

HOW TO WRITE A SUCCESSFUL FUNDRAISING PLAN

IN 4 SIMPLE STEPS

Developed by Mosman Council to Support Local
Community Groups

A comprehensive fundraising plan will provide you with a tailored guide and tactics to raise funds even in the busiest of times, and give your organisation a long-term strategy for achieving your fundraising goals.

Your Plan: Who & When

1

- ✔ Write an annual plan, or a 2,3 or 5 year plan (that is reviewed annually).
- ✔ Utilise development staff (business development manager, development director) to formulate and manage the plan in consultation with your executive body
- ✔ Seek help from a qualified development consultant who specialises in fundraising



The Goal & Your Mission

2

Think about the goals of your fundraising campaign - in the short & long term.

Your goals should address the needs of your group and include any financial and budget requirements. It is important to think about how much money you will need to raise to cover the costs of running your group's events or activities - this should be reflected in your goals - and review how money will be allocated in operating budgets.



The Tactics

3

What tactics will you employ to achieve your long & short term fundraising goals? Employ tactics that suit your organisation and figure out a target for each tactic that adds up to your total fundraising goal for the year.

e.g. For a total goal of \$5000, you may choose to designate \$3000 to donor fundraising and \$2000 to events.

Common Tactics Include:

- ✔ Individual Giving - asking major donors to make gifts to your organisation.
- ✔ Major Donor Groups - may include board giving, finance committee etc.
- ✔ Events - large-scale and smaller local events
- ✔ Direct Mail, Telemarketing, & Online/E-Giving
- ✔ Grants - foundations, corporate, government
- ✔ Corporate Giving Programs
- ✔ United Way Fundraising
- ✔ Participatory Fundraising - like walk-a-thons & fun-runs
- ✔ Minor Donor Groups
- ✔ Annual Giving & Multi-Year Campaign Giving



The Timeline

4

Setting up a timeline for your fundraising goals and sticking to it is vital to ensuring you actually start raising funds. Go into detail and cover big picture as well as smaller goals:

- ✔ Big Picture - when will each fundraising activity be held? e.g. Event in April
- ✔ Smaller Details & Goals - develop a decision timeline for critical steps e.g. venue & entertainment bookings, sponsor solicitation, invitations mail-out etc.



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