

Fund Development Plan Template



Developed by Transform Consulting Group

ORGANIZATION MISSION

FUNDRAISING HISTORY

Highlight historical funding trends and patterns your organization experienced in the last 5-10 years. Include a breakdown of your funding streams (i.e. individual donors, corporate gifts, special events, grants, and fee-for-service).

BENCHMARK RESEARCH

Pull 990 financial statements from 3-5 organizations of similar size in peer communities to compare levels of revenue from different sources.

FUNDRAISING GOALS

List up to 5 high-level goals. What are you trying to accomplish over the next three to five years through the fund development plan? How much in total do you want to raise and what are the top ways you will accomplish it? For example, start or grow an endowment, launch a planned giving program, or increase major gifts.

FUNDRAISING STRATEGIES

For each goal listed above, identify 2-3 strategies to help accomplish the goals. State tactics, partnerships, and timeline you will use to accomplish your objectives.