and ask. We're here to help you.