



# FUNDRAISING PLAN WORK PLAN

## **Analysis of funding issues**

### *Analyze current funding activities*

Conduct a review of current fundraising programs, systems and resources.

### *Analyze other organizational issues*

Conduct a preliminary audit of other organizational issues, including board and staff development, strategic planning, and organizational structure as they relate to fundraising capacity. Summarize this in a report that includes specific recommendations.

## **Determine long-range needs**

### *Review strategic plan*

Review plan for implications for long-term program directions. Identify program areas and their level of activity for a three-year period. Make recommendations for possible improvements to the strategic planning process.

### *Develop three-year budget*

Determine funding needs for programs in each of the next three years, based on the strategic planning information. Budget forecast focuses initially on expenses and not revenues.

### *Develop funding source matrix*

Identify the potential revenues to meet the expense needs of programs for the next three years. Identify the mix of revenues that will be applied to each program area.

## **Identify program options**

### *Review organizational models*

Look at theoretical models for structuring the fundraising program. Draw on specific organizational development models for examples.

### *Research other funding programs*

Look at existing models for the fundraising program. Research the fundraising programs in place for similar organizations, including groups with both conservation and non-conservation program focuses.

### *Evaluate current funding programs*

Drawing on the information from the fundraising analysis, develop specific issues that must be addressed to increase the fundraising capacity for your organization. Working with both staff and board members, identify possible strategies for improving these issues.

### *Develop fundraising strategies and policy recommendations*

Narrow the list of strategies to the preferred list of organizational policies, including any specific changes to the organizational plan and structure. Develop specific recommendations to be presented to the board of directors for approval.



## FUNDRAISING PLAN WORK PLAN (CONTINUED)

### *Write fundraising plan*

Assemble all of the appropriate information into a final fundraising plan document, including specific fundraising programs, milestones and strategies for growth. Develop a preliminary implementation strategy and budget, and identify the appropriate roles for board and staff within the strategy.

### *Adopt fundraising plan*

Board of directors approves final plan, including work plans and preliminary budget.

## **Implement funding program**

### *Develop implementation strategy*

Create a comprehensive implementation strategy for the fundraising program. Coordinate these activities with the other program priorities for the Trust.

### *Develop work plans and budget*

Create specific work plans for both staff and board members, and develop a detailed program budget for all aspects of the fundraising program.

### *Begin implementation*

Begin implementing the tasks and activities within the fundraising work plans. Establish periodic reviews to assess progress and make necessary modifications.



# FUNDRAISING PLAN -- SAMPLE WORK PLAN

<i>Task</i>	<i>Who</i>	<i>Sept</i>	<i>Oct</i>	<i>Nov</i>
<b>Analysis of funding issues</b>				
Analyze current funding activities	LE	■		
Analyze other organizational issues	MS	■		
<b>Determine long-range needs</b>				
Review strategic plan	LE	■		
Develop three-year budget	LE	■		
Develop funding source matrix	EH	■		
<b>Identify program options</b>				
Review organizational model	SC		■	
Research other funding programs	EH		■	
Evaluate current funding programs	MS		■	
Develop policy recommendations	LE		■	
Write fundraising plan	LS		■	
Adopt fundraising plan	LE			■
<b>Implement funding program</b>				
Develop implementation strategy	SC			■
Develop workplans/budget	SC			■
Begin implementation	LE			■