

Sample Fundraising Workplan

April 1, 2013 thru March 31, 2014

Total Fundraising Goal: \$XXX (sum of all your intermediate \$ goals below!)

Note: You will need to tailor the goals and mix of funding sources and strategies to your own organization's needs.

April May June July Aug Sept Oct Nov Dec Jan Feb Mar Comments

Goal: Ensure 100% Board Giving and Raise \$XXX

1. In-Person Asks

Ensure every board member agrees we are one of their favorite nonprofits

1. Type in your strategy here: for example, how will you set expectations of 100% board giving	shade in the month(s) here when this strategy will occur													
2. Type in additional strategies: e.g., how will you ask board members, in what ways, and how will you thank, etc.														

Goal: Grow our Major Gifts Program to \$XXX

1. Prospect Development

1. List all of your strategies for getting to know your prospects: think how you will reach new prospects and how you will reach current major donors to ensure they continue to feel connected and a part of your organization. Use one line for each strategy.	shade in the month(s) here when this strategy will occur												
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2. Background Work

1. List all of your "infrastructure needs" to carry out an effective major gifts program: think annual case for support, charts, graphs, stories, etc. Use one line for each strategy.	shade in the month(s) here when this strategy will be created												
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3. Events -- for Major Donors

1. List all of the events (from friendraising to fundraising) that you will host that will include major donors. Use one line for each event and be clear about the purpose and goal of each event.	shade in the month(s) here when these events will occur												
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4. Personal Asks with Major Donors

1. List all of your strategies for ensuring you have face-to-face meetings with your potential major donors. Use one line for each strategy.	shade in the month(s) here when this strategy will occur	
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5. Ongoing Recognition, Connection, and Thanks

Build a sense of "we" among our supporters - e.g., Together WE can make a difference

1. List out all of the communications tools you will use to help major donors see and feel their impact. Use one line for each outreach.	shade in the month(s) when you will release these communications	
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Goal: Grow Our Basic Membership to \$XXXX & inspire YYY supporters!

1. Direct Mail / Online --

Conserve/Retain Current Members (goal: XX% retention rate)

1. Type in your strategy here: for example, send an annual appeal letter	shade in the month(s) here when this strategy will occur													
2. List additional strategies: e.g., on-line outreach														
3. List additional strategies: e.g., reminders														
4. List additional strategies: recording gifts and sending thank you's.														
5. Continue list with any additional strategies for reaching out via direct mail/online														

Recapture Lapsers (those who have given before but not last year)

1. List your strategy here: for example, analyzing your database to understand who your lapsers are, etc.	shade in the month(s) here when this strategy will occur													
2. List additional strategies: e.g., what will you send them, etc.														
3. List additional strategies: recording gifts and sending thank you's.														
4. Continue list with any additional strategies for reaching out via direct mail/online														

Increase New Members (goal: XX new members)

1. List your strategy here: for example, how will you acquire new names?	shade in the month(s) here when this strategy will occur												
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	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Comments
2. List additional strategies: e.g., what will you send them, etc.													
3. List additional strategies: recording gifts and sending thank you's.													
4. Continue list with any additional strategies for reaching out via direct mail/online													

2. Membership Events

Host events to raise friends and a few funds

1. List out all of your events targeted at increasing awareness of your organization, mission, and impact. Use one line for each event.	shade in the month(s) here when these events will occur											
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3. Ongoing Recognition, Connection, and Thanks

Build a sense of "we" among our supporters - e.g., Together WE can make a difference

1. List out all of the communications tools you will use to help members see and feel their impact (think newsletters, annual reports, social media, etc.). Use one line for each outreach.	shade in the month(s) when you will release these communications											
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Goal: Host Fundraising Events that Raise \$XX

1. Host events that raise funds

1. List each event you will host throughout the year where the primary goal is to raise funds (think auctions, dinners, raffles, whatever you might do). Use one line for each event	shade in the month(s) here when these events will occur											
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Goal: Expand Business Support to more than YY Businesses and raise \$XX

1. List each of your strategies for reaching out to your business community: think face-to-face asks, event sponsorships, mailings, etc. Use one line for each strategy.	shade in the month(s) here when this strategy will occur											
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Goal: Secure Foundation Support of \$XX

<p>1. List each of your strategies for reaching out to foundations for support (think about what your mix of restricted versus unrestricted support is, how you will make contacts, etc.). Use one line for each strategy.</p>	<p>shade in the month(s) here when this strategy will occur (be sure to note proposal deadlines!)</p>	
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Goal: Secure Public Funding Support of \$XXX

<p>1. List each of your strategies for securing public funding support. Use one line for each strategy.</p>	<p>shade in the month(s) here when this strategy will occur (be sure to note proposal deadlines!)</p>	
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Goal: Expand Planned Giving Program with YY known planned gifts by year-end

<p>1. List all of your strategies for expanding/creating your planned giving program. Use one line for each strategy.</p>	<p>shade in the month(s) here when this strategy will occur</p>	
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Goal: Ensure we have an effective and fun fundraising program.

<p>1. List out the strategies and basic to-do's you will need to do this year to ensure you have a successful program (think volunteer recruitment and recognition, database upkeep or enhancement, reporting, etc.). Use one line for each strategy.</p>	<p>shade in the month(s) here when this strategy will occur</p>	
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