# Fundraising Operating Plan Template

The following is a template to create a fundraising operating plan for your Action Coalition. A suggested table of contents is included below that you can alter to fit your needs. Draw on the previously provided materials when completing your fundraising operating plan.

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# Fundraising Objectives

*Below, list your core objectives for your Action Coalition’s fundraising for the year, as well as supporting strategies. Examples of objectives may include the goal for total dollars raised, the goal of raising a certain amount through major gifts, or the goal of establishing a profitable fundraising event. This can also include non-numeric objectives such as forming and engaging a development committee or creating a leave-behind brochure based on your case messages. Add or subtract objectives and strategies as needed.*

**Objective 1:**

Strategies to achieve objective:

1.

2.

3.

**Objective 2:**

Strategies to achieve objective:

1.

2.

3.

**Objective 3:**

Strategies to achieve objective:

1.

2.

3.

**Objective 4:**

Strategies to achieve objective:

1.

2.

3.

# Fundraising Budget

*Note: This budget is meant to capture revenue and expenses specific to fundraising activity, rather than a comprehensive budget for the entire Action Coalition.*

|  |  |
| --- | --- |
|  | **Fiscal Year** |
| **REVENUE** |  |
| Contributed Income |  |
| Event Income |  |
| Other Income |  |
| In-Kind |  |
| **TOTAL** |  |
|  |  |
| **EXPENSES** |  |
| Personnel |  |
| Travel |  |
| Office Supplies |  |
| Event |  |
| Printing |  |
| Postage |  |
| Marketing |  |
| **TOTAL** |  |

# Fundraising Calendar

*A sample calendar template is below to help track all relationship management and fundraising activities for the fiscal year.*

|  |  |  |
| --- | --- | --- |
|  | **Activity** | **Point of Contact/ Responsible Party** |
| **January** |  |  |
| **February** |  |  |
| **March** |  |  |
| **April** |  |  |
| **May** |  |  |
| **June** |  |  |
| **July** |  |  |
| **August** |  |  |
| **September** |  |  |
| **October** |  |  |
| **November** |  |  |
| **December** |  |  |

# Implementation

*Use this section to provide more specific details or tools related to core areas of your fundraising. This might include, for example, a list of planned major gift solicitations for the year, a calendar of deadlines for foundation grant proposals or a detailed task list for a major fundraising event. Essentially, this area is intended to be a place where you can consolidate information for easy reference and updating throughout the year. The bold, blue headers are suggested sections, but tailor these as well to meet the needs of your Action Coalition’s program.*

**Individual Major Gift Solicitations**

*(include volunteers and others personally asked for a gift)*

**Institutional Major Gift Solicitations**

*(corporations/foundations)*

**Broad-based Individual Giving/Membership**

*(lower-level giving solicited through broad-based strategies, i.e. mail and email)*

**Events***(sponsorships, ticket sales)*

**Other Fundraising Strategies**

*(include anything that is not covered by the categories listed above)*