

ANNUAL FUNDRAISING PLAN

Board Member _____
Organization _____
Fiscal Year _____
Annual Give/Get if applicable _____

Each year, we ask board members to devote some serious time to the exercise of planning how s/he will reach the fundraising commitment that comes with board service to our organization.

What is its purpose?

- 1) It provides a board member with a way to take what can seem an overwhelming responsibility and break it down into manageable components.
- 2) It gives the Executive Director and development staff (if applicable) the opportunity to have a sense of whom you know and where you see your own fundraising strengths.
- 3) It can unearth mutual prospects across board members that can lead to different and more powerful strategies of engagement.
- 4) When compiled, it gives the organization a sense of the fundraising firepower of the board.
- 5) It provides your board fundraising committee with a mechanism for peer tracking and accountability.

Most importantly, it is a DISCUSSION GUIDE for a conversation with the chair of your development committee and/or your development director. What are you thinking? Can a conversation enrich this document? Can the conversation spark other ideas you have not considered? Guaranteed that the answer is yes.

Is it binding?

Of course not. First off, you can ask but a person can politely decline. You are simply documenting your plan of ASKING. Secondly, it is not a contract but rather a plan – one you can refer to in order stay on task, to motivate, and to use with fellow board members and/or staff to strategize, raise challenges, etc.

You ready?

Filling this out should take more than an hour. You should go back to it a few times. You should have your smart phone with you and you should be looking at more than your business contacts. If you are feeling stressed about it, I suggest that either you exercise ahead of time or fill it out with a nice pinot noir in hand. Whatever works for you.

Go!

YOUR OWN PERSONAL GIVING _____
Leave blank pending discussion with ED

MAJOR DONORS

(those who you believe have the capacity to give \$1,000 or more)

Name _____ Connection _____
Color Commentary _____

Name _____ Connection _____
Color Commentary _____

Name _____ Connection _____
Color Commentary _____

DONORS \$250 - \$1,000

Name _____ Connection _____
Color Commentary _____

Name _____ Connection _____
Color Commentary _____

Name _____ Connection _____
Color Commentary _____

Thoughts about total dollars you might shoot for in this category? _____

LOWER END DONATIONS

Here we are asking you to consider how you might raise smaller dollar amounts from a wider group of people. Consider the circle of influence you have – book clubs, parents of your kids’ friends, relatives, your dentist, your chiropractor, your lawyer, your kids’ orthodontist (you sure donate enough to her/him!) Who shows up on YOUR annual list of vendors for your house / family?

Name _____	Name _____
Name _____	Name _____
Name _____	Name _____
Name _____	Name _____
Name _____	Name _____
Name _____	Name _____

Thoughts about total dollars you might shoot for in this category? _____

CORPORATE CONNECTIONS

Here we’d like you to ride through your rolodex to look not only at your business contacts but personal ones as well. Who do you know who works for a company with a generous track record? Are there companies that come to mind? They might overlap with a company on someone else’s list.

CORPORATION _____ **CONTACT** _____
Color Commentary (the connection) _____

CORPORATION _____ **CONTACT** _____
Color Commentary (the connection) _____

SPECIAL EVENTS

Event #1

Tickets / # of Tables / Ads _____

Event #2

Tickets / # of Tables / Ads _____

Event #3

Tickets / # of Tables / Ads _____

FOUNDATIONS

Here you should consider anyone you know or anyone you are a degree or two of separation from who may have a contact at a foundation. In this situation, it would be helpful for the Development Director to come with a list of prospect foundations the organization is looking for help with.

FOUNDATION _____ **CONTACT** _____
Color Commentary (the connection) _____

FOUNDATION _____ **CONTACT** _____
Color Commentary (theconnection) _____

FOUNDATION _____ **CONTACT** _____
Color Commentary (the connection) _____

PRO BONO RESOURCES

Anyone you know who might be willing to donate services to the organization in exchange for visibility? Gift bag items, legal services, HR services, public relations support, etc.?

WHAT ELSE?

In this space, add what you see as challenges, what support you need from staff and any general bumps in the road you hit while filling this out. It is not an expectation that it be filled out entirely and totaled up to some amazing number. The hope is that it leads you to a plan, prompts a conversation about your own personal giving, and that it adds up to some kind of basic target for you to help keep you on track during the year.

