

Fundraising Strategy					
Team M	lembers				
Name Role					
	Principles				
Vision Statement					
Mission Statement					
Values Statement					



Financials						
			Annual Oper	rating Budget		
	Revenue Expenses Net Assets Comments					
Current	\$-	\$-	\$-			
Year 1	\$-	\$-	\$-			
Year 2	\$-	\$-	\$-			
Year 3	\$-	\$-	\$-			
Year 4	\$-	\$-	\$-			
Year 5	\$-	\$-	\$-			
			Capital	Projects	1	
	Projec	t Name		Project Budget	Target Year	Progress
				\$	-	
				\$	-	
				\$	-	
				\$	-	
				\$	-	
			Potentio	al Issues		
A	rea			Description		



	SWOT ANALYSIS					
	Inte	rnal				
Priority	Priority Strengths Priority Weaknesses					
Priority		rnal	Threats			
Priority	Opportunities	Priority	Inreals			



Priorities				
Focus Area	SWOT	Items		
	Key Performance Indicate	ors		
	Indicator	Current	Target	Delta



	Strategic Objectives				
Priority	Action	Detail	Outcome		
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
Executive Summary					



Creating Guiding Principles for Strategic Planning

Vision Statem	nent				
Steps to Create A Vision	Statement				
What is the main issue we want to address?					
How should this issue change?					
What will be the impact in the community or world?					
The organization's vision statement is:					
Principles of a Vision St					
Qualities	Meets the Criteria?				
Idealistic					
High Impact					
Future-oriented					
Inspiring					
Specific					
Focused	Focused				
Easy to Communicate (No Jargon)					

DONORVIEW

Creating Guiding Principles for Strategic Planning

Mission Statement				
Steps to Create A Mission Stateme	nt			
Why does your organizaiton exist?				
Who do you serve?				
How do you serve the clients?				
What is the outcome of your services?				
The organization's mission statement is:				
Principles of a MIssion Statemen				
Qualities	Meets the Criteria?			
Identifies the issue being addressed				
Identifies those being served				
Clearly outlines the services provided				
Present-oriented				
Achievable				
Easy to understand in simple terms - one or two sentences				
Motivating				



Creating Guiding Principles for Strategic Planning

Values Statement					
		Va	lue Words		
Abundance	Communication	Equality	Humor	Originality	Sincerity
Acceptance	Community	Ethical	Imagination	Passion	Skillfulness
Accomplishment	Compassion	Excellence	Impact	Patience	Speed
Accountability	Competence	Excitement	Independence	Patriotism	Spirituality
Accuracy	Confidence	Experience	Individuality	Peace	Stability
Achievement	Consistency	Expertise	Inner Harmony	Playfulness	Stewardship
Adaptability	Contentment	Exploration	Innovation	Poise	Strength
Adventure	Contribution	Fairness	Insightful	Positivity	Structure
Affection	Control	Faith	Inspiring	Power	Success
Alertness	Cooperation	Family	Integrity	Productivity	Support
Ambition	Courage	Fearless	Intelligence	Professionalism	Surprise
Assertiveness	Courtesy	Fidelity	Intuitive	Prosperity	Sustainability
Attentive	Creativity	Fitness	Јоу	Purpose	Teamwork
Authenticity	Credibility	Focus	Justice	Quality	Temperance
Awareness	Curiosity	Foresight	Kindness	Recognition	Thankful
Balance	Decisiveness	Forgiveness	Knowledge	Respect	Thorough
Beauty	Dedication	Freedom	Lawful	Responsibility	Thoughtful
Boldness	Dependability	Friendship	Leadership	Restraint	Timeliness
Bravery	Determination	Fun	Learning	Results-oriented	Tolerance
Brilliance	Devotion	Generosity	Logic	Rigor	Toughness
Calmness	Dignity	Giving	Love	Security	Traditional
Capable	Discipline	Goodness	Loyalty	Self-actualization	Tranquility
Careful	Diversity	Grace	Mastery	Self-development	Transparency
Caring	Drive	Gratitude	Maturity	Self-reliance	Trustworthy
Certainty	Education	Growth	Meaning	Self-respect	Understanding
Challenge	Efficiency	Happiness	Moderation	Selfless	Uniqueness
Charity	Empathy	Hard Work	Motivation	Sensitivity	Unity
Cleanliness	Endurance	Harmony	Obedience	Serenity	Vision
Clear	Energy	Health	Openness	Service	Vitality
Clever	Enjoyment	Honesty	Optimism	Sharing	Welcoming
Comfort	Enthusiasm	Honor	Order	Silence	Winning
Commitment	Environment	Humility	Organization	Simplicity	Wisdom

DONORVIEW

Creating Guiding Principles for Strategic Planning

Values Statement

Steps to Create a Values Statement

What values do you need to successfully reach your vision?

What values do you need to implement your mission?

What culture do you wish your organization to exemplify?

What values are important to your clients, donors, and staff?

The organization's value statement is:

Principles of a Values Statement				
Qualities	Meets the Criteria?			
Values are easily identified and exemplified by leadership				
Values are relevant to day to day operations				
Values impact client experiences				
Values resonate with donors				
Values are easy to understand and support vision & mission				



INTERNAL SWOT ANALYSIS					
		STRENGTHS			
First					
Why?					
Final 1st					
Ideas to leverage this s	strength:				
Ease	Cost	Impact	Alignment	Total/Priority	
Luse	2031	inpaci	Aliginitieni	0	
Second				0	
Why?					
Final 2nd					
Ideas to leverage this s	strength:				
Ease	Cost	Impact	Alignment	Total/Priority	
				0	
Third					
Why?	Final 3rd				
Ideas to leverage this strength:					
Ease	Cost	Impact	Alignment	Total/Priority	
				0	
				, i i i i i i i i i i i i i i i i i i i	



|--|

		STRENGTHS			
Fourth					
Why?					
Final 4th					
Ideas to leverage this	strength:				
Ease	Cost	Impact	Alignment	Total/Priority	
				0	
Fifth					
Why?					
Final 5th					
Ideas to leverage this	strength:				
Ease	Cost	Impact	Alignment	Total/Priority	
				0	
Sixth					
Why?					
Final 6th					
Ideas to leverage this strength:					
Ease	Cost	Impact	Alignment	Total/Priority	
				0	



WEAKNESSES								
First								
Why?								
Why?								
Why?								
Why?								
Why?								
Final 1st								
ldeas to ad	dress this w	eakness:						
Ea	se	Cost	Impact	Alignment	Total/Priority			
					0			
Second								
Why?								
Why?								
Why?								
Why?								
Why?								
Final 2nd								
ldeas to ad	dress this w	eakness:						
Ea	se	Cost	Impact	Alignment	Total/Priority			
					0			
Third								
Why?								
Why?								
Why?								
Why?								
Why?								
Final 3rd								
Ideas to address this weakness:								
Ea	se	Cost	Impact	Alignment	Total/Priority			
					0			

		WEAKNESSES							
Fourth									
Why?									
Why?									
Why?									
Why?									
Why?									
Final 4th									
Ideas to address this w	eakness:								
Ease	Cost	Impact	Alignment	Total/Priority					
				0					
Fifth									
Why?									
Why?									
Why?									
Why?									
Why?									
Final 5th									
Ideas to address this w	eakness:								
	1								
Ease	Cost	Impact	Alignment	Total/Priority					
				0					
Sixth									
Why?									
Why?									
	Why?								
Why?									
Why?									
Final 6th Ideas to address this weakness:									
ideas to adaress inis weakness:									
Ease	Cost	Impact	Alignment	Total/Priority					
		inpuci		0					
4	1			U					



OPPORTUNITIES									
First									
Why?									
Why?									
Why?									
Why?									
Why?									
Final 1st									
Ideas to take advanta	ge of this opportunity:								
Ease	Cost	Impact	Alignment	Total/Priority					
				0					
Second									
Why?									
Why?									
Why?									
Why?									
Why?									
Final 2nd									
Ideas to take advanta	ge of this opportunity:								
Ease	Cost	Impact	Alignment	Total/Priority					
				0					
Third									
Why?									
Why?									
Why?									
Why?	Why?								
Why?									
Final 3rd									
Ideas to take advantage of this opportunity:									
Ease	Cost	Impact	Alignment	Total/Priority					
				0					

EXTERNAL SWOT ANALYSIS

OPPORTUNITIES									
E a curble									
Fourth									
Why?									
Why?									
Why?									
Why?									
Why? Final 4th									
Ideas to take advanta	ae of this opportunity:								
	ge of his opportunity.								
Ease	Cost	Impact	Alignment	Total/Priority					
			,	0					
Fifth				, i i i i i i i i i i i i i i i i i i i					
Why?									
Why?									
Why?									
Why?									
Why?									
Final 5th									
Ideas to take advanta	ge of this opportunity:								
Ease	Cost	Impact	Alignment	Total/Priority					
				0					
Sixth									
Why?									
Why?									
Why?									
Why?									
Why?									
Final 6th									
Ideas to take advantage of this opportunity:									
Ease	Cost	Impact	Alignment	Total/Priority					
				0					



EXTERNAL SWOT ANALYSIS								
			THREATS					
First								
Why?								
Why?								
Why?								
Why?								
Why?								
Final 1st								
Ideas to mit	ligate this th	reat:						
Eas	se	Cost	Impact	Alignment	Total/Priority			
					0			
Second								
Why?								
Why?								
Why?								
Why?								
Why?								
Final 2nd								
Ideas to mit	tigate this th	reat:						
Eas	se	Cost	Impact	Alignment	Total/Priority			
					0			
Third								
Why?								
Why?								
Why?								
Why?								
Why?								
	Final 3rd							
Ideas to mitigate this threat:								
					1			
Eas	se	Cost	Impact	Alignment	Total/Priority			
					0			



THREATS								
Fourth								
Why?								
Why?								
Why?								
Why?								
Why?								
Final 4th								
Ideas to mitigate this th	nreat:							
Ease	Cost	Impact	Alignment	Total/Priority				
				0				
Fifth								
Why?								
Why?								
Why?								
Why?								
Why?								
Final 5th								
Ideas to mitigate this th	nreat:							
Ease	Cost	Impact	Alignment	Total/Priority				
				0				
Sixth								
Why?								
Why?								
Why?								
Why?	y?							
Why?								
Final 6th								
Ideas to mitigate this threat:								
Ease	Cost	Impact	Alignment	Total/Priority				
				0				



STRATEGIC OBJECTIVES

Financial Impact: Revenue generation or cost reduction/avoidance

Operations Impact: More efficient activities or better delivery of service

Personnel Impact: Improves culture, communication, leadership, or education of staff

Social Impact: Improves ability to serve clients - directly moving towards vision

Risk Factor: Level of effort, scope, criticality of activies affected, or potential for unexpected outcome

	OBJECTIVE 1						
ACTION	DETAIL			OUTCOME			
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority	
				0		0	
Revenue Impact	\$ -	Expenses Impact	\$ -	Net Budget Change	\$	-	
			OBJECTIVE 2				
ACTION		DETAIL			OUTCOME		
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority	
				0		0	
Revenue Impact	\$-	Expenses Impact	\$-	Net Budget Change	\$	-	
			OBJECTIVE 3				
ACTION		DETAIL		OUTCOME			
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority	
				0		0	
Revenue Impact	\$ -	Expenses Impact	\$ -	Net Budget Change	\$	-	

Strategic Objectives Worksheet

	STRATEGIC OBJECTIVES								
	OBJECTIVE 4								
ACTION	DETAIL				OUTCOME				
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority			
				0		0			
Revenue Impact	\$ -	Expenses Impact	\$ -	Net Budget Change	\$	-			
	_		OBJECTIVE 5						
ACTION		DETAIL			OUTCOME				
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority			
				0		0			
Revenue Impact	\$-	Expenses Impact	\$-	Net Budget Change	\$	-			
			OBJECTIVE 6						
ACTION		DETAIL			OUTCOME				
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority			
				0		0			
Revenue Impact	\$ -	Expenses Impact	\$ -	Net Budget Change	\$	-			
			OBJECTIVE 7	,					
ACTION		DETAIL			OUTCOME				
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority			
				0		0			
Revenue Impact	\$ -	Expenses Impact	\$ -	Net Budget Change	\$	-			

Strategic Objectives Worksheet

STRATEGIC OBJECTIVES									
			OBJECTIVE 8	}					
ACTION		DETAIL		OUTCOME					
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority			
				0		0			
Revenue Impact	\$-	Expenses Impact	\$-	Net Budget Change	\$	-			
	_		OBJECTIVE 9						
ACTION		DETAIL			OUTCOME				
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority			
				0		0			
Revenue Impact	\$ -	Expenses Impact	\$-	Net Budget Change	\$	-			
		(OBJECTIVE 1	D					
ACTION		DETAIL			OUTCOME				
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority			
				0		0			
Revenue Impact	\$ -	Expenses Impact	\$ -	Net Budget Change	\$	-			
		(OBJECTIVE 1	1					
ACTION		DETAIL			OUTCOME				
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority			
				0		0			
Revenue Impact	\$ -	Expenses Impact	\$ -	Net Budget Change	\$	-			

Strategic Objectives Worksheet

STRATEGIC OBJECTIVES									
		(OBJECTIVE 1	2					
ACTION		DETAIL		OUTCOME					
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority			
				0		0			
Revenue Impact	\$-	Expenses Impact	\$-	Net Budget Change	\$	-			
	_	(OBJECTIVE 1	3					
ACTION		DETAIL			OUTCOME				
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority			
				0		0			
Revenue Impact	\$ -	Expenses Impact	\$-	Net Budget Change	\$	-			
		(OBJECTIVE 1	4					
ACTION		DETAIL			OUTCOME				
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority			
				0		0			
Revenue Impact	\$ -	Expenses Impact	\$ -	Net Budget Change	\$	-			
		(OBJECTIVE 1	5					
ACTION		DETAIL			OUTCOME				
Financial	Operations	Personnel	Social	Total	Risk	Strategic Priority			
				0		0			
Revenue Impact	\$ -	Expenses Impact	\$ -	Net Budget Change	\$	-			

Annual Fundraising Plan

Fundraising Plan									
YEAR GOALS									
Impac	t Goal								
			Overall Fundra	ising Goals					
Oper	ating	\$	-	Capital	\$	-			
			Annual KPI	Targets					
	Objective		Implementation	of Objectives					
Month	Method		Activi	ty	Responsible	Date			
				-					
	Objective								
Month	Method		Activi	ty	Responsible	Date			
	Objective								
Month	Method		Activi	ity	Responsible	Date			





	Objective			
Month	Method	Activity Resp	onsible	Date
	Objective			
Month	Method	Activity Resp	onsible	Date
	Objective			
Month	Method	Activity Resp	onsible	Date
	Objective			
Month	Method	Activity Resp	onsible	Date
	Objective			
Month	Method	Activity Resp	onsible	Date

2	DONORVIEW
Annual F	undraising Plan

		Rev	enue	Sources				
			Oper	ating				
Source	Constituents	Curre Rever		Percent		ew enue	New Percent	New Expenses
Annual Gifts	Individuals	\$	-	#DIV/0!	\$	_	#DIV/0!	\$ -
Special Appeals	Individuals	\$	-	#DIV/0!	\$	-	#DIV/0!	\$ -
Major Gifts	Individuals	\$	-	#DIV/0!	\$	-	#DIV/0!	\$ -
Online Giving	Individuals	\$	-	#DIV/0!	\$	-	#DIV/0!	\$ -
P2P Campaigns	Individuals	\$	-	#DIV/0!	\$	-	#DIV/0!	\$ -
Membership Dues	Individuals	\$	-	#DIV/0!	\$	-	#DIV/0!	\$ -
Planned Giving	Individuals	\$	-	#DIV/0!	\$	-	#DIV/0!	\$ -
Corporate Sponsorship	Corporate	\$	-	#DIV/0!	\$	-	#DIV/0!	\$ -
Event Sponsorships	Corporate	\$	-	#DIV/0!	\$	-	#DIV/0!	\$ -
Event Sales	Individuals	\$	-	#DIV/0!	\$	-	#DIV/0!	\$ -
Grants	Foundations	\$	-	#DIV/0!	\$	-	#DIV/0!	\$ -
Service Fees	Clients	\$	-	#DIV/0!	\$	-	#DIV/0!	\$ -
Other	Other	\$	-	#DIV/0!	\$	-	#DIV/0!	\$ -
	TOTAL	\$	-		\$	-		\$ -
			Cap	oital				
	Project Name					ject Iget	Amount Raised	Amount Needed
					\$	-	\$-	\$ -
Funding Sou	rce	Pro	ojectec	l Amount	Targe	t Date		
		\$		-			1	
		\$		-				
		\$		-				
		\$		-				
		\$		-				
	Project Name					ject Iget	Amount Raised	Amount Needed
					\$	-	\$-	\$-
Funding Sou	rce	Pro	ojectec	l Amount	Targe	t Date		
		\$		-				
		\$		-				
		\$		-			1	
		\$		-				
		\$		-			1	

Annual Fundraising Plan

	Capital			
Project Name		Project Budget	Amount Raised	Amount Needed
		\$ -	\$-	\$-
Funding Source	Projected Amount	Target Date		
	\$-			
	\$ -			
	\$ -			
	\$ -			
	\$-			
Project Name		Project Budget	Amount Raised	Amount Needed
		\$-	\$-	\$-
Funding Source	Projected Amount	Target Date		
	\$ -			
	\$ -			
	\$ -			
	\$-			
	\$-			
Project Name		Project Budget	Amount Raised	Amount Needed
		\$-	\$-	\$-
Funding Source	Projected Amount	Target Date		
	\$			
	\$ -			
	\$			
	\$-			
	\$-			
Project Name		Project Budget	Amount Raised	Amount Needed
		\$-	\$-	\$-
Funding Source	Projected Amount	Target Date		
	\$			
	\$-			
	\$-			
	\$-			
	\$ -			



		Action Plan		
		Annual Gifts		
Month	Method	Activity	Responsible	Date
		Special Appeals		
	Number Sent	Target Response Rate	Average Gift	
Month	Method	Activity	Responsible	Date
		Online Giving		
#	of Campaigns	Impressions	Average Gift	
	Clicks	Cost per Click		
Month	Method	Activity	Responsible	Date
		Peer to Peer Campaigns		
Nur	nber of Teams	Number of Fundraisers	Average Gift	
Nun	nber of Donors	Target		
Month	Method	Activity	Responsible	Date



			Planned	Giving			
Numbe	er of Committee	I Planned Gifts		Asks		Response Rate	
Month	Method		Activ	/ity		Responsible	Date
			Membe	erships			
To	otal # Members		Ν	lew Members		Renewal Rate	
Month	Method		Activ	vity		Responsible	Date
			Corporate Sp	oonsorships			
Το	otal # Sponsors			New Sponsors		Renewal Rate	
Month	Method		Activ	/ity		Responsible	Date
			Corporate	Sponsors			
Compar	ny Name	Target Ask	Respor	nsible	Proj	ect	Target Date
		\$-					
		\$-					
		\$-					
		\$-					
		\$-					
		\$-					
		\$-					
		\$-					
		\$-					
		\$-					
		\$-					



		Grants		
Month	Method	Activity	Responsible	Date
		Grant Applications		
Found	dation	Project	Ask	Due Date
			\$ -	
			\$-	
			\$-	
			\$ -	
		 	\$-	
			\$ -	
			\$-	
			\$-	
			\$ -	
			\$-	
			\$ -	
		Events		
	Attendees	Return Attendees	Revenue	
Do	nor Conversion	Sponsorships	Expenses	
Month	Method	Activity	Responsible	Date



			Majo	r Gifts			
Month	Method		Act	ivity		Responsible	Date
			Giving I				
	Gift A	mount	Number	r of Gifts		·total	
					\$	-	
					\$	-	
					\$	-	
					\$ \$	-	
					⊅ \$	-	
					\$	-	
					\$	-	
				Grand Total		-	
			Major				
Donor	Name	Target Ask	Responsible	Proj	ject	Stage	Date
Donor	Name	Target Ask \$-	1		ject	Stage	Date
Donor	Name		1		iect	Stage	Date
Donor	Name	\$-	1		ject	Stage	Date
Donor	Name	\$ - \$ -	1		ject	Stage	Date
Donor	Name	\$ - \$ - \$ -	1		iect	Stage	Date
Donor	Name	\$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ -	1		ject	Stage	Date
Donor	Name	\$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ -	1		ject	Stage	Date
Donor	Name	\$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ -	1		ject	Stage	Date
Donor	Name	\$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ -	1		iect	Stage	Date
Donor	Name	\$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ - \$ -	1		ject	Stage	Date
Donor	Name	\$ - \$ -	1		ject	Stage	Date
Donor	Name	\$ - \$ -	1			Stage	Date
Donor	Name	\$ - \$ -	1		ject	Stage	Date
Donor	Name	\$ - \$ -	1		ject	Stage	Date
Donor	Name	\$ - \$ -	1		ject	Stage	Date
Donor	Name	\$ - \$ -	1		ject	Stage	Date

Annual Fundraising Plan Calendar

Calendar						
Month	Method	Activity	Responsible	Date		

Annual Fundraising Plan Calendar

Calendar				
Month	Method	Activity	Responsible	Date