

Fundraising Plan Template

XYZ's Fundraising Plan

Fiscal Year: 2019

Date: 6/28/2019

Drafted by: _____

Approved by: _____

*Note: The goal categories are hypothetical, for illustration only.
Adopt goals, strategies and actions that make sense for your organization at this time. Be realistic!*

TREC Fund Development Resource

STRATEGY	GOAL	FINANCIAL GOAL	KEY ACTION STEPS	WHO	WHEN	STAFF TIME	TOTAL STAFF HRS	NON-STAFF COSTS
Foundation Grants	<i>Secure at least \$100K in foundation renewals</i>	\$100,000	1. Submit reports to all current foundation supporters on time. reports within 2 weeks.	Helen	May	4-6 hrs	6	\$125
			2. Schedule calls with foundation officers to discuss.	Jen	Jan, June, Nov	4 hrs (each time)	12	\$0
			3. Discuss report and possible renewal.	Helen	Jan, June, Nov	2 hrs (each time)	6	\$0
			4. Submit all invited proposals by deadline.	Foundations	Apr, Aug	1-2 hrs (each time) for support	4	\$350
			5. Offer to meet to discuss each proposal submitted.	Jen	May, Sep	3-5 hrs (each time)	10	\$75
Total Staff Hours: 38		Total Non-Staff Costs: \$550		Financial Goal less non-staff costs: \$99,450				
New Member Acquisition	<i>50 New Members at an average value of \$22.50 per member</i>	\$1,125	1. Tabling at Earth Event	Staff/volunteer	May	1 hr	1	\$150
Total Staff Hours: 1		Total Non-Staff Costs: \$150		Financial Goal less non-staff costs: \$975				
Individual Membership Renewals	<i>200 renewals out of 280 (71%) at \$22.50 per member</i>	\$4,500	1. Do four (4) mailings to current members	Jen	Jan, Apr	6 hrs (each time)	12	\$800
			2. Call and follow up with unrenewed members	Board	Aug, Oct, Dec	7-9 hrs	9	\$100
Total Staff Hours: 21		Total Non-Staff Costs: \$900		Financial Goal less non-staff costs: \$3,600				
Major Donors	<i>Secure 11 new major donors (over \$500/year): \$12,000 1 @ \$5,000 4 @ \$1,000 6 @ \$500</i>	\$12,000	1. Research names of potential donors	Jen	Feb	6-8 hrs	8	\$250
			2. Send letters	Tom	Mar	8 hrs	8	\$325
			3. Call to schedule meetings	Jen	Apr	4 hrs	4	\$0
			4. In-person meetings	Chris & Board	May, Jun	4 hrs (each time)	8	\$150
Total Staff Hours: 28		Total Non-Staff Costs: \$725		Financial Goal less non-staff costs: \$11,275				

Overall Plan	Total Staff Hours: 88	Total Non-Staff Costs \$2,325	Financial Goal less non-staff costs: \$103,300
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