



*Because the World is Counting on Us.*

# **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

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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 \_\_\_\_\_  
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 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) \_\_\_\_\_

