

Your NPO name and logo

**STRATEGIC**

Fundraising

plan Add

time period

## Executive Summary

### **Introduction**

### **Process and Approach**

### **Vision, Mission, and Guiding Principles**

#### **Vision**

#### **Mission**

#### **NPO Guiding Principles**

1

2

3

4

## **Overview of the Landscape**

- At

## **Strategic Framework**

### **Strategic Question:**

**STRATEGY 1 :**

**STRATEGY 2 :**

**STRATEGY 3 :**

## **Implementation**

## **Moving Forward**

A process map illustrates where each of the following key milestones fit in the planning process:

## **History and Background**

## **Vision, Mission, and Guiding Principles**

## **Strategy Criteria**

1

2

3

4

Strategic Question:

## **STRATEGY 1 :**

### **Outcomes:**

Goal 1:

Goal 2:

Goal 3:

## **Implementation**

## **STRATEGY 2 :**

### **Outcomes:**

Goal 1:

Goal 2:

Goal 3:

Goal 4:

## **Budget Implications**

- Fundraising:
- Communications:
- Volunteer Program:
- Community Conversations:
- Larger & Fewer Grants:

## **Key Monitoring Goals**

By the end of Year One:

By the end of Year Two:

By the end of Year Three:

## **Moving Forward**

## **Acknowledgements**

## Identity Statement

We advance our mission of	
We seek to (impact)	
In the XY zip codes in (geography)	
By providing XY services	
We are sustained by...	

Appendix B – Strategy Screen

## Strategy Screen Matrix

Rating Key: Yes, No, Maybe, NA (include comments on separate page)

CRITERIA	STRATEGIES		
	1	2	3
A. Is the strategy is aligned with NPO mission, vision, and guiding principles?			
· Does the strategy leverage and/or enhance our strategic advantage(s)?			
· Do we have the financial resources to implement this strategy?			
· Do we have the capacity (among board and/or staff) to implement this strategy?			
· Does this strategy address issues of power and equity in our community by focusing on the root causes of problems?			
· Does this strategy reflect the community's health priorities by addressing areas of greatest need?			
· Does this strategy keep us in compliance with the restricted donations and covenants in our foundation's charter?			
a. Does this strategy enhance our ability to serve as convener around common themes and broader concerns of the community?			
I. Does this strategy help us achieve the impact we intend?			
COMMENTS			

### Definition of Terms

The following definitions were used in the course of the planning process and are provided for reference.

Strategic Question: How do we evolve to achieve our goal?

**STRATEGY 1 :**

**Outcomes:**

**Resources Needed:**

<b>Goal 1 :</b>		
<b>Action Steps</b>	<b>Who</b>	<b>Timing</b>
	Board	
	Staff	
	Staff	
	Staff	

**Goal 2 :**

Action Steps	Who	Timing

**Goal 3 :**

Action Steps	Who	Timing

## **STRATEGY 2 :**

### **Outcomes:**

**Resources Needed: Staff time; communications support**

<b>Goal 1 :</b>		
<b>Action Steps</b>	<b>Who</b>	<b>Timing</b>
	<b>Staff</b>	
	<b>Staff</b>	
	<b>Staff</b>	

<b>Goal 2 :</b>		
<b>Action Steps</b>	<b>Who</b>	<b>Timing</b>
	<b>Staff</b>	
	<b>Staff</b>	

**Goal 3 :**

Action Steps	Who	Timing
	Staff	
	Staff	

**Goal 4 :**

Action Steps	Who	Timing
	Exec Comm	
	Gov/ Staff	
	Gov/Staff	
	Gov/Staff	
	Gov/Staff	