

Fundraising Plan

Writing a fundraising plan is an important step that will help your organisation fundraise successfully. It helps to identify funding opportunities, organise your time, allocate tasks and make sure you meet deadlines.

Use this template to help develop a timeline for different activities that comprise your fundraising. Examples are shown before, with empty templates for you to fill out located at the end.

Example research template

Activity	Who is responsible?	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Project / campaign milestones													
Project objectives agreed	All	2nd											
Research into potential donors complete	Grants and Trusts Fundraiser	30th											
Budget/costs plan complete	Head of Fundraising			20th									
Phase one fundraising													
Approach 'A local business'	Head of Fundraising					15th							
Application to XYZ trust	Grants and trusts						1st						
First individual giving appeal	Head of Fundraising								1st				
Phase two fundraising													
Second individual giving appeal	Head of Fundraising										2nd		5th
Coffee and cake morning	Fundraising volunteer											20th	

Monthly planner

For bigger fundraising projects, you could also create additional monthly activity tables that will give further detail.

Activity for June	Who is responsible?	Date	Action
Compile list of local			
Businesses to approach	Sara, fundraising lead	1st	Complete research template with key information
Signatures on fundraising letter to local businesses	Chairperson	13th	Ensure letters have been signed by the chair of trustees
Send fundraising letters	Keith, fundraising volunteer	15th	Mailing of prepared letters to the agreed list of local businesses that could support us

Fundraising targets

As well as planning your project and fundraising activity, it will be important to plan the value of grants and donations you expect to receive and when. If you have set a fundraising target, this will help you keep track of the funding gap you are working to close.

Funding source	Amount	Date	Other notes
Funds received / committed already			
ABC Trust	£10,000	Received 1 March	Via cheque
Mr & Mrs Smith	£5,000	Received 5 March	Via cheque
Total pledged so far:	£15,000		
Applications made			
DEF Trust	£10,000	Decision 4 April	
GHI Company	£5,000	Expected in three weeks	Letter sent to CEO
Total awaiting decision:	£15,000		
Prospects – application not yet made			
JLK Trust	£20,000	Decision on 15 August	Begin draft. Submit on 15 March
MNO Solicitors	Unknown	No official decision date	