



Fundraising Planning Calendar

Organization _____

Year _____

Total FR goal: \$ _____

This calendar works best if you reproduce it on a chalkboard, white board, or large pieces of paper taped to the wall. Adjust the spacing as needed; for example, if you write a lot of grant proposals, you will need more space to mark down application and reporting deadlines for all prospective funders. (Some groups include even more details: grant research, preliminary phone calls, trips to meet funders, etc.) Ideally, 3-5 people should prepare the first draft of this calendar, then share it with program staff and board.

Action steps: (Include person responsible)

Fundraising Strategy	\$ Annual Goal	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
1. Foundations							
2. Business, Civic Groups							
3. Government							
4. New Members							
5. Renewals							



Fundraising Strategy	\$ Goal	Month1	Month 2	Month 3	Month 4	Month 5	Month 6
6. Special Appeals							
7. Board Giving							
8. Major Donations							
9. Events							
10. Earned Income							
11. Interest							
12. Other							



Fundraising Planning Calendar (months 7-12)

Organization _____

Year _____

Total FR goal: \$ _____

Action steps by month: *(Include person responsible)*

Fundraising Strategy	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
1. Foundations						
2. Business, Civic Groups						
3. Government						
4. New Members						
5. Renewals						



Fundraising Strategy	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
6. Special Appeals						
7. Board Giving						
8. Major Donations						
9. Events						
10. Earned Income						
11. Interest						
12. Other						



Sample Fundraising Plan – 2004

Red River Watershed Association

Total 2004 Income: \$85,700

Total Fundraising Costs: \$10,400

Summary of 2004 Plan

Category	Income 2003	Income 2004	Cost
Foundations	\$45,000	\$50,000	\$2,500
Corporations	\$7,500	\$10,000	\$1,000
Special Events	\$6,130	\$10,000	\$2,000
New Members	2,000	\$3,500	\$3,500
Renewals	\$2,800	\$3,000	\$500
Special Appeal	0	\$1,200	\$200
Major Donors	\$2,000	\$4,000	\$400
Board Contributions	\$2,500	\$4,000	-0-
	67,930	\$85,700	\$10,400

1. Foundations

Income: \$50,000

Cost: \$2,500 (proposal writing services)

Who: Executive Director, with help from the board

What: Develop a good general operating support proposal and tailor it to the needs of each foundation; begin a series of foundation visits.

Name	Amt Requested	Project	Ddline	Chance	Forecast
Lazar	\$20,000	GOS	1/15/04	50%	\$10,000
Meyer	\$20,000	Monitoring	2/1/04	50%	\$10,000
Bullitt	\$15,000	Well testing	3/1/04	30%	\$ 5,000
Northwest Area	\$10,000	GOS	1/15/04	50%	\$ 5,000
Compton	\$15,000	Monitoring	none	30%	\$ 5,000
Flintridge	\$15,000	Well testing	none	30%	\$ 5,000
Harder	\$20,000	GOS	4/1/04	50%	\$10,000
Total	115,000				\$50,000



2. Corporate Donations

Income: \$10,000

Cost: \$1,000 (printing, mailing, services)

Who: Teresa, with board assistance

What: Prepare a corporate proposal and begin making visits as soon as possible.

Name	Amt Requested	Project	% Chance	Forecast
Starbucks	\$5,000	Education	50%	\$2,500
Patagonia	\$5,000	Monitoring Network	20%	\$1,000
REI	\$10,000	Monitoring Network	20%	\$2,000
Con. Alliance	\$25,000	Legal Project	20%	\$5,000
Total	45,000			\$10,500

3. Special Events

Income: \$10,000

Cost: \$2,000 (food, postage, printing, services)

Who: John, with assistance from other board members

What: Hold a spring party at the home of Beverly Jones with silent auction.

4. New Memberships,

Income: \$3,500

Cost: \$3,500 (postage, printing, list rental)

Who: Pat, with assistance from the board

What: One mailing, Jan-Mar, 04, to 7,000 names @1.5% response=100 new members@ \$35=\$3,500

Mailing List	# Names	Cost	Contact Person	Telephone/email
Coastal Canoeists	1,000	-0-	Ann Jones	
American Rivers	3,000	\$25/1000	Tom Smith	
Canoe Magazine	3,000	\$100/1000	Steve Adams	
Total Names	7,000			

5. Renewals

Income: \$3,000

Cost: \$500

Who: Administrative Assistant.

What: Three renewal mailings, Feb, March and May, to 150 existing members @\$35 each, 65% cumulative response.



6. Special Appeal

Income: \$1,200

Cost: \$400

Who: Tim with help from other board members

What: One appeal, Nov/Dec 04, to 200 members, @12% response x \$50 average gift=\$1,200

7. Major Donors

Income: \$4,000

Cost: \$500

Who: Sandra, with help from other board members

What: Personal asks to 10 prospects, 5 gifts, average gift, \$500=\$2,500; special year-end appeal to 100 prospects, 15% response x \$100 average gifts=\$1,500. Sandra will put together the 100-name prospect list for the year-end mailing with help from the staff and board (10 names/board members)

Prospect List

Name	Amount	Asker
Nathan Allen	\$1,000	Sandra
Helen Aiken	\$500	Sandra
Allen Williams	\$1,000	Sandra and Phil
Sue Brattz	\$1000	Ann
Joe Green	\$500	Sandra and Ann
William Brown	\$1,000	John
Phils' Aunt	\$1,000	Phil
Sandra's mother	\$500	Sandra
Lee Smothers	\$250	Sandra and John
Marvin Gold	\$1,000	Ann

8. Board Donations

Income: \$4,000

Cost: -0-

Who: Board Chair

What: Board members will be asked to be hosts at special event; Board chair will make a personal request to each board member in late November/early December.

Name	2003 Gift	Projected for 2004
Sandra Scott	\$500	\$500
Phil Smith	\$200	\$250
Ken Jones	\$200	\$250
Ann Evans (board match)	\$2,000	\$2,000



John Mackwell	new	\$100
Linda Munoz	\$250	\$250
Tim Logan	\$100	\$150
Teresa Deriso	\$250	\$500
Total	\$3,500	\$4,000

Fundraising Calendar: Red River WS Association

Strategy	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Fndtns	X			X	X			X	X	X	X	X
Corp							X	X	X	X		
Event					X	X	X					
New Members	X	X	X	X								
Renewals			X	X		X						
Appeal											X	X
Board					X							X
Newsletter		X				X				X		