



# Fundraising Plan

*Plan the Work, Then Work the Plan - setting your ministry up for success*

## FUNDING STRATEGY BREAKDOWN

SOURCE		TYPE	PRIOR YEAR	CURRENT BUDGET	CURRENT ACTUAL
Annual Fundraiser		Sponsorships			
		Host Committee			
		Ticket Sales			
		Auction			
		Donations			
			SUBTOTAL	-	-
Campaigns		Major Gifts			
		Monthly Donors			
		Year End Giving			
		Secondary Event			
		Campaign #5			
Church Partnerships					
Grants					
Revenue Strategies		Membership Fees			
		Curriculum Sales			
		Strategy #3			
<b>TOTAL</b>			-	-	-

## HIGHEST IMPACT AREAS

CATEGORY	PRIOR YEAR	CURRENT BUDGET	CURRENT ACTUAL
Total Number of Major Sources			
Total Giving from Major Sources			
Total Number of NEW Major Sources			
Total Giving from NEW Major Sources			

# Major Donor Relationship Building

*It Takes a Village - how are you engaging your supporters in God's work?*

MOVES MANAGEMENT MATRIX



DONOR	Contact	Gift Sought	Gift Received	ASKED	INTEREST	Participation > Engagement > Ownership			NOTES
						Action #1	Action #2	Action #3	

\$0      \$0

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# FUNDRAISING STRATEGY

## Moves Management

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Moves management is a term used primarily with the non-profit sector in relationship to donor development. It refers to the process by which a prospective donor is moved from cultivation to solicitation. “**Moves**” are the actions an organization takes to bring in donors, establish relationships, and renew contributions.

### Moves Management Template

Purpose: This spreadsheet will allow you to do the following:

1. Enter the names of prospects, their affinity, stage, and product as determined in the moves management prioritizing grid (prioritizing grid.doc).
2. Enter the prospect's estimated capacity based on your prospect research, and the gift sought, determined by the evaluation committee.
3. Assign lead staff and a primary and secondary volunteer.
4. Enter the prospect's primary interest, as determined during cultivation activities.
5. Plan a series of moves across several months, leading up to an ask.

The spreadsheet has a **Prospect Grid** as the second tab, allowing you to enter this information and develop your individualized plan for each prospect:

We have also included an **Example tab** showing how information is to be entered.

# Major Donor Relationship Building

*It Takes a Village - how are you engaging your supporters in God's work?*



DONOR	GIFT Sought		INTEREST	Primary Contact	ASKED	Participation > Engagement > Ownership				NOTES
	Received	Requested				Action #1	Action #2	Action #3	Action #4	
Dick Jones	500,000	500,000	Building	Mehki	Asked		Call to invite to d Annual Dinner	Share building pla	Neighbor of Board Member	
William McKinley	200,000	200,000	Radio	Gerry	Asked	Meet with Radio	Call to invite to d Annual Dinner		Friend of Board Member	
Dina Wilson	200,000	200,000	Studio	Frank	Asked		Written dinner in Annual Dinner	Phone follow-up		
Aileen Ford	150,000	150,000	General support	Julie	Asked	Birthday card, 1/	Call to invite to d Annual Dinner			
Dudley Gale	100,000		Building	Frank	Pledged		Written dinner in Annual Dinner	Phone follow-up		
Jim Davis	75,000	75,000	General support	Taraji	Asked	Invite to lunch	Call to invite to d Annual Dinner		Friend of Founder	
Warren Smith	50,000	50,000	Car Talk	Gerry	Asked		Written dinner in Annual Dinner	Phone follow-up	Colleague of Staff Member	
Robert Frisbee	50,000	50,000	General support	Mehki	Asked		Written dinner in Annual Dinner	Phone follow-up		
Peter Stern	50,000	50,000	Nature	Gerry	Asked		Written dinner in Annual Dinner			
Herman Wouk	25,000	25,000	Nature	Frank	Asked	Meet with Outdo	Call to invite to d Annual Dinner			
Helen Washington	25,000	25,000	General support	Taraji	Asked		Written dinner in Annual Dinner	Phone follow-up		
Joan Roxie	25,000	25,000	General support	Gerry	Asked		Written dinner in Annual Dinner	Phone follow-up	Primary Volunteer	
Joseph Roberts	25,000	25,000	unknown	Frank	Asked		Written dinner in Annual Dinner	Phone follow-up		
Chris Smith	25,000	25,000	General support	Mehki	Asked		Written dinner in Annual Dinner	Phone follow-up		
Buz McLaughlin	10,000		General support	Frank			Call to invite to d Annual Dinner	Visit outreach coordinator?		
Alberta Wainright	10,000		Building	CEO	Pledged		Written dinner in Annual Dinner	Phone follow-up		
Michael Groves	10,000	10,000	Radio	CEO	Asked		Written dinner in Annual Dinner	Phone follow-up		
Duke Jones	10,000	10,000	Building	Gerry	Asked		Written dinner in Annual Dinner			
Lynn Alabaster	5,000		Nature	Taraji			Written dinner in Annual Dinner			
Will Thornburg	5,000		Building	Gerry			Written dinner in Annual Dinner			
	\$1,550,000	\$1,420,000								



# Key Performance Indicators

*Begin With the End in Mind - what specific activities make or break your goal?*

**GOAL: Increase fundraising by \$\_\_\_\_\_**

MAJOR SOURCES - new or increased	VALUE	TACTIC - what sets this apart from prior years?	RESOURCES - who do you need involved?



# Fundraising Calendar

*Teamwork Makes the Dream Work - how is your team pulling this off?*

	Fundraising Activity	Goal	Responsible	Status	Notes
January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					

# Grants & Foundations

*Ingiting the Vision - how are you inviting others into God's work?*



GRANT // FOUNDATION	DUE DATE	Gift sought	Received	INTEREST	Granting Cycle				NOTES
					Submit LOI	APPLIED	Thank You	Reporting	Website
			\$0	\$0					