

Simple Success Strategy & Goal Worksheet

Year: _____

Strategy	Description	Target Audience	Revenue Goal	Projected Cost	Who is responsible?	When?
Grants						
Events						
Individual donors						
Major gifts						
Marketing						
Communications						
Other						
Totals						

Simple Success Summary Calendar Template

	Grants	Special Events	Individual donors (monthly giving, direct mail, lapsed donors, etc.)	Major gifts	Marketing (public speaking, media, advertising, etc.)	Communications (newsletter, website, annual report, etc.)	Other (vacations, trainings, etc.)
Jan							
Feb							
Mar							
Apr							
May							
Jun							
Jul							
Aug							
Sep							
Oct							
Nov							
Dec							