



Fundraising timeline plan template

Writing a fundraising plan is an important step that will help your organisation fundraise successfully. It helps to identify funding opportunities, organise your time, allocate tasks and make sure you meet deadlines.

After watching the webinar, and following the steps outlined, use this template to help develop a timeline for different activities that comprise your fundraising. Examples are shown below, with empty templates for you to fill out located at the end.

Example research template

Activity	Who is responsible?	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Project / campaign milestones													
Project objectives agreed	All	2nd											
Research into potential donors complete	Grants and trusts fundraiser	30th											
Budget/cost plan complete	Head of Fundraising			20th									
Phase one fundraising													
Approach 'A local business'	Head of Fundraising					15th							
Application to XYZ trust	Grants and trusts fundraiser						1st						
First individual giving appeal	Head of Fundraising								1st				
Phase two fundraising													
Second individual giving appeal	Head of Fundraising												5th
Coffee and cake morning	Fundraising volunteer											20th	

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 - appl	ications 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					

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Project / campaign milestones													
Phase one fundraising													
Phase two fundraising													

Monthly planner template

Activity for	Who is responsible?	Date	Action
Fundraising targets template			
Funding source	Amount	Decision dates	Other notes
	Funds received / o	committed already	
Total pledged so far			
	Application	ons made	
Total awaiting decision			
	Prospects – applica	ations not yet made	

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PD3781 1 03/21