[Logo, company name

Description automatically generated](http://www.saadandshaw.com)

**Fundraising Milestones**

How do you keep your team motivated and engaged from the beginning of a project until the end? Here’s the answer: milestones. With projects lasting from six months to five years you need to establish milestones to give your team an incentive, a sense of accomplishment, and commitment.

Here are a few items that you can consider as you develop your milestones. Review these, use those that will work for you, and add to the list. Most importantly, set a date for each milestone, and define who will take the lead in ensuring you are on track to reach these. Use this document as a starting point. Keep it simple and stay focused.

| **Milestone** | **Person Responsible** | **Start Date** | **End Date** |
| --- | --- | --- | --- |
| 1. Secure complete buy-in from your board, staff, and supporters. |  |  |  |
| 1. All necessary information is entered into your data management system and can be accessed for reporting purposes. |  |  |  |
| 1. All department heads from across your organization have participated in an orientation session for your fundraising plan. |  |  |  |
| 1. We have recruited a volunteer leadership team. |  |  |  |
| 1. Our fundraising program is volunteer-led. |  |  |  |
| 1. Our organization is on its way to becoming a household name, in the most positive sense! |  |  |  |
| 1. Twenty percent of our annual budget is raised by the board. |  |  |  |
| 1. Our fundraising costs are less than 30%. |  |  |  |
| 1. We have a pool of prospective donors and funders who can collectively give three times the amount of our fundraising goal. |  |  |  |
| 1. We have produced and hosted a virtual VIP tour that shares our work. |  |  |  |
| 1. We reconcile our fundraising receipts with the finance department and there is a common understanding of what has been raised and from who. |  |  |  |
| 1. We send out information to our constituents at least four times a year sharing information about our impact and our vision. |  |  |  |
| 1. We have secured a lead gift that represents 20% of our fundraising goal. |  |  |  |
| 1. Minutes from our board, committee, and working group sessions are sent out to participants within 48 hours and these include action items and next steps that people have agreed to. |  |  |  |
| 1. One hundred percent of all board members make a financial gift to the organization. |  |  |  |
| 1. Fifty percent of our donors are individuals |  |  |  |
| 1. We have established a legacy giving (or planned giving) program. |  |  |  |
| 1. We are ready to participate in Giving Tuesday and have our strategies and materials developed in advance. |  |  |  |