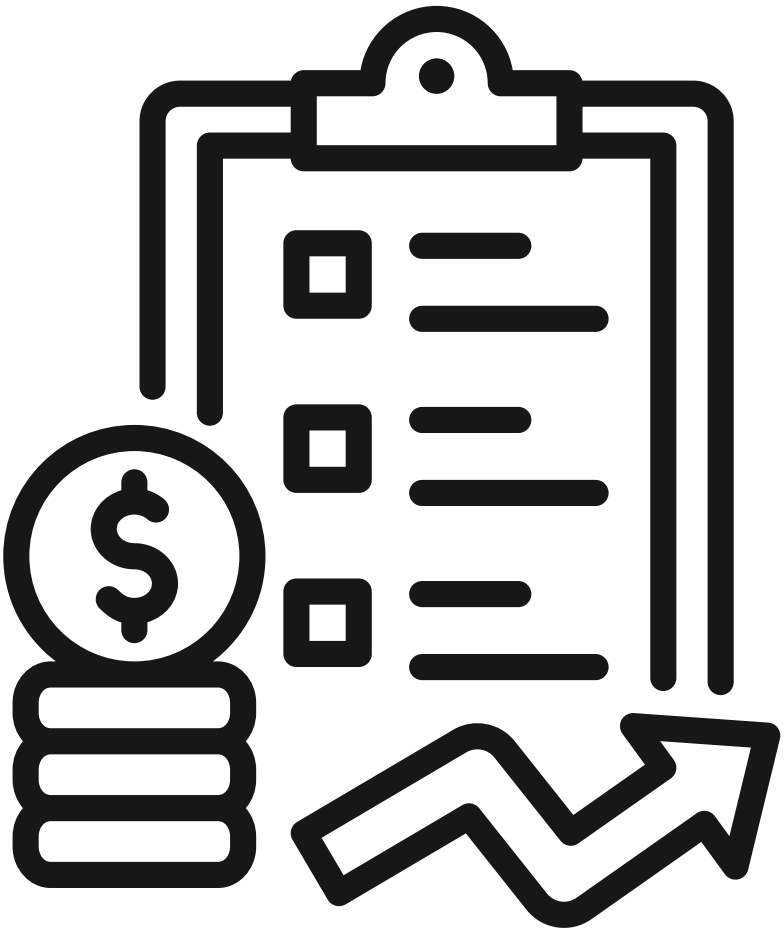
FUNDRAISING PLANNER

FUNDRAISING



2027

BROUGHT TO YOU BY PAMELA GROW

Basics & More™

Your Fundraising Planner

For your fundraising success, make a plan. Work the plan.

It sounds so simple, doesn't it? And yet a lack of clarity is one of the biggest causes of waste and procrastination in the nonprofit sector.

Antoine de Saint-Exupéry is known to have said, "A goal without a plan is just a wish." But often that's exactly what we see in the nonprofit sector.

After all, if you don't know what your fundraising goals are for your organization, it's unlikely that you'll be able to identify and prioritize exactly what you need to work on to achieve those goals.

"Peter Drucker is credited with having said "culture eats strategy for breakfast" and so it is perhaps not surprising that culture would be top of this list. If senior management set a plan that is inconsistent with "how we do things around here" it will be doomed to failure from the outset."

-Development Plans & Fundraising Performance

In 2020, the *Institute for Sustainable Philanthropy*, led by Dr. Adrian Sargeant, was commissioned to conduct a survey on the topic of fundraising planning. **This comprehensive study indicated a powerful relationship between the degree of formality adopted in fundraising planning and all measures of fundraising performance.**

You already know. These past several years have been among the toughest in history. We've endured a global pandemic and a harsh exposure of our country's racial and economic injustices. Now we're moving into uncharted territory.

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There's one thing that many economists agree on, however. Our economy is going to get worse before it gets better.

Distractions abound in our sector (and that's only going to get worse — AI anyone?). We're looking at a future that, given past indications, can only be chaotic. And I'm predicting that above all else, your *commitment, focus, and mindset will be what sets you on the path to survive, thrive, and grow in 2027*.

If you have any questions, be sure to check out the 2027 roster of *Basics & More Fundraising* classes to see how your nonprofit can build what I refer to as your "donor attraction" fundraising systems and raise more general operating support than you ever thought possible! These are the systems to see you through any crisis. Or shoot me an email at pamela@pamelagrow.com.

To your fundraising success!



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How to Use This Planner

Create a spreadsheet in Excel or your program of choice. Begin by taking a look at your funding sources from a historical perspective.

1. **How much have you raised in the past from individual donors?** I work with a lot of organizations aiming to lessen their reliance on government funding, grants, and/or events. **You'll find that building a broad base of individual (AKA general operating support) giving is a wise decision.** The best and the easiest way to do that starts with a strong donor communications system. Donor communications does require a strong investment. If you've typically run one or two campaigns a year (spring and end-of-year), could you add in a third or even a fourth or fifth targeted appeal? If you publish a print donor newsletter, *are you raising revenue with that newsletter?* Well-crafted donor newsletters can bring in as much (or more) as a fundraising appeal. One newsletter I recently wrote brought in a $1000 gift (no ask!) from a donor whose previous highest gift was $500. **What are your plans for increasing donor retention in 2027?** For new donor acquisition? How are you bringing back lapsed donors? What are your plans for major donors and legacy gifts? *Write it down!*

2. **What are your goals for increasing your monthly giving or membership?**

Create S.M.A.R.T. goals, meaning that they're specific and actionable. That means "*grow our monthly giving program*" becomes "*Grow our monthly giving program by 150 new donors by December of 2027 through one direct mail appeal and three email campaigns.*"

3. **Does 100% of your board contribute to your mission?** If not, create a plan to make it happen.

4. **Revisit events.** A big question going into 2027 will be how your events fared in 2026. Some organizations saw tremendous success going virtual. For others, virtual events were a disaster. Even though it's back to 'business as usual' for many, I urge you to put the least amount of focus on

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events going into 2027. What plans do you have in place for stewarding event attendees and transitioning them into donors? *Write it down!*

5. **Now you'll factor in any state or federal government grant funding.** Consider active foundation grants and opportunities in 2027. I've always focused primarily on general operating support. If you're a Development Department of one, you'll find grants can take over your life. If you can't focus in on general operating support grants (easier to administer), you may want to consider outsourcing. If you've relied on federal funding, now is the time to begin to explore alternative sources.

6. **Most of the time we think of business donors in terms of sponsorships.** However, you'll also want to consider separate appeals to businesses within your community.

7. **In "Other," you'll turn your attention to strategies such as earned income.** That includes your thrift shop, book sales, eBay sales, branded merchandise and the like. Careful here! Too many nonprofits, especially when they're just starting out, engage in what I call "nickel and dime" fundraising, relying on low level activities like bake sales, events, and the like. **Keep your primary focus on growing your individual giving.**

When I'm working with clients and students on developing their plans, I like to include *both a written plan* that emphasizes our missions and values (for example, you should have a solid gift acceptance policy in place), and typically an excel document where you can lay out the strategies, costs, and anticipated income.

Assess your fundraising infrastructure. If you're planning on increasing your digital fundraising in 2027, you'll need to budget for that. **Strong online fundraising requires strong systems.** If you're cobbling together too many platforms, you won't be serving your donors or your organization well. Do you have a donor database and written protocols? Does your website need to be updated? Will you be making any new hires? **Real fundraising, the sustainable kind, requires investment.**

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As a sector we're often (always?) "Tripping Over Dollars Picking Up Pennies." Your leadership needs to understand that numerous research indicates that multichannel campaigns are key to growing your donor base.

For small to mid-sized community nonprofits, your investment in direct mail and donor care will ALWAYS yield solid returns.

You'll want to include your goals and objectives for the year. This includes fundraising targets.

Funding Source	Strategy	Cost	Anticipated Income
1. Individual Donors			
2. Members/Monthly			
Board Giving			
Events			
Private Foundations			
Government Grants			
Business Donors			
Other			

Now you've got a plan for growing your fundraising in 2027, and the strategies to do it. You'll want to include written plans for your organization's non-financial goals.

- **Does your organization have a strong written case for support?** In Mal Warwick's brilliant book, *Fundraising When Money is Tight: A Strategic and Practical Guide to Surviving Tough Times and Thriving in the Future*, Mal urges readers to "reconsider why your donors support you in the first place — and reexamine your case for giving in that light." Your donors want to know that you're doing a good job with the money they gave you — *and they want to see the impact of their support.*

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- **Did you resolve to greater diversity in your board and staff?** It won't happen by osmosis. You need to plan for it. If your organization needs anti- racism training, I can provide you with recommended consultants. Highly recommended: Desiree Adaway.
- **How is your nonprofit attracting new donors and partners?** Make a plan and make an investment in acquisition (and donor care).
- **Does it make sense to outsource?** Time is money. I repeat, time is money. If your development director is spending time wrestling with your local print shop trying to figure out why your Canva files won't work, maybe it makes sense to hire an actual designer for that job. Similarly, if your "one-person" development department is spending 80% of her time on grants when your goal is to grow your individual giving program, outsourcing may be the answer. Schedule a call to see if outsourcing makes sense for your nonprofit.
- Is your organization's culture a healthy one? Believe it or not, your culture plays a strong role in your success. If not, create a plan with documented steps to get there.

Remember, you'll want to keep your plan front and center always. Modify it as needed. When an "opportunity" falls into your lap, consider how it fits into your plan and if it truly is an opportunity. Time is money. And go for big goals in 2027. After all…

You've got this!

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About Pam



Pamela Grow is the publisher of *The Grow Report,* the leading weekly newsletter for small shop fundraisers since 2008, the author of *Simple Development Systems: Successful Fundraising for the One-Person Shop,* and the founder of thefundraisingcalendar.com.

In 2016, Pam partnered with Jeff Schreifels and Richard Perry to lead the creation of the *Veritus Group Academy* (formerly Major Gift Academy).

Her *Basics & More* online fundraising classes have trained over 10,000 smart nonprofit professionals all over the world.

Pam's been named one of the *50 Most Influential Fundraisers* by *Civil Society* magazine, and one of the *25 Most Effective Fundraising Consultants* in America.

She's mom to two remarkable daughters, an avid reader, baker, progressive, and champion of fundraisers and donors everywhere.

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