

Monthly planner

For bigger fundraising projects, you could also create additional monthly activity tables that will give further detail.

Activity for June	Who is responsible?	Date	Action
Compile list of local businesses to approach	Sara, fundraising lead	1st	Complete research template with key information
Signatures on fundraising letters to local business	Chairperson	13th	Ensure letters have been signed by the chair of trustees
Send fundraising letters	Keith, fundraising volunteer	15th	Mailing of prepared letters to the agreed list of local businesses that could support us

Fundraising targets

As well as planning your project and fundraising activity, it will be important to plan the value of grants and donations you expect to receive and when. If you have set a fundraising target, this will help you keep track of the funding gap you are working to close.

Funding source	Amount	Date	Other notes
Funds received / committed already			
ABC Trust	£10,000	Received 1 March	Via cheque
Mr & Mrs Smith	£5,000	Received 5 March	Via cheque
Total pledged so far: £15,000			
Applications made			
DEF Trust	£10,000	Decision on 4 April	
GHI company	£5,000	Expected in 3 weeks	Letter sent to CEO
Total awaiting decision: £15,000			
Propsects - applications not yet made			
JLK Trust	£20,000	Decision on 15 August	Begin draft. Submit on 15 March
MNO Solicitors	Unknown	No official decision date	Fundraiser meeting with partner next week to discuss interest

Monthly planner template

Activity for	Who is responsible?	Date	Action

Fundraising targets template

Funding source	Amount	Decision dates	Other notes
Funds received / committed already			
Total pledged so far			
Applications made			
Total awaiting decision			
Prospects – applications not yet made			