

Creating a Multi-Year Fundraising and Communications Plan

Purpose of This Guide

A fundraising and communications plan should not simply be a list of fundraising activities. It should be a roadmap for securing the resources needed to achieve the organization's strategic goals.

This guide walks your team through the process of creating a three-year plan that aligns fundraising, communications, revenue diversification, donor engagement, and organizational sustainability with the organization's strategic framework.

A team could work through this process over 4–6 planning sessions and emerge with both a completed three-year plan and a shared understanding of why each strategy was chosen. The process works best when it is treated as a collaborative planning effort, not as a document to be completed by one person alone. Each session should move the group from shared understanding to clear decisions, with time between meetings for smaller teams or individuals to gather data, draft recommendations, and test assumptions.

How to Use This Guide in a Planning Process

Begin by setting a clear planning container: the purpose of the process, the decisions that need to be made, the timeline for completing the plan, and who has decision-making authority. The planning team should agree up front on what the final product will include, such as three-year revenue goals, communications priorities, strategy by revenue stream, staffing and capacity implications, and a first-year implementation dashboard.

A useful approach is to assign each planning session a specific focus. For example, Session 1 might focus on strategic alignment, Session 2 on current revenue and donor data, Session 3 on revenue goals, Session 4 on communications and audience engagement, Session 5 on capacity and delegation, and Session 6 on final decisions and implementation. Between sessions, smaller work groups can complete analysis, draft recommendations, or bring back options for the full group to review.

Who Should Be Included

- **Executive Director or CEO:** Provides strategic direction, helps connect fundraising priorities to organizational goals, and participates in major donor and funder strategy.
- **Development or fundraising staff:** Lead revenue analysis, donor segmentation, strategy development, and implementation planning.

- **Communications staff:** Ensure that messaging, storytelling, audience engagement, and campaign communications are aligned with fundraising goals.
- **Finance staff:** Provide revenue history, budget projections, assumptions, and financial reality-checking.
- **Program leaders:** Clarify program priorities, future resource needs, impact stories, and the case for support.
- **Board chair and development committee members:** Offer governance perspective, help assess board role, and identify ways board members can support relationships and visibility.
- **Operations or data staff:** Help assess systems, data quality, donor records, reporting capacity, and workflow implications.

Not every person needs to attend every meeting. The core planning team should stay consistent, while others can be invited for specific conversations. For example, program leaders may be most important during strategic alignment and case-for-support conversations, while finance and operations may be most important during revenue goal-setting and capacity review.

How to Delegate the Planning Work

Work Area	Lead Role	Support Roles	Output
Strategic alignment	Executive Director or CEO	Program leaders, board chair, development lead	Clear list of strategic priorities and resource needs
Revenue and donor analysis	Development lead	Finance, data, communications	Revenue map, donor segments, trends, risks, and opportunities
Communications strategy	Communications lead	Development, program staff, executive leadership	Audience map, message framework, content priorities, communications calendar
Capacity assessment	Operations or senior staff lead	Development, communications, finance	Staffing, systems, workload, and consultant needs
Implementation dashboard	Development lead	Finance, communications, executive leadership	Quarterly tracking tool with goals, owners, timelines, and measures

Example of a Final Plan

A final three-year fundraising and communications plan does not need to be long, but it should be clear enough that staff and board members understand the goals, priorities, and division of responsibility. A completed plan might include the following sections:

- **Executive summary:** A one-page overview of the three-year direction, including the main revenue goals, communications priorities, and capacity implications.
- **Strategic alignment:** A summary of the organizational priorities the plan is designed to support.
- **Three-year revenue goals:** A table showing current revenue and projected goals for each revenue stream over three years.
- **Revenue stream strategies:** Brief strategies for foundations, individual giving, mid-level donors, major gifts, recurring gifts, legacy giving, fee-for-service, and endowment growth.
- **Communications strategy:** Priority audiences, core messages, content themes, and annual communications rhythm.
- **Capacity plan:** Staffing, systems, data, board engagement, and consultant support needed to implement the plan.
- **Year-one implementation plan:** A practical workplan with owners, timelines, key milestones, and quarterly measures.

For example, the final plan might state that over three years the organization will reduce dependence on foundation funding from 70 percent to 55 percent of total revenue, grow recurring giving from 75 to 250 monthly donors, launch a mid-level donor program, secure five new major gift commitments, and create a communications calendar that supports donor cultivation and stewardship throughout the year. The year-one workplan would then identify who owns each priority, what must happen each quarter, and what data will be reviewed to track progress.

The most important test of the final plan is whether it can guide action. If the plan clearly answers what the organization is trying to fund, which audiences it needs to engage, what strategies it will prioritize, who is responsible for moving the work forward, and how progress will be reviewed, it is ready to become a working management tool rather than a static document.

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Step 1: Start with Strategy, Not Fundraising

Before discussing fundraising goals, review the organization's strategic plan.

Fundraising exists to support strategy.

The team should understand:

- Strategic goals
- Desired outcomes
- Planned growth
- New initiatives
- Program investments
- Community commitments
- Equity goals
- Organizational capacity needs

Discussion Questions

What does the organization hope to accomplish in the next three years?

Which priorities require significant new investment?

What existing work must be sustained?

Where are opportunities for growth?

What risks or challenges could affect implementation?

Exercise

Create a table like this:

Strategic Priority	Desired Outcome	Resources Needed
Example: Expand training programs	Reach 500 participants annually	Additional staff, marketing, and technology

The completed table becomes the foundation for the fundraising plan.

Step 2: Understand Your Current Revenue Model

Review the last three years of fundraising and revenue data.

Map every source of revenue.

Revenue Categories

Foundation Support

Private foundations, family foundations, community foundations, government grants.

Small Individual Giving

Annual donors and grassroots supporters.

Mid-Level Giving

Donors giving meaningful annual gifts that warrant additional relationship-building.

Major Gifts

Transformational gifts requiring personalized cultivation.

Recurring Giving

Monthly or automatic sustaining gifts.

Legacy Giving

Bequests, beneficiary designations, and planned gifts.

Fee-for-Service Revenue

Mission-related earned income.

Endowment Gifts

Gifts designated to permanently strengthen organizational assets.

Exercise

Create a revenue map.

Revenue Source	Current Amount	% of Revenue	Trend
Foundations			
Small Individual Giving			
Mid-Level Giving			
Major Gifts			
Recurring Gifts			
Legacy Gifts			
Fee for Service			
Endowment Gifts			

Discussion Questions

Which revenue sources are growing?

Which are stagnant?

Where are we overly dependent?

Which sources have the most long-term potential?

What revenue is vulnerable?

Step 3: Create Three-Year Revenue Goals

Revenue goals should be realistic, measurable, and aligned with organizational growth.

Example Revenue Framework

Revenue Source	Current	Year 1	Year 2	Year 3
Foundations				
Small Individual Giving				
Mid-Level Giving				
Major Gifts				
Recurring Giving				
Legacy Giving				
Fee-for-Service				
Endowment Gifts				

Key Principle

Diversification matters.

The objective is to increase revenue AND resilience.

Step 4: Build Strategies for Each Revenue Stream

Foundation Support Strategy

Purpose

Maintain strong relationships while reducing over-reliance on institutional funding.

Questions

What percentage of revenue currently comes from foundations?

Are we dependent on a small number of funders?

How many multi-year grants do we have?

Potential Strategies

- Deepen relationships with current funders
- Pursue multi-year grants
- Expand national funder base
- Develop stronger impact reporting
- Create proactive cultivation plans

Metrics

- Renewal rate
- Proposal success rate
- Multi-year commitments secured
- Average grant size

Small Individual Giving Strategy

Purpose

Build a broad community of supporters.

Questions

How many donors give annually?

How many are first-time donors?

How many return year after year?

Potential Strategies

- Annual appeals
- Giving days
- Digital campaigns
- Peer-to-peer fundraising
- Volunteer engagement
- Story-driven communications

Metrics

- Number of donors
- Retention rate
- Average gift
- New donor acquisition

Mid-Level Giving Strategy

Purpose

Create a bridge between annual giving and major gifts.

Questions

Who gives consistently but has not received personalized attention?

What donor level signals readiness for deeper engagement?

Potential Strategies

- Personalized stewardship
- Small group gatherings
- Impact reports
- Leadership giving society

Metrics

- Number of mid-level donors
- Upgrade rate
- Retention rate
- Average gift growth

Major Gift Strategy

Purpose

Secure transformational support.

Questions

Who has the greatest affinity and capacity?

Which board members can assist with introductions?

What opportunities are most compelling?

Potential Strategies

- Portfolio management
- Individual cultivation plans
- Executive involvement
- Board engagement
- Major gift proposals

Metrics

- Qualified prospects

- Donor meetings
- Solicitations
- Closed gifts

Recurring Giving Strategy

Purpose

Build predictable, unrestricted revenue.

Questions

How easy is it to become a monthly donor?

How often do we promote recurring gifts?

Potential Strategies

- Monthly giving club
- Recurring donor campaigns
- Upgrade annual donors
- Recognition and stewardship programs

Metrics

- Number of recurring donors
- Annual recurring revenue
- Retention rate

Legacy Giving Strategy

Purpose

Build future organizational sustainability.

Questions

Do supporters understand planned giving options?

Can donors easily notify the organization of future commitments?

Potential Strategies

- Legacy society
- Planned giving materials
- Donor stories

Metrics

- Documented expectancies
- Legacy society members

- Estimated future value

Fee-for-Service Strategy

Purpose

Generate mission-aligned earned revenue.

Questions

What services generate demand?

What services generate margin?

What services align with mission?

Potential Strategies

- Pricing review
- Service packaging
- Marketing improvements
- Referral partnerships
- Client retention programs

Metrics

- Revenue
- Profitability
- Client retention
- New clients

Endowment Growth Strategy

Purpose

Strengthen long-term financial sustainability.

Questions

What role should the endowment play?

What is the long-term target size?

How will endowment growth be communicated?

Potential Strategies

Build Internal Infrastructure

- Spending policy
- Investment policy



- Gift acceptance policy
- Endowment case statement

Fundraising Strategies

- Major gifts
- Legacy gifts
- Endowment campaigns
- Challenge gifts
- Board leadership gifts

Metrics

- Endowment value
- New endowment gifts
- Planned gifts designated to endowment
- Endowment campaign progress

Step 5: Build a Communications Strategy

Define Communications Goals

Communications should support fundraising objectives.

Typical goals include:

- Increase visibility
- Build trust
- Demonstrate impact
- Deepen donor engagement
- Support fundraising campaigns
- Strengthen organizational reputation

Identify Key Audiences

List primary audiences.

Examples:

- Foundation funders
- Annual donors
- Mid-level donors
- Major donor prospects
- Recurring donors
- Legacy donors

- Fee-for-service customers
- Community partners
- Board members

Create a Content Strategy

Develop an annual communications calendar.

Recommended Content Mix

Content Type	Frequency
Impact stories	Monthly
Client stories	Monthly
Program results	Quarterly
Donor stories	Quarterly
Thought leadership	Quarterly
Endowment updates	Semi-annually
Annual report	Annually

Step 6: Assess Capacity

Evaluate Team Capacity

A strong plan considers people, systems, and time.

Review

Staff roles
Board involvement
Technology
CRM systems
Marketing tools
Data management

Discussion Questions

What are we currently doing that produces little value?
What work should be stopped?
What systems need improvement?
What skills need strengthening?

Step 7: Create a Three-Year Roadmap

Year One: Build Foundations

Focus on:

- Revenue analysis
- Donor segmentation
- Major gift pipeline
- Communications strategy
- Endowment infrastructure
- Data cleanup

Year Two: Accelerate Growth

Focus on:

- Major gifts
- Mid-level donor programs
- Monthly giving growth
- Fee-for-service expansion
- Planned giving launch

Year Three: Scale and Sustain

Focus on:

- Endowment growth
- Legacy giving maturity
- Donor retention
- Revenue diversification
- Long-term sustainability

Step 8: Develop an Implementation Dashboard

Review quarterly.

Revenue Metrics

Revenue by source

Progress to goal

Revenue diversification

Donor Metrics

Retention

Acquisition

Upgrade rates

Recurring donors

Major Gifts

Meetings

Solicitations

Closed gifts

Pipeline value

Endowment

Assets

New commitments

Legacy gifts

Communications

Email engagement

Website traffic

Content production

Conversion rates

Capacity

Staff workload

Board engagement

CRM health

Final Reflection Questions

Before approving the plan, ask:

Does every fundraising strategy support a strategic priority?

Does every communications activity support fundraising, mission impact, or stakeholder engagement?

Are our goals ambitious but achievable?

Do we have the capacity to execute this plan?

Will we be more financially resilient three years from now?

If the answer is yes, the plan is likely focused on what matters most: creating sustainable resources that allow the organization to fulfill its mission and strategic vision.