



---

# June 2025 Monthly Action Plan: Your Ultimate Time-Saving Toolkit

A Step-by-Step Guide to Working Smarter,  
Saving Time and Raising More

## Introduction

We know one of the biggest challenges fundraisers face is a lack of time and resources. Whether you're a team of one, managing multiple channels, or wearing far too many hats, the pressure to do more with less is real.

That's why this month's Monthly Action Plan (MAP) is different — it's built around saving you time while increasing your fundraising results. We've pulled together a curated collection of our best tools, templates, and resources — some of them hidden gems — and grouped them into practical themes to make your life easier.

You already have access to these tools in your [Moceanic Members' Center](#), but it's easy for them to get buried or overlooked. This MAP is your shortcut — pulling forward the most actionable, time-saving materials and showing you exactly how to use them.

Each section is focused on a different area of fundraising work, with tips on how to get the most out of each resource.

---

## Who This Action Plan Is For

This MAP is for any fundraiser who feels the crunch of a long to-do list and not enough hours in the day. You might be:

- A solo fundraiser juggling multiple priorities
  - A small team trying to scale without burnout
  - A manager looking to equip your staff with faster ways to do great work
  - A fundraiser ready to shift from “winging it” to working smarter
- 

## Key Outcomes You'll Achieve

- Spend less time reinventing — and more time implementing
- Feel confident using proven templates, briefs, and checklists
- Reduce bottlenecks and last-minute panic with better planning
- Strengthen your donor relationships through timely and thoughtful follow-up
- Free up your headspace to focus on strategy, relationships, and growth

Let's get started with one of the biggest time sinks (and opportunities) in fundraising: direct mail.

---

# 1. Direct Mail – Steal These Ideas (We Mean It)

Writing and producing a compelling direct mail campaign doesn't have to be stressful. With the right materials at your fingertips, you can craft powerful donor appeals without starting from scratch.

## Direct Mail Creative Brief Template

### [Direct Mail Creative Brief](#)

The brief is the most important part of any appeal. Get this right, and everything else flows faster and smoother. This template walks you step-by-step through clarifying your offer, story, target audience, and tone.

#### How to use it:

- Fill it out before you start writing — even if you're the one doing the writing.
- Use it to align with anyone helping you — copywriters, designers, or volunteers.
- It's especially powerful when working with external vendors or new team members.

#### Why it saves time:

A strong brief prevents rewrites, clarifies expectations, and helps your appeal get done right the first time. You'll stop wasting time explaining the same things over and over, and start creating tighter, more focused messages.

## Fundraising Offer Report Card

### [Your Fundraising Offer Report Card](#)

A great offer is the heart of a high-performing appeal. It's what turns interest into action and passive readers into passionate supporters. But how do you know if your offer is good enough?

That's where the Offer Report Card comes in. This tool walks you through the essential elements of a compelling offer — from specificity to emotion to the donor taking action — and gives you a clear framework to evaluate and improve your offers.

### How to use it:

- Complete the report card for every offer you draft or review.
- Use it with your team to quickly align on which offer is strongest.
- Refer to it before finalizing your letter — or when you're stuck deciding between concepts.

### Why it saves time:

It helps you avoid the trial-and-error of weak or confusing offers. You'll move forward with confidence, knowing your offer has the power to connect and convert.

## Fundraising Message Outline

### [Fundraising Message Outline](#)

This guide provides a paragraph-by-paragraph breakdown for structuring an effective fundraising appeal. It's your roadmap to a compelling donor letter, including suggested phrases and pacing.

### How to use it:

- Follow the outline as you draft a new appeal — it helps ensure a smooth emotional and logical flow.
- Use it to check the copy you're given from a consultant or agency — make sure each section hits the mark.
- Return to it whenever you're stuck, unsure where to go next, or revising an appeal.

### Why it saves time:

This is the clarity check you need when writing under pressure. You'll stop second-guessing the structure of your letter and start producing stronger, more persuasive donor communications, faster.

## Big Fundraising Appeal Swipe File

### [Big Fundraising Appeal Swipe File](#)

This PDF compiles some of the best-performing appeal packs we've seen — contributed by members around the world. They're not perfect, but they're packed with proven strategies, heartfelt language, and creative formats that inspire action.

### How to use it:

- Browse by organization type to find examples that align with your mission.
- Note the structure of the letter — the timing of the ask, the emotional beats, and how they close.
- Look at the lifts and inserts used to drive engagement and boost response.
- Highlight donor-centric phrases and call to actions that stand out to you.

### Why it saves time:

Instead of reinventing the wheel, you get real-world copy, layouts, and response devices you can adapt to your campaign. Use it to brief your copywriter, inspire your next appeal, or refine your message strategy.

---

## 2. Supporter Connection Survey – Set Up for Success

Surveys are one of the most important campaigns we recommend. They can unlock incredible insight, major donor leads, and gifts in wills opportunities — but they're a lot of work. That's why we've built tools to help you do them more confidently and efficiently.

If you want to dive deeper into how to design, write, and follow up your Supporter Connection Survey, [check out our full course on the topic](#).

The course is packed with step-by-step guidance and even more downloadable resources than we've mentioned here — including production checklists, creative brief templates, and follow-up guidelines. What you'll see in this section are a few of our most time-saving tools from that course.

### Survey Budgeting Tool

#### [Your Survey Budgeting Tool](#)

One of the trickiest parts of planning your first supporter survey is figuring out how much it will cost — and what to include. This downloadable spreadsheet does the heavy lifting for you.

### How to use it:

- Click the link and download the spreadsheet.
- Enter your campaign volume and local costs.
- Use the explainer to understand the assumptions and make estimates even if it's your first time.

### Why it saves time:

Instead of pulling numbers from thin air or spending hours researching, you'll get a grounded, realistic budget in minutes. It's also a powerful tool for building a case for investment — perfect when leadership asks to see the numbers.

## Ultimate Supporter Connection Survey Swipe File

### [Ultimate Supporter Connection Survey Swipe File](#)

This swipe file contains real surveys from Moceanic members and coaching clients across the world. Each example shows what a high-performing Supporter Connection Survey looks like — in format, flow, and tone.

### How to use it:

- Review how different fundraisers open their letters and introduce their surveys.
- Study how motivation and pairing questions are phrased.
- Check how long questions are, what tone is used, and how reply devices are presented.
- Compare surveys that include an ask with those that don't — and why.

### Why it saves time:

This is your shortcut to understanding what a complete survey pack should look like. You'll know what to write, how long it should be, what to ask, and how to format it — without guessing or overthinking.

## Your Customizable Bequest Follow-Up Kit

### [Your Customizable Bequest Follow-Up Kit](#)

This kit is your ready-made follow-up solution to the most important question in your survey: "Have you considered leaving a gift in your will?" It includes editable letters you can use to continue the conversation with donors who expressed interest in leaving you a bequest.

### How to use it:

- Choose the letter that matches the stage of your donor (interested, confirmed, undecided).
- Customize the name, details, and tone for your audience.
- Schedule the follow-ups as part of your post-survey response plan.

### Why it saves time:

Instead of staring at a blank page wondering what to say, this kit gives you professional, donor-friendly messaging that's already field-tested. It means faster follow-up, higher conversions, and stronger donor relationships — without the stress.

## 3. Strategy and Planning – Build Your Year with Confidence

A strong plan is what turns fundraising from stressful guesswork into a focused, confident strategy. Whether you're just starting out or looking to improve your results, the tools in this section will help you make better decisions, faster — and with less second-guessing.

This section takes the best time saving tools from our Planning Hub workshop to help you create a consistent, sustainable, and effective fundraising program. These tools help you plan campaigns, allocate effort smartly, and keep communications on track throughout the year.

[Click here](#) to watch the Planning Hub workshop if you want a complete walkthrough of how to plan your fundraising year.

### Fundraising Strategy Template

#### [Building Your Fundraising Strategy Template](#)

This template brings together everything taught in Jim Green's: Building Your Fundraising Strategy Workshop. It helps you stay focused and effective when putting your strategy on paper — and keeps you from getting lost in unnecessary detail.

### How to use it:

- Follow the sections to draft a lean, powerful strategy.
- Use it to clarify your objectives, methods, metrics, and messaging.
- Present it to your board, boss, or funders to get approval and alignment.

### Why it saves time:

A great strategy is your North Star — but too many get bogged down trying to include everything. This template shows you what to include and what to leave out, so you can focus on what matters and move forward with clarity.

## Donor Data Snapshot

### [Donor Data Snapshot](#)

To raise more money, you need to understand who's in your database. This Excel-based tool tells you exactly what to track and how to categorize donors so you get actionable insight, not just numbers.

#### How to use it:

- Download the spreadsheet and enter your data.
- Follow the built-in prompts to analyze retention, giving trends, and donor segmentation.
- Use the outputs to inform your strategy, appeal planning, and budgeting.

#### Why it saves time:

No more guessing about donor behavior. This tool delivers real metrics you can use to make smarter decisions — without needing to be a data analyst. It's one of our most powerful tools, often overlooked just because it's a spreadsheet. Don't skip it!

## Communications Calendar Guide

### [Campaign Planner Guide](#)

This resource offers a complete blueprint for structuring your entire fundraising calendar. It includes a fully fleshed-out 12-month plan with suggested campaigns and communications — plus flexible guidance on how to tailor it to your organization.

#### How to use it:

- Start with the example calendar: adopt it as-is or adapt it to suit your team's bandwidth.
- Use the commentary to decide where to add or reduce depending on your capacity.
- Share with your team or leadership to keep everyone on track to achieve your goals.

#### Why it saves time:

Planning a year's worth of activity all at once helps eliminate last-minute stress and inconsistent messaging. With this in hand, you'll avoid gaps and overlaps — and free up mental space for creativity and relationship-building.

---



## 4. Thank You Letters – Make Donors Feel Amazing

Thanking your donors is one of the most high-impact actions you can take — and yet it's often rushed, templated, or overlooked. This section is packed with tools to help you craft thank-you letters that build lasting relationships and boost donor retention.

These tools are based on principles taught in our popular online workshop, *How to Write a Thank You Letter that Makes Donors Melt*, led by copywriting expert Lisa Sargent.

[Click here](#) to watch the workshop and dive deeper if you want more context, examples, and detailed coaching.

### Lisa Sargent's Swipable Thank You Language

#### [Thank You Swipables File](#)

Lisa Sargent is one of the best-known voices in donor communications — and this file captures some of her favorite donor-centric phrases. Use these in your thank-you letters to make them heartfelt, memorable, and emotionally resonant.

#### How to use it:

- Browse the list and highlight the phrases that match your tone and message.
- Paste them into your existing thank-you letters to strengthen your message.
- Use it as a starting point when you're writing a new thank-you from scratch.

#### Why it saves time:

You don't have to overthink or rewrite your appreciation messages from the ground up. These ready-to-go phrases help you say "thank you" in a way that makes donors feel seen, valued, and eager to give again.

### Lisa's Bonus Thank You Letter Template

#### [Thank You Letter Template](#)

This is a complete, editable thank-you letter built on the same donor-love principles Lisa teaches. It's heartfelt, donor-centric, and perfect for adapting to your next campaign.

### How to use it:

- Fill in your organization-specific details and campaign story.
- Customize the opening and closing to suit your voice.
- Keep a version on file to update and reuse throughout the year.

### Why it saves time:

Having a proven, editable letter on hand means you never have to start from scratch. It helps ensure quality and emotion, even when you're short on time.

## Better Donation Thank You Letter Checklist

### [The Better Donation Thank You Letter Checklist](#)

Sometimes you need a quick way to check that your thank-you letter is doing its job. This checklist gives you exactly that.

### How to use it:

- Print it out and review your letter against each item.
- Use it as a final check before you send — especially when editing under pressure.
- Share it with your team or volunteers as a simple quality standard.

### Why it saves time:

This simple checklist helps you avoid common mistakes and missed opportunities — and gets your thank-you letters out the door faster, without compromising on quality.

These are the tools we reach for again and again. They're fast, simple, and game-changing — whether you're building a relationship, pitching to a foundation, or just trying to make a task easier.

---

## Quick Reference: Your Complete Table of Time Saving Tools

Direct Mail	<a href="#">Direct Mail Creative Brief Template</a>
	<a href="#">Your Fundraising Offer Report Card</a>
	<a href="#">Fundraising Message Outline</a>
	<a href="#">The BIG Fundraising Appeal Swipe File</a>
	<a href="#">7 Steps to Record-Smashing Direct Mail Course</a>
The Supporter Connection Survey	<a href="#">Your Survey Budgeting Calculator</a>
	<a href="#">The Ultimate Supporter Connection Survey Swipe File</a>
	<a href="#">Your Customizable Bequest Follow-Up Kit</a>
	<a href="#">The Supporter Connection Survey Course</a>
Planning	<a href="#">Building Your Fundraising Strategy Template</a>
	<a href="#">Your Data Snapshot</a>
	<a href="#">Your Communications Calendar Guide</a>
	<a href="#">The Planning Hub</a>
Thank You Letters	<a href="#">The Better Donation Thank You Letter Checklist</a>
	<a href="#">Thank You Letter Template</a>
	<a href="#">Thank You Swipables File</a>
	<a href="#">How to Write Your Best Ever Donation Thank-You Letter...Every Time</a>