FUTURE DHARMA

Full Fundraising Planning Template

1. Vision / Purpose

- Why does your centre exist?
- What future are you trying to create?
- What role does fundraising play in supporting this?

2. Organisational Objectives

- What are the centre's overall main objectives for the next 12–24 months?
- Which of these require fundraising support?

3. External Analysis

- PESTLE (Political, Economic, Social, Technological, Legal, Environmental)
- Market / Supporter Analysis
- Competitor Analysis and Collaborator Analysis

4. Internal Analysis

- SWOT Analysis
    - Strengths / Weaknesses / Opportunities / Threats
- Main conclusions

5. Fundraising Objectives

- Pick top 3 objectives based on the findings of your audit
- Include targets, deadlines, and lead person

6. Key Strategies

How will you achieve your objectives?

Could include; Overall direction, Segmentation, Positioning, Case for supportIndividual giving / direct marketing, Major gifts, (Corporate fundraising, Trusts and foundations, where appropriate)

7. Tactical Plans

- What steps will enable you to carry out your strategies?
- What are the actions?

10. Budget

- Costs,
- income target,
- net target

11. Schedule

Monthly plan of key actions

12. Monitoring and Control

- Review frequency
- Key metrics
- Triggers for change