

Strategic Goals Worksheet

	Areas of Focus	Target	By when	Process/System	Team Leader
1					
2					
3					
4					
5					

Case for Giving Worksheet

Provide short – one or two sentence, powerful descriptive answers to each question.

Humanize answers whenever possible. i.e. Share a real-life example.

Use this as a board and/or staff exercise annually.

1. How do we help people?

2. Who do we help?

3. What are our vital services?

4. What is our track record?

5. Our plans for the future?

6. How do we use our money?

7. Why do we deserve your support?

Strategic Goals Sample

Areas of Focus	Target with measure	By when	Process/System	Team Leader
New donors	Increase # of donors giving at \$250+ by 50	December	monthly communication that includes compelling "funding gap" messages	Ex Dir? Dev staff? Dev volunteer?
Average new gift size target (\$\$/donor)				
Board giving goals (total)	100% giving/\$12,000	by June 30 annually	Dev. Chair or Board chair solicits	Dev chair
Communication goals (monthly? Quarterly? Email? Print?)				
Acknowledgement/thank you/recognition strategies	Thank you letters sent Phone calls to all donors \$100+	board & staff	letter sent within 1 week Calls made within 3 days	dev admin staff or community vol (name)