Planning Worksheet

Guiding questions

What is your goal?

Who is your audience?

What does your audience respond to?

What does your audience love about you?

What do you want the next 12 months (or a specific campaign/project) to feel like?

Mapping the plan

Now that you're grounded in the "why" behind your plan, it's time to start mapping it out.

This exercise will guide you through a big-picture look at your upcoming year, focusing on larger chunks of time (as opposed to a detailed week-by-week plan).

Think of this as a framework to reference throughout the year to help prioritize your well-being and sustainable fundraising success!

Complete the following steps however you'd like – typing directly into this document, printing and physically filling it out, color-coding for different types of activities (or stages of the donor cycle!), etc. Make it your own!

☐ Step 1: What's already on the calendar for your organization?
- We're looking for big-picture pushes – things that take significant staff time, whether that's fundraisers, planned time off, stewardship events, or big cornerstones of your programming throughout the year. Add those to the calendar below.

☐ Step 2: Thoughtful additions
- Thinking back to the stages of the donor cycle, what activities on the donor cycle are you already doing? What might you want to add?
- Remember, intentionally incorporating one or two manageable activities is better (and more sustainable) than trying to do everything! Here are some ideas to get you started:
  - Acquisition: "friend"-raiser, free tickets to your performance, facility tour, joint event with partner organization, shareable social media post
  - Cultivation: coffee meetings, informal meet-the-staff gatherings, virtual afternoon tea, e-newsletter, bookclub
  - Solicitation: peer-to-peer campaign, year-end appeal, fundraising event, 1:1 coffee chats, asking board to do a group match for Give to the Max Day
  - Stewardship: special thank-you event for donors and volunteers, phone "thank-a-thon," handwritten thank you letters

☐ Step 3: Working backward
- Based on the calendar so far, what are things that need to happen one or two months before? Are there tasks you can leverage to accomplish two

things at once? For example, could you use the release of your annual report as an excuse to contact donors to thank them or ask for a meeting?

☐ Step 4: Setting the pace
- Take a look at your calendar so far and take note of any especially busy and relatively slow times of the year. How can you build in time for celebration and rest? During the slower times of year, can you add some time for intentional data clean-up?

☐ Step 5: Capacity check
- Now assess the year through the lens of team capacity – are there blocks of time that will be especially busy for one member of your team? How can you plan ahead to support each other during busier seasons? Based on the schedule and your organization, are there times when you could use more volunteer, board, or staff help? When is that? Can you ask people to help ahead of time?

☐ Step 6: Identifying gaps
- Look back at your responses to the guiding questions. Does this calendar bring you closer to your goal(s)? Does it include ways to meaningfully engage your audience(s) on all stages of the donor cycle and reflect what they love about you? How can you use what you have on the calendar to bring new people in? Also consider: What was successful in previous years that you can replicate this year?

☐ Step 7: Wrapping up
- This calendar is a living document. Consider making time for regular check-ins to revisit and revise as necessary. Make sure any revisions are made through the lens of your initial goals, and prioritize rest!
- Share the goals from the top of the worksheet along with this calendar with other staff and board members for visibility

Example Month 1	Example Month 2	Example Month 3
Board meeting 5/12: spring concert, follow-ups and stewardship Rest	Newsletter offering opt-in coffee chats with new staff member Board meeting Coffee chats	Board member-planned "friend"raiser Follow-ups and stewardship Database clean-up

Fiscal Year 2026

July	August	September

October	November	December
	Nov 20: Give to the Max Day	

January	February	March

April	May	June