

## Sample: Setting Fundraising Goals in an Annual Budget

*Fiscal Year Annual Goal: \$935,000*

*The organization will lose \$50,000 in federal and state contract funds in the coming year, and it is aiming to make up for this loss and raise an additional \$20,000 for the coming year. How can it raise a total of \$70,000 in new dollars within 12 months? Suggest what they can do in order to meet their goals in the coming year, especially with individual donors.*

Source of Funds	Prior Fiscal Year	New Fiscal Year
<b>Individuals</b>		
Board of Directors	\$ 25,000	\$ 30,000
Major Gifts	\$100,000	\$120,000
Community Gifts		
Direct Mail	\$ 40,000	\$ 45,000
Newsletter/Website	\$ 10,000	\$ 12,000
Acquisition	\$ 15,000	\$ 12,000
Workplace Campaigns	\$ 10,000	\$ 10,000
Unsolicited	\$ 10,000	\$ 10,000
<i>Subtotal, Individuals</i>	<i>\$210,000</i>	<i>\$239,000</i>
<i>Institutional</i>		
Foundations	\$190,000	\$225,000
Corporations	\$ 25,000	\$ 30,000
Special Events		
Event A	\$ 10,000	\$ 15,000
Event B	\$ 30,000	\$ 30,000
<b>Government</b>		
Federal: RWC	\$225,000	\$200,000
State: Early Int.	\$ 50,000	\$ 25,000
County: Prevention	\$175,000	\$175,000
<b>Total</b>	<b>\$915,000</b>	<b>\$935,000</b>

*Ideally, bequests and tributes are placed in cash reserve funds and not in the annual fund.*

## Strategies for Accomplishing the New Annual Fund Goal

(Raising \$70,000.00 in new dollars)

**Board giving increases \$5,000.00-** Increase board giving through two new board members and 15% increases from current members.

**Increase major gifts by \$20,000.00-** Renew 75% of major donors, for a total of \$100,000; enlist 20 new major donors whose gifts totaling \$15,000. Hold three cultivation events for 40 potential major donors; follow-up with calls to everyone on prospect list. Hold individual lunch/coffee/meeting cultivation activities with top ten prospects. Hold thank you event for current major donors to raise additional \$5,000.00.

**Increase community gifts by \$9,000.00-** by improving our direct mail renewal rate from 64% to 70%. Upgrade 15 donors to become monthly sustainers at \$22/month. Reinstate 5% of lapsed donors.

**Maintain:** Renew 85% of workplace donors; make 5 workplace presentations.

**Maintain:** Renew five foundation grants totaling \$150,000.

**Increase grants by \$35,000.00-** Identify (research and qualify) ten potential foundations.

Cultivate and solicit six new (or former donor) foundations, totaling \$100,000 in requests.

Inform constituency about bequests and planned gifts.

**Increase by \$5,000.00** - Secure ten corporate sponsorships totaling \$30,000.