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| Organization’s Fundraising Plan | January 1  2021 | |
| This Fundraising Plan lays out the specific goals and action steps to raise money for Organization during the FY 2018-2019. Prepared by the Fundraising Committee. | | How (Organization) Will Raise $5,000 |

Presented By:



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## Current Assessment

Where are you right now? How many donors do you have? What is the amount that has been given (in the current year)? Have you done any fundraising? What worked? Why? What didn't? Why?

## Identify Your Assets

Think about Board members with connections. Supporters with connections. Do you have great name recognition? What does your organization have going for it that you can leverage in your fundraising efforts?

## Targets, Strategies, Goals and Action Steps

**Target 1: Fundraising: $**

Strategy 1:

Action Step 1:

Action Step 2:

Action Step 3:

## Key Milestones

|  |  |
| --- | --- |
| **Milestone** | **Due Date** |
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Strategy 2:

Action Step 1:

Action Step 2:

Action Step 3:

## Key Milestones

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| **Milestone** | **Due Date** |
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Strategy 3:

Action Step 1:

Action Step 2:

Action Step 3:

## Key Milestones

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| --- | --- |
| **Milestone** | **Due Date** |
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**Target 2: Existing Donors:**

Strategy 1:

Action Step 1:

Action Step 2:

Action Step 3:

## Key Milestones

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| --- | --- |
| **Milestone** | **Due Date** |
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Strategy 2:

Action Step 1:

Action Step 2:

Action Step 3:

## Key Milestones

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| **Milestone** | **Due Date** |
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Strategy 3:

Action Step 1:

Action Step 2:

Action Step 3:

## Key Milestones

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| **Milestone** | **Due Date** |
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**Target 3: New Donors:**

Strategy 1:

Action Step 1:

Action Step 2:

Action Step 3:

## Key Milestones

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| --- | --- |
| **Milestone** | **Due Date** |
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Strategy 2:

Action Step 1:

Action Step 2:

Action Step 3:

## Key Milestones

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| --- | --- |
| **Milestone** | **Due Date** |
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Strategy 3:

Action Step 1:

Action Step 2:

Action Step 3:

## Key Milestones

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| --- | --- |
| **Milestone** | **Due Date** |
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**Budget**

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| --- | --- | --- |
| **Activity/Item** | **Projected Cost** | **Actual Cost** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| **Total:** |  |  |

## Monitor Plan

* How will you monitor your progress? What milestones will you need? Combine a calendar and Step 6 here.

## Refine Plan

* As you go through your year, make sure you add a Right, Wrong, Missing, and Confusing report for your activities. This report will help you refine your activities the following year. How will you revisit your plan to make changes? What system will you have for those changes?

# Appendix

## SMART Goal Worksheet

**Initial Goal** *(Write the goal you have in mind)*:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**1. Specific** *(What do you want to accomplish? Who needs to be included? When do you want to do this? Why is this a goal?)*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2. Measurable** *(How can you measure progress and know if you’ve successfully met your goal?)*:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**3. Achievable** *(Do you have the skills required to achieve the goal? If not, can you obtain them? What is the motivation for this goal? Is the amount of effort required on par with what the goal will achieve?)*:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**4. Relevant** *(Why am I setting this goal now? Is it aligned with overall objectives?)*:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**5. Time-bound** *(What’s the deadline and is it realistic?)*:

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**S.M.A.R.T. Goal** *(Review what you have written, and craft a new goal statement based on what the answers to the questions above have revealed):*

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## Right, Wrong, Missing, Confusing Report

Right

What did we do right? What were the positives?

Wrong

What could we have done better?

Missing

What were we missing this time? What ideas did we have to improve next time?

Confusing

What was confusing? Where did we misstep?