



Complete Fundraising Plan

Organization name:

Mission (one sentence):

Fiscal year:

Annual fundraising goal: \$

Development team:

Plan owner:

Section 1: Revenue model

Start here. Before anything else, decide where your revenue is coming from and how much each stream is expected to contribute.

Stream	Last year's actual	This year's target	% of total goal	Risk level
Events	\$	\$	%	Low / Med / High
Peer-to-peer	\$	\$	%	Low / Med / High
Auctions / raffles	\$	\$	%	Low / Med / High

Recurring giving	\$	\$	%	Low / Med / High
Year-end appeal	\$	\$	%	Low / Med / High
Other	\$	\$	%	Low / Med / High
Total	\$	\$	100%	

Concentration check: Does any single stream exceed 50% of your total goal?

- If yes, identify your contingency if that stream underperforms by 30%:

Revenue notes (assumptions behind your targets, known variables, new streams being tested):

Section 2: Donor flow map

For every campaign in your plan, define what happens to a donor after they give. Leave no campaign without a next step.

Campaign	Donor entry	Immediate follow-up	Next campaign	Long-term
	action	(48hrs)	invitation	destination

New donor welcome sequence: What happens when someone gives for the first time?

- Day 1: _____
- Day 3–5: _____
- Day 14: _____
- Day 30: _____

Lapsed donor re-engagement: How will you reach donors who gave last year but haven't yet this year?

Section 3: Campaign system

Map your campaigns across the three layers. Every entry layer campaign should connect to a growth layer campaign, and every growth layer campaign should connect to a revenue layer campaign.

Campaign name	Layer	Campaign type	Stacked activities	Audience	Run dates	Handoff action
	Entry					
	Growth					

	Revenue					
	Revenue					

Sequence logic — write one sentence explaining how each campaign leads into the next:

- Campaign 1 → Campaign 2: _____
- Campaign 2 → Campaign 3: _____
- Campaign 3 → Campaign 4: _____

Section 4: Annual fundraising calendar

Month	Campaign	Revenue goal	Layer	Primary audience	Key tasks	Handoff
January		\$				
February		\$				
March		\$				
April		\$				
May		\$				
June		\$				

July		\$				
August		\$				
September		\$				
October		\$				
November		\$				
December		\$				

Quarterly revenue check:

- Q1 target: \$ _____ | Q2 target: \$ _____ | Q3 target: \$ _____ | Q4 target: \$ _____
- Is any single quarter carrying more than 50% of the annual goal?

Section 5: Campaign financial models

Complete one block per campaign before it is approved to run.

Campaign name:

- Campaign type:
- Run dates:
- Expected gross revenue: \$
- Platform / transaction fees: \$
- Prize or item costs: \$

- Promotion and design: \$
- Event or logistics costs: \$
- Estimated staff hours:
- **Total estimated costs:** \$
- **Projected net revenue:** \$
- Effort level: Low / Medium / High
- Approved to run: Yes / No / Pending

(Copy this block for each campaign in your plan.)

Section 6: Tracking and reporting

Complete this after every campaign closes.

Campaign name:

- Run dates:
- New donors acquired:
- Donors retained from previous campaign:
- Retention rate: %
- Conversion rate (visitors to donors): %
- Effort level (actual): Low / Medium / High
- What worked:
- What to change:
- Decision: Repeat / Modify / Remove

Annual review. Three questions to answer at year-end:

1. Which campaigns generated the strongest retention and should be scaled?
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2. Which campaigns are worth running again at the same level?

3. Which campaigns should be removed from next year's plan?

Resilience check

Before finalizing, answer this: if your single largest campaign underperforms by 30%, does the rest of the plan still hit a viable target?

- Largest campaign: _____ | Target: \$_____ | 30% shortfall: \$_____
- Remaining plan total without that shortfall: \$_____
- Is that still a viable year? Yes / No
- If not, which stream can absorb the gap?
