

Fundraising Planning Checklist

It's great that you are thinking about planning for the upcoming year, but you may also be wondering, "What's the point, things are changing so quickly!" A properly developed and executed fundraising plan not only provides guidance for development activities it also helps your team identify and secure diverse resources, and ensures that your board and staff are on the same page and committed to fundraising.

Creating a fundraising plan is not difficult. In 6 easy steps, you can have a fundraising plan designed and ready to go.

Let's get started!

☐ STEP 1. Identify Your Fundraising Planning Team

To create a plan with buy-in from your team, you need full participation. This will look differently for everyone, but your team may include members of your fundraising committee, leadership team, key volunteers, and/or other staff who have a good understanding of fundraising needs. A good-sized planning team should have between 4-6 people.

Who will be on your planning team?

- ☐ **Board (2-3 people):**
- ☐ **Staff (2-3 people):**
- ☐ **Volunteers (1-2 optional):**
- ☐ **You:**

☐ STEP 2. Set a Realistic Fundraising Goal

Now that you have a fundraising team set up, it is time to set your goal. It is important to remember that your goal should not be set by how much money you "need to come up with," but an amount that is realistic to achieve. How much do you need to raise this year? What is a realistic goal based on past results? Do you have staff capacity and other resources in place to achieve this goal? Is your team in agreement on the goal amount?

- ☐ **GOAL \$** _____

☐ STEP 3. Developing Successful Strategies

Now the fun part!

You and your team get to decide strategies and set income projections. This is a great time to think about what level of fundraising is needed; Bare Bones, Reasonable, or Ideal. Which fundraising strategies do you plan to use and how much do you expect to raise? What is reasonable to expect in the coming year given your staff capacity, fundraising trends, and the size of your prospect list?

Strategy	Income Projection	Cost Projection	Staff Hours
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

☐ STEP 4. Assigning Tasks to Your Team

You have a great team of folks who helped you to develop a fundraising plan, now it is time to identify the people who can help you implement it. What available resources do you have access to? Do you need help from partners, outside consultants, other allies from outside the organization?

Make sure you set clear expectations with these folks. You can do that by identifying staff, board members, volunteers, or outsiders. Make sure to set hard deadlines. Check back on a quarterly or monthly basis and celebrate those wins.

☐ STEP 5. Create a Living Calendar

Creating a calendar is a great way to make sure everyone knows what fundraising activities are taking place. Include events, mailing, proposal deadlines, etc.

- ☐ **Create a month-by-month calendar**
- ☐ **Make calendar available for everyone to see in real-time**

☐ STEP 6. Year-End Rinse and Repeat

Congratulations! You made it to the end of your budget year, and hopefully, you experienced some successes. By the time you get to this point, you should already be updating your plan in preparation for the next year.

Final Thoughts

Is creating a fundraising plan really this simple? Yes! Remember, planning doesn't have to be hard or take a lot of time, but it does require some serious thought. A good fundraising plan is a roadmap to success and shows you how to allocate your precious resources of time and money. It keeps you out of crisis mode and helps you control the flow of work in your office. When you have a good plan in place, you should never wonder what you need to work on during the day because your plan will guide you.