



**Next River**  
Fundraising  
Strategies

Where the Science and Heart of Fundraising Converge



## THE FUNDRAISER'S PLANNER

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The Fundraiser's Planner is a product and service of Next River Fundraising Strategies, LLC. To learn more visit: [www.nextriverfundraising.com](http://www.nextriverfundraising.com)

**PROVEN STRATEGY. SYSTEMS THAT WORK. STORIES THAT INSPIRE.**

# Terms of Use & Copyright

Hi there! We're thrilled you're using The Fundraiser's Planner.

This planner was created with a lot of heart (and a lot of coffee) to help fundraisers like you get organized, stay focused, and raise more money with less stress.

## A quick word about how this digital file can—and can't—be used:

### ✔ What You Can Do:

Use this planner for your own personal or professional fundraising work.

Print it, write in it, type in it, import it into your favorite note-taking app—whatever works for your brain.

Use it to stay sane during campaign season, audit prep, or any day ending in “y.”

### ✘ What You Can't Do:

- Share it with your team, colleagues, friends, or social media followers. This is a single-user license.
- Upload it to the internet, even in private forums or behind paywalls.
- Reproduce or sell any part of this planner as your own (that's just not cool).

If your organization or team would like to use the planner together, we offer team and site licenses—just drop us a note and we'll hook you up with a bulk discount.

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Unauthorized use or distribution violates copyright law (and honestly, our trust).

Need help or want more tools?

Visit [www.myfundraisingplanner.com](http://www.myfundraisingplanner.com) or email us at [hello@nextriver.com](mailto:hello@nextriver.com).

We're here to make fundraising easier—and yes, even fun.

# How To Use Your Fundraiser's Planner

CONGRATULATIONS! And welcome to The Fundraiser's Planner –the first comprehensive journal and planner designed specifically for fundraisers and nonprofit leaders – created by fundraisers for fundraisers.

The Fundraiser's Planner incorporates the best in personal time management and goal setting with high-level fundraising focus to help you manage your day and reach your fundraising goals in one, easy-to-use system.

By taking the time to invest in yourself and writing your goals and actions down, you're already setting yourself up for success. Articulating your goals and writing them down means you stand a greater chance of achieving them.

The Fundraiser's Planner is designed to be intuitive and easy-to-use. The prompts in each section are meant to encourage your thinking and creativity and give you space to track both personal and professional goals. The following notes may help guide you in how to use each page.

- 🕒 The months and dates are intentionally left blank so that you can customize it to your calendar or fiscal year.
- 🕒 It's arranged in order so that you can set your yearly goals, followed by your quarterly goals.
- 🕒 The first Quarterly Goal Setting page sets up your goals looking forward, while quarters 2,3, and 4 have space for reflecting on successes from the prior three months.
- 🕒 Each quarterly section is followed by three monthly sections consisting of the week and daily pages for each month.
- 🕒 There are five weekly pages for each month; if a particular month does not have five weeks, you may wish to use those extra pages for additional notes, task tracking, or be creative and add pictures or quotes that inspire you. It's your planner; make it work for you!



## My Purpose

Before you dig deep into goal setting, set aside some time to reflect on your work as a fundraiser, why you do what you do, and what it means to you personally. By connecting your individual purpose – your “why” – to your daily work, you can create a deeper, more meaningful connection to the work itself. It helps you set clear goals and overcome obstacles by grounding yourself in a sense of gratitude and meaning.



## Personal Goal Setting

You may choose to use these pages for goal setting in your personal or professional life. They're different than your specific fundraising goals because these are for you as an individual fundraiser, not organizational or institutional goals. Remember that goals should be:

### SMART

Specific • **M**easureable • **A**chievable\* • **R**elevant • **T**ime-Bound

*(\*May also be "Aspirational" and that's pretty exciting!) The Personal Goal Setting pages give you space and prompts to develop SMART goals and tie them back to your Purpose.*



## Annual Fundraising Goals

This is your space to develop your annual fundraising strategies and tactics – what will you need to do to reach your fundraising goals this year? Make the distinction between a strategy and a tactic. A *strategy* is your high-level, overarching goal that is part of your overall plan or budget. A *tactic* is what you do to achieve the strategy. For example, your fundraising strategy might be “Increase the amount of dollars raised from foundations by 20% this year” (high level, specific, time-bound) – the tactics you would use might be “Identify 5 foundations that have never funded us before; Ask the board to identify foundations they are familiar with for additional research,” etc.

*“A Goal Without a Plan is Just a Wish”*

Antoine de Saint-Exupéry

To get even more out of your Fundraiser's Planner, sign up for “The Flow Chart,” a regular email newsletter from Next River Fundraising Strategies. It's full of tips, ideas, current trends, and additional resources and planning tools to make this your best fundraising year ever.

# My Purpose

*Fundraising is one of the most fulfilling and rewarding professions to be a part of – as a fundraiser, you are serving an important mission. By reflecting on your Purpose within in the context of Fundraising, your goals and plans can take on a dynamic that goes beyond the transactional and into great transformation for you, your donors, and your mission’s beneficiaries. Your Purpose is the driver of everything you do, the why that fuels your what.*

Why do I work in fundraising? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What do I enjoy most about fundraising? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What frustrates me most about fundraising? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What are my greatest areas of success in fundraising? What am I best at? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What areas of fundraising do I need to invest more in? Where are my areas of greatest opportunity? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Three adjectives I think describe me really well:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Three adjectives that describe what I aspire to be:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I believe that fundraising is an important and powerful profession because \_\_\_\_\_

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What is most important to me about my organization's mission? \_\_\_\_\_

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How does the organization's mission and the work that I do to support it relate to my personal beliefs and values? \_\_\_\_\_

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If I were ever to leave this position or to retire from fundraising, how would I want people to remember me? What would I hope they say about me and my work? \_\_\_\_\_

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Using your answers to the questions above as a guide, how would you define your Purpose Statement – the reason why you do what you do and have set the goals that you have in front of you?

# Personal Goal Setting

*Your personal goals are different than your fundraising/institutional goals. These are the things that you want to do for yourself. You may choose to make them very personal (“Start taking photography classes”) or related directly to your professional goals (“Get my CFRE by the end of next year.”)*

By (date) \_\_\_\_\_, I will \_\_\_\_\_

\_\_\_\_\_

This goal is important to me because \_\_\_\_\_

\_\_\_\_\_

It aligns with my personal values and purpose because \_\_\_\_\_

\_\_\_\_\_

How will I feel when I have taken steps towards accomplishing this goal? \_\_\_\_\_

\_\_\_\_\_

The steps I will take to reach this goal are:

Action Steps	Milestones/Date
_____	_____
_____	_____
_____	_____

What roadblocks might I encounter in reaching this goal?  
How can I overcome them?

\_\_\_\_\_

\_\_\_\_\_

Who can I ask to hold me accountable to this goal? Who do I need to report to on its success?

\_\_\_\_\_

\_\_\_\_\_

How will I celebrate reaching this goal or working towards it? \_\_\_\_\_

\_\_\_\_\_

Three adjectives that describe how I feel about this goal are:

\_\_\_\_\_

# Personal Goal Setting

By (date) \_\_\_\_\_, I will \_\_\_\_\_

This goal is important to me because \_\_\_\_\_

It aligns with my personal values and purpose because \_\_\_\_\_

How will I feel when I have taken steps towards accomplishing this goal? \_\_\_\_\_

The steps I will take to reach this goal are:

Action Steps	Milestones/Date
_____	_____
_____	_____
_____	_____
_____	_____

What roadblocks might I encounter in reaching this goal?  
How can I overcome them?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Who can I ask to hold me accountable to this goal? Who  
do I need to report to on its success?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How will I celebrate reaching this goal or working towards it? \_\_\_\_\_

Three adjectives that describe how I feel about this goal are:

\_\_\_\_\_  
\_\_\_\_\_

# Personal Goal Setting

By (date) \_\_\_\_\_, I will \_\_\_\_\_

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This goal is important to me because \_\_\_\_\_

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It aligns with my personal values and purpose because \_\_\_\_\_

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How will I feel when I have taken steps towards accomplishing this goal? \_\_\_\_\_

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The steps I will take to reach this goal are:

Action Steps	Milestones/Date
_____	_____
_____	_____
_____	_____
_____	_____

What roadblocks might I encounter in reaching this goal?  
How can I overcome them?

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Who can I ask to hold me accountable to this goal? Who  
do I need to report to on its success?

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How will I celebrate reaching this goal or working towards it? \_\_\_\_\_

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Three adjectives that describe how I feel about this goal are:

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# Personal Goal Setting

By (date) \_\_\_\_\_, I will \_\_\_\_\_

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This goal is important to me because \_\_\_\_\_

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It aligns with my personal values and purpose because \_\_\_\_\_

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How will I feel when I have taken steps towards accomplishing this goal? \_\_\_\_\_

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The steps I will take to reach this goal are:

Action Steps	Milestones/Date
_____	_____
_____	_____
_____	_____
_____	_____

What roadblocks might I encounter in reaching this goal?  
How can I overcome them?

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Who can I ask to hold me accountable to this goal? Who  
do I need to report to on its success?

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How will I celebrate reaching this goal or working towards it? \_\_\_\_\_

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Three adjectives that describe how I feel about this goal are:

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# Annual Fundraising Goals

Total \$ Fundraising Goal This Year:

\$ \_\_\_\_\_

Individuals	\$ _____
Corporate	\$ _____
Foundations	\$ _____
Grants	\$ _____
Events	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Annual	\$ _____
Unrestricted	\$ _____
Restricted	\$ _____
Capital	\$ _____
Endowed	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Total Fundraising Expense This Year:

\$ \_\_\_\_\_

Staff / Salary	\$ _____
Equipment	\$ _____
Technology / CRM	\$ _____
Special Events	\$ _____
Communications	\$ _____
Stewardship	\$ _____
Printing	\$ _____

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Total # of Donors Goal This Year:

\_\_\_\_\_

Individuals	\$ _____
Corporate	\$ _____
Foundations	\$ _____
Grants	\$ _____
Events	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Donor Retention Goal	% _____
Last Year's Donor Retention Rate	% _____

The formula for Donor Retention Rate is, # of donors last year divided by the # of donors this year.

# of Donors Year 1:	_____	=	<input type="text"/>	%
# of Donors Year 2:	_____			

# Annual Fundraising Goal Strategies

**Key Strategies for Fundraising This Year.** Identify your top priorities for fundraising goal setting that will support the organization's strategic development and fulfill the mission. Strategies are the over-arching, longer-term goals that lead to specific outcomes. Tactics are the action steps that support reaching the goal. For example: Strategy – Increase the Number of Recurring Gift Donors by 20% before the end of the year. Tactic: Identify all donors who typically make more than two gifts per year.

Strategy # 1 \_\_\_\_\_

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Tactics to reach this goal:

\_\_\_\_\_

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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Resources needed to reach this goal:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

Strategy # 2 \_\_\_\_\_

\_\_\_\_\_

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Tactics to reach this goal:

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\_\_\_\_\_

Resources needed to reach this goal:

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# Annual Fundraising Goal Strategies

Strategy # 3 \_\_\_\_\_

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Tactics to reach this goal:

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Resources needed to reach this goal:

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Strategy # 4 \_\_\_\_\_

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Tactics to reach this goal:

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Resources needed to reach this goal:

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# Annual Fundraising Goal Strategies

Strategy # 5 \_\_\_\_\_

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Tactics to reach this goal:

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Resources needed to reach this goal:

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Strategy # 6 \_\_\_\_\_

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Tactics to reach this goal:

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Resources needed to reach this goal:

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# Annual Fundraising Goal Strategies

Strategy # 7 \_\_\_\_\_

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Tactics to reach this goal:

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Resources needed to reach this goal:

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Strategy # 8 \_\_\_\_\_

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Tactics to reach this goal:

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Resources needed to reach this goal:

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# Annual Fundraising Goal Strategies

Strategy # 9 \_\_\_\_\_

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Tactics to reach this goal:

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Resources needed to reach this goal:

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Strategy # 10 \_\_\_\_\_

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Tactics to reach this goal:

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Resources needed to reach this goal:

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# Year At A Glance

Month

Month

Month

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My personal priorities for this year are:

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The things I will do to make this a great personal year are:

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**Year :** \_\_\_\_\_

Month	Month	Month
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Month	Month	Month
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**My primary fundraising priorities for the year are:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**The things I will do to make this a great fundraising year are:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Quarterly Fundraising Goals & Review

Total \$ Fundraising Goal This Quarter

\$ \_\_\_\_\_

Individuals	\$ _____
Corporate	\$ _____
Foundations	\$ _____
Grants	\$ _____
Events	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

# Q1

Total # of Donors Goal This Quarter

\$ \_\_\_\_\_

Individuals	\$ _____
Corporate	\$ _____
Foundations	\$ _____
Grants	\$ _____
Events	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

### Goals

Number of New Donors # \_\_\_\_\_

Number of Renewed Donors # \_\_\_\_\_

Donor Retention Rate % \_\_\_\_\_

The formula for Donor Retention Rate is,

# of donors last year  
divided by the  
# of donors this year.

$$\frac{\text{\# of Donors Year 1:}}{\text{\# of Donors Year 2:}} = \text{\%}$$

Key fundraising goals and metrics to achieve this quarter :  
(e.g. number of asks or proposals, number of visits, stewardship activities, etc.)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Months in Review**

\_\_\_\_\_ /20 \_\_\_\_\_ through \_\_\_\_\_ /20 \_\_\_\_\_

**First Quarter**

My top personal priorities this quarter are \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

My top fundraising priorities this quarter are \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What am I most excited about this quarter?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What am I most worried about this quarter?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What steps can I take to reduce any worries or concern? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Tactics and milestone to reach personal goals this quarter:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Tactics and milestone to reach my fundraising goals this quarter:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Monthly Goal Planning & Review

My Top 5 Priorities this Month \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Asks to Make or Proposals to Submit this Month \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Five (or more!) Donors I Will Contact This Month \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Three (or more!) Stewardship Activities or Random Acts of Gratitude I Will Complete This Month \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Sunday	Monday

My Fundraising Goal for This Month Is \$ \_\_\_\_\_

To reach this goal and to further the overall fundraising strategy, the fundraising actions I need to complete this month are:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Month and Year

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Tuesday

Wednesday

Thursday

Friday

Saturday


Where can I express gratitude this month in my personal and professional life? How?

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What can I do this month for myself or to practice self care?

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# Weekly Planner

## This Week's #1 Priority to Accomplish

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## Top 5 Additional Priorities This Week

1	<hr/> <hr/>
2	<hr/> <hr/>
3	<hr/> <hr/>
4	<hr/> <hr/>
5	<hr/> <hr/>

## Fundraising Actions That Need to Happen to This Week

*Donors to contact, grant proposals, prospecting, event planning, or ongoing tasks that need attention, etc.*

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## Milestones/actions towards my personal goals:

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## How can I practice self-care this week & nurture myself?

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## What am I excited about this week?

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## What am I nervous or worried about this week? What can I do to reduce that anxiety?

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# Weekly Beginning (Date)

Monday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Tuesday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Wednesday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Thursday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Friday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Saturday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Sunday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

# Weekly Planner

## This Week's #1 Priority to Accomplish

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## Top 5 Additional Priorities This Week

1	<hr/> <hr/>
2	<hr/> <hr/>
3	<hr/> <hr/>
4	<hr/> <hr/>
5	<hr/> <hr/>

## Fundraising Actions That Need to Happen to This Week

*Donors to contact, grant proposals, prospecting, event planning, or ongoing tasks that need attention, etc.*

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## Milestones/actions towards my personal goals:

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## How can I practice self-care this week & nurture myself?

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## What am I excited about this week?

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## What am I nervous or worried about this week? What can I do to reduce that anxiety?

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# Weekly Beginning (Date)

Monday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Tuesday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Wednesday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Thursday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Friday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Saturday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Sunday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

# Weekly Planner

## This Week's #1 Priority to Accomplish

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## Top 5 Additional Priorities This Week

1	<hr/> <hr/> <hr/>
2	<hr/> <hr/> <hr/>
3	<hr/> <hr/> <hr/>
4	<hr/> <hr/> <hr/>
5	<hr/> <hr/> <hr/>

## Fundraising Actions That Need to Happen to This Week

*Donors to contact, grant proposals, prospecting, event planning, or ongoing tasks that need attention, etc.*

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## Milestones/actions towards my personal goals:

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## How can I practice self-care this week & nurture myself?

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## What am I excited about this week?

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## What am I nervous or worried about this week? What can I do to reduce that anxiety?

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# Weekly Beginning (Date)

Monday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Tuesday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Wednesday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Thursday

To Do List

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Friday

To Do List

- 1: \_\_\_\_\_
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- 3: \_\_\_\_\_

Today's Priority

Saturday

To Do List

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Today's Priority

Sunday

To Do List

- 1: \_\_\_\_\_
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Today's Priority

# Weekly Planner

## This Week's #1 Priority to Accomplish

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## Top 5 Additional Priorities This Week

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## Fundraising Actions That Need to Happen to This Week

*Donors to contact, grant proposals, prospecting, event planning, or ongoing tasks that need attention, etc.*

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## Milestones/actions towards my personal goals:

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## How can I practice self-care this week & nurture myself?

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## What am I excited about this week?

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## What am I nervous or worried about this week? What can I do to reduce that anxiety?

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# Weekly Beginning (Date)

Monday

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Today's Priority

# Monthly Review

My greatest successes and the things I am most proud of this month are \_\_\_\_\_

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What lessons did I learn this month or what opportunities presented themselves that I need to work on? \_\_\_\_\_

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What went really well this month?

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What could have gone better?

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My favorite or most moving donor interaction this month was \_\_\_\_\_

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The ways I expressed gratitude to donors, my colleagues, my friends and family – and myself! – this month were \_\_\_\_\_

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**Professional Development / CFRE Tracking, or Space For Notes And Ideas:**

# Monthly Goal Planning & Review

My Top 5 Priorities this Month \_\_\_\_\_  
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Asks to Make or Proposals to Submit this Month \_\_\_\_\_  
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Five (or more!) Donors I Will Contact This Month \_\_\_\_\_  
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Three (or more!) Stewardship Activities or Random Acts of Gratitude I Will Complete This Month \_\_\_\_\_  
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Sunday	Monday

My Fundraising Goal for This Month Is \$ \_\_\_\_\_

To reach this goal and to further the overall fundraising strategy, the fundraising actions I need to complete this month are:  
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Month and Year

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Tuesday

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Where can I express gratitude this month in my personal and professional life? How?

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What can I do this month for myself or to practice self care?

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# Weekly Planner

## This Week's #1 Priority to Accomplish

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## Milestones/actions towards my personal goals:

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# Weekly Planner

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Today's Priority

# Weekly Planner

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Today's Priority

# Monthly Review

My greatest successes and the things I am most proud of this month are \_\_\_\_\_

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What lessons did I learn this month or what opportunities presented themselves that I need to work on? \_\_\_\_\_

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What went really well this month?

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What could have gone better?

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My favorite or most moving donor interaction this month was \_\_\_\_\_

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The ways I expressed gratitude to donors, my colleagues, my friends and family – and myself! – this month were \_\_\_\_\_

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**Professional Development / CFRE Tracking, or Space For Notes And Ideas:**

# Monthly Goal Planning & Review

My Top 5 Priorities this Month \_\_\_\_\_  
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Sunday	Monday

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To reach this goal and to further the overall fundraising strategy, the fundraising actions I need to complete this month are:  
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**Month and Year**

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Tuesday

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Where can I express gratitude this month in my personal and professional life? How?

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What can I do this month for myself or to practice self care?

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# Weekly Planner

## This Week's #1 Priority to Accomplish

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Today's Priority

Thursday

To Do List

- 1: \_\_\_\_\_
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Today's Priority

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To Do List

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To Do List

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Today's Priority

Sunday

To Do List

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Today's Priority

# Weekly Planner

## This Week's #1 Priority to Accomplish

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## Top 5 Additional Priorities This Week

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2	<hr/> <hr/>
3	<hr/> <hr/>
4	<hr/> <hr/>
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## Fundraising Actions That Need to Happen to This Week

*Donors to contact, grant proposals, prospecting, event planning, or ongoing tasks that need attention, etc.*

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## Milestones/actions towards my personal goals:

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## How can I practice self-care this week & nurture myself?

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## What am I excited about this week?

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## What am I nervous or worried about this week? What can I do to reduce that anxiety?

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Today's Priority

# Monthly Review

My greatest successes and the things I am most proud of this month are \_\_\_\_\_

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What lessons did I learn this month or what opportunities presented themselves that I need to work on? \_\_\_\_\_

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What went really well this month?

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What could have gone better?

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My favorite or most moving donor interaction this month was \_\_\_\_\_

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The ways I expressed gratitude to donors, my colleagues, my friends and family – and myself! – this month were \_\_\_\_\_

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**Professional Development / CFRE Tracking, or Space For Notes And Ideas:**

# Quarterly Fundraising Goals & Review

Total \$ Raised To-Date \$ \_\_\_\_\_

Total # Donors To-Date # \_\_\_\_\_

Renewal Rate To-Date \$ \_\_\_\_\_

Total \$ Fundraising Goal This Quarter

\$ \_\_\_\_\_

Individuals \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

Corporate \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

Foundations \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

Grants \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

Events \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

# Q2

## Last Quarter Review

Total \$ Raised Last Quarter \$ \_\_\_\_\_

Was This:

At Goal

Above Goal

Below Goal

What were my key accomplishments last quarter and what am I most proud of? \_\_\_\_\_

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What can I do better and where can I improve this quarter? \_\_\_\_\_

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What action steps do I need to take to improve? \_\_\_\_\_

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**Months in Review**

\_\_\_\_\_ /20 \_\_\_\_\_ through \_\_\_\_\_ /20 \_\_\_\_\_

**Second Quarter**

What lessons did I learn last quarter that I can put into use over the next three months? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

My top personal priorities this quarter are \_\_\_\_\_  
\_\_\_\_\_

Do I need to revise or refocus my personal goals at all? How? \_\_\_\_\_  
\_\_\_\_\_

My top fundraising priorities this quarter are \_\_\_\_\_  
\_\_\_\_\_

Do I need to revise or refocus my fundraising strategies this quarter? \_\_\_\_\_  
\_\_\_\_\_

What am I most excited about this quarter?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What am I most worried about this quarter?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What steps can I take to reduce any worries or concern? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Tactics and milestone to reach personal goals this quarter:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Tactics and milestone to reach my fundraising goals this quarter:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Monthly Goal Planning & Review

My Top 5 Priorities this Month \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
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 \_\_\_\_\_

Asks to Make or Proposals to Submit this Month \_\_\_\_\_  
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Five (or more!) Donors I Will Contact This Month \_\_\_\_\_  
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Three (or more!) Stewardship Activities or Random Acts of Gratitude I Will Complete This Month \_\_\_\_\_  
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Sunday	Monday

My Fundraising Goal for This Month Is \$ \_\_\_\_\_

To reach this goal and to further the overall fundraising strategy, the fundraising actions I need to complete this month are:  
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 \_\_\_\_\_  
 \_\_\_\_\_

Month and Year

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Tuesday

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Saturday


Where can I express gratitude this month in my personal and professional life? How?

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What can I do this month for myself or to practice self care?

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# Weekly Planner

## This Week's #1 Priority to Accomplish

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What lessons did I learn this month or what opportunities presented themselves that I need to work on? \_\_\_\_\_

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What went really well this month?

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What could have gone better?

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My favorite or most moving donor interaction this month was \_\_\_\_\_

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The ways I expressed gratitude to donors, my colleagues, my friends and family – and myself! – this month were \_\_\_\_\_

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**Professional Development / CFRE Tracking, or Space For Notes And Ideas:**

# Monthly Goal Planning & Review

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To reach this goal and to further the overall fundraising strategy, the fundraising actions I need to complete this month are:

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Where can I express gratitude this month in my personal and professional life? How?

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## How can I practice self-care this week & nurture myself?

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## What am I excited about this week?

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# Weekly Beginning (Date)

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Today's Priority

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Today's Priority

# Weekly Planner

## This Week's #1 Priority to Accomplish

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## Top 5 Additional Priorities This Week

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## Fundraising Actions That Need to Happen to This Week

*Donors to contact, grant proposals, prospecting, event planning, or ongoing tasks that need attention, etc.*

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## Milestones/actions towards my personal goals:

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## How can I practice self-care this week & nurture myself?

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# Monthly Review

My greatest successes and the things I am most proud of this month are \_\_\_\_\_

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What lessons did I learn this month or what opportunities presented themselves that I need to work on? \_\_\_\_\_

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What went really well this month?

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What could have gone better?

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My favorite or most moving donor interaction this month was \_\_\_\_\_

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The ways I expressed gratitude to donors, my colleagues, my friends and family – and myself! – this month were \_\_\_\_\_

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**Professional Development / CFRE Tracking, or Space For Notes And Ideas:**

# Monthly Goal Planning & Review

My Top 5 Priorities this Month \_\_\_\_\_  
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Asks to Make or Proposals to Submit this Month \_\_\_\_\_  
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My Fundraising Goal for This Month Is \$ \_\_\_\_\_

To reach this goal and to further the overall fundraising strategy, the fundraising actions I need to complete this month are:  
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Month and Year

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Where can I express gratitude this month in my personal and professional life? How?

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What can I do this month for myself or to practice self care?

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# Weekly Planner

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My greatest successes and the things I am most proud of this month are \_\_\_\_\_

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What lessons did I learn this month or what opportunities presented themselves that I need to work on? \_\_\_\_\_

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What went really well this month?

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What could have gone better?

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My favorite or most moving donor interaction this month was \_\_\_\_\_

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The ways I expressed gratitude to donors, my colleagues, my friends and family – and myself! – this month were \_\_\_\_\_

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**Professional Development / CFRE Tracking, or Space For Notes And Ideas:**

# Quarterly Fundraising Goals & Review

Total \$ Raised To-Date \$ \_\_\_\_\_

Total # Donors To-Date # \_\_\_\_\_

Renewal Rate To-Date \$ \_\_\_\_\_

Total \$ Fundraising Goal This Quarter

\$ \_\_\_\_\_

# Q3

Individuals \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

Corporate \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

Foundations \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

Grants \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

Events \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

## Last Quarter Review

Total \$ Raised Last Quarter \$ \_\_\_\_\_

Was This:

At Goal

Above Goal

Below Goal

What were my key accomplishments last quarter and what am I most proud of? \_\_\_\_\_

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What can I do better and where can I improve this quarter? \_\_\_\_\_

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What action steps do I need to take to improve? \_\_\_\_\_

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**Months in Review**

\_\_\_\_\_ /20 \_\_\_\_\_ through \_\_\_\_\_ /20 \_\_\_\_\_

**Third Quarter**

What lessons did I learn last quarter that I can put into use over the next three months? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

My top personal priorities this quarter are \_\_\_\_\_  
\_\_\_\_\_

Do I need to revise or refocus my personal goals at all? How? \_\_\_\_\_  
\_\_\_\_\_

My top fundraising priorities this quarter are \_\_\_\_\_  
\_\_\_\_\_

Do I need to revise or refocus my fundraising strategies this quarter? \_\_\_\_\_  
\_\_\_\_\_

What am I most excited about this quarter?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What am I most worried about this quarter?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What steps can I take to reduce any worries or concern? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Tactics and milestone to reach personal goals this quarter:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Tactics and milestone to reach my fundraising goals this quarter:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Monthly Goal Planning & Review

My Top 5 Priorities this Month \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
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Asks to Make or Proposals to Submit this Month \_\_\_\_\_  
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Five (or more!) Donors I Will Contact This Month \_\_\_\_\_  
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Sunday	Monday

My Fundraising Goal for This Month Is \$ \_\_\_\_\_

To reach this goal and to further the overall fundraising strategy, the fundraising actions I need to complete this month are:  
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Month and Year

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Today's Priority

# Weekly Planner

## This Week's #1 Priority to Accomplish

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## Top 5 Additional Priorities This Week

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## Fundraising Actions That Need to Happen to This Week

*Donors to contact, grant proposals, prospecting, event planning, or ongoing tasks that need attention, etc.*

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## Milestones/actions towards my personal goals:

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## How can I practice self-care this week & nurture myself?

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## What am I excited about this week?

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Today's Priority

# Monthly Review

My greatest successes and the things I am most proud of this month are \_\_\_\_\_

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What lessons did I learn this month or what opportunities presented themselves that I need to work on? \_\_\_\_\_

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What went really well this month?

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What could have gone better?

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My favorite or most moving donor interaction this month was \_\_\_\_\_

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The ways I expressed gratitude to donors, my colleagues, my friends and family – and myself! – this month were \_\_\_\_\_

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**Professional Development / CFRE Tracking, or Space For Notes And Ideas:**

# Monthly Goal Planning & Review

My Top 5 Priorities this Month \_\_\_\_\_  
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Asks to Make or Proposals to Submit this Month \_\_\_\_\_  
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My Fundraising Goal for This Month Is \$ \_\_\_\_\_

To reach this goal and to further the overall fundraising strategy, the fundraising actions I need to complete this month are:  
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Month and Year

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Where can I express gratitude this month in my personal and professional life? How?

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What can I do this month for myself or to practice self care?

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# Weekly Planner

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What lessons did I learn this month or what opportunities presented themselves that I need to work on? \_\_\_\_\_

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What went really well this month?

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What could have gone better?

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Month and Year

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# Weekly Planner

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- 1: \_\_\_\_\_
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- 3: \_\_\_\_\_

Today's Priority

Sunday

To Do List

- 1: \_\_\_\_\_
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Today's Priority

# Weekly Planner

## This Week's #1 Priority to Accomplish

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## Top 5 Additional Priorities This Week

1	<hr/> <hr/>
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3	<hr/> <hr/>
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## Fundraising Actions That Need to Happen to This Week

*Donors to contact, grant proposals, prospecting, event planning, or ongoing tasks that need attention, etc.*

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## Milestones/actions towards my personal goals:

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## How can I practice self-care this week & nurture myself?

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## What am I excited about this week?

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## What am I nervous or worried about this week? What can I do to reduce that anxiety?

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# Weekly Beginning (Date)

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# Monthly Review

My greatest successes and the things I am most proud of this month are \_\_\_\_\_

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What lessons did I learn this month or what opportunities presented themselves that I need to work on? \_\_\_\_\_

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What went really well this month?

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What could have gone better?

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My favorite or most moving donor interaction this month was \_\_\_\_\_

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The ways I expressed gratitude to donors, my colleagues, my friends and family – and myself! – this month were \_\_\_\_\_

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**Professional Development / CFRE Tracking, or Space For Notes And Ideas:**

# Quarterly Fundraising Goals & Review

Total \$ Raised To-Date \$ \_\_\_\_\_

Total # Donors To-Date # \_\_\_\_\_

Renewal Rate To-Date \$ \_\_\_\_\_

Total \$ Fundraising Goal This Quarter

\$ \_\_\_\_\_

# Q4

Individuals \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

Corporate \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

Foundations \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

Grants \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

Events \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_ # of Donors \_\_\_\_\_

## Last Quarter Review

Total \$ Raised Last Quarter \$ \_\_\_\_\_

Was This:

At Goal

Above Goal

Below Goal

What were my key accomplishments last quarter and what am I most proud of? \_\_\_\_\_

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What can I do better and where can I improve this quarter? \_\_\_\_\_

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What action steps do I need to take to improve? \_\_\_\_\_

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**Months in Review**

\_\_\_\_\_ /20 \_\_\_\_\_ through \_\_\_\_\_ /20 \_\_\_\_\_

**Fourth Quarter**

What lessons did I learn last quarter that I can put into use over the next three months? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

My top personal priorities this quarter are \_\_\_\_\_  
\_\_\_\_\_

Do I need to revise or refocus my personal goals at all? How? \_\_\_\_\_  
\_\_\_\_\_

My top fundraising priorities this quarter are \_\_\_\_\_  
\_\_\_\_\_

Do I need to revise or refocus my fundraising strategies this quarter? \_\_\_\_\_  
\_\_\_\_\_

What am I most excited about this quarter?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What am I most worried about this quarter?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What steps can I take to reduce any worries or concern? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Tactics and milestone to reach personal goals this quarter:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Tactics and milestone to reach my fundraising goals this quarter:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Monthly Goal Planning & Review

My Top 5 Priorities this Month \_\_\_\_\_  
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 \_\_\_\_\_  
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Asks to Make or Proposals to Submit this Month \_\_\_\_\_  
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Five (or more!) Donors I Will Contact This Month \_\_\_\_\_  
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Three (or more!) Stewardship Activities or Random Acts of Gratitude I Will Complete This Month \_\_\_\_\_  
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Sunday	Monday

My Fundraising Goal for This Month Is \$ \_\_\_\_\_

To reach this goal and to further the overall fundraising strategy, the fundraising actions I need to complete this month are:  
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Month and Year

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Tuesday

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Where can I express gratitude this month in my personal and professional life? How?

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What can I do this month for myself or to practice self care?

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# Weekly Planner

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What went really well this month?

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What could have gone better?

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My favorite or most moving donor interaction this month was \_\_\_\_\_

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The ways I expressed gratitude to donors, my colleagues, my friends and family – and myself! – this month were \_\_\_\_\_

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## Professional Development / CFRE Tracking, or Space For Notes And Ideas:

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My Top 5 Priorities this Month \_\_\_\_\_  
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- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

Today's Priority

Tuesday

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Today's Priority

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Today's Priority

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Today's Priority

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Today's Priority

Saturday

To Do List

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Today's Priority

Sunday

To Do List

- 1: \_\_\_\_\_
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- 3: \_\_\_\_\_

Today's Priority

# Weekly Planner

## This Week's #1 Priority to Accomplish

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## Top 5 Additional Priorities This Week

1	<hr/> <hr/>
2	<hr/> <hr/>
3	<hr/> <hr/>
4	<hr/> <hr/>
5	<hr/> <hr/>

## Fundraising Actions That Need to Happen to This Week

*Donors to contact, grant proposals, prospecting, event planning, or ongoing tasks that need attention, etc.*

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## Milestones/actions towards my personal goals:

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## How can I practice self-care this week & nurture myself?

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## What am I excited about this week?

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## What am I nervous or worried about this week? What can I do to reduce that anxiety?

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# Weekly Beginning (Date)

Monday

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Today's Priority

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Today's Priority

# Monthly Review

My greatest successes and the things I am most proud of this month are \_\_\_\_\_

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What lessons did I learn this month or what opportunities presented themselves that I need to work on? \_\_\_\_\_

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What went really well this month?

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What could have gone better?

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My favorite or most moving donor interaction this month was \_\_\_\_\_

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The ways I expressed gratitude to donors, my colleagues, my friends and family – and myself! – this month were \_\_\_\_\_

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**Professional Development / CFRE Tracking, or Space For Notes And Ideas:**

# Monthly Goal Planning & Review

My Top 5 Priorities this Month \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Asks to Make or Proposals to Submit this Month \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Five (or more!) Donors I Will Contact This Month \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Three (or more!) Stewardship Activities or Random Acts of Gratitude I Will Complete This Month \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Sunday	Monday

My Fundraising Goal for This Month Is \$ \_\_\_\_\_

To reach this goal and to further the overall fundraising strategy, the fundraising actions I need to complete this month are:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Month and Year

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Tuesday

Wednesday

Thursday

Friday

Saturday


Where can I express gratitude this month in my personal and professional life? How?

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What can I do this month for myself or to practice self care?

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# Weekly Planner

## This Week's #1 Priority to Accomplish

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## What am I nervous or worried about this week? What can I do to reduce that anxiety?

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Today's Priority

# Monthly Review

My greatest successes and the things I am most proud of this month are \_\_\_\_\_

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What lessons did I learn this month or what opportunities presented themselves that I need to work on? \_\_\_\_\_

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What went really well this month?

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What could have gone better?

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My favorite or most moving donor interaction this month was \_\_\_\_\_

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The ways I expressed gratitude to donors, my colleagues, my friends and family – and myself! – this month were \_\_\_\_\_

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# Yearly Review

Total \$ Raised This Year \$ \_\_\_\_\_

Total # Donors This Year \$ \_\_\_\_\_

Total Goal Amount Was \$ \_\_\_\_\_

The Goal Number Was \$ \_\_\_\_\_

Total Over / Under \$ \_\_\_\_\_

Total Over / Under \$ \_\_\_\_\_

Total Donor Retention Rate This Year %

Goal Donor Retention Rate This Year %

What fundraising strategies were most successful this year? Why? \_\_\_\_\_

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Which strategies were least successful this year? Why? \_\_\_\_\_

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What fundraising accomplishment am I most proud of? \_\_\_\_\_

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What donor interaction or gift story stands out the most? \_\_\_\_\_

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What opportunities or lessons did I learn that I need to work on next year? What were my greatest strengths that I can carry into the next year? \_\_\_\_\_

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The Flow Chart, the regular email newsletter from

## Next River Fundraising Strategies,

brings additional resources directly to your inbox – trends in fundraising to be aware of, upcoming dates and important milestones, additional fundraising tools, and campaign-specific strategies. To learn more and to sign up for this free resource, please visit

[www.nextriverfundraising.com](http://www.nextriverfundraising.com)

## Advisory Council

The following very generously gave of their time and expertise in providing guidance, review, and direction to ensure The Fundraiser's Planner incorporates best practice in fundraising planning, success measurement, personal goal setting, and time management.

**Chad Barger, CFRE**

Productive Fundraising  
[productivefundraising.com](http://productivefundraising.com)

**Lindsay McCreary, MBA**

La Jolla Country Day School  
[lindsaymccreary.com](http://lindsaymccreary.com)

**Lisa Sargent**

Sargent Communications  
[lisasargent.com](http://lisasargent.com)

**Alice Ferris, MBA, CFRE, ACFRE**

GoalBusters Consulting  
[goalbusters.net](http://goalbusters.net)

**Barbara O'Reilly, CFRE**

Windmill Hill Consulting  
[whillconsulting.com](http://whillconsulting.com)

**Lynne Wester**

The DRG Group  
[donorrelations.com](http://donorrelations.com)

**Cherian Koshy, CFRE, CAP**

[cheriankoshy.com](http://cheriankoshy.com)

**Marc A. Pitman**

Concord Leadership  
[concordleadershipgroup.com](http://concordleadershipgroup.com)

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The Fundraiser's Planner was conceived and created by T. Clay Buck, CFRE ([nextriverfundraising.com](http://nextriverfundraising.com)) and Veronica A. Seymour, CFRE ([itinerantcommunications.com](http://itinerantcommunications.com)).  
It was designed by Amy Keller • Just Sue Graphic Design • [justsuegraphicdesign.com](http://justsuegraphicdesign.com)

