



Make Your 2025 Plan the Most Effective You've Ever Had

WORKBOOK

A Special Note from Steven Screen

Thank you for joining the **'Make Your 2025 Plan the Most Effective You've Ever Had'** session. Jim and I are thrilled to see your dedication to growing your organization and making a bigger impact.

We understand that fundraising can be tough—especially when it means pushing yourself to ask more often and take on more. But as we always remind our clients, "If you Ask more, you will raise more."

This workbook is here to help you turn the ideas from our session into practical actions for your organization. Use it to organize your thoughts, set bold yet realistic goals, and build a clear path to fundraising success in 2025.

Take your time as you work through each section. Be honest, aim high, and don't be afraid to dream big. And remember, if you need support along the way, we're here to help. Email us at: Jim@betterfundraising.com or Steven@betterfundraising.com.

Section 1 – GOALS

Revenue Goal Setting

2024 Revenue: \$

2025 Revenue Goal: \$

Increase: \$ (%)



Revenue Sources

List the different sources of your fundraising revenue for 2024. For each revenue source, fill in the amount of revenue for 2024. Then, write down your goal for 2025. After that, calculate and write the percentage change between 2024 and 2025.

Revenue Sources	2024 Actual	2025 Goal	% Increase
Appeals + Reports (print + digital)	\$	\$	%
Major Gifts	\$	\$	%
Events	\$	\$	%
Grants	\$	\$	%
	\$	\$	%
	\$	\$	%
	\$	\$	%

(Add more rows as needed, for example: legacy gifts, earned income.)

Section 2 – PLANNING YOUR PLAN

In the next two sections, you're going to plan your appeals, e-appeals and reports (the first row of the chart on the previous page). The other revenue sources are important, but are not within the scope of this fundraising plan.

1. Your asks (appeals and e-appeals) raise the most money, so let's start there.

Current number
of asks per year

Goal number
of asks for 2025

New opportunities to ask donors for a gift:

1. _____
2. _____
3. _____

2. Your reports (newsletters, Donor Reporting Letters, e-stories) raise less money than your asks. But they're an important part of any fundraising system. Here's a tip: you should aim for ONE report for every TWO asks.

Current number
of reports per year

Goal number
of reports for 2025

New opportunities to report back to your donors:

1. _____
2. _____
3. _____

Section 3 – COMPLETE YOUR PLAN

Use the 12-month calendar included in this packet to map out your 2025 fundraising. Include your appeals, chaser emails, e-appeals, reports, and e-stories. Remember the core principles of planning:

- Ask before a need
- Schedule revenue-generating appeals (your 'rocks in a jar') FIRST
- 'Never Go Dark' on your donors

If you need help, there are a few sample plans included in this packet—one with a medium amount of donor communications and one with a high amount.

Section 4 – FROM VISION TO ACTION

Ensuring Success with Expert Support

Congratulations! You've created an ambitious and exciting plan for 2025. But as you look at it now, it's important to recognize that creating the plan is just the first step. Successful execution will require focus, resources, and adaptability as the year unfolds.

At this stage, many organizations begin to feel a bit overwhelmed by the scale of what they've set out to accomplish. If that's where you are now, don't worry—you're not alone. This is where many nonprofit leaders realize that having expert guidance and support could be the difference between a plan that looks good on paper and one that delivers tangible results.

As you review your new fundraising plan, ask yourself the following questions:

1. **Do I have the right systems and processes in place to execute this plan effectively?**
2. **Are my team and resources sufficient to meet these bold goals?**
3. **Could my organization benefit from expert help to ensure we maximize our fundraising potential in 2025?**

Our company specializes in helping nonprofits like yours not only create effective plans but also execute them with confidence. We offer tailored support for organizations at every stage, from planning to implementation.

What Could Working Together Look Like?

If you're serious about transforming your 2025 fundraising plan into a reality, we can help you take the next step. Here are the three ways organizations normally work with us:



Done For You: Take the burden of creating donor communications off your plate. For less than hiring a full-time employee, our team of experienced fundraisers will create your organization's appeals and newsletters.



Consulting: Work side-by-side with the expert team at the Better Fundraising Company. We'll review your fundraising, help you develop and implement a robust fundraising plan, and be an on-call 'solver of fundraising problems.'



Major Gifts Engine: Install a proven major donor management system tailored to your organization. Work with our experts to retain more major donors, increase their giving, and create a repeatable system that drives sustainable growth.

Ready to explore how we can help you make 2025 your best fundraising year yet?

Go to the Better Fundraising room (Eagle B) to chat with Jim or Steven. Or email them at Jim@betterfundraising.com or Steven@betterfundraising.com.

Calendar Planning Tool - Small Volume

	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Clear Needs												
Print Appeals												
Email Chaser												
E-Appeal												
Newsletter/ Report												
E-Story												

BetterFundraising.Com

Principles of Fundraising Planning 1. Ask before a need. 2. Plan your appeals first. 3. Never go dark on your donors

Clear Needs: Whenever your organization or beneficiaries have a need to clearly articulated and specific requirements or goals that an organization needs to fulfill. In fundraising, it's important to communicate these needs clearly to donors so they understand how their contributions will make a difference.

Print Appeal: This is a fundraising letter you mail to your donors. Every appeal should include a reply device (which the donor returns to you along with their gift) and a reply envelope.

Email Chaser: This is an emailed version of your appeal, sent around the day you expect the appeal to land in a donor's mailbox. You should send a chaser email to everyone on your email list.

E-Appeal: This is a fundraising email you send to everyone on your email list. Because they're email-only, they take less time to create and cost less money to distribute. But they typically raise LESS money than print appeals.

Newsletter/Report: This is a piece of donor communications that shares stories of success and transformation that happened because a donor made a gift. Aim to have one report for every two appeals.

E-Story: This is a story of success or transformation you email to your donors. Because they're email-only, they take less time to create and cost less money to distribute. E-Stories are a proven way to connect emotionally with donors in between asks and printed reports.

Calendar Planning Tool - Medium Volume

	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Clear Needs												
Print Appeals												
Email Chaser												
E-Appeal												
Newsletter/ Report												
E-Story												

BetterFundraising.Com

Principles of Fundraising Planning 1. Ask before a need. 2. Plan your appeals first. 3. Never go dark on your donors

Clear Needs: Whenever your organization or beneficiaries have a need to clearly articulated and specific requirements or goals that an organization needs to fulfill. In fundraising, it's important to communicate these needs clearly to donors so they understand how their contributions will make a difference.

Print Appeal: This is a fundraising letter you mail to your donors. Every appeal should include a reply device (which the donor returns to you along with their gift) and a reply envelope.

Email Chaser: This is an emailed version of your appeal, sent around the day you expect the appeal to land in a donor's mailbox. You should send a chaser email to everyone on your email list.

E-Appeal: This is a fundraising email you send to everyone on your email list. Because they're email-only, they take less time to create and cost less money to distribute. But they typically raise LESS money than print appeals.

Newsletter/Report: This is a piece of donor communications that shares stories of success and transformation that happened because a donor made a gift. Aim to have one report for every two appeals.

E-Story: This is a story of success or transformation you email to your donors. Because they're email-only, they take less time to create and cost less money to distribute. E-Stories are a proven way to connect emotionally with donors in between asks and printed reports.

Calendar Planning Tool

	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Clear Needs												
Print Appeals												
Email Chaser												
E-Appeal												
Newsletter/ Report												
E-Story												

BetterFundraising.Com

Principles of Fundraising Planning 1. Ask before a need. 2. Plan your appeals first. 3. Never go dark on your donors

Clear Needs: Whenever your organization or beneficiaries have a needto clearly articulated and specific requirements or goals that an organization needs to fulfill. In fundraising, it's important to communicate these needs clearly to donors so they understand how their contributions will make a difference.

Print Appeal: This is a fundraising letter you mail to your donors. Every appeal should include a reply device (which the donor returns to you along with their gift) and a reply envelope.

Email Chaser: This is an emailed version of your appeal, sent around the day you expect the appeal to land in a donor's mailbox. You should send a chaser email to everyone on your email list.

E-Appeal: This is a fundraising email you send to everyone on your email list. Because they're email-only, they take less time to create and cost less money to distribute. But they typically raise LESS money than print appeals.

Newsletter/Report: This is a piece of donor communications that shares stories of success and transformation that happened because a donor made a gift. Aim to have one report for every two appeals.

E-Story: This is a story of success or transformation you email to your donors. Because they're email-only, they take less time to create and cost less money to distribute. E-Stories are a proven way to connect emotionally with donors in between asks and printed reports.