

SAMPLE INDIVIDUAL FUND DEVELOPMENT PLAN FOR BOARD OF DIRECTORS

Organization X's current budget of \$_____ consists of contributions from individuals, foundations and corporations. In order to maintain a successful fundraising program, all board members are expected to make their own personal gift and to participate in activities that will build stronger relationships with our supporters, attract new donors, and raise money.

Please complete this as your YEAR fundraising plan, by confirming your personal gift, choosing the fundraising activities you will participate in, and setting goals in those areas. Please make sure your plan is completed before or by the _____ (date) board meeting.

- *Make a personal donation.* Board members of Organization X are each expected to make an annual financial contribution. There is no minimum amount, and we ask that you consider an amount that represents a significant gift to you. To make this gift, consider pledging an amount early in the year, and making pledge payments over the course of the year.

In YEAR, I can donate: _____

I will pay my pledge:

_____ at one time, by _____ (date)

_____ in 4 quarterly payments

_____ in 12 monthly payments

- *Help identify those who might support Organization X and involve them in cultivation events to gauge their level of interest in our mission.*

I can help identify new supporters: yes _____ no _____

If you already know of people who you think would like to learn more about our work, please list their names below. We will do *nothing* with these names before talking with you further.

1. _____

2. _____

3. _____

4. _____

5. _____

- *Participate in donor meetings.* Many of our solicitations to donors and prospects include a face-to-face meeting. Board Members can play a vital role in these meetings.

I am interested in attending donor meetings: yes _____ no _____

The best times for me are: morning _____ afternoon _____ evening _____

- *Make thank-you calls to donors and supporters.* This involves calling donors just to say “thanks.” It’s not a pitch for money, but just an opportunity to thank the donors for their support, answer any questions that they may have, and learn more about the donor. You will be given information and assistance to make these thank you calls.

I will make thank-you calls to donors and supporters: yes ___ no ___

- *Serve on the fund development committee.* This involves working with the Development Director to design an annual fundraising plan, and helping to engage all Board Members in fundraising efforts.

I will serve on the committee: yes ___ no ___

I would like to learn more about the committee: yes ___ no ___

- *Host a cultivation gathering at your home/office.* Cultivation gatherings are used to tell potential supporters about the work of Organization X and to strengthen our relationship with current donors. These gatherings are *not* to raise money. By hosting a party, you underwrite the cost of food and drink, and open up your home/office for guests. You can also co-host with another board member or supporter.

I am available to host a cultivation event: yes ___ no ___

Best time of year: Winter ___ Spring ___ Summer ___ Fall ___

- *Other relationship building activities to boost fundraising results.*

I am also willing to help by:

- ___ Meeting with donors to learn more about why they give to Organization X
- ___ Calling donors to invite them to events, opportunities to see Organization X in action, etc.
- ___ Calling donors to update them on breaking news or recent accomplishments.
- ___ Leading “field trips” or tours with supporters and prospects to see our work firsthand.
- ___ Attending events, programs and activities to welcome and chat with guests.
- ___ Writing personal notes on fundraising letters.
- ___ Writing personal thank-you notes to donors.

- *Other ways to support fundraising.*

I have expertise in the following areas: _____

I agree to fulfill the above-stated fundraising goals to the best of my ability and with staff support.

Board Member

Date

Board President or Executive Director

Date



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