

**Funding Plan Template**

**for a Diversified Portfolio**

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# Revenue Categories

Diversifying funding is crucial for nonprofit long-term fiscal sustainability. Here are key funding categories that nonprofits can include in a balanced portfolio.

 Avoid category over-reliance by

* Aiming for no more than 25–30% from any one category
* Monitoring and adjusting your funding mix annually
* Building a reserve fund with surpluses from multiple sources

**1. *Individual Donations***

* Annual Giving (recurring or one-time)
* Major Gifts (high-net-worth donors)
* Monthly Sustainers
* Online Appeals (email, social media, crowdfunding)
* Planned Giving (bequests, legacy gifts)

***2. Grants***

* Private Foundations (e.g., local, family, or national foundations)
* Corporate Foundations (e.g., Walmart, Google)
* Government Grants
* Federal (e.g., NEA, HUD)
* State & Local Agencies
* Donor-Advised Funds (DAFs)
* One-time Campaigns (e.g., GoFundMe, Givebutter)
* Recurring Campaigns (e.g., Patreon, Ko-fi)

***3. Events & Fundraisers***

* Annual Galas
* Walks/Runs/Bike-a-thons
* Benefit Auctions
* Peer-to-Peer Campaigns

***4. Corporate Sponsorships & Partnerships***

* Event Sponsorships
* Program Support
* Cause Marketing Campaigns
* In-Kind Donations (products or services)
* Church or Denominational Support
* University- or Hospital-Affiliated Funding

***5. Earned Revenue: Services and Products***

* Program Fees (sliding scale, full pay, scholarships)
* Product Sales (merchandise, curriculum, books)
* Consulting or Training Services
* Social Enterprises (e.g., thrift stores, cafés)

***6. Earned Revenue: Contracts***

* Government Contracts
* School Districts, Municipalities, Healthcare Systems
* Corporate Clients

***7. Memberships & Subscriptions***

* Member Dues
* Educational or Professional Memberships
* Subscription-Based Content or Access

***8. Investment Income***

* Endowment Earnings
* Interest from Reserve Accounts

# Three-Year Funding Plan Template

Organization Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total Revenue Goal (Annual): $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Time Frame: 3 Years

Prepared by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_

Instructions: Use this section to forecast and track funding details for each of the four selected categories across three years. Include goals, key contacts, deadlines, and any strategic notes.

Instructions: Use this table to outline your revenue projections by category over the next three years. Adjust values and notes as needed.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Funding Category | Year 1 Goal ($) | Year 2 Goal ($) | Year 3 Goal ($) | Notes / Strategies |
| Grants |  |  |  |  |
| Individual Donations |  |  |  |  |
| Events & Fundraisers |  |  |  |  |
| Earned Income |  |  |  |  |
| Total Revenue Goal |  |  |  |  |

## Grants

### Year 1

Funding Goal ($): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Contacts:

- Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Phone/Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deadlines or Timeframe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Strategic Notes:

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### Year 2

Funding Goal ($): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Contacts:

- Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Phone/Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deadlines or Timeframe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Strategic Notes:

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### Year 3

Funding Goal ($): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Contacts:

- Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Phone/Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deadlines or Timeframe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Strategic Notes:

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## Individual Donations

### Year 1

Funding Goal ($): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Contacts:

- Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Phone/Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deadlines or Timeframe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Strategic Notes:

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### Year 2

Funding Goal ($): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Contacts:

- Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Phone/Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deadlines or Timeframe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Strategic Notes:

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### Year 3

Funding Goal ($): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Contacts:

- Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Phone/Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deadlines or Timeframe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Strategic Notes:

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## Events & Fundraisers

### Year 1

Funding Goal ($): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Contacts:

- Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Phone/Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deadlines or Timeframe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Strategic Notes:

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### Year 2

Funding Goal ($): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Contacts:

- Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Phone/Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deadlines or Timeframe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Strategic Notes:

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### Year 3

Funding Goal ($): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Contacts:

- Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Phone/Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deadlines or Timeframe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Strategic Notes:

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## Earned Income

### Year 1

Funding Goal ($): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Contacts:

- Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Phone/Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deadlines or Timeframe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Strategic Notes:

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### Year 2

Funding Goal ($): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Contacts:

- Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Phone/Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deadlines or Timeframe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Strategic Notes:

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### Year 3

Funding Goal ($): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Contacts:

- Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Phone/Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deadlines or Timeframe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Strategic Notes:

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