

Planning with Purpose

Transform Your Fundraising in 8 Weeks

Program Developed by
The Fundraising Lab

Beginning March, 2021



www.fundraisinglab.ca

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Introduction

The need for your services is soaring, but you need funds to better serve your community. You're making a difference, but you want to make an impact.

The reality is that you're spread thin. You're working solo or have a small team and you're tapped out. Your systems and processes are lacking efficiency. Your relationships with donors could be stronger. Your board isn't responsive to your efforts. And you're putting out fires and not getting to the crux of your work.

You know what you want to accomplish but it feels overwhelming.
So where do you begin...

You begin with a program created to help you work through your roadblocks. You begin with Planning with Purpose.

Over 8 weeks, you will learn to create, communicate and carry out an achievable, actionable and adaptable plan that will transform the way you fundraise.

Key Information

- Start Date: March 29, 2021
- Cost: \$849.00 CAD
- Delivery: self-paced, live group Q&A sessions and discounted one-on-one calls
- Access: Lifetime access to all course materials and recordings

Course Outline

WEEK 1: March 29

Modules 1 & 2 - Getting Started

Introduction - 30 minutes

- 1.0 Meet Cathy, your Fundraising Guide
- 1.1 Welcome to the Course!
- 1.2 The Importance of Having a Plan
- 1.3 The Learning Approach
- 1.4 Some Context

Fundraising's Enabling Ecology Framework - 30 minutes

- 2.0 Creating the Enabling Ecology in Support of Fundraising



WEEK 2: April 5

Module 3

The Fundraising Plan – 5 minutes

3.0 The 5 Steps to Developing Your Fundraising Plan

Step 1: Inventory Taking – 25 minutes

3.1 Inventory Taking

WEEK 3: April 12

Module 3

Weekly Q&A sessions begin – 60 minutes

WEEK 4: April 19

Module 3

Step 2: Filling Out the Fundraising Plan Template - 90 minutes

3.2.a The Fundraising Plan Template

3.2.b Details of the Fundraising Plan Template

3.2.c The Interconnectedness of the Fundraising Plan, Budget and Donor Database

3.2.d Intro to Do Good's Fundraising Plan

3.2.e Inputting Fundraising Strategies

3.2.f Inputting Infrastructure

Weekly Q&A – 60 minutes

WEEK 5: April 26

Module 3

Steps 3-5: What to Keep, Improve, and Add to Your Plan – 30 minutes

3.3 What will you keep: Fundraising Strategies and Infrastructure

3.4 What will you improve

3.5 What will you add

Weekly Q&A – 60 minutes

Week 6: May 3

Module 3 - Keep working on your fundraising plan

Q&A – 60 minutes



Week 7: May 10

Module 4

The Budget – 60 minutes

- 4.1 Creating Your Budget
- 4.2 Fundraising Revenue
- 4.3 Legacy Giving Revenue
- 4.4 Expenses and Net Revenue
- 4.5 The Three Types of Revenue
- 4.6 Cost Per Dollar Raised

Q&A – 60 minutes

Week 8: May 17

Modules 5-7

Pulling it All Together – 105 minutes

- 5.0 Pulling it All Together
- 6.0 Getting Buy-in (including simulated presentation to the Board of Directors)
- 7.0 The Fairy Dust

Q&A – 60 minutes

After the plan: at your own pace

Master Classes - 90 minutes

- The Executive Director's Role in Philanthropy
- The Board of Director's Role in Philanthropy

Live Workshops - 120 minutes

- How to configure your fundraising database – April 12, 2021
- The basics of writing a case statement – May 11, 2021

