

## Annual Fundraising Plan Worksheet

### STEP 1: What We Know

Vision: \_\_\_\_\_

Mission: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Values: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

SWOT Analysis: Strengths, Weaknesses, Opportunities, Threats

S	W
O	T

Current Fundraising Activities: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## STEP 2: What We Can Improve

**Analyze current strategies** - Name some current tactics used in your organization and identify their strategic purpose. Keep in mind tactics can have more than one strategic purpose.

Fundraising Tactic	Acquisition	Retention	Upgrade
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

### Special Event Analysis

Event Name:
Number of years event has been held:
Benefits: Revenue, new donors, awareness, volunteer appreciation, donor connection, branding
Costs: Expenses, staff and volunteer time, fatigue, vendors, wrong target audience

**Resources Available:** List available resources for fundraising, including staff, board, volunteers, fundraising budget (if you know it)

_____
_____
_____

### **STEP 3: Where We're Going**

**Develop Annual Fundraising Goals** – Using the information gathering in steps 1 & 2, start to identify strategic goals for your annual fundraising plan. These goals should be challenging but achievable. Be as specific as possible and include measurements where appropriate.

Examples:

Goal 1. Secure 100% participation and a 25% increase in donations from board members

Goal 2. Raise 25% more than last year at the annual fundraiser

**Development Diversity** – Be sure to diversity your development efforts to avoid heavy dependency on one source of income. Consider some type of goal in each of the following areas:

Individual donors:

Corporate gifts:

Grant income:

Special events:

Marketing:

Board and Volunteers:

Development infrastructure:

Earned income:

## STEP 4: How We'll Do It

Determine Objectives to Reach Goals – Break down each goal into objectives. Objectives are the big things you need to do in order to accomplish your goal.

Example:

Goal 1. Raise 25% more than last year at our annual fundraiser.

- a) Improve attendance by sending out Save the Date postcard and asking board members to host a table
- b) Add 5 members to the planning committee
- c) Recruit 2 more Gold sponsors, 4 more Silver sponsors, and 6 more Bronze sponsors
- d) Include Young Professionals Only post-party
- e) Hire an auction company to assist with check-in and check-out so the lines are shorter

Goal 1. \_\_\_\_\_

Objectives:

- a) \_\_\_\_\_
- b) \_\_\_\_\_
- c) \_\_\_\_\_
- d) \_\_\_\_\_
- e) \_\_\_\_\_

Goal 2. \_\_\_\_\_

Objectives:

- a) \_\_\_\_\_
- b) \_\_\_\_\_
- c) \_\_\_\_\_
- d) \_\_\_\_\_
- e) \_\_\_\_\_

Repeat this process with each goal in your plan.

## STEP 5: Who Will Do It and When

**Assign Responsibility** – Now that a detailed outline of what needs to be accomplished has been completed, the next step involves identification of who is responsible. Each objective should ultimately be assigned a responsible party and a deadline. Of course, each objective may involve multiple action steps which may be accomplished by a team of individuals, but identifying one responsible person for each objective will help with completion.

Example:

Goal 1. Secure 100% participation and a 25% increase in donations from board members

Objective:	Responsible Party:	Due:
Thank board members individually for their commitment and previous donations	Executive Director	June 15
Ask all board members to make a personal donation to the organization, and to commit to doing so each year	Board President	1Q
Update board member job description to include some financial contribution as an expectation and requirement	Development Director	August 30
Recruit two additional board members who can add value and provide cushion in the event an existing board member has to step down	Nominating Committee Chair	2Q

Goal 1. \_\_\_\_\_

Objective:	Responsible Party:	Due:

Remember, this worksheet was designed to get you started and take you through all the steps of an Annual Fundraising Plan. When you're back at the office, I suggest going through each step more thoroughly and gathering feedback from key individuals. Write down the information you gather into one document that you can refer to as your annual fundraising plan.

## STEP 6: Implementation and Evaluation

I find one way to ensure the plan is used and implemented is to create a two page document that is easy to view and update. I like to call this your **FAST (Fundraising Action Steps) Report**. Page one is an executive summary of steps 1-4 listed above, highlighting the most significant findings. Page two is a breakdown of objectives based on due date:

- THIS month –with the most detail, list objectives that need to be addressed right away
- 3 months – list objectives that need to be addressed sometime in the next 3 months
- 12 months – list the remaining objectives that will be completed in the next year

Review this FAST report monthly, and as you complete items, move objectives up. This gives you a quick view of what you need to be doing now, and what is around the corner. It also helps you to realize you can't do all of it today. There may be another way that works better for you. Like transferring goals and objectives into a sharable spreadsheet. Each objective can be given a line with the responsible party, deadline identified, and date completed (as well as other helpful information).

Another way to do this is to transfer goals and action steps into a shared spreadsheet, which can serve as an updatable “to-do” list. Each action step can be given a line with the responsible party, deadline identified, and date completed, as well as other information deemed helpful.

These actions will also make it easier to complete an updated annual fundraising plan for the following year when the time comes. Having a written plan with measurable goals will allow for a conversation specific to what was accomplished and what wasn't, providing groundwork for your next annual fundraising plan.

*This Fund Development Plan Outline was created by Cindy Grubenhoff of In the Know, LLC. She has worked with non-profit organizations as a volunteer, staff member or board member for more than 20 years and now serves the sector as a Fundraising Strategist. For additional information about her background or other organizations she has worked with, please visit her web site: [www.InTheKnowLLC.com](http://www.InTheKnowLLC.com).*

**In the Know, LLC** offers an effective and affordable way for non-profits to meet their fundraising goals. Cindy Grubenhoff can serve as your Strategic Fundraising Coach, train your board members on fundraising, or facilitate a strategic planning process. When struggles within an organization stem from a lack of fundraising experience and/or a lack of time to complete fundraising tasks, In the Know, LLC can become part of the solution.

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