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## 7.107:01 Annual Planning Template for Advancement Offices

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**FORM 7.107:01**



**Annual Planning Template for Advancement Departments**

*I. Assessment of the Prior Year*

A. Accomplishments and Milestones Achieved:

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B. Disappointments:

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C. Learnings and Revisions Going Forward:

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*II. Planning Assumptions for the Current Year*

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*III. Goals and Initiatives for the Current Year*

Annual Goals	Target/Success Measure	Key Milestones
1.		
2.		
3.		
4.		
5.		

Key Initiatives and Action Plans	Project Leader	Completion Date (by quarter)

1.		
2.		
3.		
4.		
5.		

IV. *Keys to Success*

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V. *Resources Required*

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VI. *Opportunities*

- A. What could happen (internal or external) that would provide new opportunities for the department? How can you optimize the opportunities?

VII. *Risks*

- A. What could happen (internal or external) that would jeopardize successful execution of the plan?
- B. How can you mitigate the risks?