



---

# July 2025 Monthly Action Plan: Give Your Planning A Power-Up

A Step-by-Step Guide to Building Your Smartest  
Fundraising Year Yet

## Introduction

Planning might not feel like fundraising – but it’s the foundation of every campaign, every relationship, and every dollar raised.

This Monthly Action Plan (MAP) is designed to help you map out your fundraising year with greater confidence, clarity, and intent. Whether you need a fresh plan, a sharper strategy, or just a better handle on your calendar, this MAP brings together Moceanic’s most powerful planning tools in one place.

You already have access to all these tools in the [Moceanic Members’ Center](#) – but we know it can be tricky knowing where to start. That’s why we’ve done the thinking for you: curating the most essential resources for this time of year, so you can focus on what matters most and get more done with less stress.

You’ll move from guesswork to goal-getting – and into the new year with purpose and momentum.

---

## Who This Action Plan Is For

This MAP is especially for you if:

- You're starting a new fundraising year or cycle
- You’ve been flying by the seat of your pants and want to get organized
- You need to align your plan with your boss, board, or team
- You want to save time while improving results

---

## Key Outcomes You'll Achieve

- Build a focused, evidence-based fundraising strategy
  - Use data to prioritize what works (and skip what doesn’t)
  - Map your communications for a consistent, donor-friendly year
  - Identify hidden opportunities that already exist in database
-

# 1. Build Your Strategy the Smart Way

## Learn:

- How to write a strategy that actually gets used – not one that gathers dust
- Get your team aligned and working toward the same clear goals
- Break down silos and improve collaboration across roles
- Focus your energy on what matters most in fundraising

## Module:

- Workshop: [Building Your Fundraising Strategy with Jim Green](#). Jim's way of writing a strategy might be different to what you've seen before. It will teach you how to build a clear, practical fundraising strategy that gets results AND brings your team together.

## Tools:

- [Strategy Template – Building Your Fundraising Strategy](#)\* This ready-made template takes the guess work out of how present your strategy to your boss. Download it, plug your strategy in slide by slide and you're done!

*\*This is a Power Point file and will download to your computer when you click the link.*

## Why This Matters:

- Most strategies gather dust because they're too vague or too complex. Jim's workshop helps you create a strategy your whole team can understand, believe in, and actually use – so you stay focused, work better together, and raise more money.

## 2. Sense-Check Your Market and Dive into Data

### Learn:

- How to use the 3D Sense Check to understand your market, set realistic fundraising goals, and define the right targets for your nonprofit.
- What data you actually need to set clear goals, check your progress, and make sure your plan is working.

### Modules:

- Workshop: [Your 3D Fundraising Sense Check](#). Learn how to do data-based market research you can actually use.
- Workshop: [Metrics & Measures Workshop 1](#). In this workshop Sean outlines the top-level data that helps you plan and lets you know if you're on track – without getting bogged down in all the detail.

### Tools:

#### Ready Made Templates for you to Complete

- [Your 3D Fundraising Sense Check](#) \*
- [Donor Data Snapshot Tool](#) \*

*\*These are both Microsoft Excel files and will download to your computer when you click the link.*

### Why This Matters:

- Knowing where you stand is the first step to getting where you want to go. The Donor Data Snapshot gives you clarity about how healthy your donor base is, while the Sense Check means you'll build smarter plans rooted in real-world data.

### 3. Map Your Year with the Communications Calendar

#### Learn:

- What to send, when to send it, and how to stay on track all year long – without burning out.

#### Module:

- Workshop: [Your Communications Calendar](#). Sean explains how to use two incredible tools to help you take your Strategy into an annual Communications Plan.

#### Tools:

- [Your Handy Guide to a Great Donor Communications Calendar](#). Start here and learn how to balance what you need to send with the resources you have.
- [Communications Calendar Spreadsheet](#)\* Dive deeper and map out your plan in this template.

*\*This is a Microsoft Excel file and will download to your computer when you click the link.*

#### Why This Matters:

- A strong strategy is essential – but it's your communications calendar that brings it to life. By mapping out what to send, when, and to whom, you turn high-level goals into consistent, donor-centered action.

## 4. Use the Survey to Kickstart Your Plan

### Learn:

- How one survey can shape your entire year of fundraising. It will show you who your most generous supporters are. Which donors might consider monthly giving, or even leaving a gift in their will. And it gives you the kind of language and insight you need to write appeals that feel personal and truly connect.

### Module:

- Workshop: [Supporter Connection Survey](#)

### Tools:

There are SO many tools in the Supporter Connection Survey Course. You can find them all in the [bonus section](#). We've listed a few of our favorites below.

- [Survey Budget Calculator](#)\* This spreadsheet does the hard work of figuring out costs and income for this unique campaign.
- [Ultimate Survey Swipe File](#). There's nothing like examples! This file has some of the best Supporter Connection Surveys we've seen so you can see our teaching in action.
- [Customizable Bequest Follow-Up Kit](#). Bequest leads are the most precious you'll ever get. We've given you ready-made materials you can use to continue the conversation with these beautiful people.

*\*This is a Microsoft Excel file and will download to your computer when you click the link.*

### Why this matters:

- The Supporter Connection Survey sets you – and every team – up for success. It gives your bequest team real leads, your mid and major donor team the right people to build relationships with, and your regular giving team fresh prospects. It's a powerful way to start the year with clarity, focus, and insight straight from your donors.

## Quick Reference: Your Complete Table of Planning Power Up Tools

Strategy	<a href="#">Workshop: Building Your Fundraising Strategy with Jim Green</a>
	<a href="#">Template: Building Your Fundraising Strategy Template</a>
Data	<a href="#">Video: Your 3D Fundraising Sense Check</a>
	<a href="#">Template: Your 3D Fundraising Sense Check</a>
	<a href="#">Template: Donor Data Snapshot Tool</a>
Communications Calendar	<a href="#">Video: Your Communications Calendar</a>
	<a href="#">Your Handy Guide to a Great Donor Communications Calendar</a>
	<a href="#">Template: Communications Calendar Spreadsheet</a>
The Supporter Connection Survey	<a href="#">The Supporter Connection Survey Course</a>
	<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>