# The fundraising planning process:
# A checklist

**1. Planning team.** All successful plans require participation and buy-in from throughout the organization.

Who will lead the process?

    **Board** (2-3 people) _____

    **Staff** (2-3) _____

    **Other volunteers** (optional; 1-2) _____

**2. Case statement.** Have you defined – clearly – why donors would want to give to your group?

Do you have a written case statement, or the components of the case? Rate your case materials:

       *Excellent*           *Poor*
        5     4     3     2     1

**3. Goal.** How much money do you need to raise?

    Have you set an annual fundraising goal? **Yes / No / Don't know**    Goal $_____

**4. Strategies and sub-goals.** How much do you expect to raise from each fundraising strategy? How much will each strategy cost?

    Have you identified your mix of fundraising strategies?  **Yes / No / Don't know**
    (grants, major gifts, etc)

    List sub-goals below:

| **Strategy** | **Income goal** | **Cost** |
| --- | --- | --- |

**5. Workers.** Who's available to help *implement* these strategies? The more fundraisers you have, the more money you will raise. (If you're short on help, don't schedule more than you and your colleagues can accomplish.)  List all potential helpers:

| **Staff** | **Board** | **Volunteers** |
| --- | --- | --- |
| | | |

**6. Outside help.** Will you need support from peers, consultants, or other people outside the organization?

List allies who might assist with the planning process or give you feedback on your plan:

**7. Calendar.** To be useful, a fundraising plan must schedule – month by month – all fundraising activities: mailings, proposal deadlines, events, phone banks, etc. The calendar provides a reality check during the planning process: if any particular month looks too crowded, you'll need to reschedule or drop certain activities (and perhaps lower your fundraising goals accordingly.)

> Do you have a calendar that includes all fundraising activities throughout the year?
> **Yes / No / Don't know**

By creating it in large format and hanging it in a prominent place, this calendar:
- o Reminds everyone of upcoming deadlines.
- o Helps program staff to understand the value and variety of fundraising activities.
- o Serves as a buffer to protect the lead fundraiser: when staff or board ask you to take on new tasks, you can point to the calendar and say, "My month is already packed; let's see if we can work it into the plan next year."

> If you have a fundraising calendar, is it large enough for everyone to see and understand?
> **Yes / No / Don't know**

> Is it posted in a prominent place in the office?  **Yes / No / Don't know**

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