



# Preparing & Sticking to Your Fundraising Plan

By Rona Fernandez

Attendees at a recent house party in the home of one of Arkansas Public Policy Panel's (APPP) founders. APPP's Development Director Beth Ardapple reminds us that fundraising plans are easier to carry out if they include events like house parties because they are relatively easy to hold, as the co-hosts provide so much of the labor and resources. APPP has raised as much as \$8,500 at house parties, which always generate new donors. Photo by Brett Miracle Huie

**I SEE IT ALL THE TIME IN MY WORK** as a fundraising consultant: a well-intentioned nonprofit staffer creates a lovely, detailed and smart annual fundraising plan. Then six months into the year, when the group hasn't accomplished half of the strategies on the plan nor reached its fundraising goal, the staffer calls me to help figure out what went wrong. When I take a good look at that initial plan that was crafted with such care at the beginning of the year, I usually find the answers. The plan is often based on unrealistic, overly ambitious goals, with too many activities packed in. In other cases, fundraising events and appeals were scheduled in a way that conflicted with major program activities. No wonder the group hasn't been able to get things done on its fundraising plan—the plan itself is so often flawed from the start.

To highlight some best practices in developing fundraising plans, I interviewed fundraising staff at three different nonprofits: Student Action with Farmworkers, which connects young people with farmworker struggles in the Southeastern United States; San Francisco Baykeeper, a grassroots watchdog organization that advocates for a clean and safe Bay; and the Arkansas Public Policy Panel, a statewide group that does progressive community organizing and coalition-building. Each of these groups has its own

approach to developing and sticking with its fundraising plan, and each has diverse income streams that include a substantial amount of funding from individual and grassroots sources.

Before I get into how to stick to your fundraising plan, let's ensure that you have a solid plan to begin with. Here is a list of things to think about when creating a realistic and achievable fundraising plan.

## **1. Plan ahead—and even further ahead.**

Many groups make the mistake of creating their fundraising plan after they have set their program activities and calendar for the year. Usually that calendar is so packed with activities that once fundraising is discussed, little time is left in the calendar to do it. Starting the process early on and making it part of your overall organizational planning process makes a big difference. It allows you to spend the time needed to craft a feasible plan, incorporate data from your past fundraising activities, and get input from multiple stakeholders in your organization.

Based in North Carolina, Student Action with Farmworkers (SAF) has a strong grassroots fundraising program, which they begin planning long before the start of each new fiscal year. Execu-

tive Director Melinda Wiggins states, “We start our budget and development planning in May [for a September to August fiscal year] so that the board and the staff can look at the plan as well. There are a lot of details I get to add in August and September—I look at past budgets, goals and objectives for the future. It really takes all that time to think about the program piece first, and to ask questions like, ‘Did we do well with budgeting last year? What were we off by?’”

## 2. Involve everyone in creating the plan.

If the main fundraiser for the organization is sitting at their desk composing a grand plan of grassroots fundraising that others are supposed to help carry out without giving input, then the plan is most likely doomed to fail.

At the Arkansas Public Policy Panel (APPP), a statewide organizing and coalition-building group, key staff, board and volunteers came together to create a broad four-year plan under the guidance of a consultant. “Twenty-five people were involved at one point when we were pulling it together,” says APPP Development Director Beth Ardapple. They continue to work with their fundraising committee on a monthly basis and review the plan annually.

It is crucial for staff, board, and even key members and volunteers to have input on the plan and reality-check it. Having more eyes on the plan helps to ensure that it coordinates with, or at least doesn’t conflict with, major program activities—like the launch of a new organizing campaign—during which staff capacity to do anything more will be low. Ideally, integrating fundraising into these big programmatic pushes is the best way to make sure you are asking your constituents for money in a way that aligns with your mission.

“A lot of our fundraising is program-related, which is great because they are funds that I can count on,” says SAF’s Wiggins. “The students raise money as part of the program: \$20,000 every year.”

## 3. Make broad annual goals (not activities) that can be used to guide your plan.

Creating broad goals is important for when unexpected events or crises come up during the course of the year. These goals will help you decide which activities on your plan you can deprioritize and which ones to make sure you get done no matter what. These goals may also be achieved through various methods and strategies, giving you flexibility later on if something forces you to shift your plan. Some examples of broad annual plan goals may be to raise \$20,000 from individuals, recruit 50 new donors, or engage

all board members in fundraising, all of which can be achieved by doing mail or email appeals, fundraising events, or by integrating pitches into your existing public events. The activities on your plan should flow directly from these goals.

## Five Steps to Carrying Out Your Plan

Now that you have a strong plan that board and staff are ready to help implement, how do you make sure that you carry out the activities on your plan in a timely fashion, given everything else your group is doing? Here are five steps for sticking to your fundraising plan and achieving the goals you set at the beginning of the year.

### 1. Create a fundraising team or committee.

Just as your group might have a leadership team or a campaign team, a fundraising committee can widen accountability to all parts of the organization and keep you on track with your plan.

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At APPP, the fundraising committee of seven people, made up of representatives from the board of directors, 501(c)(4) steering committee, staff, and volunteers, meets monthly. “That monthly meeting of the fundraising committee has held me, as the development director, accountable for getting the legwork done,” says Ardapple. “So when we come to the next meeting we’ve done what we said we were going to do. With grant work, you’ve got deadlines, you’ve got stuff pushing you, and I think you need someone pushing you on each thing that you say you’re going to do to hold you accountable.”

The committee is also a ready-made source of people-power to carry out your plan as well as to brainstorm strategies when you need to adjust your plan (see number 2 below).

### 2. Keep your team’s spirits (and skills) up.

It’s not enough just to get a great group of folks together to carry out and track your fundraising plan. They need support, just like any group of volunteers do, to be successful. This doesn’t have to



be extremely labor-intensive, but it does require work. First off, this team is doing something—fundraising—that can be psychologically challenging as well as isolating. They may be afraid of asking for money or may not feel confident in their abilities. So inspiring and motivating them is the biggest part of keeping your team strong.

“I’ll ask program staff to stop by at the fundraising committee meeting and tell them a story about what’s going on in the field—some challenge, some accomplishment,” says Ardapple. “They’re

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not just doing the work to bring in the money, but they get to see the impact it has.”

Ardapple also has taken advantage of the affordable webinars that GIFT regularly offers to train her committee members and help keep their skills sharp. “They just loved [the GIFT webinar]. They talked about it for months—it helped keep them inspired and motivated.”

In order to help your group carry out its plan and be able to give useful feedback, it is also important for your team to understand how what they are doing fits into the big picture. This means sharing financial information about your fundraising goals, including your organizational budget and what programs cost, so that they can explain this information to donors as needed. This will help reassure them that their work is making a difference.

“Our fundraising committee knows that what they are raising is 10 percent of the [organization’s] budget,” says Ardapple. “To keep that from seeming like it’s not very significant, I make it very clear and say over and over again that, for example, this house party we had that raised \$1,000—somebody came to that party and contacted us later and made a \$3,000 or \$7,000 donation. The committee is working to raise \$80,000 this year, but there’s another \$40,000 that is indirectly coming in from their work. And I remind them that when you build a base of donors, you have a lot of people give \$25, but there are people that are going to emerge from that base that are going to make bigger donations.”

### 3. Work your plan, but be flexible.

Even the best-laid plans are bound to get sidetracked by the unexpected—a board or staff member leaving the organization or a

major program opportunity arising that requires heavy staff time. But if you keep your big annual goals in mind at all times, there are usually ways to work through these surprises without throwing your entire plan off course.

“What we try to do is to build in enough flexibility in the fundraising plan to allow us to be able to react when there’s a program need that comes up,” says Eliet Henderson, development director at San Francisco Baykeeper. “A small example is when there’s a need for an action alert [about our program], we may be busy, but we try to be flexible enough to do it. But it’s helpful for us too because everyone who gets involved with us through an action alert are potential donors, or if they are already donors, then it strengthens their relationship with us.”

Especially if your organization has other types of funding that operate on hard deadlines that cannot be changed (i.e., foundation or government grants), it can be difficult to do everything on your plan exactly the way you thought you would. At the same time, if your overall plan goals are realistic, it is important to do your best to still meet them.

“It’s always easier to push back on things that aren’t on deadline [the way foundation fundraising is]. For example, if we have a fundraising appeal scheduled for this week, we can push it off, but at some point it has to get done.” SF Baykeeper’s four-person development staff team has a shared department calendar with deadlines for both individual and foundation fundraising. Henderson also says that calendaring out all the steps that lead up to a big activity, such as mail appeal or event, is crucial. Breaking these large activities down into smaller tasks makes the work more manageable and your timeline for carrying them out more realistic and less likely to be pushed back.

Another common scenario is that an organization’s fundraising plan is overly ambitious, despite its best efforts to reality-check the plan at the beginning of the year. When it is time to put things into action, board, staff and volunteers freeze up and say, “We can’t do that!” If this happens to you, engage these same naysayers in coming up with an alternative to meeting the objectives of a particular strategy.

For example, if you planned to do a major donor drive, and all of a sudden a big organizing campaign event has taken over the team’s capacity and momentum, ask them, “Okay, what are we going to do?” Let them help you come up with a solution, whether that be to scale back the donor drive, integrate it into the campaign event (for example, by calling major donors to turn

them out for the event but also to ask them for a meeting), or reschedule the drive completely. Taking this approach increases your fundraising team's accountability to your plan, and keeps the work moving forward.

"Sometimes you just assess [the unexpected challenge] and put it in the parking lot until you can figure out what to do about it," says Ardapple. "For example, we didn't get as many new donors this year because it's going to take more activities than we had planned. This is an issue we have to deal with. We've grown our donor base one-by-one through personal contact, and we're thinking this isn't going to work. So what we've decided is that at the end of this year, we're going to develop a new strategy, but we had to set it aside for now because we had other activities in the works."

#### 4. Don't freak out if something goes wrong.

The best thing about a plan is that it can be your anchor, even when things go wrong. I have seen organizations deal with major crises—the unanticipated departure of an executive director or other key staff member, for example—and come through it because they had a strong plan in place and were able to adapt that

plan to fit the new situation. You can't plan for everything, but you can plan as much as possible and know that some things are just not going to go your way. And that's okay.

"I still freak out," says SAF's Wiggins about the stress that comes with working a fundraising plan and still not knowing if the budget will be met. "But we have our [funding] reserve, and we have a plan.... The only thing that gets me through sometimes is that we have a plan, and knowing that if things work out all right then we are going to meet or exceed budget."

#### 5. Evaluate your plan at the end of the year—then start again!

Eventually, you will get to the end of the year when it is time to give your team a pat on the back and collectively take a look at how you did throughout the year. This evaluation is crucial to the next step: coming up with a new plan based on new information and doing the whole thing all over again.

But hopefully, this time, you will be a little bit wiser, and your next plan—and its implementation—will be even better. ■

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