



Nonprofit Goal Planning

Worksheets to Set Your Fundraising Goals



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Written goals raise the chances of achievement by 42%.

Goal Research Summary depicts that writing goals down brings clarity, keeping an individual focused. Depending on the actions taken, written goals can help achieve better results.

“A goal is a dream with a deadline.” – **Napoleon Hill**

Want to know one of the best ways to increase productivity, inspire more supporters and reach greater heights of success for your nonprofit? Setting goals— informed, passionate, and ambitious goals you can reach and use to grow your mission.

You can't achieve what you don't set your sights on.

The process of goal setting instills the courage to create even bigger aspirations and take on bigger challenges. These handy, customizable worksheets are here to help you set inspired (and attainable!) goals for your nonprofit.

First, we'll walk you through some quick goal-setting basics to keep in mind and how to perform a SWOT analysis to ensure your goals are informed by successes and challenges. Then we'll show you how to set larger goals, smaller and more specific revenue goals, and multi-channel marketing goals geared towards growing your impact.

Just add your own text, print, and get going on achieving your next level of fundraising success!

Getting Started

Fundamentals of Goal Setting

The right goals will help keep your fundraising efforts focused and motivated while providing you with a realistic benchmark to determine if you're succeeding.

Keep in mind the following as you use these worksheets:

- ✓ Write down your goals
- ✓ Set meaningful goals that excite you
- ✓ Make goals specific and measurable
- ✓ Give your goals a timeframe
- ✓ Create accountability with your team and your audience

Some questions to take inventory and get you going:

Regarding your mission, what are you currently most excited about achieving?
This could be financial and non-financial, big or small.

What avenues have you used to measure your goals in the past?

Are there additional ways you could better track, analyze, and understand your results?

Who will you share these goals with to help keep you on track to achieving them?



Did you know?

You are 76% more likely to achieve your goals if you write action commitments and share weekly progress reports. Scheduled accountability is a game-changer.

Getting Started

SWOT Analysis

A **SWOT** analysis is a strategic planning technique used by businesses and nonprofits of all sizes. It helps you to clarify objectives and determine realistic goals.

(S)TRENGTHS: List what your organization does well, how it stands out, and any internal resources or tangible resources you possess.

(W)EAKNESSES: Include areas in which your organization lacks, including resource limitations, things other organizations may do better, or unclear call-to-action items.

(O)PPORTUNITIES: List underserved markets (i.e., virtual or outside local reach), competitors, emerging needs for your services (if any), or increasing awareness and/or media coverage.

(T)HREATS: Consider a changing regulatory environment, negative press/media coverage, and/or shifting donor attitudes towards your cause.



>> **PRO TIP**

Don't be afraid to **update your goals periodically**—they shouldn't be static. Make them dynamic and ever-evolving.

Goal-Setting Worksheets

Annual Goals

Don't be afraid to think big when setting your annual goals, just be sure to take into account your past successes and setbacks. This way, you'll ensure an ambitious goal that you can meet, and even exceed.

Keep in mind:

- ✓ Goals should be challenging and allow you to grow
- ✓ Goals should be just outside your comfort zone
- ✓ Goals should be able to support a realistic plan to attain them

How much money did your organization raise last year?

Where/what sources did they come from?

How much did you spend to bring in those donations?

What feels like an attainable, yet ambitious, revenue goal for your organization?

What do you want your focus for the year to be?

What stakeholders have a say in determining your goals?

What goals, other than financial, would help scale your mission?

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» **Hint:** Setting a timeframe for your goals creates urgency and stakes. Just be sure to allow some room for setbacks when determining a deadline.

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Goal-Setting Worksheets

Revenue Goals

Once you have a larger revenue goal in mind that excites you (and maybe even scares you a bit!), it's time to break that down into **smaller revenue goals** that will help you get there.

Individual Giving

Last Year's Results _____
Amount Spent _____
Current Goal _____
Budget to Spend _____
Timeframe _____

Major Gifts

Last Year's Results _____
Amount Spent _____
Current Goal _____
Budget to Spend _____
Timeframe _____

Peer-to-Peer

Last Year's Results _____
Amount Spent _____
Current Goal _____
Budget to Spend _____
Timeframe _____

Board Fundraising

Last Year's Results _____
Amount Spent _____
Current Goal _____
Budget to Spend _____
Timeframe _____

Goal-Setting Worksheets

Revenue Goals (Continued)

Corporate Giving

Last Year's Results _____
Amount Spent _____
Current Goal _____
Budget to Spend _____
Timeframe _____

Fundraising Events

Last Year's Results _____
Amount Spent _____
Current Goal _____
Budget to Spend _____
Timeframe _____

Text-to-Give

Last Year's Results _____
Amount Spent _____
Current Goal _____
Budget to Spend _____
Timeframe _____

Grants, Sponsorships, Giving Days, Retail, and Any Additional Revenue Sources

Last Year's Results _____
Amount Spent _____
Current Goal _____
Budget to Spend _____
Timeframe _____



Bonus:

Don't miss our [Social Media Strategies](#) resource to learn more about optimizing your social media channels for fundraising success.

Goal-Setting Worksheets

Goals to Expand Reach and Awareness

Looking at the revenue goals you've set for your nonprofit, let's examine how each aspect of a multi-channel fundraising campaign can work harder for you. This will ensure you're simultaneously working towards reaching more donors and bringing in more donations.

Social Media Tally your follower counts, likes, and the diverse engagement trends across your posts (paid or organic).

Last year's results:

Facebook: _____

Instagram: _____

LinkedIn: _____

Twitter: _____

TikTok: _____

Other: _____

This year's goal(s):

Facebook: _____

Instagram: _____

LinkedIn: _____

Twitter: _____

TikTok: _____

Other: _____

Email Consider your open rates, click-through rates, and any giving trends associated with email sends during or outside of events.

Last year's results: _____

This year's goal(s): _____



>> **PRO TIP**

Refine your donor segmentation for more specific fundraising results. This could include recurring donors vs. one-time donors, first-time donors vs. repeat donors, and giving levels.

Goal-Setting Worksheets

Goals to Expand Reach and Awareness (Continued)

Peer-to-Peer Fundraising *Analyze your use of peer-to-peer fundraising (or lack thereof) and establish a strategy based on your results.*

Last year's results _____

This year's goal(s) _____

Direct Mail *If you targeted your audience with direct mail, consider your reach (ZIP codes, demographics, etc.), ROI, and the impact it had on your success.*

Last year's results _____

This year's goal(s) _____

Other

Last year's results _____

This year's goal(s) _____

“Without a goal, you can't score.”

– Johan Cruyff

Set your goals. Strategize. Thrive.

Use these inspired and informed goals to take the next step in achieving your mission. Create a solid fundraising action plan to get your team and supporters on track to raise more and boost awareness for your organization.

We hope you can take these goals and use them to make a greater impact with less effort because when you are passionate about your cause, reaching your goals shouldn't feel like work.

About GiveSmart

GiveSmart offers flexible, customizable features to support your online fundraising all year round. Whether you host a distinguished, annual event or you are looking for a platform to support any fundraiser of yours, we are the solution to support your mission.

To speak directly with a fundraising expert about GiveSmart's comprehensive fundraising and auction features, visit givesmart.com/demo or call 800-667-8075.

