Fundraising Plan Composition Checklist

- ☐ Print this checklist to help guide you through the process.
- ☐ Download the Simplified Fundraising Plan Template and open it on your computer.
- ☐ Enter your organization's name and the fiscal year for which the plan is being created for at the top.
- ☐ IMPORTANT: Skip the first section; we'll fill this in last.
- ☐ Input put all of the strategies that you will use to raise funds (e.g. fundraising events, mail appeals, face to face donor cultivation, etc.) in place of the [strategy] headers. Consult your funnels worksheet for help here. Copy and paste the blocks as needed if you need more.
- ☐ Make sure you included "Donor Stewardship" as a strategy – it has to be one!
- ☐ For each strategy, populate the rationale, plan, timetable, responsible parties, estimated expense and projected revenue blocks. Remember, this is a SIMPLIFIED fundraising plan so be brief. A sentence or two for each item will usually suffice.
- ☐ Now total the revenue from each section and populate the chart at the beginning of the plan.
- ☐ How does this compare with your fundraising goal? Can this be your fundraising goal? If it's too low, in which areas do you have the greatest potential for increasing revenue? How can you adjust the strategy to reach this goal?
- ☐ Continue this refinement process until the plan is where you need it to be from both a revenue and capacity perspective.
- ☐ Review the plan with @fundraiserchad during your one on one Q&A call.
- ☐ Make revisions based on feedback.
- ☐ Present the draft plan internally for feedback.
- ☐ Make revisions based on feedback.
- ☐ Plan is adopted by organization.
- ☐ Systematize the plan (remember this from week one?). Get the steps to bring this plan to life into your trusted personal productivity system.

productive FUNDRAISING