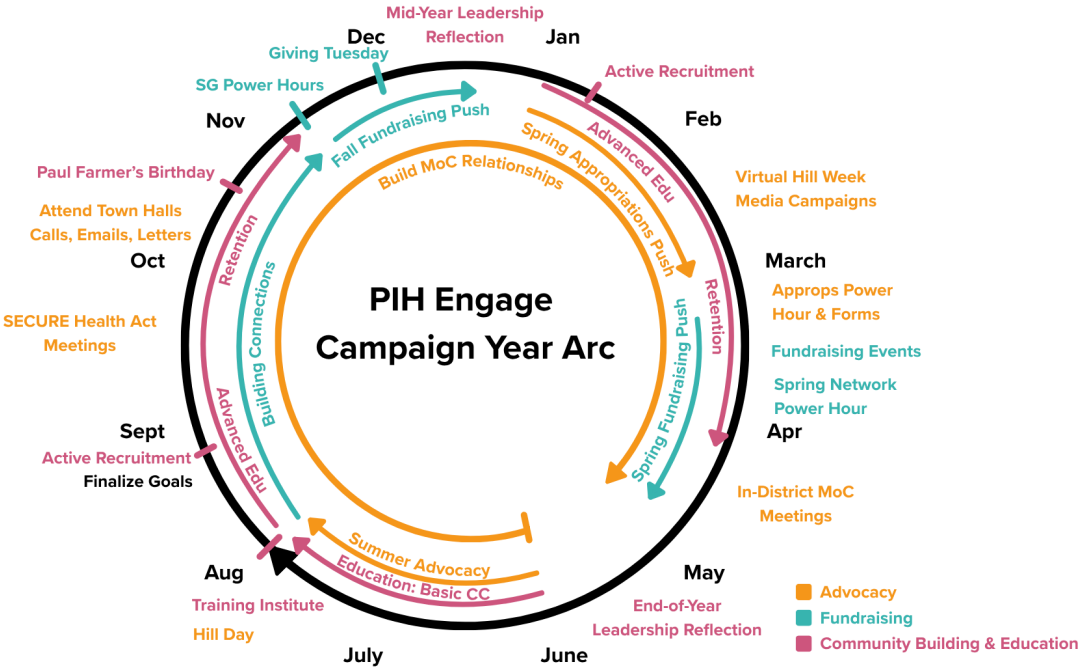
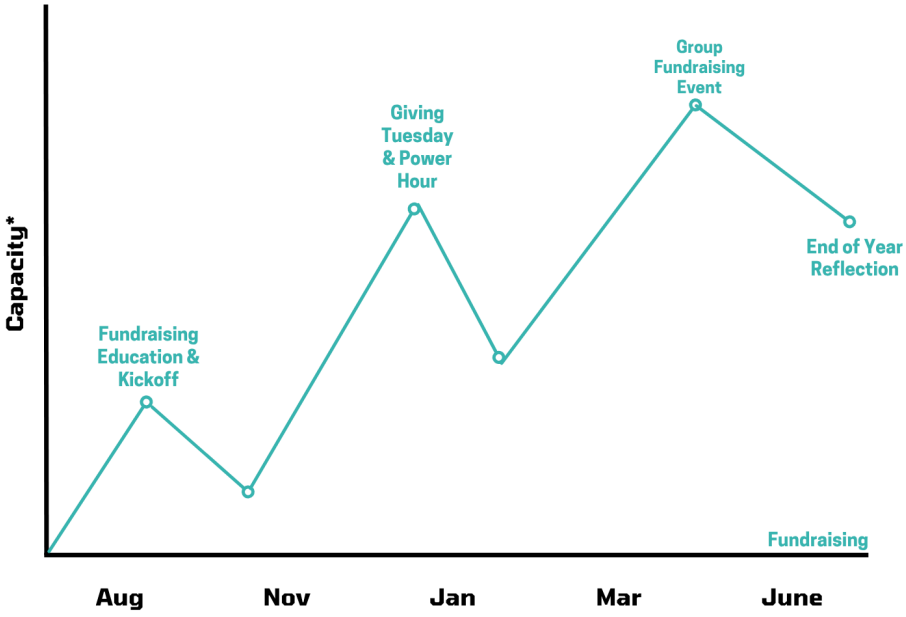
Partners In Health
ENGAGE

Fundraising Lead
Goal Setting & Strategy Sheet





** Where higher capacity means more planning and higher turnout*

Pre-Goal Setting Reflection

Over the last year, what did your team accomplish for fundraising, and what was the impact of your fundraising efforts? How did you do in both personal and group fundraising?

What are the areas of growth of your team as it relates to fundraising? How will you address your challenges moving forward?

Set Your Fundraising Goals

Personal Fundraising

Number of members personal fundraising	**Number of fundraising connections per member**	**Total fundraising $ goal** from personal fundraising

Group Fundraising

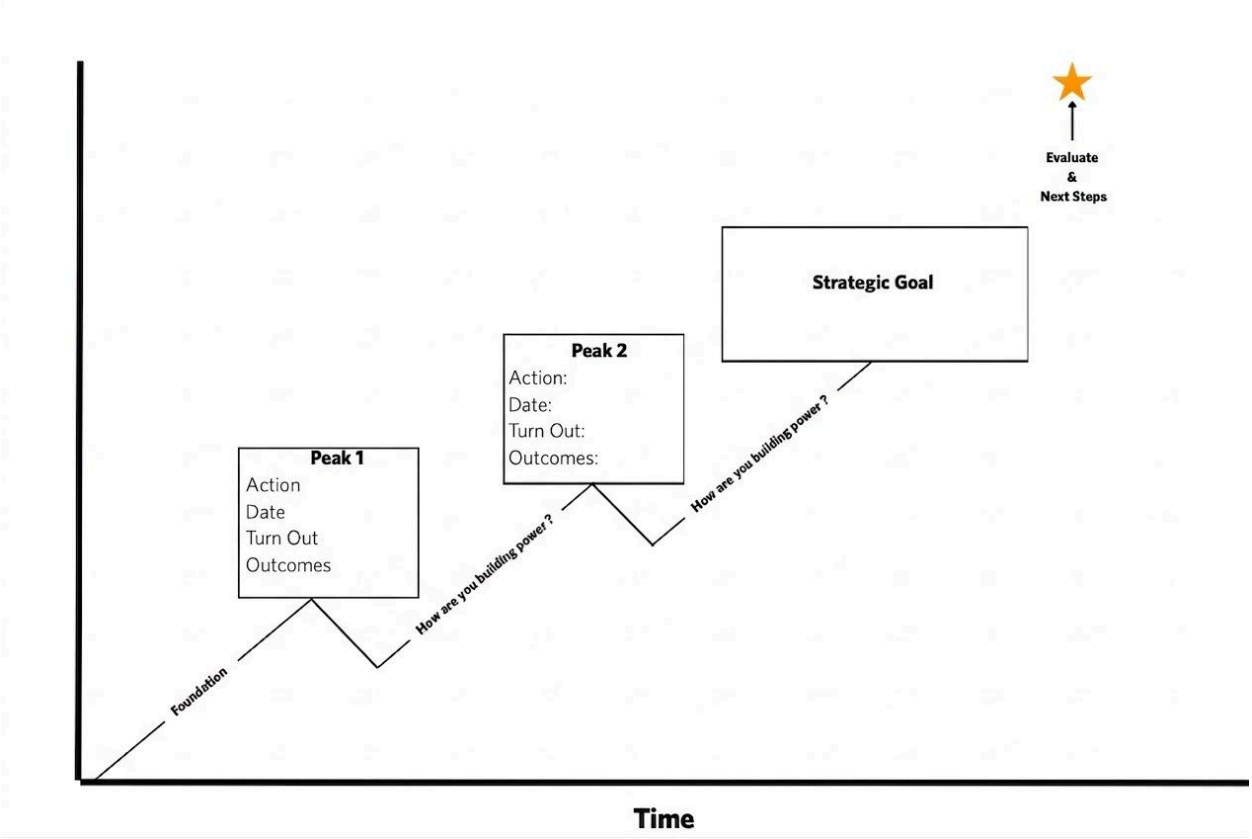
Fundraising events (List the events)	**Number of fundraising connections** from events	**Total fundraising $ goal** from group fundraising

Total goal # connections: _____

Total goal $ raised: _____

Fundraising Campaign Peak Timeline

Plan your team fundraising campaign peak timeline to meet your personal and fundraising goal.



Foundation: What education, conversation, needs to happen with your leadership team or general team to achieve this strategic goal? Have you identified who on your team will be fundraising? How are you building relationships with these members? How are you holding these members accountable? How are you tracking your metrics? How do you plan to communicate progress of goal with team? How do you plan to celebrate progress?

Peak Goal # 1: What actions/event will help you meet this goal?

Peak Goal # 2: What actions/event will help you meet this goal?

Strategic Goal: # of members personal fundraising to bring # of connections

Post Goal Setting Reflection

What would success in your pillar look like mid-year (January) and at the end of the year (June)?

How will you, as the fundraising lead, support your team in achieving this success?

What are you most worried about as the fundraising lead responsible for setting, achieving, and reviewing the fundraising goals?

You can think about your fundraising work as a campaign arc that builds over time. Are there any events in your community that are important to consider? (E.g., final exams period, a lead is getting married)

Fundraising Terms

Fundraising connection: A relationship built between a donor and fundraiser. A connection is made when you receive a donation from someone with whom you have communicated the campaign, and feel confident they understand our mission and values.