



How to Write a Fundraising Plan in 2 Steps

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Contents

- 3 Introduction
- 4 **Step one:** Reflect on last year's performance
- 6 Sample performance assessment table
- 8 **Step two:** Define your goals, strategies, tactics, owners, and timelines
- 9 One year fundraising plan template
- 11 Helpful resources

Introduction

A fundraising plan is a best-case road map with clear goals to keep your team focused on what matters most and keep everyone accountable.

It is one document that outlines your fundraising priorities, goals, and plans over a specific amount of time, usually a 12-month period, for example, January–December, or whatever your fiscal year is. It can include goals, owners, strategies, campaigns, events, and even a communications schedule.

Yet the vast majority of nonprofits—[57.1% to be exact](#)—do not have a written fundraising plan.

No plan means no measurable goals. It means no one can be held accountable. It also means there's no clear way to evaluate which strategies worked and what didn't, robbing you of a chance to learn from what went wrong.

If you're like a lot of nonprofit professionals you may be asking yourself:

Why do this?

Will creating a written fundraising plan raise me more money?

Yes! Whatever your goal, you are 42% more likely to achieve it just by writing it down. According to research by Dr. Adrian Sargeant, world-renowned fundraising researcher, "organizations with a written fundraising plan consistently outperform organizations without one."

Ready to craft your fundraising plan?

While every fundraising plan may look a tad different, they all involve the same planning steps and core components.

“By failing to plan, you are planning to fail.”

Benjamin Franklin



Step 1

Reflect on last year's performance



The first step in making a fundraising plan isn't thinking about the future—it's taking stock of your past. Look back at last year's fundraising initiatives, campaigns, and events to assess your strengths, challenges, and opportunities. This can be as simple or complex as you want.

Here's a handy [retention calculator](#) to help you determine your average gift size and the financial impact donor retention can have on your overall fundraising efforts.

Some key questions to consider

1. Which fundraising strategies gave us the best return on investment?

2. What is our overall donor retention?

3. What percentage of first-time donors make a second gift (second gift conversion rate)?

4. Where do we get our best donors?

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5. Who are our most loyal donors?

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6. What is the average age of our donors?

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7. What is our greatest opportunity to grow revenue?

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You can also try this simple table to assess your past performance and clarify your goals.

Revenue source	Last year projected goal	Actual raised	What worked	What we need to improve	To do next year
Annual Fund	\$20,000	\$17,500	GivingTuesday, local giving day, donor match, online giving	Email segmentation, new donor welcome process	Hire copywriter, send twice as many emails, secure match earlier, make new donor welcome calls
Major Gifts	\$100,000	\$125,000	More face-to-face visits	CRM for moves management	Buy new CRM
Grants	\$500,000	\$475,000	Multi-year grants	Must expand scope to meet goal	Hire grant writer
Corporate Sponsorships	\$50,000	\$75,000	Strong, well-stewarded partnerships	Event cultivation to corporate prospects	Schedule, plan & recruit cultivation events
Events	\$20,000	\$10,000		Consider retiring event to ease staff burden	
Other					



Here is a template you can fill in.

Revenue source	Last year projected goal	Actual raised	What worked	What we need to improve	To do next year



Step 2

Define your goals, strategies, tactics, owners, and timelines

Writing down your goals encourages you to get clear on your objectives and identify the tasks and timeline needed to complete them.

Set yourself up for success by asking: What can we reasonably achieve with our current tools and capacity? Can we boost revenue by investing fundraising and infrastructure, for example, by upgrading our donor database or hiring a copywriter?

The most important, but overlooked, part of a goal is assigning an owner. To make sure your fundraising plan is followed specify the individual, team, or department in charge of working toward that goal. Make sure the goals set in the fundraising plan are part of their annual performance review.

The best goals are SMART goals

Specific, measurable, attainable, relevant, and time bound.

Here are a few examples of SMART goals you might set for your organization:

- 1** Recruit two volunteers to join the Board Development Committee. Train and have them in place by April 15.
Owner: Board Development Chair
- 2** Boost overall donor retention by 5% (to 50% overall) by creating and implementing a donor-centered stewardship plan. This plan will include at least seven meaningful, personal communications in a 12-month period.
Owner: Stewardship Manager
- 3** Increase major gift revenue by 20% through retention and upgrades.
Owner: Major Gift Officer

Here is an example of a fundraising plan.

Fundraising Plan

Year: 2024

Goal	Strategy/Outcome	Plan/Tactic	Expenses/Needs	Owner(s)	Timeline/Progress	Notes
<ul style="list-style-type: none"> Use technology to reach our fundraising goals 	<ul style="list-style-type: none"> Purchase new CRM to communicate and fundraise more effectively with donors 	<ul style="list-style-type: none"> Recruit CRM committee of key staff and board chair Complete list of CRM needs across departments 	<ul style="list-style-type: none"> Hire a partner to help with CRM vendor selection & migration 	<ul style="list-style-type: none"> Executive Director + committee: Development Director, Program Director, Volunteer Director & Events Manager 	<ul style="list-style-type: none"> Purchase and implement by the end of June to ensure successful year-end Not started 	<ul style="list-style-type: none"> Look for a system with built-in retention and engagement metrics, plus all-in-one CRM and digital tools (online forms, email, marketing automation)
<ul style="list-style-type: none"> Increase unrestricted individual giving revenue through monthly giving and ensure our financial stability w/aging donor base w/legacy gifts 	<ul style="list-style-type: none"> Plan and launch a monthly giving program, convert 10% of annual fund donors Plan and launch a legacy program, convert 1% of annual fund donors 	<ul style="list-style-type: none"> Send spring/fall monthly giving direct mail & email appeals Mail legacy-giving postcards, direct mail campaign & host legacy luncheon 	<ul style="list-style-type: none"> Copywriting, design, print & postage Venue rental, food, beverage, signage & decorations 	<ul style="list-style-type: none"> Development Director 	<ul style="list-style-type: none"> Not started 	<ul style="list-style-type: none"> Invite board members to consider a legacy gift at next board meeting
<ul style="list-style-type: none"> Increase donor retention rate by 10%, for an additional \$200,000 in revenue bloomerang.co/template/donor-retention-calculator/ 	<ul style="list-style-type: none"> Institute a new donor welcome program Reevaluate current stewardship plan Conduct a donor satisfaction survey 	<ul style="list-style-type: none"> Make new donor welcome calls Design & mail "donoriversary" postcards 	<ul style="list-style-type: none"> Copywriting, design, print & postage Hiring outside contractor to design survey 	<ul style="list-style-type: none"> Development Director 	<ul style="list-style-type: none"> New donor welcome program started Donor satisfaction survey not started 	<ul style="list-style-type: none"> Include planned giving questions in the donor survey
<ul style="list-style-type: none"> Increase overall donated revenue by 20% 	<ul style="list-style-type: none"> Upgrade major gift donor-giving portfolio Secure new corporate sponsors, foundation grants, and government grants 	<ul style="list-style-type: none"> Leverage new CRM moves/management capabilities to ensure face-to-face donor visits 	<ul style="list-style-type: none"> Hire outside grant writer 	<ul style="list-style-type: none"> Development Director 	<ul style="list-style-type: none"> Need to hire grant writer ASAP 	<ul style="list-style-type: none"> Be careful to check grant writer references thoroughly





Below is a fundraising plan template you can fill in.

Fundraising Plan

Year:

Goal	Strategy/Outcome	Plan/Tactic	Expenses/Needs	Owner(s)	Timeline/Progress	Notes
Goal	Strategy/Outcome	Plan/Tactic	Expenses/Needs	Owner(s)	Timeline/Progress	Notes
Goal	Strategy/Outcome	Plan/Tactic	Expenses/Needs	Owner(s)	Timeline/Progress	Notes
Goal	Strategy/Outcome	Plan/Tactic	Expenses/Needs	Owner(s)	Timeline/Progress	Notes

Helpful resources



Links to online templates in Canva

- 1 [One Year Fundraising Plan Template](#)
- 2 [Two Year Fundraising Plan Template](#)



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