

Sample Annual Fund Development Plan

ABC LITERACY CENTER, INC.

FY 2009 FUND DEVELOPMENT PLAN

INTRODUCTION

The purpose of developing an annual giving development plan is to help the staff and board set realistic income goals with respect to the annual budgeting process. The plan also outlines the strategic steps required to reach those goals, as well as board and staff responsibilities in accomplishing the plan.

This proposed FY plan identifies targeted financial goals necessary to support the FY operating budget being recommended by the Finance and Executive Committees. The plan will be revised and updated on an as-needed basis in conjunction with revisions to the operating budget.

I. FINANCIAL GOALS

PROJECTED FY OPERATING BUDGET: \$618,118.00

Income Categories	FY 2008 Income Actual	FY 2009 Income Projections	% of Total 2009 Income
Government	\$385,972.00*	\$380,851.00	62%
Foundations	37,003.00	27,000.00	4%
Individuals/Family Trusts	62,033.00	53,000.00	9%
Service Organizations	2,045.00	2,000.00	.3%
Federated Campaigns (ST, CFC, United Way)	89,692.00	107,000.00	17%
Special Events	32,155.00	32,000.00	5%
Other (Unsolicited Income)	17,955.00*	3,000.00	.5%
Interest Income	1,800.00	2,500.00	.4%
1998 Audited Excess Revenues		10,767.00	1.8%
TOTAL INCOME	\$628,655.00	\$618,118.00	100%

*(including approximately \$13,000 in one-time gifts)

II. STRATEGIC GOALS (non-monetary goals impacting success of plan)

- 100% giving by ABC, Inc. board, executive director, and key staff (92% giving was achieved in previous FY).
- 100% participation by board in some fundraising task, including cultivation of donors (65% participation was achieved in previous FY).

- Enhanced communications re: fund development within the board and with prospects, including regular presentations at board meetings by fund development chair.
- Develop plan for ongoing recruitment/training of fundraising volunteers. Recruit a minimum of ten non-board volunteers to work in fund development.
- Develop new prospects for both personal solicitation campaign and direct mail solicitation; cultivate family foundations/trusts.
- Strengthen donor cultivation program and board and staff understanding of the purpose and process of cultivation.
- Actively involve ABC, Inc. staff and students in special events and fundraising activities (e.g., in previous FY students helped with several direct mails, supported phonathon, walk, yearbook campaign, and Student Recognition Evening; staff coordinated concert, participated in walk, contributed graphic design work for direct mail and publications, and received an Achievement Award for their increased participation in the last United Way campaign.)
- Strengthen coordination between the public relations and fund development committees to further support fundraising efforts.
- Maintain systems for ongoing monitoring/evaluation of progress in all areas of fund development.

III. SOLICITATION STRATEGIES

A. Personal Solicitation Campaign

1. Board Solicitation (Chairs: President, Fund Development Chair)
 Time Frame: September-December, 2008
 # of Prospects: 26
 Goal: 100% giving; \$7,000 (Amount raised in previous FY: \$7,800)

Method: Personal solicitation. Request amounts based on donor history (one-time annual giving in lieu of multiple direct mail solicitations; these individuals will, however, get notice of special events.)

Solicitors: President and Fund Development Chair

2. Individual Solicitation (Chair(s): Name(s), with 12 team solicitors)

Time Frame: September-December, 2008
 # of Prospects: 50-75 top individual donors, Advisory Board, family trusts/foundations

Goal: \$30,000; 60% renewals, 15% gift upgrades (\$28,500 received/pledged for FY 2008)

Method: Personal solicitation by board and non-board volunteers (one-time annual giving in lieu of multiple solicitations.)

Solicitors: (names)

B. Special Events

1. Walk for Literacy (Walk Chair: Name)
(Phonathon Co-Chairs: Names)

Time Frame: October 2, 2008
of Walkers: 100

Goal: \$16,000 gross/\$14,800 net (FY 2003 Walk grossed \$16,100)

Method: Mailing: 2,500 pieces; phonathon 2 weeks later to recruit walkers, pledgers, donations; news articles and other promotional publicity; other personal recruitment by board, staff, students.

2. Student Recognition Evening (Chair(s): to be named)

Time Frame: April-June, 1999
of Prospects: 650 individuals (previous attendees/invitees, new)

Goal: \$3,500 gross/\$0 net; 350 guests, volunteers, and students (\$4,000 raised by 2008 Recognition Evening.)

Method: Invitation mailed; follow-up phone calls, face-to-face soliciting; newsletter announcement.

3. Yearbook/Ad Campaign (Chair(s): Name(s))

Time Frame: December, 2008 - May, 2009
of Prospects: 75 corporate sponsors; 100 businesses; 35 individuals/other

Goal: \$10,500 gross/\$8,000 net; 60% renewal ads, 15% upgrades, 10% new (over \$12,000 gross raised in 2008 campaign)

Method: Mailing; follow-up phone calls and personal soliciting.

Solicitors: Board, staff, volunteers, college interns, students.

4. Benefit Concert (Chair(s): Name(s))

Time Frame: March 25, 2009
Attendance Goal: 350

Goal: \$2,000 gross/\$1,500 net (concert raised \$2,000 in 3/08)

Method: Mailings, radio and TV PR., flyers, posters, newsletters, and newspaper coverage.

Solicitors: staff, volunteers, other?

C. Direct Mail

Each direct mail will have a different theme to encourage multiple gifts and to reach individuals with varied interests. Direct mail is responsibility of finance director and fundraising assistant.

Federated Campaign Mailings:

Letter to previous donors through United Way, state, and CFC campaigns to encouraging renewal in the 2008 campaign and possible gift upgrade.

Time Frame: August-September, 2008

of Prospects: 191 previous donors (including board members who choose to contribute through Donor Option Program)

Goal: United Way: \$35,000; 75% renewal, 15% upgraded gifts (\$34,000 raised in most recent campaign) ST & CFC:\$7,000 (\$7,300 raised in most recent campaign)

Method: Mailings; newsletter articles, publicity in workplaces.

Direct Mail

Time Frame: December, 2008
of Prospects: 2,500 (1,000 new)
of Donors: 200

Goal: \$8,000; 60% renewal, 15% gift upgrades, 5% new donors (\$8,000 raised in most recent Holiday Drive)

Method: Mailing with remit enclosure; follow-up articles in newsletter; holiday mailing possibly signed by individual students from each class. Follow-up mailing to major donors in previous campaign who have not renewed their gift.

Direct Mail

Time Frame: April-May, 2009
of Prospects: 3,000 (1,000 new)
of Donors: 200

Goal: \$8,000; 60% renewal, 15% gift upgrades, 5% new donors (\$6,000 raised in 2008 Friends Drive)

Method: Mailing with remit enclosure; follow-up articles in newsletter; and follow-up letter within one month to non-respondents (if staff resources permit). Mailing possibly signed by selected board members and students. Follow-up mailing to major donors in previous campaign who have not renewed their gift.

D. Government and Foundation Grants

Time Frame: On-going throughout the year
of Reports: 165
of New Prospects: at least 10

Goal: \$365,528: 9 government applications; \$30,000: 15 foundation proposals; \$65,000: United Way Grant (include in Fed. Campaign Total)

Method: Finance Director and relevant program staff prepare grant applications.

IV. Cultivation Strategies (Making "Friends")

The purpose of cultivation is:

- 1) To add prospects to our donor base and develop them to become active supporters and regular donors; and
- 2) To improve relationships with current board members, donors, volunteers, and other friends of ABC, Inc., to build a greater understanding of how they can help our agency achieve its mission.

Donor and volunteer recognition are critical to the cultivation process. Cultivation needs to be discussed regularly at board meetings to encourage each board member to become part of the cultivation process.

A. Open Houses:

This is a responsibility of the P.R. Committee; chair(s) to be named through that committee.

Time: Twice per year: December, 2008 (Donor Recognition)
April, 2009 (Volunteer Recognition)

Goal: Appreciation evenings at ABC, Inc. for donors and volunteers; opportunity to see facilities, meet staff and students; recruitment of potential volunteers; and cultivation of potential donors.

Method: Special mailings with invitations; newsletter articles; public announcements; personal invitations by board.

Responsible: board, staff, students, other volunteers

B. Communications

Holiday Card: Holiday card to 300 friends and major donors (not a solicitation)

Newsletter: 6x per year. Sent to agency mailing list (3,500+) provides regular updates on agency programs, student writings, activities, and special events. Mailing list includes funders, donors, volunteers, home-based students, elected officials, other agency executives, and service providers.

Annual Report: Annually to coincide with July 1 fiscal year. Mail in September. This is a major communications tool sent to government and private funding sources, large donors, agency executives, and public officials, and is submitted with most proposals and requests to large donor prospects.

Student Yearbook: Another major communications tool featuring student writings. Distributed at annual Recognition Evening and mailed to major corporate sponsors of event and major ad-takers, major funding sources as well as new prospects.

Other Publicity/Public Relations: A separate public relations plan will be developed by P.R. Committee to help reinforce cultivation efforts of this Fund Development Plan. A close communications linkage between the Fund Development and P.R. Committees needs to be maintained to adequately support the objectives of the Fund Development Plan.

V. Monitoring the Fund Development Plan and Process

- The Development Committee will meet 6 times a year to review the progress of the plan and, with development staff, will identify problems and solutions.
- Development staff and committee chair will discuss development issues on a regular basis.
- Committee chair and development staff will monitor sub-committee chairs; committee chair will follow-up re: problems.
- Development Committee will discuss fund development plan and progress at monthly board meetings.
- Development staff will provide financial and statistical data with which to help evaluate progress of the plan.

VI. Fund Development Calendar FY 2009

July	Preparation of Annual Report Review results of June Recognition Dinner
August	Annual Report mailed with cover letter Plan P.R. for United Way, government employee Campaigns Send letters to United Way, government and CFC Donors (Direct Mail #1)
September	Mailing/phonathon/other publicity for Literacy Walk Personal solicitation of board members (Sept.-Nov.) United Way employee campaign at ABC, Inc.

October	<p>Literacy Walk Follow-up re: walk pledges Personal campaign with large donors (Sept.-Dec.) Direct Mail #2 planned</p>
November	<p>Discuss cultivation strategies (On-going) Evaluate results of Literacy Walk Prepare holiday mailing/ mailing lists P.R. Committee will plan Open House Evaluate previous ad campaign for yearbook and plan 2009 campaign</p>
December	<p>Direct Mail #2 Holiday Open House Advance solicitation for corporate sponsors of yearbook Review progress of personal annual campaign</p>
January	<p>Review results of Direct Mail #2 Review progress of ad campaign Review results of personal campaign Plan benefit concert</p>
February	<p>Review progress of ad campaign Continue discussions of cultivation strategies Review plans for Volunteer Recognition Evening Review plans for Student Recognition Evening Review plans for benefit concert</p>
March	<p>Finalize plans for Direct Mail #3 Update progress on ad campaign Review results of Federated Campaigns (United Way, ST, CFC) Benefit concert See February</p>
April	<p>Volunteer Recognition Evening Process Direct Mail #3 Review results of benefit concert Update Progress re: ad book campaign Update Progress re: Recognition Evening Begin FY 2010 fund development planning process</p>
May	<p>Complete ad campaign Review progress re: Direct Mail #3 Update Progress re: Recognition Evening Mailing for Recognition Dinner Begin planning for 5th Annual Literacy Walk</p>
June	<p>Recognition Evening Review results of ad campaign and dinner ticket sales Update results of Direct Mail #3 Full board to approve FY 2000 Fund Development Plan and agency operating budget</p>