



Fundraising planning involves more than just scheduling the organization's fundraising events and appeals. This outline will help you think through who your organization's most likely donors will be, what their capacity and motivation for giving might be, and how to best use your human resources (Board, staff, volunteers) to reach your fundraising goals. The plan will be most effective if you think through these questions with the input of those who will ultimately be instrumental in helping to implement the plan.

Building Private Philanthropic Support Development Plan Outline

NOTE: YOUR PLAN SHOULD BE WRITTEN WITH ENOUGH DETAIL AND BACKGROUND SO IT COULD BE EASILY UNDERSTOOD BY A NEW OR PROSPECTIVE BOARD MEMBER.

A. Fund Raising Goals

- What is your overall goal for private philanthropic support?

B. Sectors

- What is your overall goal for gifts from individuals? Foundations? Corporations? Small businesses? Other?

C. Markets

- Can you break down each of these sectors into specific fundraising markets/constituencies? This analysis should result in categories based on why a particular part of a funding sector might be interested in funding your organization (such as health care corporations, or foundations interested in economic development, or individuals who are recent immigrants working in the banking industry); or the particular relationship and/or linkage to the organization of the prospect group (for example, professional colleagues of Board members, clients, friends of gala tickets buyers)
- Include both donor groups you expect will contribute this year and prospects you are hoping will give in future years if contact is initiated during the coming year.

D. Fund Raising Strategies

For *each of the markets identified in section C*, you should outline a specific plan addressing the following elements:

1. Prospects

- How many prospects are there?
- Approximately, how many (or what percentage) of these prospects are already donors to your organization?
- For prospects who have not given before, how will they be identified?
- Who will make the link to the new prospects?

2. Goals

Direct Goals

- How much did you raise from this market last year?
- What is your dollar goal for this year?
- What size or range of gifts are anticipated?
- How many new donors are anticipated?

Indirect Goals

- What are your indirect goals?

Example:

Direct 50 gifts @ \$1,000 to \$1,500 through one-to-one visits as part of the major donor campaign.

Indirect Expand awareness of the agency among middle-management in the Latin American financial sector. Or, increase the Board's fund raising capacity.

3. Cultivation Activities

- What cultivation or education activities are planned for these prospects? (For example: mailings and site visits)

4. Solicitation Strategies

- What fund raising activities or strategies will you use to solicit this market? (For example: direct face-to-face meetings, small events at Board members homes, mail, a gala)
- Include numbers, for example, how many mailings you plan and how many will be asked in each mailing, or how many tickets you project to sell to your gala.

5. Board and Volunteer Role

- What is the role of Board members or other volunteers in these activities?
- Are there Board members responsible for taking leadership and helping engage other Board members in these activities? Who?

6. Staff Role

- What are staff responsibilities for these activities? List each staff member and their individual responsibilities.

7. Calendar

- What are the key dates for organizing these activities?
- Block out time for preparation and follow up.

8. Budget

- List the major items of expense. Include an estimate of staff costs.

E Master Calendar

- Create a master calendar for the year showing the dates for all fundraising activities.
- Block out time for preparation and follow up.
- Include appropriate checkpoints for evaluation in the calendar.