

# Strategic Annual Fundraising Plan

## How to Sustain and Grow Your Organization

*Contact  
me to do  
this  
together!*

### STEP 1: What We Know

Vision: \_\_\_\_\_

Mission: \_\_\_\_\_

Values: \_\_\_\_\_

SWOT Analysis: Strengths, Weaknesses, Opportunities, Threats (*or connect to your strategic plan*)

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O	T

### STEP 2: What We Can Improve

**Analyze current strategies** - Name some current tactics used in your organization and identify their strategic purpose. Keep in mind tactics can have more than one strategic purpose.

Fundraising Tactic	Acquisition	Retention	Upgrade
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

## Special Event Analysis

Event Name:
Number of years event has been held:
Benefits: Revenue, new donors, awareness, volunteer appreciation, donor connection, branding
Costs: Expenses, staff and volunteer time, fatigue, vendors, wrong target audience

**Resources Available:** List available resources for fundraising, including staff, board, volunteers, fundraising budget (if you know it).

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## STEP 3: Where We're Going

**Develop Annual Fundraising Goals** – Using the information gathered in steps 1 & 2, start to identify strategic goals for your annual fundraising plan. These goals should be challenging but achievable. Be as specific as possible and include measurements where appropriate.

I won't lie, this is the hard part! Deciding how you should be spending your time and which tactics are the best bang for your buck depends on many factors and isn't the same for every organization.

**Development Diversity** – Be sure to diversify your development efforts to avoid heavy dependency on one source of income. The most sustainable organizations rely primarily on gifts from individuals.

In addition to setting goals specific to individual donors/major gifts, foundations and grants, planned giving or bequests and corporate donations, consider creating some goals in other areas that impact fundraising success: events, marketing, board/volunteers, development infrastructure, and even possibly earned income.

Consider some type of goal in each of the following areas:

Individual donors/Major Gifts:	Marketing:
Corporate gifts:	Board and Volunteers:
Grant income:	Development infrastructure:
Special events:	Other (Planned Giving, Earned income, etc):

## STEP 4: How We'll Do It

Determine Objectives to Reach Goals – Break down each goal into objectives. Objectives are the big things you need to do in order to accomplish your goal.

Goal \_\_\_\_\_

Objectives:

- a) \_\_\_\_\_
- b) \_\_\_\_\_
- c) \_\_\_\_\_
- d) \_\_\_\_\_
- e) \_\_\_\_\_

**Repeat this process with each goal in your plan.**

## STEP 5: Who Will Do It and When

**Assign Responsibility** – Now that a detailed outline of what needs to be accomplished has been completed, the next step involves identification of who is responsible. Each objective should ultimately be assigned a responsible party and a deadline. Of course, each objective may involve multiple action steps which may be accomplished by a team of individuals, but **identifying one responsible person for each objective will help with completion.**

Remember, this worksheet was designed to get you started and take you through all the steps of a Strategic Annual Fundraising Plan. When you're back at the office, **I suggest going through each step more thoroughly and gathering feedback from key individuals.** Write down the information you gather into one document that you can refer to as your annual fundraising plan.

## STEP 6: Implement the Plan

Make sure you do whatever it takes to set yourself up for success as you work to implement the plan. There is no point in going through this process if the plan is going to sit on the shelf and go unused.

I find one way to ensure the plan is used and implemented is to transfer goals and action steps into a **shared spreadsheet**, which can serve as an updatable “to-do” list. Each action step can be given a line with the responsible party, deadline identified, and date completed, as well as other information deemed helpful.

Another way to do this is to create a two-page document that is easy to view and update. I like to call this your **FAST (Fundraising**

**Action Steps) Report.** Page one is an executive summary of steps 1-4 listed above, highlighting the most significant findings. Page two is a breakdown of objectives based on due date. This gives you a quick view of what you need to be doing now, and what is around the corner.

These actions will make it easier to complete an updated annual fundraising plan for the following year when the time comes. Having a written plan with measurable goals will allow for a conversation specific to what was accomplished and what wasn't, providing groundwork for your next annual fundraising plan.

***Like what you see?** If this all sounds great, but you know some additional guidance would help, let me know! My signature coaching service will walk you through this process, help you develop goals that make sense, and make sure your implementation stays on track. Contact me today and we can start this process together.*

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