

Creating a Roadmap for Successful Fundraising

Annual Campaign Building Blocks

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Evolve Giving Group

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Meet *Evolve.*



Judy Gadiel
Senior Vice President,
People & Projects

About Evolve

Women owned & led

Mission-driven

\$330+ million raised

5,000+ leaders trained



HIRE

FUNDRAISE

LEARN

Nonprofit Causes *We Serve*

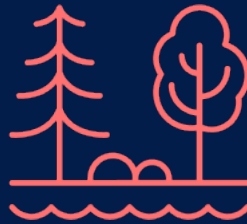
We work with those who meet a variety of community needs
& share our commitments to social equity and justice.



Arts &
Humanities



Education
& Youth



Environment
& Animal
Welfare



Faith-Based



Healthcare



Human Needs



How to Create a Fundraising Plan

Session Goals

- Understand Fundraising Framework
- Define Building Blocks of Annual Campaign
- Explore Goal Setting & Strategy Development
- Examine Leadership & Donor Engagement
- Create a Fundraising Plan

Fundraising Framework



Relationship-
Based

Leadership Key

Culture of
Philanthropy

Building a Culture of Philanthropy

Philanthropy

- Actively pursue philanthropic investments
- Transformational events
- Longer-term needs

V.

Charity

- Passively receive gifts
- Focus on fundraising transactions
- Short-term, fiscal year based organizational needs

10 Key Characteristics

Shared
accountability
for fundraising

Fundraising
goals are
aligned with
org's mission

Commitment to
stewardship

Engaged
professional
& lay
leadership

Clear, concise
mission &
vision
statements

Donors with
capacity &
interest in
major gifts

Quality
programs &
services

Opportunities for
volunteers to
engage

Systems &
technology
to support
donors

Demonstrated
need for
philanthropic
support

Why a Fundraising Plan?

- Builds confidence & trust
- Provides a roadmap for the team
- Holds you accountable
- Divide roles/responsibilities
- Stakeholder involvement
- Evaluate the past/create a vision for the future

The Annual Campaign



Documented
Strategy



Time
Limited



Manageable
Goals



Supported by
Data



Long- & short-
term
cultivation

Building Blocks of a Fundraising Plan



- Fundraising goals
- Whom to ask & what to do?

- Board members
- Volunteers
- Staff

- Engagement
- Stewardship
- Recognition

- Development calendar
- Gift tracking
- Acknowledgements

The Dollars

Fundraising Goals & Strategies

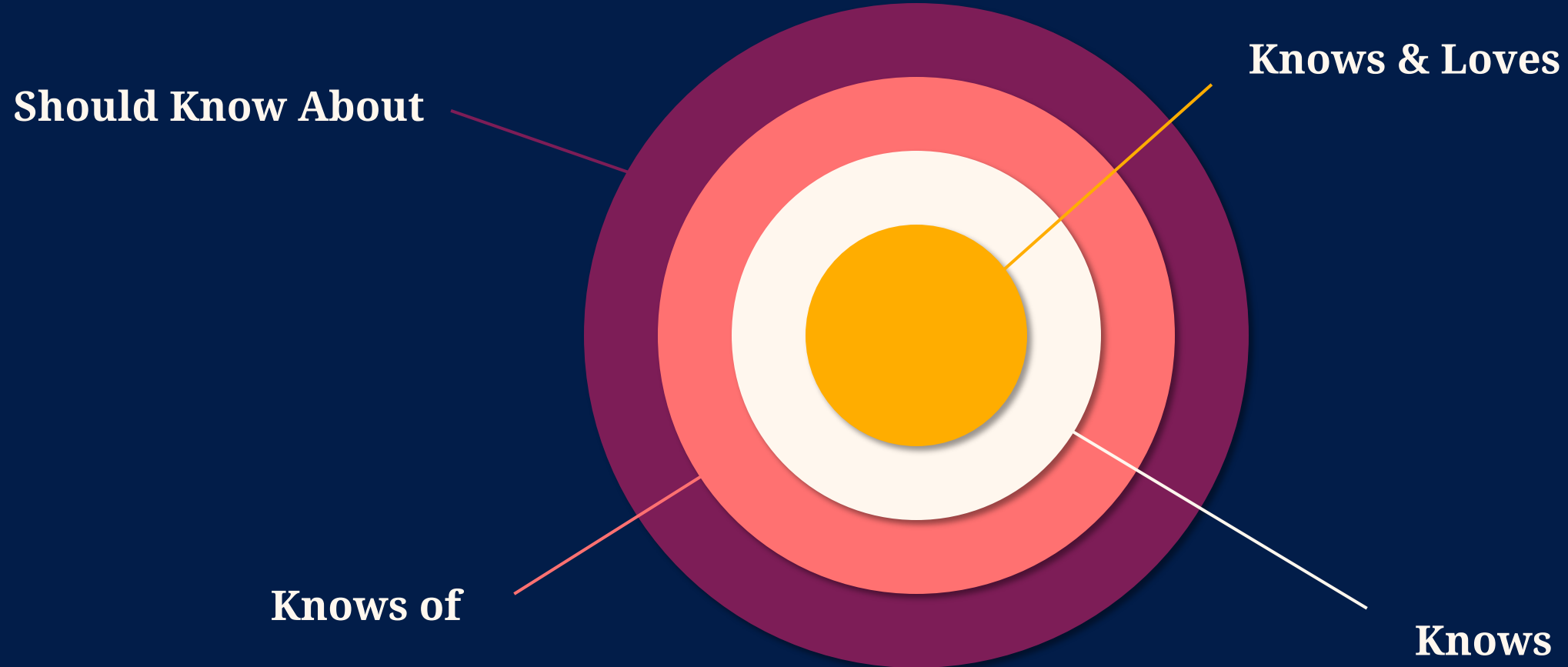
The Dollars

Fundraising Capacity & Organizational Need

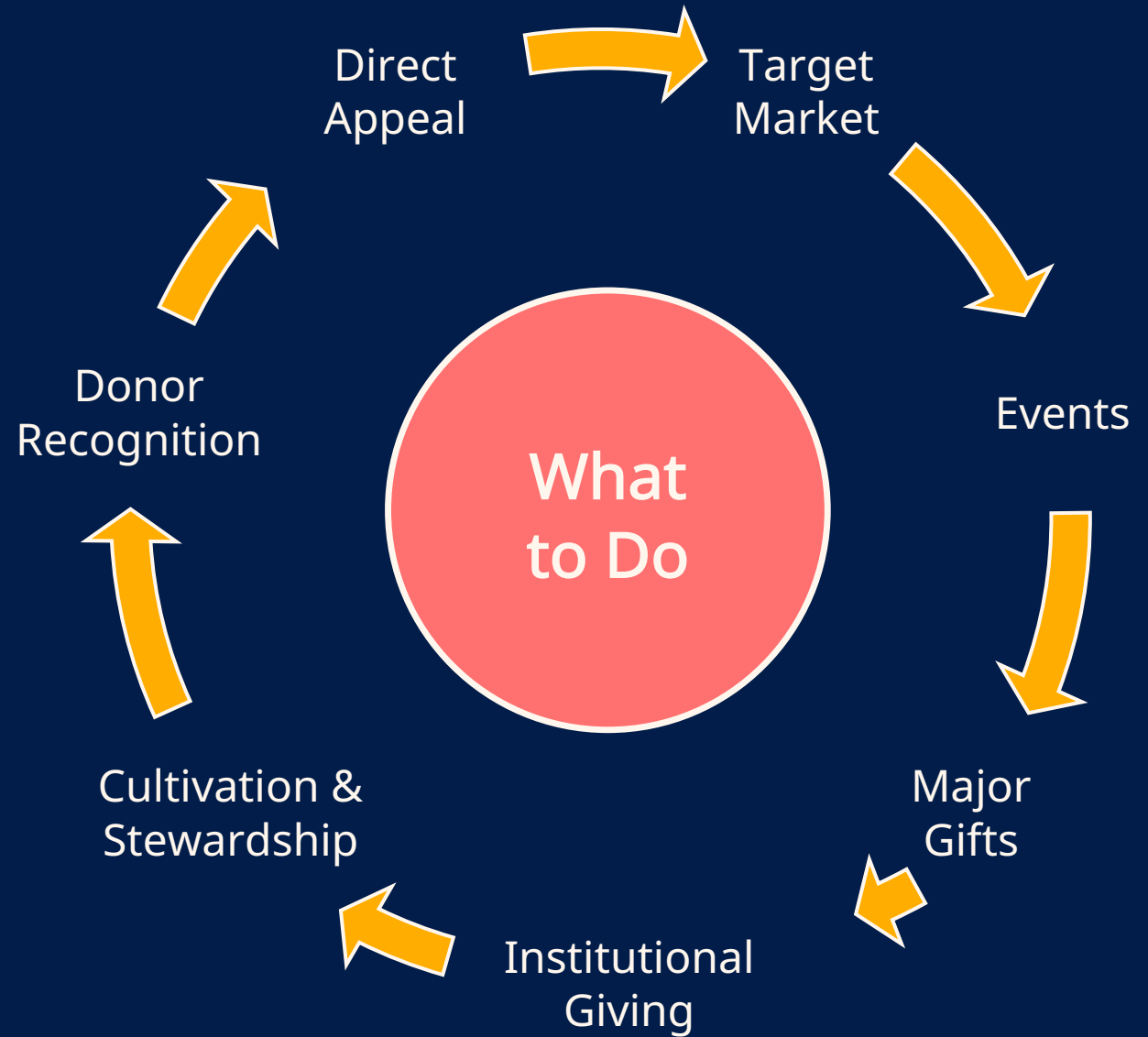


Fundraising Strategies

Who to Ask?



Fundraising Strategies



(Name of Activity #1) Overview



Person Responsible



Budget



Timeline
(date of activity + date to start planning)

Activity #1 Strategies & Tactics

- Strategy: XXX
 - Tactic: XXX
- Strategy: XXX
 - Tactic: XXX
 - Tactic: XXX
- Strategy: XXX
 - Tactic: XXX
 - Tactic: XXX

Sample Worksheet

Fundraising Strategy	\$Goal	New, Renew or Upgrade	Action Steps	Responsible Party	Timeline	Cost
Board Contributions	\$30,000	Upgrade	Individual Meetings	Board Chair & Board Dev Chair	September	\$0

Sample Goal: Raise \$30,000 from board members to support program initiatives for FY2023

The Leadership

Involvement of Board, Staff & Volunteers

Responsible Leadership



Development
Committee



Board



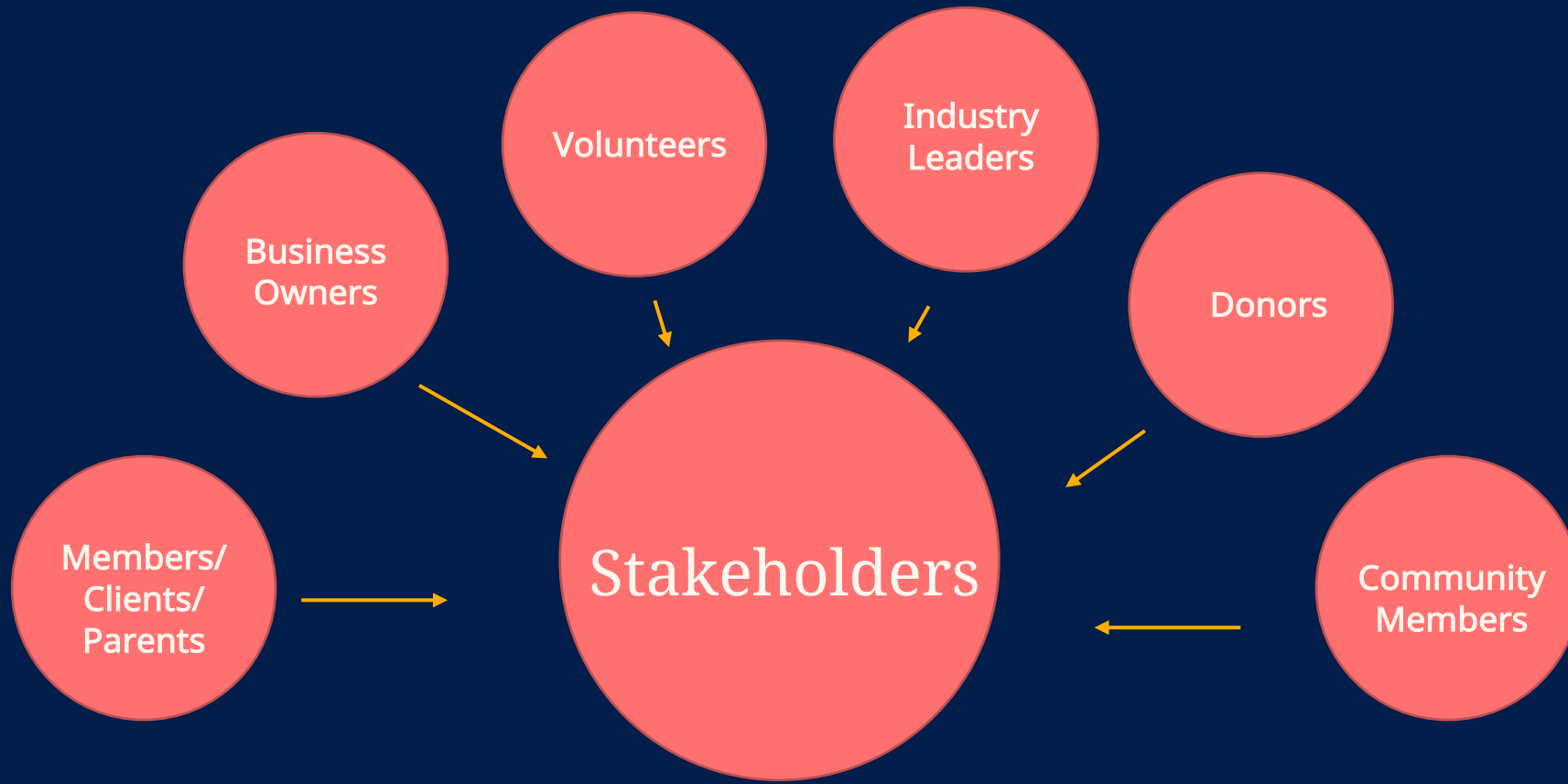
Key
Volunteers



Staff

Board & Committee Leadership

Who should serve?

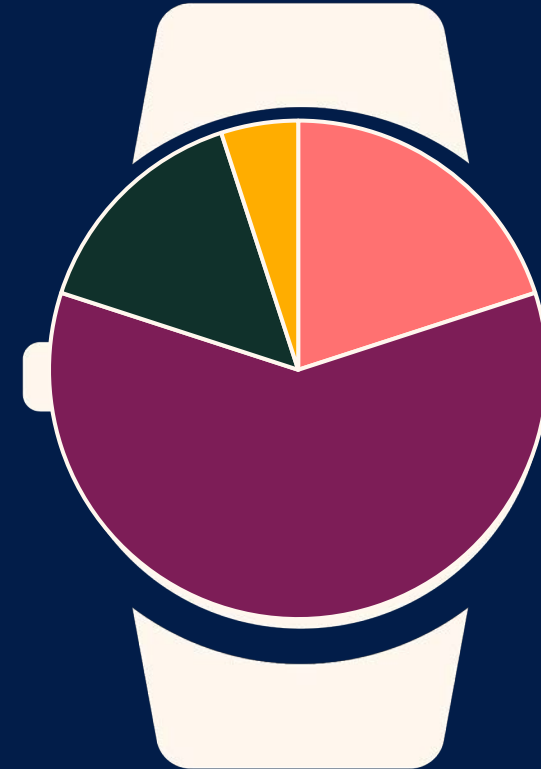


Prioritization: Dividing Time

%% of Dollars



Time



Where Should the Time Go?

- Relationship Building
- Top 5 – 10 donors
- Face-to-Face Campaign
- Future Leadership
- Major Gift Prospects
- Community Outreach

The Audience

Cultivation/Engagement, Stewardship & Recognition

Donor Engagement



Communications

- Newsletters
- E-Blasts
- Annual Report



Donor Materials

- Case for Support
- Campaign Brochure
- Direct Mail



Website & Social

- Donation Page
- Donor List
- Social Media Presence

Stewardship Calendar by Giving Level

GIVING LEVEL	Thank in Quarterly Newsletter & Gala Program	Special Recognition in Annual Report /Website	VIP Reception	Quarterly Donor Briefings
\$500,000+	✓	✓	✓	✓
\$250,000 - \$499,999	✓	✓	✓	✓
\$150,000 - \$249,999	✓	✓	✓	✓
\$50,000 - \$149,999	✓	✓	✓	✓
\$25,000 - \$49,999	✓	✓	✓	
\$10,000 - \$24,999	✓	✓		
\$5,000 - \$9,999	✓			

The Summer Focus

	June 30/July 1	July 7/8	July 14/15	July 21/22	July 28/29	August 4/5
Target Group	Older alumni	Young alumni	Board members	Grandparents	Legacy & \$2,500+ donors	Legacy & \$2,500+ donors
Other Guests	Major donor prospects	Faculty/staff families	Major donor prospects	Faculty/staff families	Major donor prospects	Faculty/staff families
Primary Staff	Alumni Staff	Alumni Staff	Development Director	Assistant Director	Development Director	Camp Director
Lay Leadership	Steve/Andy	Lisa/Debi	Board chair	Amy/Beth	Development Chair	Board chair
Goal	Education	Solicitation	Cultivation/ Stewardship	Cultivation/ Stewardship	Cultivation/ Stewardship	Cultivation/ Stewardship

The Internal Systems

Calendar, Gift Tracking & Acknowledgements

The Development Calendar

	Stewardship/ Recognition	Stewardship/ Recognition	Stewardship/ Recognition	Stewardship	Communication	Stewardship/ Recognition	Prospecting	Solicitation	Solicitation
	JANUARY	FEBRUARY	MARCH	MAY	JUNE/JULY	AUGUST	SEPTEMBER	OCTOBER- DECEMBER	NOV/DEC
Notes	Thank you Eblast	Donor list on website	Camp Update Newsletter	Summer Invites	Camp Update E-blast	Craft Item from Campers or Gift Bag	Identify and research major donor prospects	Donor meetings	Year End Appeal
Donors (\$1000+)	✓	✓	✓	✓	✓	✓		✓	✓
Donors (\$0-\$999)	✓	✓	✓	✓	✓	✓		✓	✓
Alumni (campers and staff)			✓		✓				✓
Prospective donors			✓		✓		✓		✓
Current families			✓		✓				✓

Gift Tracking

Tracking

- Contact Information
- Gift History
- Event Attendance
- Recognition Preferences
- Meetings/Phone Calls
- Restricted Gifts

Gift Processing & Acknowledgement

- Gift Entry
- Accounting
- Acknowledgements

Evaluation

- Reports

Q & A

Thank you!

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