

ANNUAL

What's the plan and  
whose making it?

February 24, 2022





A person wearing a grey blazer and dark top is holding a rectangular black sign with a light-colored wooden frame. The sign is held up with both hands, positioned in front of a red brick wall. The word 'WELCOME' is written on the sign in a white, bold, sans-serif font. The entire scene is set against a solid blue background.

WELCOME



# Presenters



**Kimberly Liebowitz**  
**Connect and Grow Consulting**



**Victoria Prevatt**  
**Good Works Consulting, LLC**

# Today's Sessions

Session I: Why have a special event? How to host an event that engages donors for a lifetime.

Session II: Why have major donor giving program? Steps to build a successful major gifts program, how to identify major donors for your organization.

Session III: What is an annual giving program and why do you need one? How to conduct a successful annual giving program including examples of how to develop a plan and calendar.







1.6 Million Nonprofits  
registered with the IRS

\$471.44 Billion Given in 2020



Most nonprofits are small and community-based, serving local needs:

92% spend less than \$1 million annually

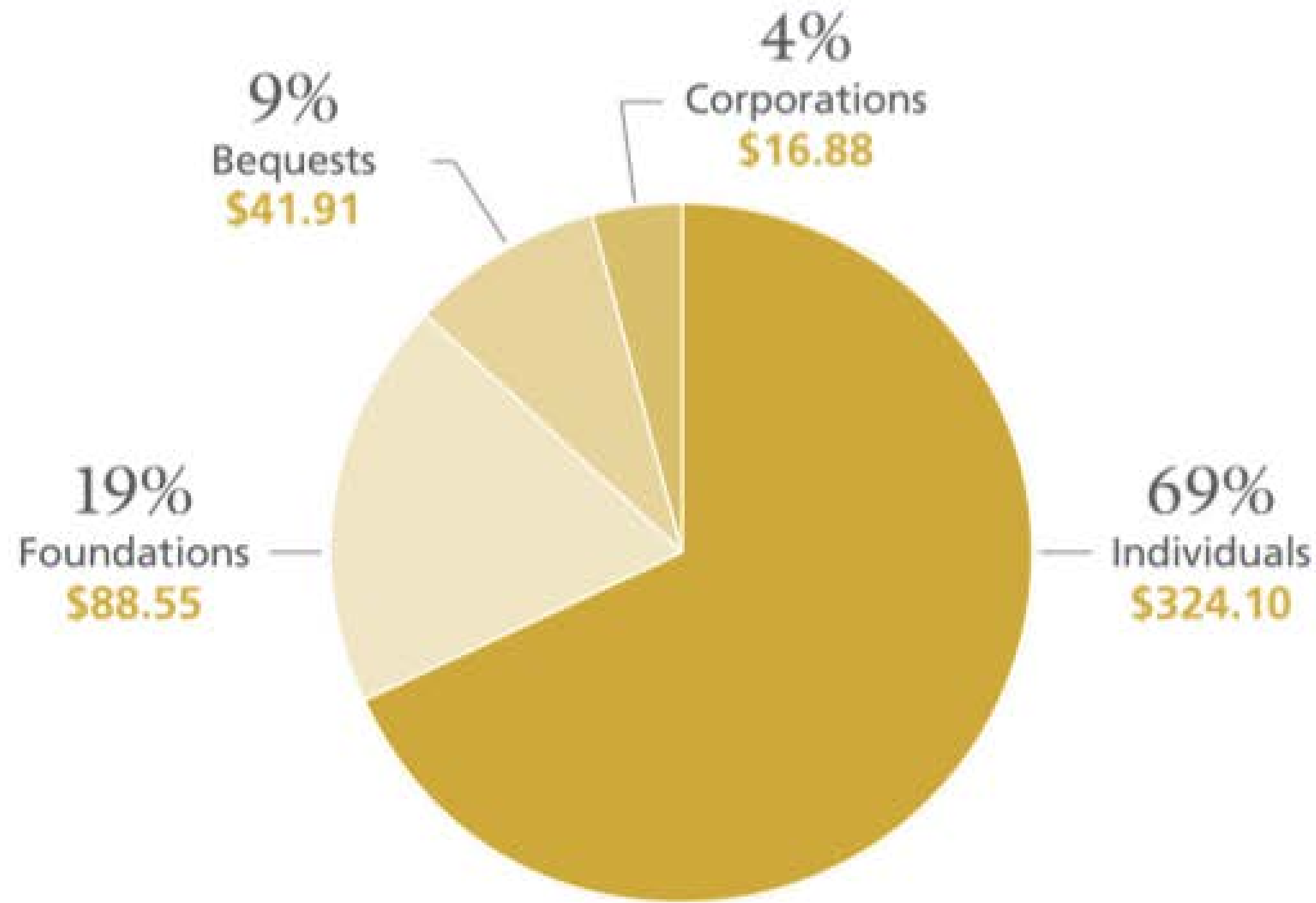
88% spend less than \$500,000





# 2020 contributions: \$471.44 billion by source of contributions

(in billions of dollars - all figures are rounded)





# Annual Fund Who, What, Why and How





# What is it?

An annual fund plan is a written plan that demonstrates your organization's fundraising efforts.



# Why



1 Strategy

2 Accountability

3 Ability to say No



Past Finances

Data

Survey





# Current Fundraising Trends

1

Donor-  
Advised  
Funds

2

Transfer of  
Wealth

3

Reoccurring  
Gifts



# Review Mission and Vision

Top of mind

Expand impact

More than activity metrics





SET  
GOAL

MAKE  
PLAN

GET  
TO  
WORK

STICK  
TO IT

REACH  
GOAL

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Focus

Big, Small, Action

Not all fundraising



# Stewardship

Retention

Include in plan

Engagement





Revenue resources

Activity

Who and When





Last year’s finances

Source	Goal	Actual Raised	Costs	Actual Net Raised	What Went Well	Areas for Improvements	Action Steps
Individual Donors	\$10,000	\$9,500	\$2,000	\$7,500	Holiday campaign, online giving	Direct mail campaign was too expensive	Revamp direct mail campaign
Major Donors							
Grants							



***XXX will build a sustainable fundraising plan with revenue increases by 10% annually.***

***Objective I: Create a diverse annual giving and stewardship plan that supports the development of churches, corporate sponsorships, grants, special events, and individual gifts.***

**Action Step 1:** Create a monthly giving appeal to current and future donors by 02/28/2022

**Action Step 2:** Identify and apply to 22 grantors and foundations generating a minimum of \$60,000 by 12/1/2022

**Action Step 3:** Increase annual individual donors to 300 donors for a minimum of \$350,000 (completed by 12/31/2022, monthly reporting)

**Action Step 4:** Increase church donations to 25 churches for a minimum of \$55,000 (completed by



Share your plan, ask!

Share your plan with  
your stakeholders

Take a seat at the  
table



# Reflection Question:



# Reflection question:

Where do you think your biggest opportunity for growth this year is?

How do you plan for it?



# Reflection question:

What is your biggest pain points in planning ?



# Reflection question:

How often do you review your annual giving plan  
and who updates?



# Contact Us



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**SCAN ME**