

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

3

2

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...	

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?			
H. 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:

Goal 1 :		
Action Steps	Who	Timing
	Board	
	Staff	
	Staff	
	Staff	

Goal 2 :

Action Steps	Who	Timing

Goal 3 :

Action Steps	Who	Timing

STRATEGY 2 :

Outcomes:

Resources Needed: Staff t ime; communications support

Goal 1 :		
Action Steps	Who	Timing
	Staff	
	Staff	
	Staff	

Goal 2 :		
Action Steps	Who	Timing
	Staff	
	Staff	

Goal 3 :		
Action Steps	Who	Timing
	Staff	
	Staff	

Goal 4 :		
Action Steps	Who	Timing
	Exec Comm	
	Gov/ Staff	
	Gov/Staff	
	Gov/Staff	
	Gov/Staff	