



Start Your Fundraising Year Off with a Great Plan!

Presented by: Kirstin VanderMolen & Jaime Van Essen,
Kennari Consulting

Tuesday, January 30 | 11:00 a.m.-12:00 p.m. ET



Donation Forms | Event Registration
Text Fundraising | Peer-to-Peer | Auctions



A little housekeeping...

We're recording this webinar!



All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!

Feel free to ask questions!



Use the Questions chat box to ask your questions. We will have a Q&A session at the end of the presentation.



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Donation Forms | Event Registration
Text Fundraising | Peer-to-Peer
Auctions | Integrations & Data



full-service fundraising consulting firm
that helps nonprofits evolve their
fundraising.



Donation Forms | Event Registration
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Today's Speakers



Kirstin VanderMolen
Senior Strategist

In her role as a Senior Strategist, Kirstin works with annual giving clients to help them acquire and cultivate donors through thoughtful engagement opportunities, events, and communications. Kirstin also works with campaign clients to ensure they reach their fundraising goals.



Jaime Van Essen
Strategist

Jaime specializes in helping nonprofits build data systems and processes with donor management tools, online giving platforms, and communication methods that support their day-to-day fundraising activities. Jaime firmly believes that maximizing data and systems management plays an integral role in successful fundraising



Start Your Fundraising Year

with a Great Plan

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Kennari Consulting

January 2024





What we will cover today:

- Review 2023 - what worked and what didn't
- Plan for 2024
- Sample internal and external reports
- Sample Development Plan
- Streamlining processes to make you even more efficient

First: **we review.**

- If it worked, keep doing it! *If it didn't, find out why and build new strategies!*
- Review donor giving from year to year for specific appeals, events, etc.
- Which donor categories performed well (recurring donors, volunteers, members, major donors)
- Review retention rates:
 - First-time donors
 - Major donors
 - Monthly donors

Industry standards:

1st time donor renewal 18-20%,
Multiple year donor renewal 60%,
Monthly Donor Renewal 85-90%,
Overall donor renewal between 40-45%

Prepare an Internal Report

- **Inform** leadership staff and the board
- **Celebrate successes** and **make changes** where needed
- Keep it **simple** and in a **consistent** format
- **Use it in goal setting**
- Helps focus on more than just dollars
- Can publish through **social media or other digital communication**

Sample
Internal
Report

| ABC Organization | | | | | |
|-----------------------------|--------|--------|--------|--------|------|
| Fund Development Activities | | | | | |
| | 2020 | 2021 | 2022 | 2023 | 2024 |
| | Actual | Actual | Actual | Actual | Goal |
| Direct Mail (*net) | | | | | |
| Newsletters | | | | | |
| Lapsed Donor | | | | | |
| Year End Appeal | | | | | |
| Appeals Subtotal | | | | | |
| Events (*net) | | | | | |
| Event 1 | | | | | |
| Event 2 | | | | | |
| Event 3 | | | | | |
| Third Party Events | | | | | |
| Events Subtotal | | | | | |
| Other | | | | | |
| Major Gifts | | | | | |
| Grants | | | | | |
| Memorial/Honorarium | | | | | |
| United Way Designations | | | | | |
| Unsolicited/Non trackable | | | | | |
| Other Subtotal | | | | | |
| | | | | | |
| TOTAL | | | | | |

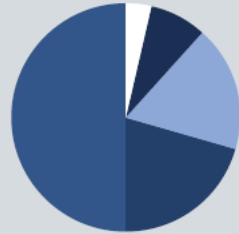
Sample (Continued)

Internal Report

| | 2020 Actual | 2021 Actual | 2022 Actual | 2023 Actual | 2024 Goal |
|----------------------|----------------|----------------|----------------|----------------|--------------|
| Wills/Estate Gifts | | | | | |
| Campaign Giving | | | | | |
| Grand TOTAL | | | | | |
| | | | | | |
| # of donors | | | | | |
| # of online gifts | | | | | |
| | | | | | |
| # of 1st time donors | | | | | |

Prepare an External Report

55,000
PEOPLE MAKING
295,000
VISITS PER YEAR



- Our funding comes from:**
- Membership 6%
 - Grants from Foundations 13%
 - Meeting Rent 29%
 - Private Donations 33%
 - Retail Sales 81%

A COMMUNITY OF SUPPORT

**14 PROGRAMS, 67 GROUPS
100+ MEETINGS A WEEK**

- AA
- ACOA
- AL-ANON
- ALATEEN
- DOUBLE TROUBLE
- NA
- FA
- LIFERING
- NAR-ANON RECOVERY
- REFUGE RECOVERY
- SMART RECOVERY
- FAMILY AND FRIENDS
- SMART RECOVERY
- YOGA
- ZEN MEDITATION RECOVERY



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Strengthens families and helps break the cycle of addiction.



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- Anonymous



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Benefits of A Development Plan

Benefits of a Development Plan

- It's an effective road map
- Allows you to plan ahead and be more efficient
- Creates space to create strategy
- Best of all – it gives you freedom to say no to things that aren't in the plan
- It includes metrics, goals, and strategies to get you there

Sample

Development Plan with Metrics

| Revenue Source | 2023 Actual | # | 2024 Goal | # |
|-------------------------|-------------|-------|-----------|-------|
| Direct Mail/Appeals | \$50,000 | 1,154 | \$55,000 | 1,200 |
| Events | \$100,000 | 242 | \$100,000 | 240 |
| Grants | \$400,000 | 18 | \$400,000 | 20 |
| Individual Asks | \$75,000 | 50 | \$75,000 | 50 |
| On line/Recurring Gifts | \$125,000 | 300 | \$125,000 | 300 |
| Unsolicited | | | | |

| Gift Amount | 2023 Actual | # | 2024 Goal | # |
|-----------------|-------------|-------|-----------|-------|
| \$1-99 | \$200,000 | 242 | \$55,000 | 1,200 |
| \$100-\$999 | \$100,000 | 20 | \$100,000 | 240 |
| \$1,000-\$9,999 | \$400,000 | 1,400 | \$400,000 | 20 |
| \$10,000+ | \$75,000 | 16 | \$75,000 | 50 |

| Constituent Type | 2023 Actual | # | 2024 Goal | # |
|------------------|-------------|-------|-----------|-------|
| Business | \$200,000 | 242 | \$55,000 | 1,200 |
| Foundation | \$100,000 | 20 | \$100,000 | 240 |
| Individual | \$400,000 | 1,400 | \$400,000 | 20 |
| Board | \$75,000 | 16 | \$75,000 | 50 |
| Faculty/Staff | \$35,000 | 125 | \$125,000 | 300 |

| Retention/Acquisition | 2020 | 2021 | 2022 Goal |
|--------------------------|------|------|-----------|
| # First Time Donors | 148 | 136 | 150 |
| First Time Donor Renewal | 16% | 24% | 24% |
| Overall Retention | 56% | 64% | 65% |
| Major Donor Retention | 71% | 88% | 85% |

A background image showing several pairs of hands clapping in a celebratory gesture. The hands are in various stages of clapping, with some fully together and others just starting or ending. The image is slightly blurred and has a warm, golden-brown color palette.

Sample Development Plan Page

Event Fundraising Goals

2023 Actual: \$50,000

2024 Goal: \$85,000

- **[Event Name]: \$70,000**
 - Add 2-3 specific strategies

Event Purpose: _____

- **[Event Name]: \$7,500**
 - Add 2-3 specific strategies

Event Purpose: _____

- **[Event Name]: \$5,000 – 10,000**
 - Add 2-3 specific strategies

Event Purpose: _____

Event Fundraising Goals (continued)

Ongoing Activities:

- 3-5 key activities already being done
- *Sample: Continue to solicit sponsors and matching gift donors*

Specific Strategies:

- 3-5 overall strategies to grow events
- *Sample: Grow sponsorship revenue by soliciting lapsed sponsors and reviewing organization vendor list for new sponsorship dollars*

Board/Volunteer Responsibilities:

- *Sample: Board and non-board volunteers should attend events, invite attendees, host a table, help with sponsor recruitment, thank event donors, and identify future board and/or committee members after each event.*

Timeline:

Setting budgets and the goals to achieve them takes work!

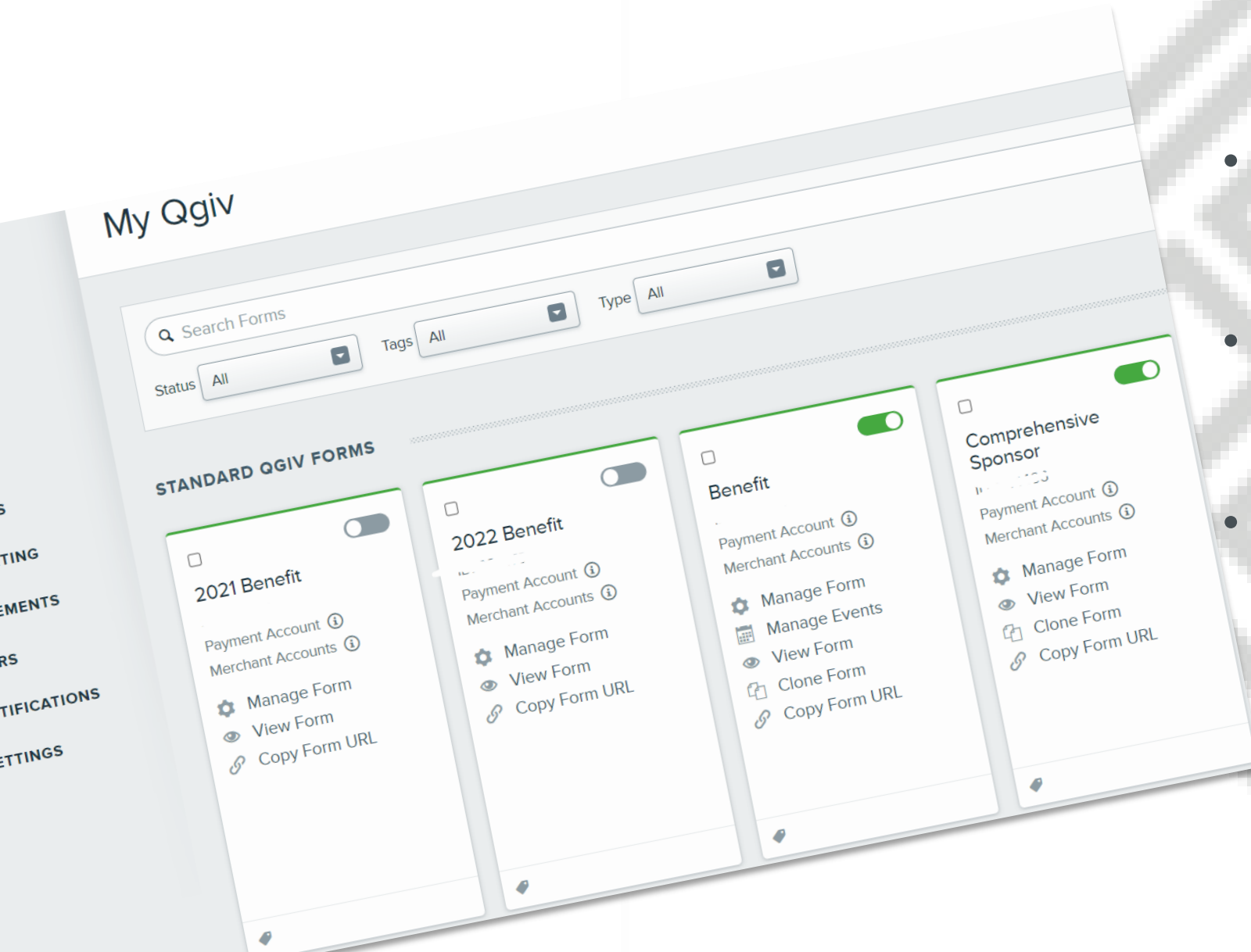
Let's do some cleanup and streamline processes to make the best use of your time and be as efficient as you can be.

Time to Deep Clean!

- What?
 - Online Forms
 - Acknowledgement letters – print *and* electronic
- Why?
 - Staff changes
 - Process changes



Online Forms



- You probably have a list of old forms created by multiple staff over the years
- Know the ins and outs of form fields and management options
- Clone previous forms whenever possible

Acknowledgement Best Practices

-
- **Acknowledgements are critical!**
 - **Update regularly**, depending on your gift volume.
 - **Impact!** When reading the letter, the donor should feel great about the gift they gave.
 - **Update (and test!) your auto-response messages through your online giving forms.**

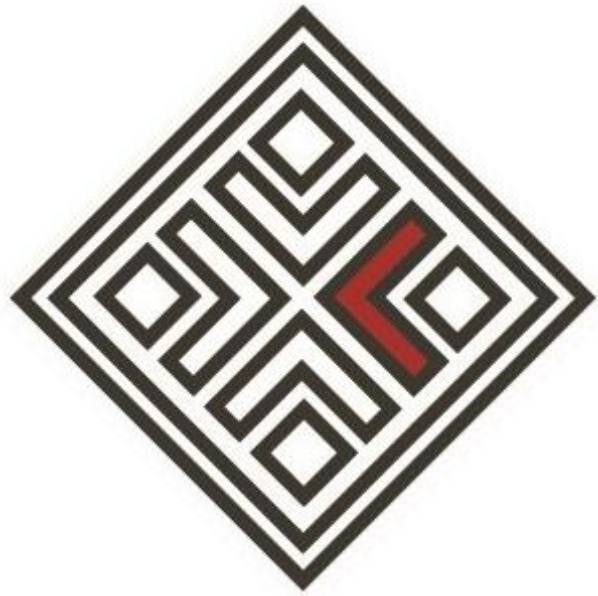
Thank
you!

**You should not have a
one-size-fits-all
acknowledgement.**

Think about different gifts from different
types of donors you receive gifts from,
and the types of gifts they make.

**Acknowledgements should reflect the donor
and the type of gift the donor is making.**





Types of Donors & Donations

- New Donors
- New RECURRING Donors/Donations
- Major Gifts
- Event Transactions
- Tribute Gifts
- Online vs. Mail Donors

When sending emailed receipts, be clear if that's the only acknowledgement they'll receive.

Check out

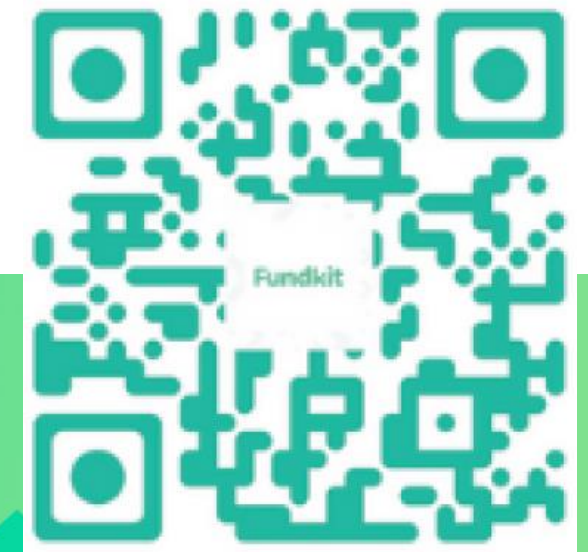
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Wednesday, February 21, 10AM ET



Today's webinar participants can use code 'Qgiv' for \$5 off!

Q & A

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Thank you for joining!

For more information on Qgiv's fundraising platform, contact:

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This webinar program qualifies for 1 point of continuing education toward maintaining the Certified Fundraising Executive Management (CFRE) credential.