



## Last year's finances

<i>Source</i>	<i>Goal</i>	<i>Actual Raised</i>	<i>Costs</i>	<i>Actual Net Raised</i>	<i>What Went Well</i>	<i>Areas for Improvements</i>	<i>Action Steps</i>
Individual Donors	\$10,000	\$9,500	\$2,000	\$7,500	Holiday campaign, online giving	Direct mail campaign was too expensive	Revamp direct mail campaign
Major Donors							
Grants							
Corporate Sponsorships							

Other							

## Set goals

**My organization's main goal for this year is:**

The sub-goals that will help achieve the main goals are:

1. *Grow recurring gift program*
- 2.
- 3.

<i>Sub-Goal</i>	<i>Specific</i>	<i>Measurable</i>	<i>Attainable</i>	<i>Relatable</i>	<i>Time-based</i>
Grow recurring gift program	Increase the number of recurring donors	from 100 to 150	Yes - only need 50 more recurring donors	This will help grow consistent fundraising revenue	Deadline: by the end of the Q2


Plan fundraising activities

<i>Activity</i>	<i>Person Responsible</i>	<i>Timeline</i>	<i>Planned Outcome</i>	<i>Hours Required</i>	<i>Estimated Cost</i>	<i>Estimated Revenue</i>
Social media campaign	Jane Smith	January to April	Find new supporters, direct them to online giving page	2 hrs/week	\$100	\$2,000
Holiday campaign						
Quarterly newsletter						

Direct mail appeal						
Thank-you calls						
Fundraising event						
Stewardship event						

## Fundraising Calendar

<i>Month</i>	<i>Individual Donors</i>	<i>Major Donors</i>	<i>Grants</i>	<i>Corporate Sponsorships</i>	<i>Other</i>
<i>JANUARY</i>	- Update online donation page			-Outreach	
<i>FEBRUARY</i>			-Grant deadline #1		

<i>MARCH</i>		-Fundraising event			
<i>APRIL</i>	-Stewardship event			-Follow up	
<i>MAY</i>	-Direct mail appeal				
<i>JUNE</i>			-Grant deadline #2		
<i>JULY</i>				-Planning	
<i>AUGUST</i>					
<i>SEPTEMBER</i>	-Social media campaign	-Stewardship event			
<i>OCTOBER</i>					
<i>NOVEMBER</i>				-Stewardship	
<i>DECEMBER</i>	-Holiday campaign	-Holiday campaign			