



Nonprofit Fundraising Plan Template

1. Executive Summary

- Briefly outline the purpose of the fundraising plan.
- Summarize the fundraising goals, strategies, and timeline.
- Include key metrics to track success.

2. Fundraising Goals

- **Total Fundraising Goal:** \$[Amount]
- **Breakdown of Goals:**
 - General Donations: \$[Amount]
 - Major Gifts: \$[Amount]
 - Grants: \$[Amount]
 - Events: \$[Amount]
 - Corporate Sponsorships: \$[Amount]
 - Other (e.g., merchandise sales, planned giving): \$[Amount]
- **SMART Goals:** Ensure goals are Specific, Measurable, Achievable, Relevant, and Time-bound.

3. Target Audience

- **Donor Segments:**
 - Individual Donors (existing, lapsed, and new prospects)
 - Major Donors
 - Corporate Partners
 - Foundations/Grant-making Institutions
 - Online Donors
- **Donor Persona:** Develop profiles that describe typical donors, including demographics, interests, and giving behaviors.

4. Fundraising Strategies & Tactics

- **Individual Giving:**
 - Direct mail campaigns
 - Online fundraising campaigns (social media, email)
 - Peer-to-peer fundraising initiatives



- **Major Gifts:**
 - One-on-one donor meetings
 - Personalized giving proposals
 - Donor stewardship and relationship-building activities
- **Grants & Foundations:**
 - Identify potential grant opportunities
 - Develop a grant application calendar
 - Build relationships with grant-makers
- **Events:**
 - Signature annual events (galas, auctions, charity runs)
 - Smaller, recurring events (fundraising dinners, online webinars)
 - Virtual fundraising events
- **Corporate Partnerships:**
 - Sponsorships for events and programs
 - Employee matching gift programs
 - Corporate volunteer initiatives
- **Planned Giving:**
 - Promote legacy giving (wills, trusts, bequests)
 - Develop marketing materials targeting potential legacy donors

5. Timeline

- **Yearly Calendar:** Identify key dates for fundraising activities (campaign launches, events, grant deadlines).
- **Monthly/Quarterly Milestones:** Break down activities by months or quarters to ensure progress tracking.

Month	Activity/Event	Responsible Party	Goal/Target
January	Launch annual campaign	Development Team	\$10,000

6. Budget

- **Fundraising Expenses:**
 - Marketing and communication costs
 - Event expenses (venue, catering, promotional materials)
 - Grant-writing fees



- Software and technology (donor management systems)
- Staffing and administrative costs
- **Projected Revenue vs. Expenses:**
 - Calculate the ROI (Return on Investment) for each fundraising activity.

7. Roles & Responsibilities

- **Board Members:** [Specific fundraising roles, e.g., donor outreach, event hosting]
- **Development Team:** [Tasks, e.g., campaign execution, grant writing]
- **Volunteers:** [Support roles, e.g., event staffing, social media promotion]

8. Donor Stewardship & Retention Plan

- **Thank-You Process:** Outline how donations will be acknowledged and appreciated.
- **Regular Updates:** Plan for keeping donors informed (e.g., newsletters, social media, annual reports).
- **Recognition Opportunities:** Highlight how major donors will be recognized (naming opportunities, donor walls, VIP events).

9. Evaluation & Metrics

- **Key Performance Indicators (KPIs):**
 - Total funds raised vs. goal
 - Number of new donors acquired
 - Donor retention rate
 - Cost per dollar raised (CPDR)
 - Event attendance and revenue
- **Reporting:** Schedule regular check-ins (monthly, quarterly) to assess progress and adjust strategies as needed.

10. Appendix

- **Donor Database Overview:** A brief description of the donor management system.
- **Grant Calendar:** List of grants with deadlines and application status.
- **Sample Marketing Materials:** Examples of brochures, social media posts, and email templates.