Appendix H: Additional
Strategic Fundraising Plan: Case Preparation

Mission Statement:
Philosophical expression of the needs that the foundation/organization is going to address. Why do we exist?

Goals:
General statements in which the organization will address the needs in the mission statement. What are we doing?

Objectives:
Specific statements, to be revised at least once a year, explaining how you are going to meet the goals as stated. Statements of objectives articulate your programs and are measurable. How are you going to achieve our goals?

Programs and Services:
Concrete descriptions of services currently provided by the foundation/organization.

Finances:
Budget description. Who holds the money, the fundraising proposal, and the tax exempt form? Method of deposit and withdrawal.

Governance:
Description of officer responsibilities, team member responsibilities and advisor roles.

Facilities and Mechanics of Delivery:
The physical setting you will work in, by project.

Organization, planning, and evaluation:
Description of the process by which you will evaluate and validate your organization as a whole as well as the specific programs.

History of Founding and Growth:
Brief description of the organization and its programs.

List major supporters: