1. Vision/Purpose

Why does your centre exist?
(What are you trying to achieve overall, beyond fundraising?)

What vision are you trying to create? Or, what is your centre/group's *Purpose*?

Imagine your centre 2 years from now, moving well towards its goals:

What does it look like?

What is happening there?

Who is there?

Why have they come?

2. Organisational Objectives

Top 3 objectives that will help you realise your vision - (the top 3 things you are aiming to achieve)

1

2

3

How will you know you are on track?

6 months from now what will have happened that shows you you're on track?

12 months from now what will have happened that shows you you're on track?

3. Simple Audit

Current Activity

What fundraising are you doing right now?

What brings in most of your income?

What is working well?

What has not worked well or felt difficult?

Current supporters

Who are you mainly fundraising from?

Do you know total numbers? How regularly? What is their connection to Triratna/your centre?

Are there people who could potentially give more support? Who are they?

Are there external pressures or organisations affecting your supporters?

Capacity and constraints
Who is responsible for fundraising?

How much time is available? Do you feel like that is enough time?

How confident do you feel asking for money 1-10?
(Not at all confident = 1, Very confident = 10) .....

How confident are the other people who fundraise in your team?

4. Fundraising Objectives

Based on your audit, what needs to be addressed? *These become your fundraising objectives*

(Choose the top 1–3 things)

Objective 1

Objective 2

Objective 3

5. Strategies

For each objective, what needs to change, or happen, to meet that objective?

For objective 1:

For objective 2:

For objective 3:

6. Actions (Next Month)

Pick your top priority objective: What is one realistic action you can take in the next month to get closer to that objective?

What is the first step?

What would make it easier to start?

7. Commitment

My one action to take after this session:

When will I do this?

Date: .....