**Fundraising, Development & Revenue Plan Worksheet**

Using this document, we’ll prepare a basic fundraising, revenue and development plan for your business or organization. This plan can be used for your fundraising planning, or to complete more detailed fundraising and grants workplans as needed.

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**Step 1: Consider How You Want to Earn and Receive Money**

You can receive money from individuals, other businesses and organizations, or through government grants and contracts. There may also be additional revenue streams to keep in mind. Here, let’s look at some common ways:

|  |  |  |
| --- | --- | --- |
| Individuals | Businesses | Government/Foundations |
| * Memberships
* Donations of money
* In-Kind donations of goods or services
* Fees for Services Provided
* Purchases/sales of items or goods
* Ticket purchases for special events
* Contracts
* Other
 | * Sponsorships
* Advertising
* Purchases/sales of items or goods
* Fees for Services Provided
* Contracts
* Business Memberships
 | * Ticket purchases
* Grants
* Contracts
* Tax Revenue Share
 |

Some organizations, taxing, and accounting methods may look at special events or fundraising events as separate items. Still, when planning your events, you’ll want to consider how individuals can give (i.e. purchasing a ticket), and how businesses can give (i.e. Vendor Space, Sponsorship, Etc.).

**Step 2: Building the Plan (Sample)**

Now, let’s look back at the income portion of our budget to make sure we understand our income goals. Once we have our goals in mind, we can build a grid. For our grid,we need to think about the broad strategies, activities and timelines for our revenue development, and who will be responsible for or involved in each strategy. Remember, it could be a staff person, board member, volunteer or even a committee or team.

|  |  |
| --- | --- |
| **Individuals** | **360000.00** |
| Donations | 275000.00 |
| Fee for Service | 75000.00 |
| Rental Fees | 10000.00 |
| **Businesses** | **125000.00** |
| Sponsors | 125000.00 |
| **Government/Foundations/Other** | **1449000.00** |
| Grants | 799000.00 |
| Contracts | 650000.00 |

Example

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Strategy** | **Objectives/Tasks** | **Responsible** | **Goal** | **Status** |
| Donations | Implement annual membership drive in SeptemberPartner with United Way for workplace giving program in JuneImplement major donor ask campaign with 15 donors at $15,000.00 | Fundraising ManagerFundraising ManagerFundraising Manager; Executive Director | $25,000.00$25,000.00$225,000.00 |  |
| Fees for Service | Secure $100.00 per month in rental fees from at least 10 units. | Leasing Agent | $10,000.00 |  |
| Sponsors | Secure 10 sponsors at $1,000.00; Secure 5 sponsors at $5,000.00; Secure 5 sponsors at $10,000.00; Secure 2 sponsors at $20,000.00 | Fundraising Manager; Advocacy Director | $125,000.00 |  |
| Grants | Secure 5 federal, state or local grants by March | Fundraising Manager; Department Managers as needed | $799,000.00 |  |
| Contracts | Secure 1 state contract by January. | Fundraising Manager; Executive Director; Housing Services Manager; Income Services Manager; Mental Health Manager | $650,000.00 |  |

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**Step 3: Building the Plan (Your Turn!)**

[Copy and Paste Your Income Budget Here]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Strategy** | **Objectives/Tasks** | **Responsible** | **Goal** | **Status** |
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**Step 4: Complete and Save!**

We’ll add this to your Operations Manual.