

FUTURE OF NURSING™

Campaign for Action

AT THE CENTER TO CHAMPION NURSING IN AMERICA



Fundraising Operating Plan Template

The following is a template to create a fundraising operating plan for your Action Coalition. A suggested table of contents is included below that you can alter to fit your needs. Draw on the previously provided materials when completing your fundraising operating plan.

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Fundraising Objectives

Below, list your core objectives for your Action Coalition’s fundraising for the year, as well as supporting strategies. Examples of objectives may include the goal for total dollars raised, the goal of raising a certain amount through major gifts, or the goal of establishing a profitable fundraising event. This can also include non-numeric objectives such as forming and engaging a development committee or creating a leave-behind brochure based on your case messages. Add or subtract objectives and strategies as needed.

Objective 1: _____

Strategies to achieve objective:

- 1. _____
- 2. _____
- 3. _____

Objective 2: _____

Strategies to achieve objective:

- 1. _____
- 2. _____
- 3. _____

Objective 3: _____

Strategies to achieve objective:

1. _____

2. _____

3. _____

Objective 4: _____

Strategies to achieve objective:

1. _____

2. _____

3. _____

Fundraising Budget

Note: This budget is meant to capture revenue and expenses specific to fundraising activity, rather than a comprehensive budget for the entire Action Coalition.

	Fiscal Year
REVENUE	
Contributed Income	
Event Income	
Other Income	
In-Kind	
TOTAL	
EXPENSES	
Personnel	
Travel	
Office Supplies	
Event	
Printing	
Postage	
Marketing	
TOTAL	

Fundraising Calendar

A sample calendar template is below to help track all relationship management and fundraising activities for the fiscal year.

	Activity	Point of Contact/ Responsible Party
January		
February		
March		
April		
May		
June		
July		
August		
September		
October		
November		
December		

Implementation

Use this section to provide more specific details or tools related to core areas of your fundraising. This might include, for example, a list of planned major gift solicitations for the year, a calendar of deadlines for foundation grant proposals or a detailed task list for a major fundraising event. Essentially, this area is intended to be a place where you can consolidate information for easy reference and updating throughout the year. The bold, blue headers are suggested sections, but tailor these as well to meet the needs of your Action Coalition's program.

Individual Major Gift Solicitations

(include volunteers and others personally asked for a gift)

Institutional Major Gift Solicitations

(corporations/foundations)

Broad-based Individual Giving/Membership

(lower-level giving solicited through broad-based strategies, i.e. mail and email)

Events

(sponsorships, ticket sales)

Other Fundraising Strategies

(include anything that is not covered by the categories listed above)