

UNIT 4: STRENGTHEN APPLICATION

Fundraising Strategy Template



Pre-assignment for Unit 4 workshop

Instructions: Using this template, and the information learned from Units 1, 2 and 3 of the *Building Equity training*, please prepare a draft fundraising plan to share at the workshop and/or to use for application of the concepts you have learned through the training.

If you are not attending a Unit 4 workshop, but going through the course at your own pace, online, this template is intended as a synthesis of the training series—strengthening your application of concepts explored.

This template should take you 1 hour to complete, though you may wish to take longer to discuss some elements with others in your organization. We have provided space throughout this template to answer questions and fill in tables, but please feel free to add in extra pages if you need more space.

FUNDRAISING PLAN for: _____
(insert organization name)

Prepared by: _____

Date: _____



1. ORGANIZATIONAL CONTEXT

1.1 Please provide a short paragraph describing your organization’s vision and mission.

VISION:

MISSION:

1.2 Please describe your organization’s values.

1.3 Describe your organization’s current resource mobilization strategy, or upcoming strategy if in progress, and any funding targets/resource goals associated with this strategy. If there are no targets or goals identified, propose some or consult internally to identify what these might be.



1.4 Organization’s desired future sources of income.

If you have completed Unit 1A of Building Equity: Resource Mobilization for Impact, please refer to the table from Change the Game Academy Module 1 you completed, which summarizes the desired future state of revenue sources for your organization.

*If you did not complete Unit 1A, please refer to the training content and resources from **Unit 1**.*

2. CHOOSING FUNDRAISING TECHNIQUES AND IDENTIFYING ASSETS TO LEVERAGE

2.1 Refer to *Unit 1B, exercise 2* and *Unit 3A, exercise 1*, where you ranked various fundraising techniques, including advanced fundraising techniques, from 1-5 (1 being not suitable and 5 being very suitable), based on their suitability to your organization as well as their feasibility within the Canadian context.

If you did not complete Unit 1a, please refer to the resources and training materials for Unit 1 and Unit 3 on the *Resource Library* for further details on fundraising techniques and ranking them based on suitability for your organization.

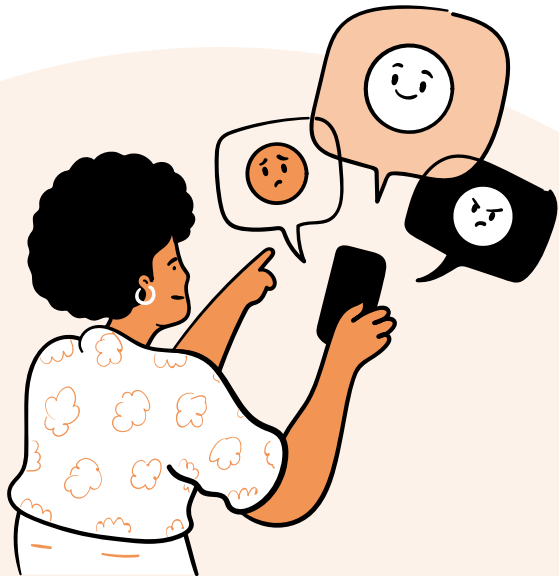
Based on the table on the desired future state of your organization from the section above (1.4) completed in *Unit 1A* of the training, and the techniques you ranked as 'suitable to very suitable' for your organization in Unit 1B exercise 2 and Unit 3B exercise 1, select a technique for a particular resource or revenue source using the table below; only focus on the resource or revenue sources that are applicable to your organization and its strategy.

To support this process, please, refer to the asset mapping exercises you completed for Unit 1A (*exercises 1 and 2*), and indicate in the appropriate column the assets that can be leveraged.



ANNEX TABLE 1	% OF DESIRED TOTAL INCOME UNDER STRATEGIC PERIOD	FUNDRAISING TECHNIQUE(S)	ORGANIZATIONAL ASSETS TO LEVERAGE
LOCAL COMMUNITY SOURCES			
Individuals			
Local companies/community enterprises			
Others			
Sub Total			
NATIONAL SOURCES			
Government			
Individuals			
Companies			
Foundations/NGOs			
Other			
Sub Total			

ANNEX TABLE 1	% OF DESIRED TOTAL INCOME UNDER STRATEGIC PERIOD	FUNDRAISING TECHNIQUE(S)	ORGANIZATIONAL ASSETS TO LEVERAGE
INTERNATIONAL SOURCES			
Government			
Foundations and NGOs			
Other			
Sub Total			
TOTAL			



3. ESTABLISH RESOURCE MOBILIZATION GOALS

A resource mobilization strategy requires specific, measurable, achievable, relevant, and time-bound (SMART) goals. These goals should reflect your organization’s mission, values, strategy, and vision for the future. Identify at least three but no more than five resource mobilization goals for your organization.

3.1 Reflect on the table you completed in section 2. Identify the revenue/donor sources and partnerships you are seeking to build in support of your organization’s strategy and funding goals, and craft 3-5 SMART goals with accompanying indicators and targets.

ANNEX TABLE 2

RESOURCE MOBILIZATION GOAL	INDICATOR	TARGET (Y1)

3.2 How do your resource mobilization goals reflect key principles of localization, community-centred fundraising, and ethical storytelling? Please refer to units 1 and 2 to access training content and materials on localization (*Unit 1A*), community-centered fundraising (*Unit 2B*), and ethical storytelling (*Unit 2A*).

4. ANNUAL PLAN (Y1)

4.1 Refer to *Unit 2A, exercise 1* in your workbook. Consider the key events/milestones you made note of in planning a year of your organization's resource mobilization fundraising and associated communication initiatives, when completing the table below. This table will serve as a draft annual plan, informed by your fundraising goals, and you will have the chance to discuss your plan in more depth during the in-person workshop.

If you have not completed Unit 2A, exercise 1, please refer to the training content and resources shared for *Unit 2*.



ANNEX TABLE 3

RESOURCE MOBILIZATION GOAL	ACTIVITY(IES), INCLUDING COMMUNICATIONS ACTIVITIES	COSTS/RESOURCES NEEDED	TIMELINE												
			J	F	M	A	M	J	J	A	S	O	N	D	

