Best Friends Animal Society

SAVE THEM ALL®

Building a Reliable Stream of Revenue Through Individual Giving

Annual Planning Action Items to Maintain Your Momentum

Pick Three!

Annual Planning

1. Review your current source(s) of funding to determine if there is risk resulting from reliance on one or two very large sources of revenue. Consider whether the composition of revenue sources should be adjusted for long-term stability.

2. Identify one new funding source or tactic you want to try, and set a goal, based on what you've learned. What will you need to track and evaluate to determine success?

3. Commit to creating a schedule for completing your plan and reviewing it regularly.

4. Attend at least two of this conference's six development sessions to help you flesh out your annual plan.

Mail

1. Create an annual production calendar and process for you/your team to follow so you can have a formulaic approach to developing each mailing and not have to reinvent the wheel each time. Build out deliverable dates for all touches to understand which task need to happen concurrently.

2. Set a goal to increase the number of individual donors by X amount by X date. Build a plan and identify your measures of success so you can make it happen.

3. Working with accurate data is imperative. Make sure your donor names, salutations, addresses, and communication preferences are clean so mail will be delivered to the right people at the right time. Set a regular, recurring schedule for performing data hygiene processes like National Change of Address (NCOA) and identification/merge of duplicate donor records.

4. Develop a system for honoring donor communication preferences. Create a variety of communication preference options so you can honor donors' wishes while keeping them as engaged as possible.

5. If you feel ready to challenge yourself, identify two new variables you want to test. Develop creative and processes to test these elements in your next mailing.

Digital Media

1. Re-examine your website navigation. Does it reflect what your donors want, or what you or your agency's leadership want? How do you know? If you don't know, how can you find out?

2. Look at the last two stories you told digitally. Are there any ways you could have put donors at the stories' centers — made them the heroes?

3. Check out at least one of the digital offerings at this conference or look through the webinar archives for digital presentations.

https://network.bestfriends.org/resources/webinars-and-presentations/webinar-archive

Major Gifts

1. Define what your organization will regard as a major gift and review your database for current donors that would fit into that category.

2. Create a plan and the steps you will take to build/strengthen relationships with those prospective major donors (one-on-one meetings, monthly touches, etc.).

3. Assess current donors and pick 5-10 who have greater capacity than their current giving. Think about how you might cultivate them to become more involved and/or deeply connected to your organization. Who in the organization or community could help you increase their commitment? Who knows whom? Work as a team!

4. Practice your listening and communication skills.

Foundation Partnerships

1. Review the online resources on foundations and grant writing available through the link provided in the workshop materials.

2. Define your organization's vision, mission, the problem you seek to solve, and funding priorities (solutions to the problem) to stay focused and best align your organization with foundation prospects.

3. Get organized! Create a tracking system/calendar for foundation prospects, non-prospects, and grants (you can start with a basic Excel spreadsheet). Organize key documents in a handy "go to grants" folder: IRS determination letter, Articles of Incorporation, IRS Form 990, most recent audit, board list, mission statement, agency operating budget, annual report.

Planned Giving

1. Prepare suggested legal language.

2. Create a bequest intention form.

3. Update your online database (or create a spreadsheet, depending on what tools your organization has) to track who has requested legacy information and/or revealed legacy intentions.

    a. If legacy information has been requested, make at least one follow-up phone call.
    b. If an individual has revealed legacy intentions, write and mail a thank-you letter.

Helpful tool: *Legacy of Kindness* brochure (hard copy)

Your Best Friends 2019 Fundraising Workshop Team

- Annual Planning and Direct Mail: Barbara Camick, Carly Dy-Buncio
- Digital: Amy Starnes
- It's All About the Relationship Panel: Kelly Cramer (Foundation Partnerships), Sharon Krinsky Davis (Major Gifts), Andrea Grane (Planned Giving)
- Facilitator: Trish Tolbert