

REALTIME INSIGHTS



# Easy to Use & Practical Fundraising Plan Template





Dear all,

At Realtime Insights, we are thrilled to share with you our new, easy to use and practical, Fundraising Plan designed to support your mission and strategic goals.

In today's dynamic environment, effective fundraising is crucial for our continued success and impact. To that end, we have developed a plan that is both comprehensive and easy to implement, ensuring that our efforts are focused and productive.

We invite you to explore this plan and consider how it can be applied to your own fundraising initiatives. By adopting these strategies, you can enhance your engagement with donors and achieve your fundraising goals more effectively.

We are confident that this plan will be a valuable resource for you and look forward to your feedback and success stories.

For more detailed information, please visit our website at <https://realtimeinsights.co.ke/> Would you like us to support you in designing a fundraising plan: Book a **Consultation Here**

Thank you for your continued support and dedication to our cause.

Warm regards,

Lucy Njue

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Realtime Insights

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Feel free to reach out if you have any questions or need further assistance. Together, we can make a significant difference!



# Steps for Developing a Practical Fundraising Plan

01

## Assess Your Current Situation

- Review past strategies to identify what worked well and what did not.
- Analyze strengths, weaknesses, opportunities, and threats (SWOT analysis).

02

## Define Your Goals

- Align your goals with your organization's mission and strategic plan.
- Examples:
  - Raise USD 50,000,000 through a combination of individual donations, corporate sponsorships, and grant funding by the end of the fiscal year.
  - Increase donor retention rate from 45% to 60% by implementing targeted engagement strategies and personalized communication.

# Steps for Developing a Practical Fundraising Plan

03

## Segment Your Donors

- Classify donors into segments such as individuals, corporates, foundations, etc.
- Customize your approach based on each donor segment's characteristics and preferences.

04

## Develop Targeted Strategies

- Tailor strategies to each type of donor (individual, foundations, corporate) and align them with the four phases of the fundraising cycle:
  - Identification: Research and identify potential donors.
  - Cultivation: Build relationships and engage with potential donors.
  - Solicitation: Make the ask for donations.
  - Stewardship: Thank donors and maintain relationships.

# Steps for Developing a Practical Fundraising Plan

05

## Create a Timeline and Action Plan

- Set a timeline for each fundraising activity, specifying start and end dates.
- Assign responsibilities to team members and ensure they have the necessary resources and support.

06

## Develop a Budget

- Estimate the costs associated with each fundraising activity, including staff time, marketing materials, event expenses, and technology.

07

## Evaluate and Reflect

- Regularly review the outcomes of your fundraising activities, comparing them to your goals.
- Collect feedback from donors, staff, and volunteers to understand their experiences and identify areas for improvement.



# Steps for Developing a Practical Fundraising Plan

08

## Document Learnings

- Record insights and lessons learned from your fundraising efforts to inform future planning.

To help you appreciate this, see below a template with examples for your use:



## Fundraising Plan -Sample

### Goals:

**Raise USD 50,000,000 through a combination of individual donations, corporate sponsorships, and grant funding by the end of the fiscal year.**

**Increase donor retention rate from 45% to 60% by implementing targeted engagement strategies and personalized communication.**

[illegible]

	<b>General</b>																		
	Launch an organisational Website						X	X											
	Attend Networking Events, Conferences and stakeholders meetings at least one a month			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	
	Develop and share organisational annual report																	X	
	Participate in a media show to highlight our work						X					X							
	Host a free monthly/quarterly webinars/training for your stakeholders to raise awareness			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	
3	<b>Soliciting of Funds</b>	USD 50,000,000																	
	<b>Examples of activities</b>																		
	<b>Individuals</b>																		
	Hold an annual fundraising event. Walkathon, Dinner etc	USD 15,000,000									X								
	Establish a monthly giving program targeting 100 recurring donors, giving 1000 per month annually	USD 1,200,000			X	X													
	Launch a social media campaign to raise resources for a specific activity e.g purchase of sanitary pads for girls							X	X										
	<b>Foundations</b>																		
	Write atleast 5 grant proposals once invited to write/or if the donor meets the LIA criteria (Linkages, Interest and Ability)					X			X			X					X		
	<b>Corporates</b>																		
	Establish a Corporate Partnership Program	1 million: 5 Corporates donating Kes 200,000 each										X							
	<b>Donor Stewardship</b>																		
	<b>Examples of activities</b>																		
	Send out Thank you notes to donors within 48 hours of donation						X	X	X	X	X	X	X	X	X	X	X	X	
	Recognise donors - on the webiste, annual reports, on social media etc						X	X	X	X	X	X	X	X	X	X	X	X	
	Invite donors to participate in your work -								X		X			X			X		
	Develop a Gift Acceptance Policy								X										
	Develop and share quarterly Reports					X			X			X			X			X	



Thank You for  
Joining us!



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