

THE **5** BUILDING BLOCKS OF A SUCCESSFUL ANNUAL FUNDRAISING PLAN

Learn how your organization can create a successful annual plan that encourages more engagement, more advocacy, and more giving!



At the center of every successful nonprofit lies a well-thought-out fundraising plan.



Well, duh, right? After all, annual fundraising without a plan is like driving cross-country without a map: There's no way you're going to end up where you want to be.

An annual fundraising plan sets the stage for everything your nonprofit will do: your goals for the year, the fundraisers you'll put on, and the strategy behind every decision that your organization makes.

Locking in these details early on allows you to anticipate upcoming needs, set budgets for any campaigns or events, and create a plan B in case something doesn't turn out as expected. At the end of the day, the effectiveness of your fundraising plan is up to you and your team. But have no fear: that's why we've created this guide to help you through the process.

Read on to discover the 5 building blocks your nonprofit needs to build a successful annual fundraising plan that will lead you down the path to success!

Let's dive right in...



Set Your Financial Goals

Look at past yearly totals and target an aspirational-yet-attainable percentage of growth. Nailing down your financial goals from the start, allows you to have a clear idea of what your goals should be for each individual component of your fundraising plan, from fundraising events to board members to crowdfunding campaigns.

Determine your organization's large, overarching fundraising goal for the year, then divide it up into the following categories:

- **Individual giving:** Donations from individual donors supporting your cause. For most organizations, this makes up the majority percentage of their fundraising goal.
- **Peer-to-peer fundraising:** Donations from volunteer fundraisers who raise money from friends and family on behalf of your organization.
- **Board fundraising:** Money raised or donated by your board members.
- **Corporate giving:** Contributions from small local businesses and/or larger corporate partners who align with your mission. This can come in the form of event sponsorships, donation matches during a day-of-giving campaign, employee giving campaigns, or larger, one-time corporate gifts.

Other categories may include foundations, in-kind donations, volunteer grants, major gifts and planned giving depending on your organization's unique needs and donor mix.



2

Think About the Donor

One of the biggest mistakes many nonprofits make is focusing solely on their own needs instead of those of the donor—both are equally important! If you don't create events and campaigns that appeal to your donors' interests and needs, you likely won't be able to meet your goals.

Remember these four steps: [segment](#), [map](#), [target](#), [personalize](#):

- **Segment your key donor demographic(s):** Age, location, income, interests, preferred methods of engagement... You may discover that your organization has more than one key demographic, so plan accordingly!
- **Map the donor journey:** What is their first interaction with your organization? What media channel(s) will you use? What inspires them to give the first time? What about after that?
- **Target them on the channel they prefer:** In general, millennials prefer social media and text messages, Gen X-ers prefer email and social media, and baby boomers prefer phone calls, and the greatest generation prefers written communication like direct mail. However, all generations are increasingly receptive to text messaging.
- **Personalize your message:** Contributions from small local businesses and/or larger corporate partners who align with your mission. This can come in the form of event sponsorships, donation matches during a day-of-giving campaign, employee giving campaigns, or larger, one-time corporate gifts.



3

Create an Annual Campaign Calendar

Think of your annual campaign calendar as the holy grail of fundraising success. When building your annual campaign calendar, start early and work backward from key dates to determine your schedule of events and fundraising milestones for the year. Map out internal and external projects and organize each communication you'll send by date, audience and communication. Remember your financial goals from step one? Now is the time to make them actionable.

Here are some ideas to help you get started:

Individual giving (monthly):

- Reengage lapsed donors
- Inspire a culture of giving among volunteers via targeted campaigns
- Encourage recurring donations—smaller donations on a regular basis create predictable revenue
- Launch two online campaigns centered on mission-related activities

Peer-to-peer fundraising (2-3 months before an event):

- Expand fundraiser base and recruit new advocates into relevant programs
- Host events that will attract and reengage previous participants
- Use rewards to help motivate (these don't just have to be cheap giveaways!)

Board fundraising (bi-annual basis):

- Educate and empower your board to fundraise on your behalf
- Help the board set meaningful, measurable, realistic goals to set them up for success

Corporate giving (quarterly):

- Leverage personal connections and outreach to forge new partnerships
- Think ahead: What's coming up at your organization that may be of interest to new or existing partners
- Think differently: It's not only about event sponsorships anymore



4

Identify Recurring Touchpoints

We'll let you in on a secret: recurring touchpoints are a huge help when planning your annual fundraising strategy. By outlining ongoing tasks, asks, or needs that happen monthly, quarterly, or seasonally, your organization can cut down on its work by simply scheduling out and repeating processes as needed.

Example donor touchpoints:

Monthly

- Donation thank you letters (no ask)
- Mission-relevant story for new contacts (ask)
- Campaign launches and/or updates for past donors (ask)

Quarterly

- Monthly donor newsletter
- Updates for board of directors
- Internal progress report

Seasonally

- Special event invitations
- Seasonal campaigns (spring fundraiser, summer event, #GivingTuesday, year-end giving)

Tip: Don't just use one channel. Use multiple touchpoints for each channel to increase engagement and fundraising results. A good multi-channel approach includes email, social media, text messaging, online and direct mail, so plan accordingly!



5

Conduct annual, bi-annual or quarterly reviews

Your annual fundraising calendar has been planned, your strategy is set, and the year is off to a great start! But once you're in the throes of executing your plan, it can be easy to become distracted and forget to check in. For maximum effectiveness, your organization should always be aware of what is and isn't working. So take some time throughout the year to look at some key performance metrics (KPIs). Review what you're doing, analyze your results, and see how you can improve. Making a change in the middle of a campaign is better than wasting time and money on something that isn't working!

Keep these KPIs in mind:

- **Fundraising metrics:** How many donations, monetary totals, average donation size, totals by channel, pledge fulfillment rate, fundraising ROI, cost per dollar raised
- **Donor retention metrics:** Donor retention and churn rate, year-over-year growth, conversion rate, recurring gift percentage, giving capacity
- **Fundraiser metrics:** Participation rate, amount raised per individual, individual and team totals per campaign, average donation size
- **Email and text messaging metrics:** Open rate, click-through rate, conversion rate, opt-out rate
- **Social media metrics:** Engagement rate (likes, comments, shares), follower growth, landing page conversions



Now that you know the building blocks of an annual fundraising plan, you can get started!



Did you know that using mobile and online fundraising and communication software is one of the easiest ways to help your organization engage with donors, track campaigns, and meet fundraising goals?

Using fundraising software like MobileCause, you'll provide donors with a secure, easy way to donate from a PC, tablet, or smartphone, you'll capture more donations right when they're inspired to give. As for communicating with donors, text messaging provides a 98% open rate, making it the one form of communication that is nearly impossible to ignore!



Need help getting started? MobileCause provides an innovative suite of digital fundraising and donor engagement solutions that help nonprofits do more good. To speak directly to an expert about implementing MobileCause software and strategy for your organization, please call (888) 661-8804 or go to <https://www.mobilecause.com/free-consultation/>