



# **YOUR 2022 FUNDRAISING PLANNER**



For your fundraising success, set a goal, make a plan to achieve it, then 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.

As famed writer Antoine de Saint-Exupéry once said, "A goal without a plan is just a wish." 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.

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.

***"These past two years have been among the toughest in history. We've endured a global pandemic and harsh exposure to our country's racial and economic injustices. There's one thing that all economists agree on, however. Our economy is going to get worse before it gets better. Distractions abound. We've just been through a rough year and there's no telling what's coming next. 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."***

- Pamela Grow

# Fundraising takeaways for 2022

- During uncertain times, donors look to organizations for clarity, and they trust these organizations to take care of world issues that keep them up at night.
- As they reject uncertainty, donors are more motivated to act when presented with a projected outcome. Instead of setting a goal to raise 20% more, for example, start with a specific need (i.e. building a school) and set out to raise that amount.
- As virus variants emerge and social unrest lingers on, donors will continue to “join the fight” by giving online. Don’t underestimate the power of a multichannel fundraising approach.
- Philanthropy is about passion and transformation. Focus on shared values, and gifts will come.

## RESOURCES

[Create Your Transformational Fundraising Strategy in 5 Simple Steps »](#)

[8 Donor Outreach Ideas for Transformational Fundraisers »](#)

[How to Develop a Personalized Nonprofit Email Strategy »](#)

## How to use this planner

Begin by taking a look at your funding sources from a historical perspective. Include both a written plan that emphasizes your missions and values (for example, you should have a solid gift acceptance policy in place), and a spreadsheet where you can lay out the strategies, costs, and anticipated income.

Funding source	Strategy	Cost	Anticipated income
Individual donors			
Members/monthly			
Board giving			
Events			
Private foundations			
Government grants			
Business donors			
Other			

# How to strategize with your spreadsheet

You'll want to include your goals and objectives for the year, including fundraising targets. Collaborate with your team to ask the hard questions and propose solutions.

- 1. How much have you raised in the past from individual donors?** Organizations seeking to lessen their reliance on government funding, grants, or events will find that building a strong individual giving program is a wise decision.
- 2. If you've typically run two campaigns a year (spring and EOY), could you add in a third or even a fourth or fifth targeted appeal?** What themes, events, and giving opportunities could you build a fundraising campaign around?
- 3. If you publish a print donor newsletter, are you raising revenue with it?** Well-crafted donor newsletters can bring in as much (or more) as a fundraising appeal.
- 4. What are your plans for increasing donor retention in 2022?** For new donor acquisition? How are you bringing back lapsed donors? Write them down!
- 5. What are your goals for increasing your monthly giving or membership?** Make it specific and make it actionable. Thus "grow our monthly giving program" becomes "Grow our monthly giving program by 150 new donors by December of 2022 through one direct mail appeal and three email campaigns."
- 6. Does 100% of your board contribute to your mission?** If not, create a plan to make it happen.
- 7. What plans do you have in place for stewarding event attendees and converting them into donors?** A big question going into 2022 will be how your events fared in 2020/2021. Some organizations saw tremendous success going virtual. For others, virtual events were a disaster.
- 8. Consider active foundation grants and opportunities in 2022.** You can start by focusing 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 on general operating support grants (easier to administer), you may want to consider outsourcing.
- 9. Factor in any state or federal government grant funding.** 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.
- 10. Turn your attention to other strategies such as earned income.** That includes your thrift shop, book sales, eBay sales, branded merchandise, and the like.



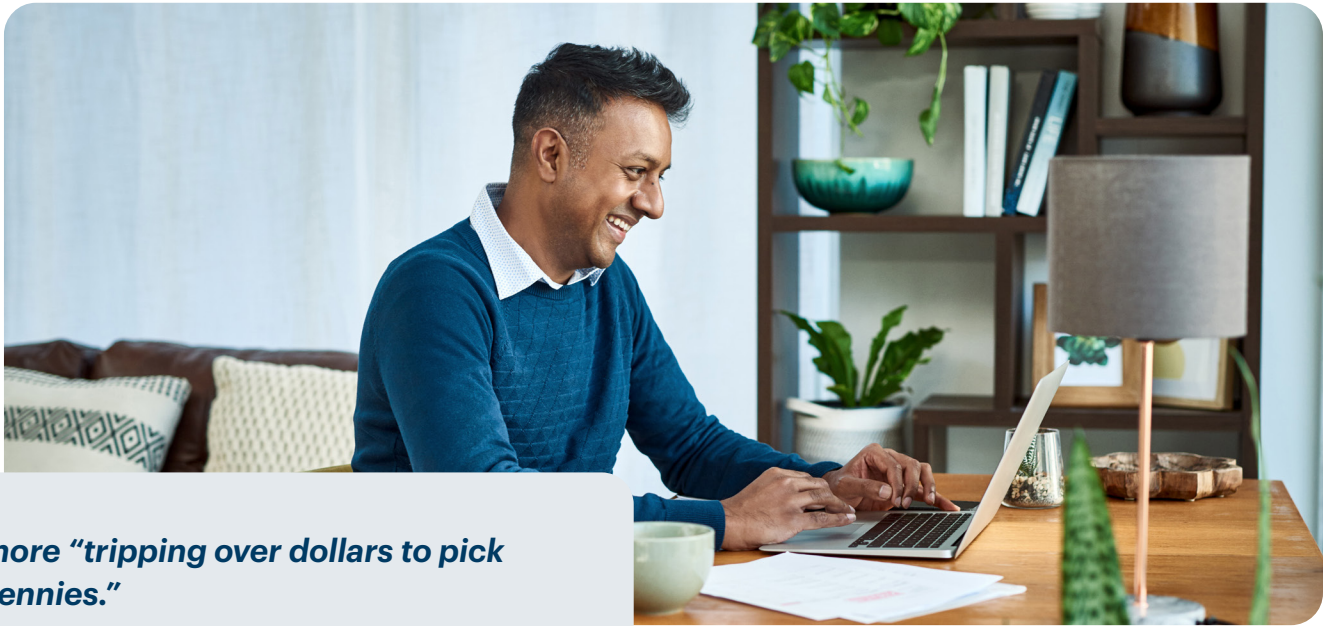
## RESOURCES

[Your Data-Driven Persona Checklist »](#)

[How to Create a Monthly Giving Form That Converts »](#)

[Your Donor Retention Toolkit »](#)

# How to assess your fundraising infrastructure



***No more “tripping over dollars to pick up pennies.”***

Your leadership needs to understand that all the studies indicate that multichannel campaigns are key to growing your donor base. An investment in direct mail and donor care will yield solid returns.

## **Digital fundraising doesn't have to be a budget killer:**

- Online fundraising revenue increased by 32% last year.
- Nonprofit mobile audiences grew by 26%, with a 3% average increase in email list size.
- Return on ad spend was highest for search ads (\$4.78), followed by social media (\$1.05), and video (\$0.27).
- On average, the cost to acquire a new lead through digital advertising was \$2.60.
- Mobile message click-through rates were 6.3% for fundraising messages and 10% for advocacy messages. Both figures are far higher than comparable email metrics.

(Source: [M+R Benchmarks](#))

That said, strong online fundraising requires a strong system. If you're cobbling together too many systems, you won't be serving your donors or your organization well. Do you have a donor database? Does your website need to be updated? Will you be making any new hires? Real fundraising, the sustainable kind, requires investment.

## **RESOURCES**

[Evaluate your fundraising software »](#)

[The Digital Fundraising Makeover for Nonprofits »](#)

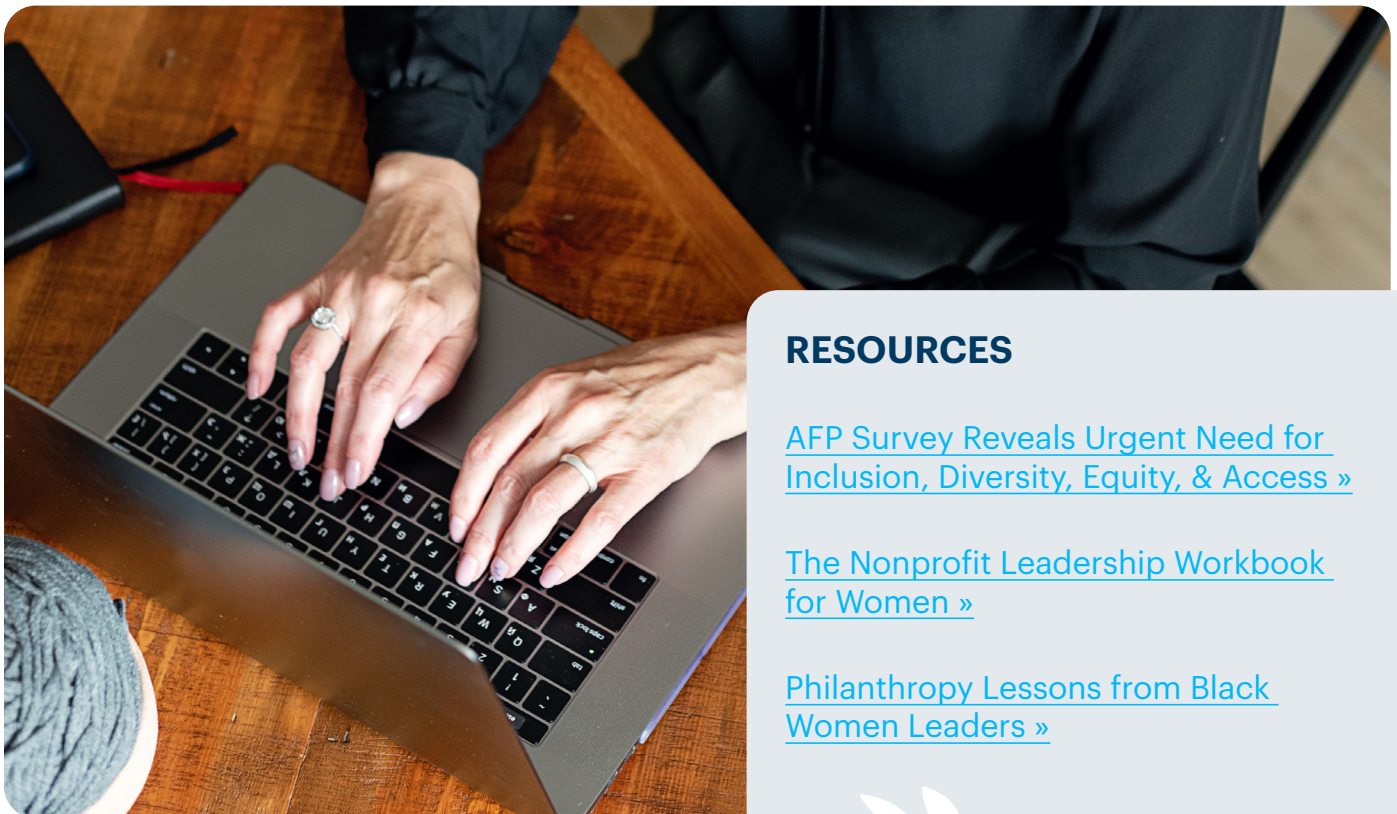
[4 Strategies to Build Multichannel Donor Relationships »](#)

# How to evaluate your non-financial goals

Now that you have a plan for growing your fundraising in 2022, and the strategies to do it, you'll want to include written plans for your organization's non-financial goals.

- Did you resolve to have 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, for example, you can check out [these resources](#) for Education, Inclusion, Accountability, & DEI Support.
- 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. 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 their time on grants when your goal is to grow your individual giving program, outsourcing may be the answer.
- Is your organization's culture a healthy one? If not, create an action 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 2022.



## RESOURCES

[AFP Survey Reveals Urgent Need for Inclusion, Diversity, Equity, & Access »](#)

[The Nonprofit Leadership Workbook for Women »](#)

[Philanthropy Lessons from Black Women Leaders »](#)



## About Pamela Grow

Pamela Grow is the publisher of The Grow Report, the leading weekly e-newsletter for small shop fundraisers, the author of Simple Development Systems: Successful Fundraising for the One-Person Shop, and a fundraising copywriter. In 2016, Pam partnered with Jeff Schreifels and Richard Perry to lead the creation of Veritus Group Academy (formerly Major Gift Academy). Her Basics & More online classes have trained over 8,000 nonprofits all over the world.

Pam's been named one of the 50 Most Influential Fundraisers by Civil Society magazine, and one of the 40 Most Effective Fundraising Consultants by The Michael Chatman Giving Show.

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

*If you have any questions, be sure to check out the 2022 roster of Basics & More Fundraising classes to see how your nonprofit can build your own Lifetime Donor Attraction Systems.*

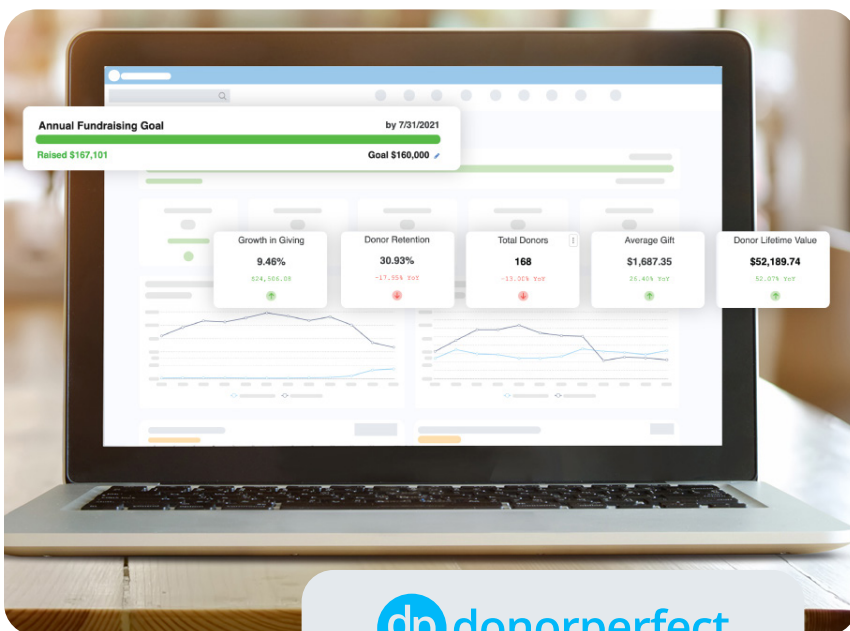


**Pamela Grow**

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## DonorPerfect



**dp** donorperfect

### Your Complete Digital Fundraising Suite

- Boost fundraising revenue
- Improve donor retention
- Engage and steward donors
- Gain donor insights
- Increase online success

**GET A DEMO**

Funding source	Strategy	Cost	Anticipated income
Individual donors			
Members/monthly			
Board giving			
Events			
Private foundations			
Government grants			
Business donors			
Other			