
Fundraising Planning Worksheet

A Tool for Creating Your Annual Fundraising Plan

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Although 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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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.