

Win • Lift • Keep

A Focused Annual Fundraising Plan
for the Chaos We Actually Live In

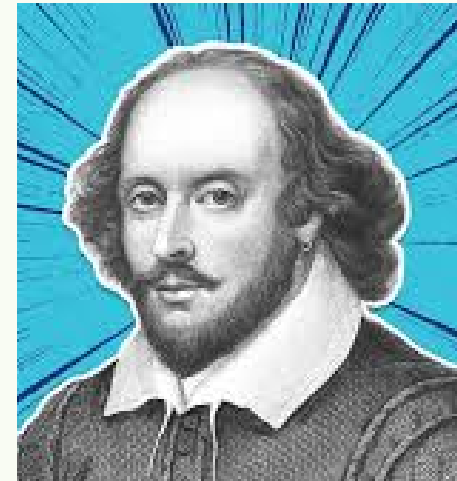
Sharon Somerville Boyes, CFRE
Author | Speaker | Strategist
Founder & CEO, Boyes of Somer
 Champagne & HashBrowns

Planet Philanthropy 2026
Tuesday, June 23 • 9:00 - 10:15 a.m.
Port Charlotte, FL

Introduction



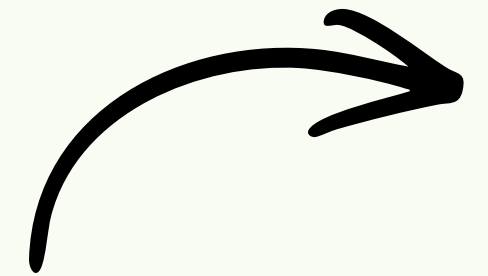
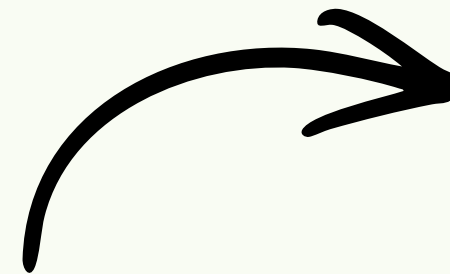
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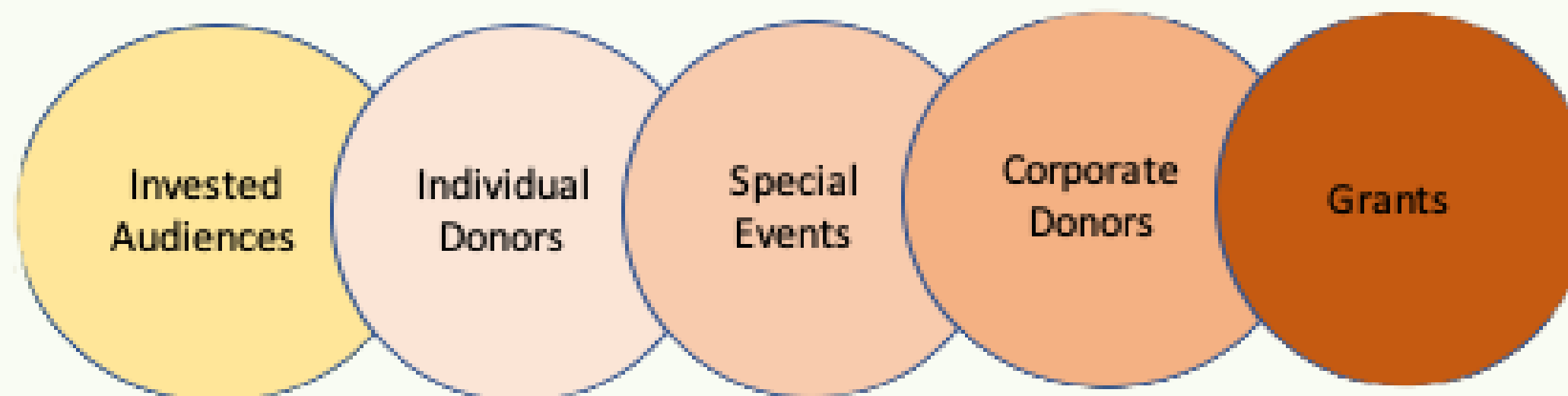
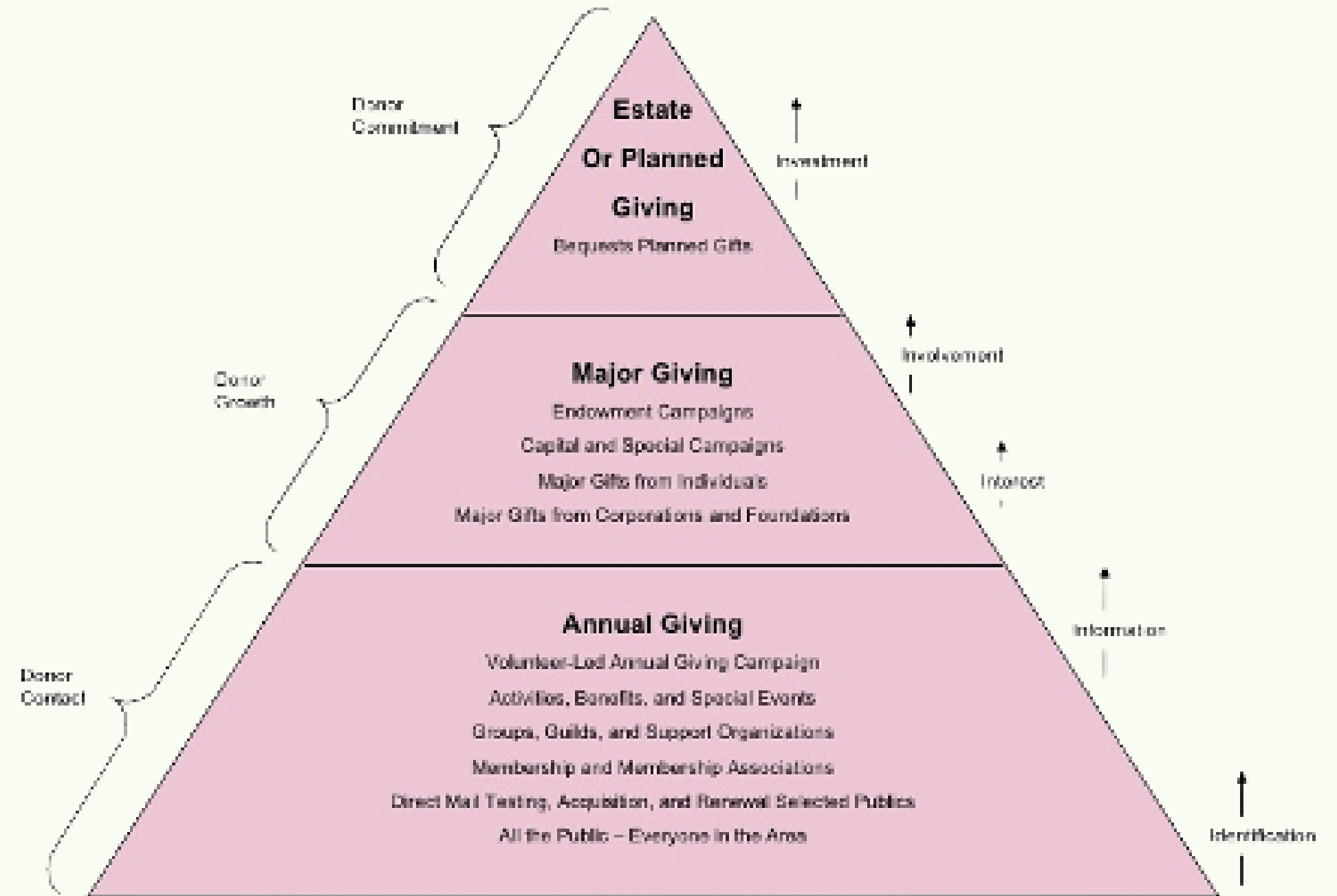
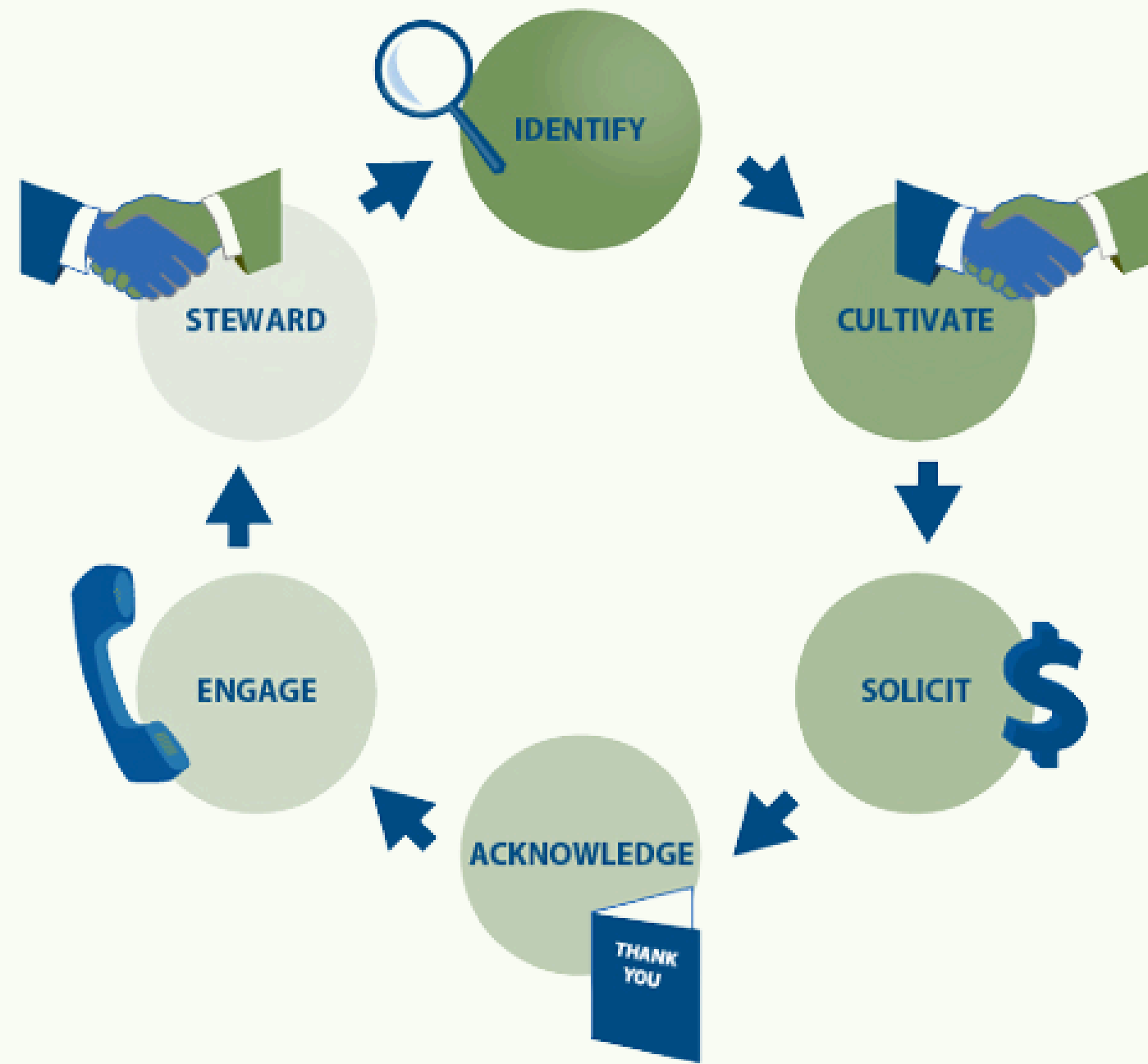
Session Roadmap

Today's Learning Objectives:

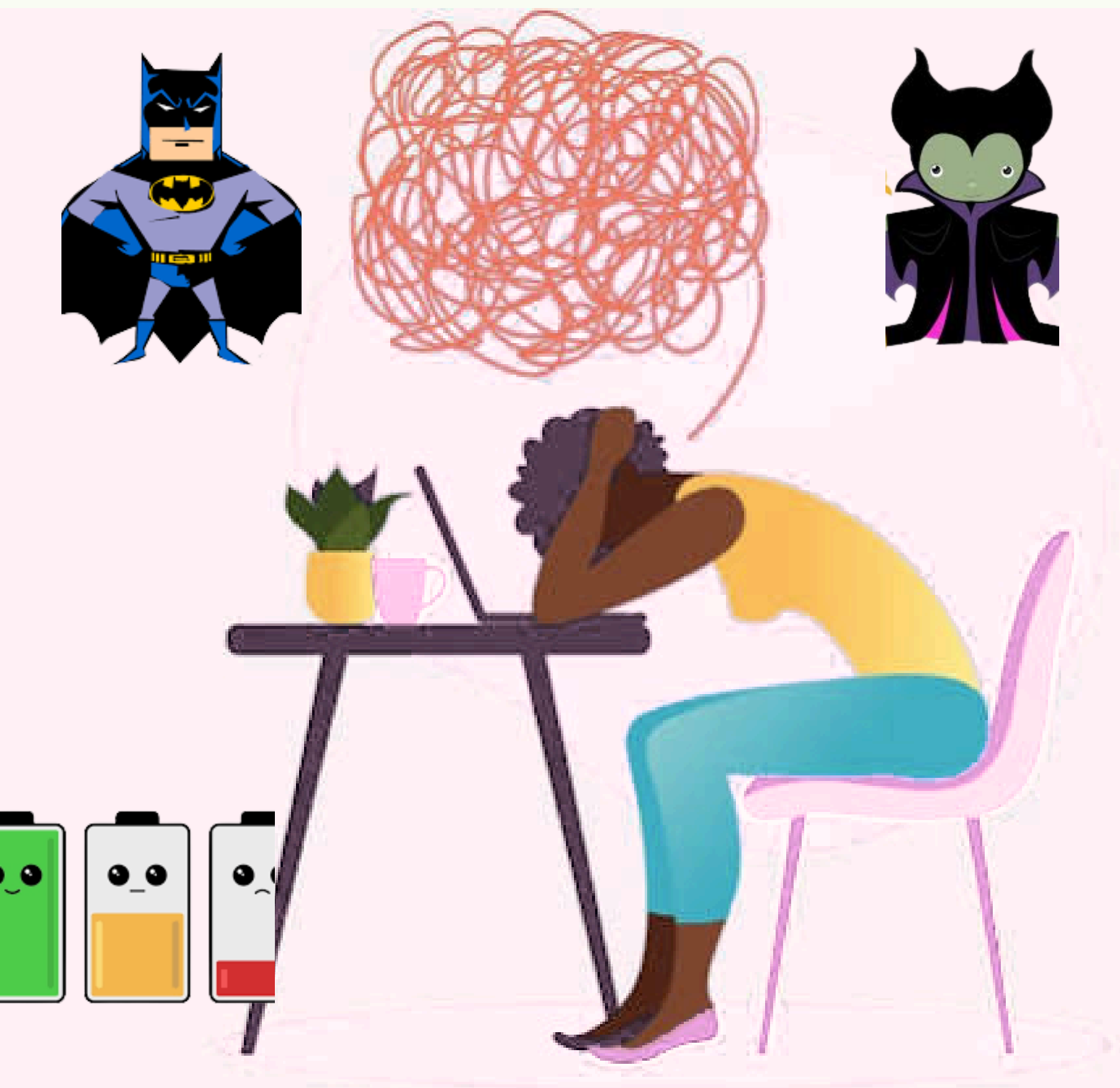
1. Define the Win • Lift • Keep framework
2. Identify ways to align your fundraising priority into a focused annual plan for both short and long-term results.
3. Apply these principles to help fundraisers stay grounded and resilient while adapting to the changing needs of the organization and world.
4. Laugh and have fun.



All aspects of the fundraising pipeline, process and pyramid are functioning at their highest capacity to ensure all projects, programs and initiatives are properly funded and the future is secured. Audiences are clearly defined and communication messages and vehicles are on brand, segmented and strategically planned to achieve desired outcomes. Communications and marketing efforts elevate the status of the organization, support its fundraising efforts and drive event attendance.







**Win
Lift
Keep**



Transformative Fundraising Framework:

Win • Lift • Keep

WIN

**Attract New
Donors
& Increase
Revenue**

LIFT

**Elevate Existing
Donor Impact**

KEEP

**Deepen Loyalty
& Retention**

Together, these drive transformation: Sustainable growth, expanded mission reach, and long-term impact.

Win • Lift • Keep



Actual Goals from Annual Plan

Goal	Category
1.Acquire 50 New Supporters	WIN
2.Increase Average Gift 10%	LIFT
3.Improve Retention 5%	KEEP

Tactic	Category
Networking Events	WIN
New Corporate Prospects	WIN
Discovery Calls	LIFT
Major Gift Portfolios	LIFT
Thank You Calls	KEEP
Impact Reporting	KEEP

Win
Lift
Keep

The Same Plan

Overall Development Goals:

1. Win more donors and diversify revenue stream

Goal: Acquire 50 new supporters by FY End

Strategies:

- Increase community engagement by attending 2 networking events each month. Targeted groups include: Women's Networking Group and Chambers of Commerce (ED and FM) (October – June)
- Create list of 10 new corporate prospects (ED and Board) (Dec. – June)

2. Lift the performance of current donors

Goal: Make 10 Thank You Actions, 7 Discovery Actions per month. End result: increase of average gift size by 10%

Strategies:

- Implement stewardship plan with result of 10 Thank You actions per month (phone calls or HWN) in addition make 7 Discovery Calls per month to learn more about our supporters (who they are, why they give, learn more about the organization/program etc.)
- Establish a book of business for Executive Director and Foundation Manager of top 20 prospects each. Add 10 new prospects to book per quarter. (October. – June)
 - Have a written Moves Management Strategy for top donors to convert to or an overall gift increase of 10%:
 - Major Gifts
 - Individual Donors
 - Monthly Giving
 - Planned Gifts
 - Capital Campaign donors
 - Have stewardship strategy for donor segments (Appendix A/B)
 - Major Donors
 - Special Events Donors
 - Grateful Families/Patients
 - New Donors
 - Donors by Level
 - Donors >\$250
 - \$250+
 - \$500+
 - \$1,000+
 - \$2,500+
 - \$5,000+

3. Keep more of the donors we currently have

Goal: Improve donor retention rate by 5%

- Donors (goal: keep 57% of FY donors).
- Begin working on 1st time donors - Baseline

Strategies:

- Implement quarterly Thank-a-thons for staff and volunteers.
- Improve donor record integrity to have valid phone numbers and emails for 70% of active donor records by FY End. FYXX - 84% of active records do not have email/phone/both. Establish a standard for organization/corporation accounts and use relationships versus constituent record contact information.
- Create a 60-day post-gift donor impact statement (infographic) to share via email or postcard. The goal is to send within 1 week of the 60-day post-gift date.
- Implement a volunteer pipeline and workflow strategy to utilize community connections that did not pass a wealth screening threshold.

Month	WIN	LIFT	KEEP
July	Outreach	Discovery	Newsletter
August	Prospecting	Cultivation	Stewardship
September	Event Acquisition your B	Major Gifts	Follow-Up
October	Lead Generation	Upgrade Strategy	Retention
November	Year-End Acquisition	Major Asks	Gratitude
December	Giving Tuesday	Upgrades	Stewardship

Win
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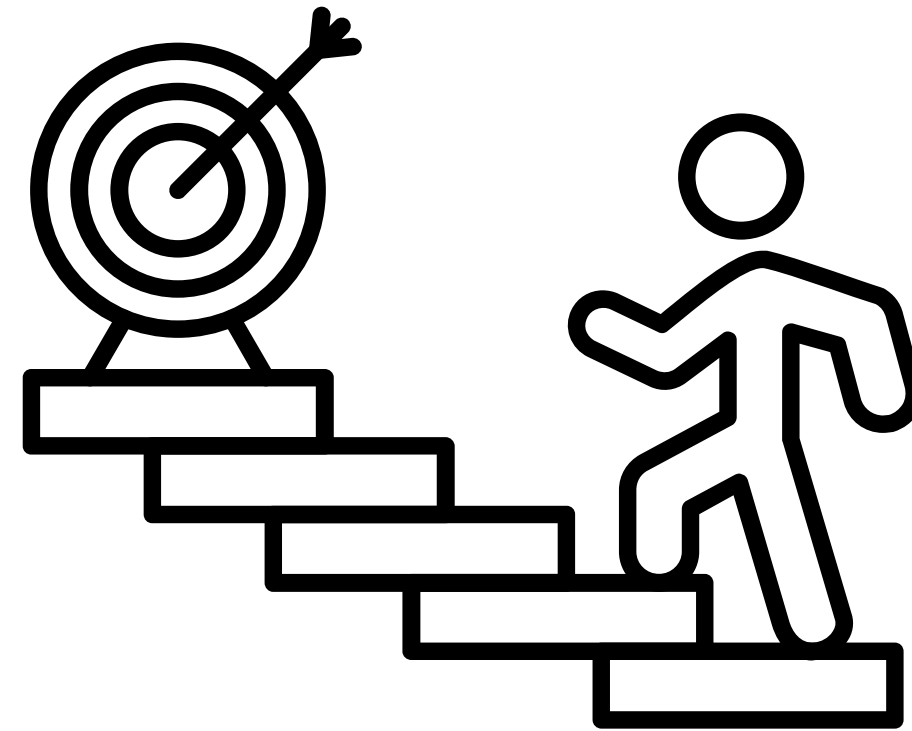
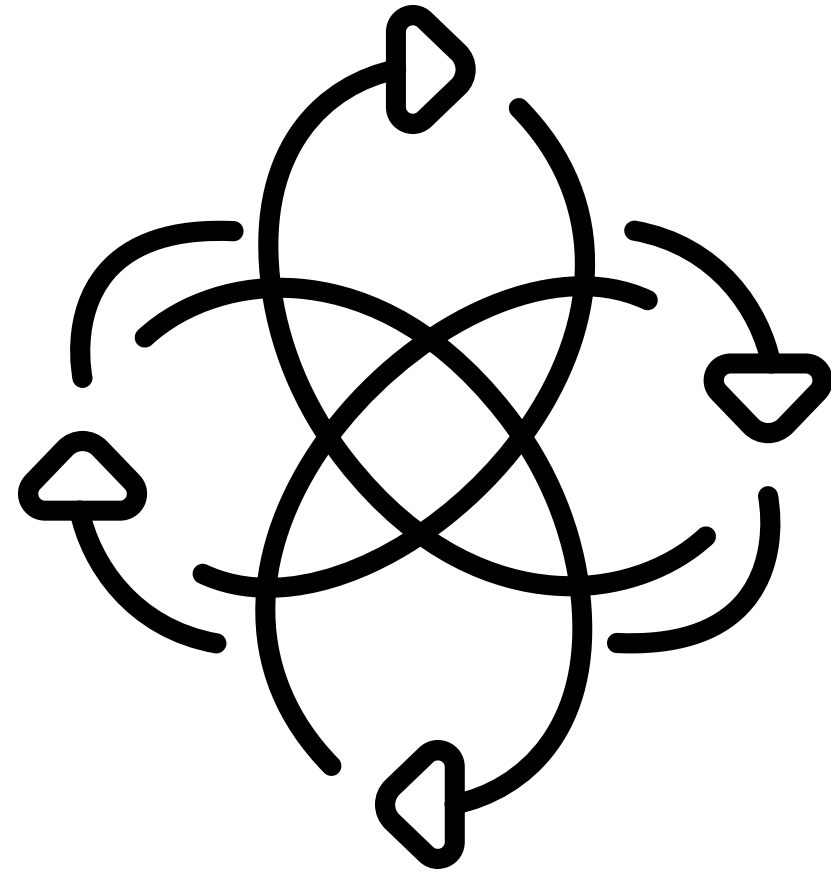
The Same Plan

Development & Marketing Activities:

	Grants Monthly Reports: List Those Here:	Special Events/Programs	Individual Donors (Monthly Giving, Direct Mail, Email Appeal, Digital Campaigns)	Major Giving Donors (\$2,500+)	Communications (newsletter, website, annual report, etc.)	Special Projects -Capital Project	Industry Holidays/ Campaigns https://www.petsit.com/2026-pet-holidays
July	Major Hospital System Insurance Company	Back to School Event	Giving Summaries for previous year monthly donors		Quarterly Donor Newsletter		Dry Eye Awareness Month
August		Donation Celebration		Somerville Trust			National Eye Exam Month Children's Eye Health and Safety Month Contact Lens Health Week
Sept		Gala (9/14)					Healthy Aging Month Sports Eye Safety Month
Oct					Quarterly Donor Newsletter		World Sight Day Eye Injury Prevention Month World Smile Day
Nov		AHP Conference (List City)	End of Year Campaign				Diabetic Eye Disease Awareness Month
Dec		Holiday Mission Event	Giving Tuesday End of Year Appeal End of Year Online Efforts	Boyes Trust			Gift of Sight Month Giving Tuesday National Gratitude Month

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Complexity for Fundraisers



Clarity for Everyone Else

Win
Lift
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The Same Plan

Step #1: Knowledge is Power

- **Baseline**

- #of donors total/gift
- Last (few) years' performance (trends)
- Attrition rate

- **Budget**

- Overall number (expected increases)
- Line item number (patterns)
- What matters most (Great Strides)

- **Goals**

- Financial (objects/strategies)
- Impact (1x gifts/quick win/priorities)
- Challenges (list them all)



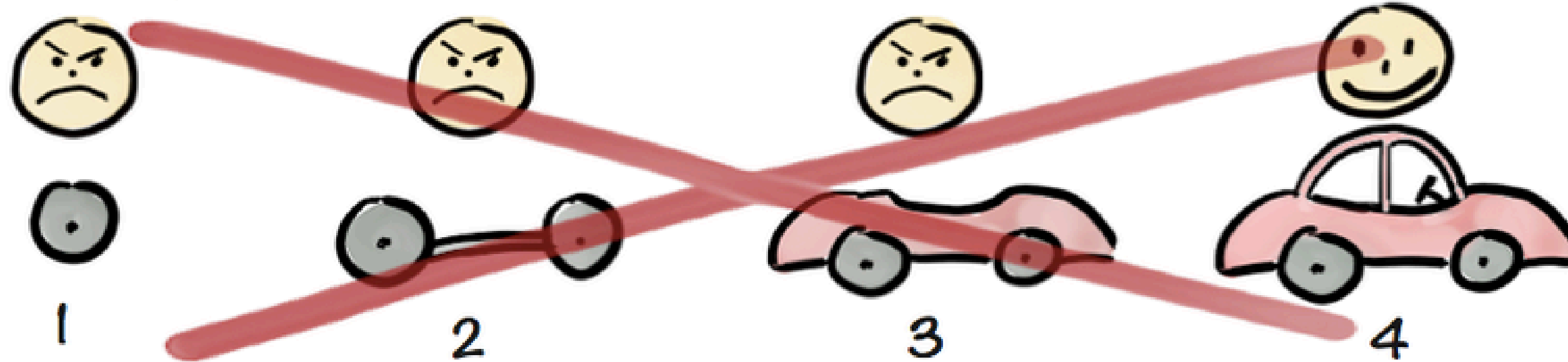
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Step #1: In Action

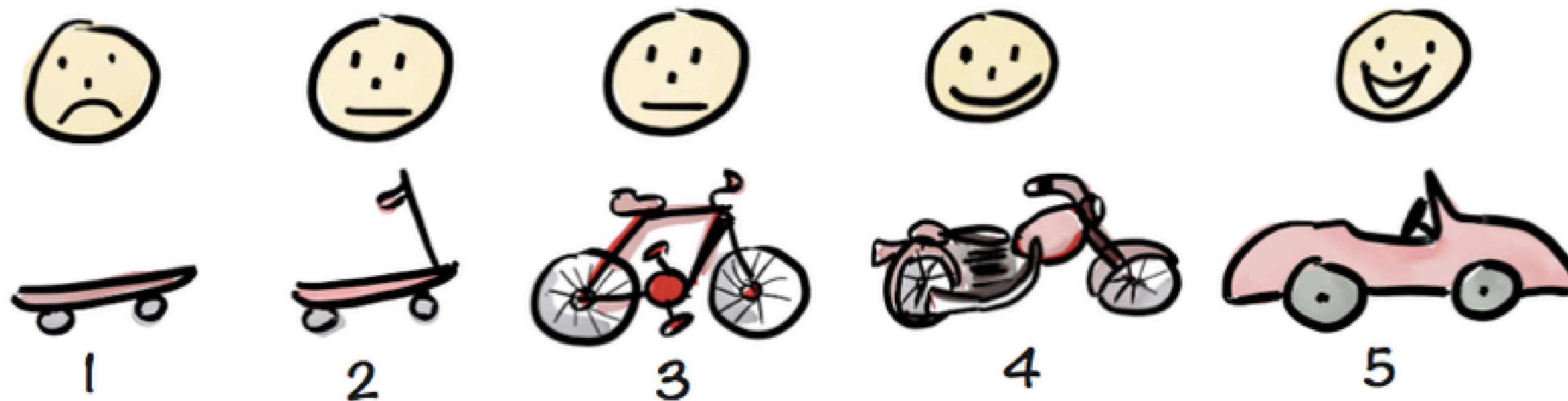
Launch Planned Giving - identified priority

- Requires updating webpage and creating 1 page sell sheet
- Requires reviewing gift acceptance policy
- Requires including in all communications
- Requires identifying prospects and engaging with current Legacy Donors
- Requires creating expert 'cabinet' and educating
- Involves all members of Development team and Executive Director.
- Resources/Expertise Needed - Implementation within current staffing
- Timeline: Now — 6 months (ongoing)

Not like this....



Like this!



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Step #2: Who Makes Up Your Pipeline

- **Invested Donors (grateful patients, alumae, survivors)**
- **Individuals**
- **Corporate Donors**
- **Grantmakers**
 - **Family**
 - **Corporate**
 - **Government**
- **Special Event attendees**
- **Members**



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Step #2: In Action

- **Where are the leaks?**
- **Where are the opportunities?**
- **How are we stewarding them**
- **What stories are we telling them and when?**
- **Do we even know who they are**
 - **database records**
 - **any notes**
 - **wealth screening?**
- **What will it take to get your pipeline patched and flowing?**



**Win
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Step #3: Map It Out

- Calendar all your development and marketing activities
- Update your stewardship appendix.

WIN

**Attract New
Donors
& Increase
Revenue**

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**Elevate Existing
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KEEP

**Deepen Loyalty
& Retention**

Best Practices

Donor Stewardship - Appendix B

Have stewardship strategy for donor segments – Year 1 focus on saying thanks

*Need to use Raiser's Edge to create and automate processes

Thank you process – this is in addition to the tax-receipt/thank you

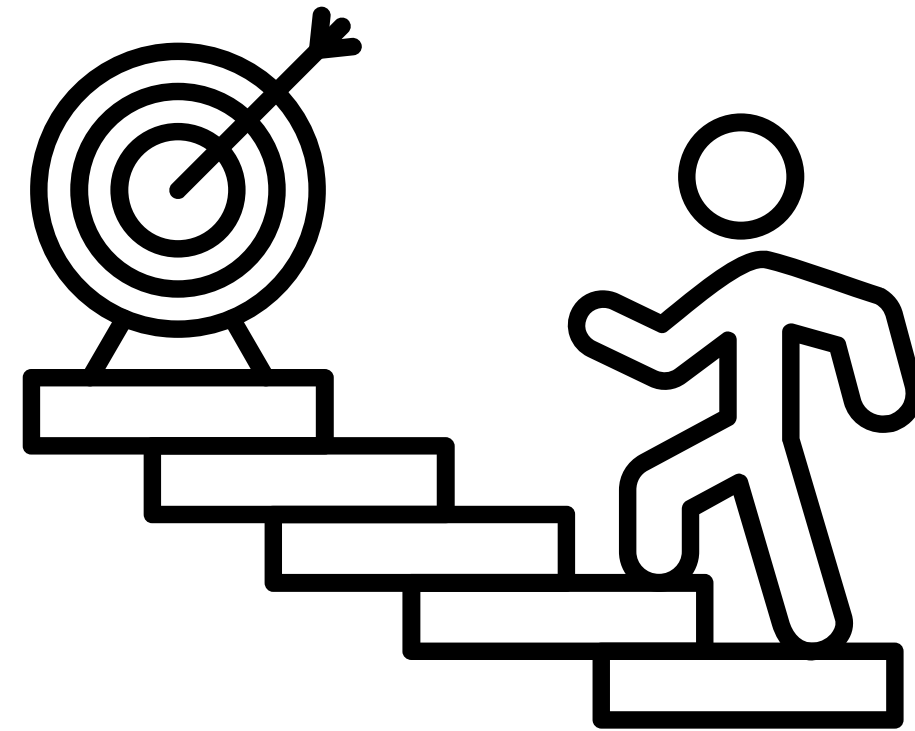
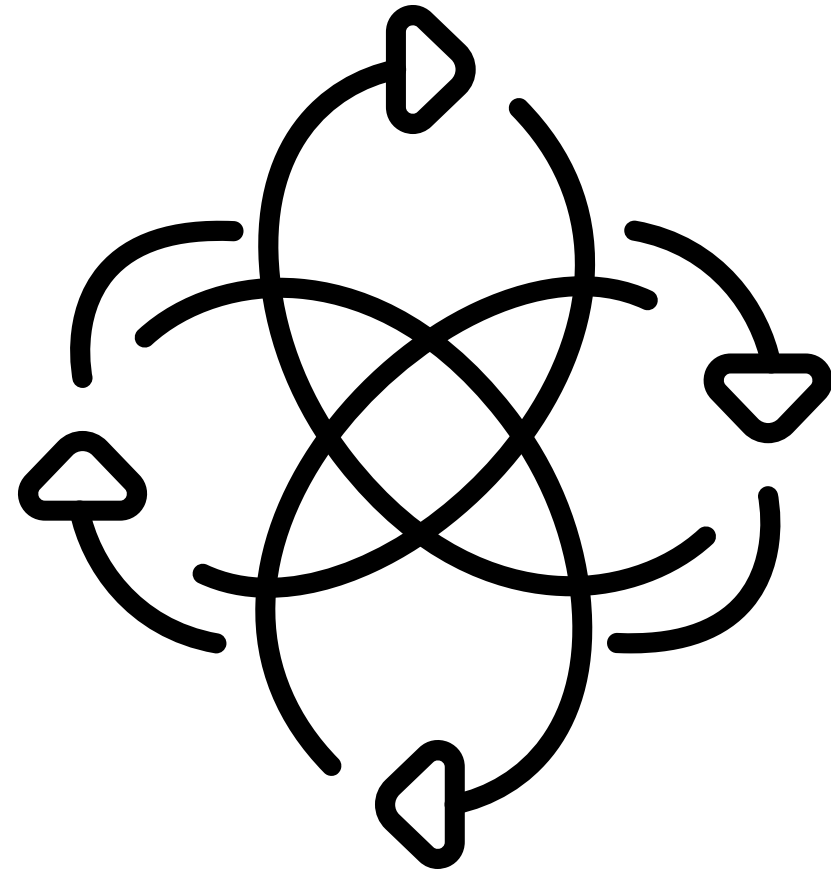
- Major Donors (\$2500+)
 - Donor receives phone call from Board Chair/ED within 3 days of gift/pledge
 - Donor receives handwritten thank you from the Thank You Brigade within month
 - FM or gift solicitor designs impact reporting and other stewardship milestones.
 - Gala Donors
 - \$10,000+ donors receive phone call from Board Chair/ED within 3 days of gift/pledge
 - \$5,000+ donors phone call from committee chair within 1 week of gift/pledge
 - Donor receives handwritten thank you from FM within month
 - Social Event Donors
 - \$10,000+ donors receive phone call from Board Chair/ED within 3 days of gift/pledge
 - \$5,000+ donors phone call from committee chair within 1 week of gift/pledge
 - Donor receives handwritten thank you from FM within month
 - New Donors (new donor list should be pulled 1 x per month)
 - 1st Welcome Series Email sent within 1 day
 - 2nd Welcome Series Email sent after 30 days
 - Donor receives personal thank you note from FM within 3 days of gift/pledge
- *Once per month, use new donor list and add email addresses to Constant Contact donor and newsletter list. (FS)
- Donors by Level (Workflows added in RE on 1/23, Implement on 2/1)
 - Donors >\$250 – thank you by FS within 3 days or within 5 days (HWN)
 - \$250+ - thank you by FM within 3 days (email) or within 5 days (HWN)
 - \$1000+ - thank you by ED within 3 days (email) or within 5 days (HWN)

Tax-Receipt/Thank You Correspondence

- Gift Received Type (How did we receive the gift?)
 - Digital (Through website, constant contact, etc.)
 - Tax-receipt/thank you should be digital only – through Raiser's Edge auto feature
 - Mail (Check)
 - Tax-receipt/thank you should be sent by mail
 - *If we received the check by mail and we have an email address in their constituent record, a digital email receipt should also be sent.

- *Pearlflection* over perfection
- Quarterly YMAD Piece
- 2x a YMAD Specific to their interest
- 2x a year, thank you, not associated with a gift.
- 2x a year – I know you're interested in XX.
- Facetime beyond asking
- Technology is your friend

Complexity for Fundraisers



Clarity for Everyone Else

Lift, Win, Keep Everything

- Campaigns
- Events
- Staff Meetings
- Weekly Schedule
- Daily Schedule
- Life ❤️



My Motto...

Come for the party

Stay for the mission.

Project	WIN	LIFT	KEEP
Gala	Send proposal to X	Call Potential Bid Donors	3 renewals
Capital Project	F/U with: X	Invite X for Tour	Send Project Program Stats
Board Development	Schedule meeting with X	Send Project Program Stats	Send List of New Donors to X
Moving Ahead	Attend Networking Event	Creating Story Bank	1 Hour of Thank You Calls
Controlled Chaos	Year-End Acquisition	Major Asks	Gratitude
Remember	Action Alleviates Anxiety	Comparison is the Thief of Joy	React Don't Respond

Sample Staff Meeting Agenda

- 1. Weekly Cheers**
- 2. Wins - Next Two Weeks**
- 3. Lift - Next Two Weeks**
- 4. Keep - Next Two Weeks**
- 5. OMGs**

Win • Lift • Keep

Proven fundraising model applied through leadership & strategy

How I Approach This Work

Win (0-90 Days)

Stabilize. Activate. Build momentum.

- Rapid fundraising and pipeline audit
- Reactivate lapsed and warm major donors
- Clarify and unify case for support
- Align messaging across leadership and stakeholders
- Launch targeted campaigns for early traction

Outcome: Early revenue + visible momentum

LIFT (3-8 Months)

Align people. Strengthen strategy.

- Leadership and board alignment
- Define clear fundraising roles and accountability
- Strengthen major gifts strategy and donor journey
- Reposition events and communications as fundraising tools
- Expand visibility through storytelling and thought leadership

Outcome: Stronger pipeline + aligned leadership

KEEP (8-12 Months)

Build what lasts.

- Develop 12-18 month fundraising roadmap
- Implement simple, repeatable systems
- Establish donor engagement and stewardship cadence
- Train team for long-term ownership
- Deliver board-level strategy and next steps

Outcome: Sustainable fundraising engine

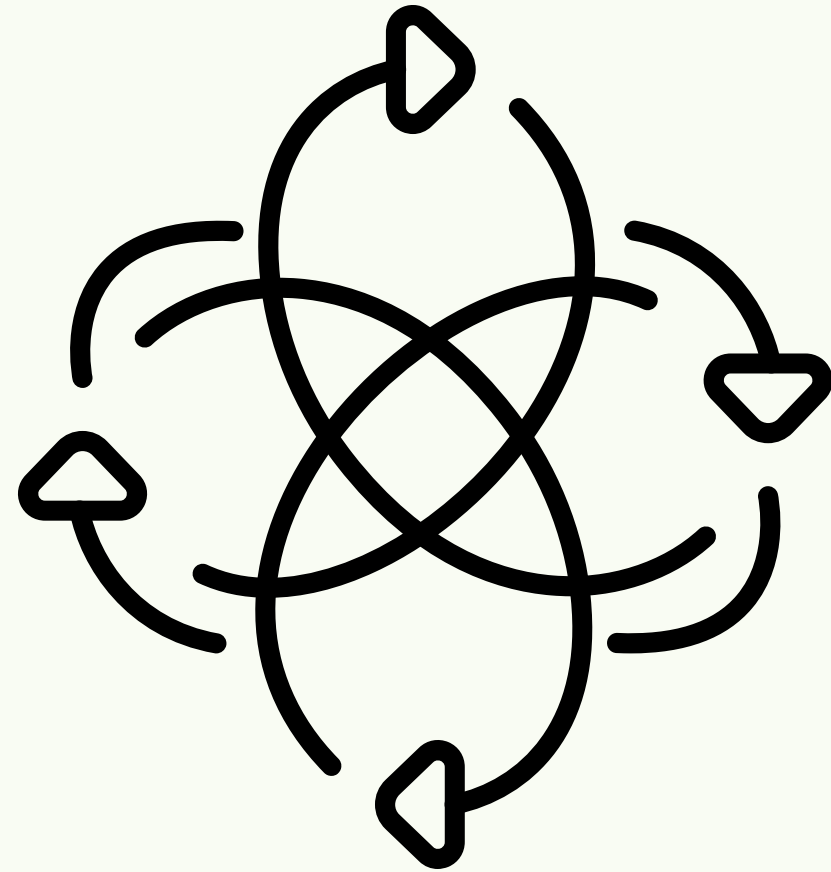
Strategic Clarity. Real-World Application.

With 20+ years of nonprofit executive leadership, Sharon Somerville Boyes brings a systems-based approach to fundraising—aligning people, strategy, and revenue to create results that last.

**This is not just
about raising money.**

**It's about building
a structure that
supports it.**

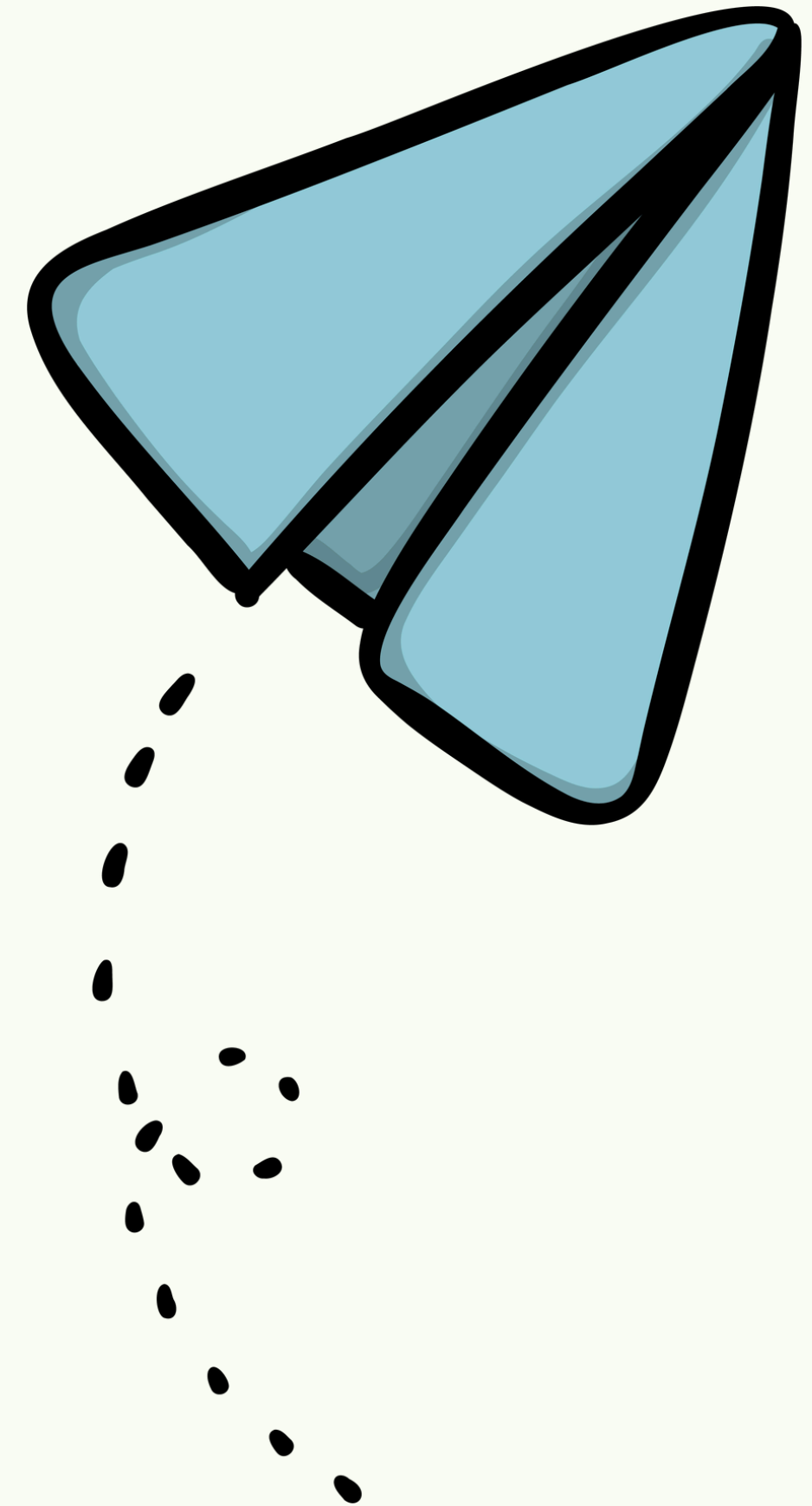
Complexity for Fundraisers



AND...Clarity for Fundraisers

Takeaways

- What's one thing you'll apply when you return to the office?
- What's your **Aha!** moment from today?
- What are you doing now to Win, Lift, Keep donors?



Thank You!

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Questions?

