

## Creating an Annual Fundraising Plan

by Priscilla Hung

*My organization's strategic fundraising goals are (consider non-monetary goals that are key to building a successful donor program, eg, strengthening teamwork in fundraising, increasing staff time for individual donor work, increasing number of in-person visits with major donors, etc.):*

1.

2.

3.

<i>Information that will help inform our fundraising plan</i>	<i>Have</i>	<i>Need</i>	<i>Not Applicable</i>
Last fiscal year's income and expense			
This fiscal year's budget			
Last year's fundraising plan			
Cash flow projections			
Fundraising assessment			
Grant proposal calendar			

People who need to be involved in the plan:

<i>Name/Groups</i>	<i>Decider</i>	<i>Accountable</i>	<i>Responsible</i>	<i>Consulted</i>	<i>Informed</i>

*We are going to keep the plan dynamic and useful by:*

1.

2.

# Strategy Planning Guide

Strategy:

Acquisition     
  Retention     
  Upgrading

Audience:

Number of people are in this audience:

Goals: \$ \_\_\_\_\_ Other: \_\_\_\_\_

# of gifts \_\_\_\_\_

% response rate \_\_\_\_\_

Gift Range Chart

Gift amount	Donors needed	Prospects Needed	Total amount
<b>Total</b>			

Tasks & Timeline:

**Fundraising Plan Sample:**

<b>Individual Donors</b> \$100,000	Major Donor Campaign	\$15,000 from 20 renewed major donors	1. Prep campaign materials, donor list, and board members 2. Send renewal letters to current and letters announcing campaign to prospects 3. Call all to set up meetings 4. Hold solicitation meetings 5. Have all gifts secured	ED, DD, board chair ED, DD, board	March April	None \$100
	All current major donors, all current donors giving at least \$250	\$10,000 from 20 upgraded donors		ED, board ED, board ED, board	April May-June June	None \$100 for food/mileage None
	Membership Renewals All current members	\$10,000 from 500 renewed members	1. Prep letter and member list 2. Send renewal letters to all 3. Hold member phonebank 4. Have all gifts secured	DD, Organizer for all	August September October November	None \$500 \$250 None

<b>Category</b>	<b>Strategy &amp; Audience</b>	<b>Goals</b>	<b>Steps</b>	<b>Who</b>	<b>When</b>	<b>Cost</b>

