**CanadaHelps Webinar**

**June 7, 2018**

**Fundraising Plan Worksheet**

1. **TAKE AN INVENTORY OF WHAT YOU’RE ALREADY DOING**

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| What are we already doing? | How much $ do we make from it? | Keep? |
| Direct mail twice per year. Not sure how much each raises but in total it raises $55k, I think. | $55,000 | Y |
| Golf tournament | $50,000 | Y |
| Foundation grants. Mr. Money Baggs grant = $25k. Others are about the same, I think | $50,000 | Y |
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1. **PUT IT IN THE SAMPLE FUNDRAISING PLAN FORMAT**

See sample fundraising plan provided.

It’s useful to put your current fundraising activities in this format so you have them in one place, in a particular order. Then, you can add to it and build your fundraising plan using this template. Your activities and numbers will be somewhat consistent. It’s easier to work from a similar template year over year.

I find it helpful to put the above in the fundraising template. It makes it easier for me to see what we may possibly want to keep and what we may want to discontinue.

1. **WHAT WILL YOU KEEP?**

**Factors to consider when deciding to keep or discontinue initiatives already being undertaken:**

* Net revenue
* Return on investment or cost of fundraising
* Volunteer engagement/burn out
* Potential for growth/stability/enhancement
* What are the implications if we discontinue the initiative?
* Others?

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| --- | --- |
| **What are we keeping?** | **What improvements or changes do we want to make to what we are keeping?** |
| **1. Direct mail** | Track the results/returns so that we know how much each campaign raises. Set up database to allow us to do this. |
|  | Use more inspirational/emotional story telling in the letters. We may need external help via training or external writer. |
|  | Add on digital media: send teaser email and follow up email after letter had dropped to increase chances donors will open the letter when they see. Experiment with Facebook posts |
|  | Add in CanadaHelps embedded online giving forms and create an onlne CH campaign for each direct mail letter we send. |
| **2. Golf tournament** | Review sponsorship program and transition from traditional Gold, Silver, Bronze “canned” package to more of a discussion with prospective sponsors about activation opportunities that will help them reach potential clients. |
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| **3.Foundation giving**  | Develop tracking system that follows: grants applied for, due dates for reporting, due dates for upcoming submission deadlines, accurate tracking of successful grants secured.  |
|  | Develop a new foundation grant template that can be adapted as needed for new grants |
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**Examples of things to change/build upon:**

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| --- | --- |
| * Recruit new/skilled volunteers
 | * Add technology to enhance options for donors to give
 |
| * Focus on net revenue
 | * Consider experimenting with best practices
 |
| * Improve on return on investment
 | * Develop clear work plan with tasks
 |

1. **WHAT NEW INITIATIVES WILL YOU ADD?**

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| --- | --- |
| **What are we adding?** | **Who do we need to talk to/engage to succeed? What is the product/initiative; who will be interested in supporting it/who is the audience; how will we reach the new audience?** |
| **1.**  | Who needs to be engaged: |
|  | What is the new initiative? |
|  | Who is the audience? |
|  | How will we reach the new audience? |
| **2.**  | Who needs to be engaged: |
|  | What is the new initiative? |
|  | Who is the audience? |
|  | How will we reach the new audience? |
| **3.**  | Who needs to be engaged: |
|  | What is the new initiative? |
|  | Who is the audience? |
|  | How will we reach the new audience? |

**What might you add/enhance?**

* Leadership giving program?
* Bequest program?
* A new special event?
* Collaborative opportunities?

**Things to consider when deciding:**

* Which initiatives will have the greatest return on investment?
* Can I collaborate with other groups?
* What resources will I need to introduce new initiative

**5. UPDATE OR CREATE AN UPDATED FR PLAN**

See version 2 of the fundraising plan in the power point presentation

**6. WHAT ARE THE THREE THINGS I WILL DO WHEN I GET OFF THIS WEBINAR TO BEGIN THE CHANGE I WANT?**

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| --- |
| **1.** |
| **2.** |
| **3.** |