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# Fundraising Planning Worksheet

## *A Tool for Creating Your Annual Fundraising Plan*

BY STEPHANIE ROTH, MIMI HO AND PRISCILLA HUNG

**A**lthough fall isn't the start of most organization's fiscal years, perhaps as a remnant of our school-year schedules, it is a time when many of us gear up after summer holidays — often with renewed energy — for the busy fall fundraising season. One task facing those of us with fiscal years beginning on January 1st is the preparation of our annual fundraising plan.

This article presents a systematic way of creating an annual fundraising plan for your organization. The focus of this process (like the focus of the *Grassroots Fundraising Journal*) is on strategies for building a base of individual donors in order to create a reliable and repeatable source of income.

The six-step planning process this worksheet takes you through will help you create a plan that is based on the realities of your organization's funding base, infrastructure, and fundraising team. We recommend you include both board and staff in creating your plans, along with anyone else who is key to implementing the plan. When the people who are expected to carry out the

fundraising activities have participated in developing the plan, their commitment to it will be greater, boosting your chance of fundraising success.

Before calling together everyone you want to involve in creating the details, however, go through the steps here and gather whatever preliminary information will be needed to complete the plan. Then schedule a meeting of all the people who will be key to carrying it out, sending them a copy of the following worksheet pages with the information you have gathered.

You'll see that Step 1 assumes you've already developed your budget for the coming year, or at least a draft that will be completed once you've figured out exactly how much money you can realistically raise.

It takes some time to think through a fundraising plan in this amount of detail, but once you've done this planning, all your fundraising tasks are clear and ready to be implemented. **GFJ**

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PRISCILLA HUNG & STEPHANIE ROTH ARE CO-DIRECTORS OF GIFT. MIMI HO IS PROGRAM DIRECTOR OF THE ASIAN PACIFIC ENVIRONMENTAL NETWORK.

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### STEP 1: GATHER THE NUMBERS

A. What are your projected total expenses for the coming year? . . . . . \$ \_\_\_\_\_

B. How much income, in total, is already committed toward your expenses? (Include only support that is already promised — individual donor pledges that have been made as well as government, corporate, or foundation grants that you are assured of) . . . . . \$ \_\_\_\_\_

C. Subtract "B" from "A" for total amount to be raised: . . . . . \$ \_\_\_\_\_

D. Fill out the following chart with your results from last year's fundraising activities, your current year-to-date figures, and projections for the coming year. There will likely be some parts of the chart that you'll leave blank at this stage in your planning process until you've completed more of this worksheet and can come back to them. The "sources" listed are examples only. Add ones that are relevant to your organization, such as house parties, online appeals, and so on. In the "expense" column for each activity, include in the cost of raising the money not only materials and other expenses but also staff time if possible.

**Fundraising activities, current year-to-date figures, and projections for the coming year:**

| <b>SOURCE</b>              | <b>LAST YEAR'S INCOME</b> | <b>LAST YEAR'S EXPENSE</b> | <b>CURRENT YEAR'S INCOME</b> | <b>CURRENT YEAR'S EXPENSE</b> | <b>NEXT YEAR'S INCOME</b> | <b>NEXT YEAR'S EXPENSE</b> |
|----------------------------|---------------------------|----------------------------|------------------------------|-------------------------------|---------------------------|----------------------------|
| <b>Individual donors</b>   |                           |                            |                              |                               |                           |                            |
| <b>Total</b>               |                           |                            |                              |                               |                           |                            |
| • Membership dues          |                           |                            |                              |                               |                           |                            |
| • Events                   |                           |                            |                              |                               |                           |                            |
| • Major Gifts              |                           |                            |                              |                               |                           |                            |
| • Mail solicitation        |                           |                            |                              |                               |                           |                            |
| • Other:                   |                           |                            |                              |                               |                           |                            |
| <b>Sales/earned income</b> |                           |                            |                              |                               |                           |                            |
| <b>Other sources:</b>      |                           |                            |                              |                               |                           |                            |
| • Government               |                           |                            |                              |                               |                           |                            |
| • Foundations              |                           |                            |                              |                               |                           |                            |
| • Corporations             |                           |                            |                              |                               |                           |                            |
| <b>TOTALS</b>              |                           |                            |                              |                               |                           |                            |

## STEP 2: ANALYZE PAST FUNDRAISING EFFORTS

(Use separate sheets of paper for the following questions for each source.)

- For each of the sources of income in the chart in Step 1, note briefly what has worked well to bring in money that you want to do again.
- What hasn't worked? How can you improve or modify these strategies to make them work?
- What are new opportunities coming up that you want to take advantage of, such as a special anniversary, a large organizing campaign, a new executive director?

(If you want to do a more detailed evaluation of your past fundraising efforts, including rate of response, what worked, and what should change, see "Evaluating Your Individual Donor Program" by Stephanie Roth in *Grassroots Fundraising Journal*, Vol. 20 #6, (Nov-Dec 2001), available at [www.grassrootsfundraising.org](http://www.grassrootsfundraising.org).)

## STEP 3: DETERMINE YOUR AVAILABLE RESOURCES

Resources for fundraising include the people who will be involved in carrying out various fundraising tasks as well as money you'll need to spend on staff time and materials. The expenses were included in Step 1. The following chart will help you brainstorm who you can recruit to your fundraising team.

| <b>WHO?</b>  | <b>HOW MANY?</b> | <b>WHAT COULD THEY DO?</b> |
|--|------------------|----------------------------|
| Board members  |                  |                            |
| Staff (including program staff)                                    |                  |                            |
| Volunteers (including former board and staff, members, supporters) |                  |                            |
| Who else?  |                  |                            |
|  |                  |                            |
|  |                  |                            |

If your organization's budget-setting process has identified how much you plan to spend on fundraising, put that amount here as another resource you have available:

\$ \_\_\_\_\_

## STEP 4: STRATEGIES — WHAT WILL YOU DO?

Now think about the fundraising strategies you'll use to build support from individual donors — and in some cases, from small businesses or corporations — from the point of view of getting new donors, renewing current donors, and upgrading current donors.

**Acquire new donors** — List all the activities you will engage in to bring in new donors, such as direct mail appeals, e-mail outreach, house parties and other events, and individual donor asks:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Renew current donors** — List the activities you'll engage in to ask your current supporters to give again. Typically, these include mail appeals, e-mail solicitations, and follow-up phone calls. They also include personal solicitation for larger gifts. Special events are also activities that donors often come to year after year.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Upgrade current donors** — Getting donors to consider larger gifts usually requires a more personal approach. The size of a major gift depends on your donor base. For a group with few or no donors, a major gift might be \$100. For a group with several hundred donors or more who give varying amounts, \$250, \$500, or even \$1,000 may be the threshold for a major gift.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## STEP 5: HAMMER OUT THE DETAILS

For each fundraising strategy that you plan to use, fill out a separate page with the following information:

**Strategy:** \_\_\_\_\_

Projected income (gross):           \$ \_\_\_\_\_  
 Total cost (use worksheet below):   \$ \_\_\_\_\_  
 Net income:                               \$ \_\_\_\_\_

Other goals that this strategy will meet (such as get new donors, generate publicity, involve board members in fundraising): \_\_\_\_\_

Number of staff and volunteers needed to carry out this strategy: \_\_\_\_\_

### Expenses to complete this strategy:

| EXPENSE                | \$ AMOUNT | NOTES |
|------------------------|-----------|-------|
| Staff time             |           |       |
| Consultant/ Services   |           |       |
| Design                 |           |       |
| Printing               |           |       |
| Postage                |           |       |
| Travel /Transportation |           |       |
| Food                   |           |       |
| Other:                 |           |       |
| Other:                 |           |       |
| <b>TOTAL</b>           |           |       |

**Activities / Steps to complete this strategy:**

| DATE | TASK(S) | WHO |
|------|---------|-----|
|      |         |     |
|      |         |     |
|      |         |     |
|      |         |     |
|      |         |     |
|      |         |     |
|      |         |     |
|      |         |     |
|      |         |     |
|      |         |     |

## STEP 6: PUT IT ALL TOGETHER

Finally, you can pull together all your fundraising planning in one chart that will show what fundraising activities you are doing, how much you intend to raise, from whom, when, who will do what, and how much it will cost. The following worksheet starts with a couple of sample activities to give you an idea of how to fill it out.

| STRATEGY                   | GOALS<br>(dollar amount and response) | TARGET AUDIENCE                     | DESCRIPTION  | WHEN                     | WHO  | COST   |           |
|----------------------------|---------------------------------------|-------------------------------------|--|--------------------------|--|--|-----------|
| House Parties (total of 3) | \$3,000<br>45 new donors              | Friends and family of board members | Small events in homes of board members (or other supporters) | March, May, October      | <b>Staff:</b> Help recruit hosts, help create invitations, thank yous, logistical support<br><b>Board:</b> Host part, invite own contacts, provide refreshments            | \$200 per party                                |           |
| Major Gift Campaign        | \$20,000                              | Current donors, \$100 & up          | Personal solicitation: phone or in-person                    | October 15 – November 30 | <b>Staff:</b> Prepare materials, identify prospects, draft letter, conduct solicitations<br><b>Board &amp; other volunteers:</b> Identify prospects, conduct solicitations | <i>Minimal:</i> some postage and meeting costs |           |
|                            |                                       |                                     |  |                          |  |  |           |
|                            |                                       |                                     |  |                          |  |  |           |
|                            |                                       |                                     |  |                          |  |  |           |
|                            |                                       |                                     |  |                          |  |  |           |
|                            |                                       |                                     |  |                          |  |  |           |
|                            |                                       |                                     |  |                          |  |  |           |
|                            |                                       |                                     |  |                          |  |  |           |
| <b>TOTAL INCOME:</b>       | <b>\$</b>                             |                                     |  |                          |  | <b>TOTAL EXPENSES:</b>                         | <b>\$</b> |