DEVELOPING A FUNDRAISING PLAN

A worksheet and templates to develop a simple fundraising plan for your project.

This tool will help you out to:

✓ IDENTIFY THE RESOURCES NEEDED TO MAKE YOUR PROJECT HAPPEN

✓ DEVELOP A SERIES OF GOAL-BASED FUNDRAISING ACTIVITIES

✓ HARNESS EFFORTS TO ENSURE THEY DELIVER YOUR FUNDRAISING GOALS

✓ KEEP YOUR ANNUAL FUNDRAISING FOCUSED AND ON TRACK

ABOUT THIS TOOL

Most changemaking projects will need money and other resources to get started, cover costs and achieve sustained impact.

Fundraising is the process of asking for the donations you will need to make your project happen. This includes donations from individuals, companies, and foundations. Donations that support supplies, marketing, and everyday expenses, from utilities to payroll.

Fundraising is more than just raising money though – it's about ensuring your project has all the resources it needs (money, people, services) to make an impact and be sustainable long-term. The more donations you receive, the greater the impact you can have and the more certain that the impact will be lasting.

A strong fundraising plan is the backbone of a successful project. Think about it like a treasure map that guides you to the exact activities that will bear the most fruit during the year.

You can use this worksheet and templates to get started on your fundraising plan. Your plan will keep you focused and on track, so you spend your time doing the things that matter to you and your community.

DEVELOPING YOUR FUNDRAISING PLAN

Take the following steps to build a simple annual fundraising plan. There's a series of templates provided to support each step.

1. DEFINE THE PROJECT NEED

Start by identifying what it will take to make your project happen (e.g. people, marketing, supplies, etc.). For each thing you need, think about what resources it entails and what type of donation is most relevant – money, skilled volunteer time, or some other in-kind donation. Use the Project Requirements template provided to itemise your needs and asks, and to identify the main fundraising goals for the project.

2. KEY ALLIES

Then brainstorm fundraising efforts that could contribute to hitting those goals. Start with your board fundraising goal and then think about the fundraising activities that can contribute to it. From submitting a launching a crowdfunding campaign, to securing a grant application from a foundation, to holding a fundraising event. The fundraising activities that are right for you will depend on the type of project, the fundraising goal, and the time and skills you have at your disposal.

You can work up detail on particular fundraising activities in the Fundraising Activity template provided. Consider the tasks involved, when these would need to be done, and who from your team would take responsibility. Also think about what it would cost to successfully complete the fundraising effort, detailing both the time and expenses you're likely to incur..

5. SOCIAL INNOVATION

As a team, agree the combination of fundraising activities required to address your project needs and deliver on your fundraising goals. You can put these activities together in the Fundraising Plan template provided. For each agreed fundraising activity, set out your goal or target, summarise the key tasks involved, who will take them on, and any due date and resources required.

Take time to review your plan as a whole. Taken together, will the fundraising activities deliver on your ambitions? Is the plan feasible given the time and resources available to you? Are there ways to simplify or strengthen your fundraising efforts?

5. SCHEDULE FUNDRAISING ACTIVITIES

Fundraising is not usually a one-off event, but likely an ongoing process to ensure your project has the right resources at the right time. Begin to think about scheduling your fundraising efforts throughout the year. What activities and commitments will be required early to get things started? What additional resources will you need to move to the next stage? How will you keep the project alive beyond the next year? You can use the Fundraising Calendar template to timeline your fundraising activities.

PROJECT REQUIREMENTS TEMPLATE

	1	2	3	4	5	6	7	8
PROJECT NEED								
CASH FUNDING REQUIRED								
VOLUNTEER TIME REQUIRED								
IN-KIND DONATIONS REQUIRED								

FUNDRAISING GOALS

FUNDRAISING ACTIVITY TEMPLATE

OVERALL FUNDRAISING GOAL	TARGET DATE

TARGET DELIVERABLES FROM THE FUNDRAISING ACTIVITY

Cash Funding:	Volunteer Time:	In-kind Donations:

ACTIONABLE TASKS TO DELIVER ON THE FUNDRAISING GOAL				RESOURCES REQUIRED TO COMPLETE FUNDRAISING ACTIVITY			
Fundraising Task	Due Date	Task Owner	Status	Expense	Amount	Team Input	Hours
				Total:		Total:	

FUNDRAISING PLAN TEMPLATE

FUNDRAISING ACTIVITY							
GOAL OR TARGET							
KEY TASKS							
TASK OWNER							
RESOURCE EXPENSES							
NEEDED TIME							

FUNDRAISING CALENDAR TEMPLATE

JANUARY	FEBUARY	MARCH	APRIL

MAY	JUNE	JULY	AUGUST

SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER

FURTHER INFORMATION

Thanks for taking the time to check out this guide.

Motivated to learn more? Social Shifters has put together a wide range of practical courses and resources to help you plan, start and grow your project idea.

Visit **socialshifters.co** to discover more or listen to **The Social Shifters Podcast** to hear incredible stories from young innovators from around the world!

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