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Have a Fundraising Plan, Work the Plan, Improve the Plan

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Ever since passage of the 2017 federal tax law, with its potential threats to charitable giving among middle-income households (and even among very wealthy households, due to the doubling of the estate tax exemption), nonprofits have asked us—again and again—“What should we do? How can we continue to raise money successfully under the new tax law?”

For the most part, we see the answer to that question as, “Have a plan, work the plan.” The plan may be different than in years past, but the importance of a solid, year-round fundraising plan based on a serious assessment of your organization’s ideal business model and fundraising strengths will never change. While we’ve posted several articles on this subject in the last year (including “[Individual Giving Trends and Your Nonprofit’s Development Plan](#)”), today we’ll take a deeper dive into how nonprofits can develop a robust fundraising plan. To assist, we’ve rounded up several reliable resources where you can learn more.

First—and not self-evidently—if you’re a leader or board member of a nonprofit, this might be a good time to pause and ask yourself: are we clear about our organization’s overall revenue model, including earned income and where all forms of contributed revenue fit in?

Once you know where fundraising fits in, you can determine the “mix,” or diversification within the fundraising stream. Most nonprofits, especially small and midsize ones, don’t have enough people to focus on foundation grants, individual giving (annual and monthly), major donors, peer-to-peer, direct mail, corporate sponsorships, fundraising events, a membership program, a capital campaign, and planned giving—all at the same time. There will likely be three or four of those that are the right match for your mission, your stakeholders, and your skills in any given time period. You have to determine, in part by trial and error, what activities will generate the biggest return on the investment of time and resources. As Laurie Wolf of Alaska’s Foraker Group, in explaining Foraker’s [holistic sustainability model](#) for nonprofits, says, “Find your sweet spot.”

In other words, one path to success is focusing on the most common-sense, natural sources of support for your organization, and ensure systems are in place to stabilize and advance them. Then, you can experiment with additional revenue sources to diversify and see if any of them gain traction.

With that in mind, here are some resources to help you establish, develop, or improve your fundraising plan:

The Foundation Center offers a free in-person, webinar, or recorded [Introduction to Fundraising Planning](#).

Network for Good’s [Super-Simple Fundraising Plan](#) is very basic and focused on individual donors. NFG has many more free resources and guides, most focused on individual donor giving.

BoardSource has useful resources on the [fundraising responsibilities of nonprofit boards](#).

The Haas Jr. Foundation has developed excellent materials to help [smaller nonprofits develop successful fundraising programs](#). We particularly like “[Fundraising Bright Spots](#),” in which the researchers studied 16 nonprofits with limited budgets and small staffs that nevertheless had robust individual giving programs. After reviewing data and conducting in-depth interviews with the nonprofits’ staff, board, and donors, the researchers identified four essential ingredients that all 16 organizations had in common that are explained in the (not dauntingly long) report.

The Texas Commission for the Arts has some good free materials on [developing a basic fundraising plan](#).

Rob Maddrey, Director for Sustainability of the North Carolina Center *for* Nonprofits, recommends Gail Perry's resources for small and midsize nonprofits, including "[Do's and Don'ts for Your Annual Fundraising Plan](#)."

Once your plan is in place, you likely will need to assess it, tweak it, and improve it every year. These resources can help you improve various aspects of your plan:

The [Fundraising Effectiveness Project](#) (FEP), a partnership of the Association of Fundraising Professionals (AFP) and many other organizations, has free reports, resources, and tools to help you measure and evaluate your individual donor fundraising program against a set of more than 100 performance indicators.

Tim Sarrantonio at Neon One (an FEP partner) posted a [great summary of the Donor Retention workshop](#) he taught recently for AFP.

AFP has some cool [micro-learning videos posted](#), and if you join your local chapter you'll receive discounts on educational programs, classes, and resources.

See Gail Perry's tips for major donor asks [on her blog](#).

We like this simple year-round [donor engagement strategy](#) from TechSoup. That post links to another great one on [A/B testing](#) to help you refine your messaging, donation pages, and other donor communications. In today's environment, nonprofits can't afford to run individual donor programs without testing.

If you use these resources, please [let us know](#) how they worked—or didn't work—for your nonprofit! Like working a fundraising plan, our work to create, gather, and distribute useful capacity-building information for nonprofits is an iterative process of learning from our direct experiences and the experiences of others in our network, trying out and sharing new things, and collecting feedback to make sure we're always testing and improving.