



How to Develop an Integrated Fundraising Plan

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1. Shift your thinking from organization-centric to partner-centric
 - A. Create strategy with your donors' needs in mind
2. Plan according to how you invite supporters to come closer to your ministry
 - A. Remember, fundraising is ministry, plan accordingly
 - B. Remember the '3 of 9' example
3. Don't treat everyone the same, tailor your strategy to their level of engagement
 - A. Your donors define the level of relationship you have, not you
 - B. Always be ready to respond as they do

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4. Create partner groups according to their level of engagement
 - A. Mega Gift Partners, Major Gift Partners, Monthly Partners, General Partners, etc.
 - B. Be sure they are coded accordingly in your CRM
5. Plan for how many touches and invitations you want each year for each group of supporters
 - A. Critical decision – how often, what message, what level of invitation, other calls to action
 - B. We usually err on asking too seldom rather than too often
6. Integrate all fundraising work: events, mailings, email, personal visits, etc.
 - A. Every touch is part of the strategy
 - B. Be careful not to confuse your partners, coordinate your communication

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7. Create an annual calendar or activity and a plan for each partner group
 - A. Example
8. Create metrics for measuring your activity
 - A. How will you measure success?
 - B. Measure activity – what you can control not what you can't (such as giving)
9. Cover everything in prayer
 - A. Form a prayer team to cover your fundraising work
 - B. Be personally committed to prayer for discernment, wisdom and trust



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Your annual fundraising plan pulls together all that we have taught over these last five webinars:

1. Keys to Effective Fundraising During the COVID-19 Crisis
2. Tell your Story Well
3. Walking with Your Giving Partners through a Crisis: How to Care for your Donors during a Pandemic
4. How to expand our donor base
5. How to start/develop Major Gift Program