ANNUAL FUNDRAISING PLAN
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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 who 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 (guarantee 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 to stay on task, to motivate you 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 stressful about it, I suggest that either you work out 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, etc. 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_________________________________

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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 we are looking for you to 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) _______________________________________________
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.