

Fundraising Strategy Planning Worksheets

Fundraising Strategy**Team Members**

Name	Role

Guiding Principles**Vision Statement****Mission Statement****Values Statement**

Fundraising Strategy Planning Worksheets

Financials				
Annual Operating Budget				
	Revenue	Expenses	Net Assets	Comments
Current	\$ -	\$ -	\$ -	
Year 1	\$ -	\$ -	\$ -	
Year 2	\$ -	\$ -	\$ -	
Year 3	\$ -	\$ -	\$ -	
Year 4	\$ -	\$ -	\$ -	
Year 5	\$ -	\$ -	\$ -	
Capital Projects				
Project Name	Project Budget	Target Year	Progress	
	\$ -			
	\$ -			
	\$ -			
	\$ -			
	\$ -			
Potential Issues				
Area	Description			

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SWOT ANALYSIS			
Internal			
Priority	Strengths	Priority	Weaknesses
External			
Priority	Opportunities	Priority	Threats

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Priorities			
Focus Area	SWOT Items		
Key Performance Indicators			
Indicator	Current	Target	Delta

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

Fundraising Strategy Planning Worksheets

Fundraising Plan					
YEAR GOALS					
Impact Goal					
Overall Fundraising Goals					
Operating	\$	-	Capital	\$	-
Annual KPI Targets					
Implementation of Objectives					
Objective					
Month	Method	Activity	Responsible	Date	
Objective					
Month	Method	Activity	Responsible	Date	
Objective					
Month	Method	Activity	Responsible	Date	

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Objective				
Month	Method	Activity	Responsible	Date
Objective				
Month	Method	Activity	Responsible	Date
Objective				
Month	Method	Activity	Responsible	Date
Objective				
Month	Method	Activity	Responsible	Date
Objective				
Month	Method	Activity	Responsible	Date

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Revenue Sources						
Operating						
Source	Constituents	Current Revenue	Percent	New Revenue	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	\$ -		\$ -		\$ -
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				
	\$ -					
	\$ -					
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	\$ -					

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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		
	\$ -			
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	\$ -			
	\$ -			
	\$ -			
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		
	\$ -			
	\$ -			
	\$ -			
	\$ -			
	\$ -			

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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				
Number of Teams		Number of Fundraisers		Average Gift
Number of Donors		Target		
Month	Method	Activity	Responsible	Date

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Planned Giving						
Number of Committed Planned Gifts			Asks		Response Rate	
Month	Method	Activity			Responsible	Date
Memberships						
Total # Members			New Members		Renewal Rate	
Month	Method	Activity			Responsible	Date
Corporate Sponsorships						
Total # Sponsors			New Sponsors		Renewal Rate	
Month	Method	Activity			Responsible	Date
Corporate Sponsors						
Company Name	Target Ask	Responsible	Project	Target Date		
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Grants				
Month	Method	Activity	Responsible	Date
Grant Applications				
Foundation	Project	Ask	Due Date	
		\$ -		
		\$ -		
		\$ -		
		\$ -		
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Events				
Attendees		Return Attendees		Revenue
Donor Conversion		Sponsorships		Expenses
Month	Method	Activity	Responsible	Date

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Major Gifts					
Month	Method	Activity	Responsible	Date	
Giving Pyramid					
	Gift Amount	Number of Gifts	Sub-total		
			\$ -		
			\$ -		
			\$ -		
			\$ -		
			\$ -		
			\$ -		
			\$ -		
			\$ -		
			\$ -		
			\$ -		
	Grand Total			\$ -	
Major Donors					
Donor Name	Target Ask	Responsible	Project	Stage	Date
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Fundraising Strategy Planning Worksheets

Calendar				
Month	Method	Activity	Responsible	Date