



Center *for* Nonprofit Leadership

at ADELPHI UNIVERSITY
School of Social Work

SAMPLE TEMPLATE Individual Board Member's Fund Development Plan*

The operating budget for _____ consists of revenue and contributions from _____, _____, and _____. In order to maintain a successful fundraising program that gives _____ the opportunity to deliver our mission as completely as possible, all board members are expected to participate in activities to raise money throughout the year and to make their own personal gift.

Please complete this as your _____ fundraising plan by choosing the fundraising activities you will participate in, setting goals in those areas, and confirming your personal gift.

Individual board fundraising plans should be completed before or by _____ and submitted to _____.

1. **Individual Donor Prospects: The ABC's**

Building a broad individual donor base is the foundation for fundraising success. Below, please list individual donor prospects with whom you can cultivate a relationship, introduce to the organization, and ultimately solicit for financial support over the next 12 months. We can help with this process. Ideal donor prospects will have the ability and capacity to support the work of _____ with a meaningful contribution, belief and interest in the work of _____, a connection relationship to you and/or _____. The _____ is available to work with fellow board members to identify and vet viable donor prospects.

NAME OF PROSPECT	ABILITY	BELIEF	CONNECTION
1.			
2.			
3.			
4.			
5.			

2. **Donor Cultivation & Stewardship**

Solicitation and stewardship of major donors and prospects often include a face-to-face meeting. Board Members play a key role in these meetings as both governance leadership and as fellow financial supporters, both of which successfully leverage increased support for our organization.

Are you willing to attend donor meetings? YES _____ NO _____

_____ I'm not ready for this yet, but with training and practice I would like to participate in donor meetings in the future.

3. **Engagement through Special Events & Staff-Led Efforts, including the Annual Appeal**

This engagement includes _____, _____, and _____ (events and activities). Individuals can be engaged through ticket sales, sponsorships, and/or in-person appeals.

I will help to raise funds for the following events or activities:

(Identify Activity)

_____ YES _____ NO _____
_____ YES _____ NO _____

I will raise funds for the Annual Appeal letter through the following activities:

Adding personal notes: YES _____ NO _____
Identifying additional recipients: YES _____ NO _____
Reaching out on my Facebook and/or LinkedIn page: YES _____ NO _____

I can commit to _____ (insert number) of names based on relationships I have with current or prospective donors.

My own contacts: YES _____ NO _____

Social media promotion: YES _____ NO _____

Other: _____

My goal will be to raise \$ _____ through Special Events & Appeals.

4. **Hosting an event at my home – Board Led Outreach**

Home events are used to educate our friends and donors about the work of _____ and are a ripe opportunity to raise money and cultivate new donor prospects. By hosting a party, Board members underwrite the cost of food and drinks and open up our homes/spaces to the foundation and help generate attendance by inviting prospective donors in our networks.

I am available to host a party at my home: YES _____ NO _____

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

I have a friend/colleague who I will ask to host a house party: YES _____ NO _____

The name of my friend is: _____

My goal to raise \$ _____ through a house party.

_____ I am unable to host this year, but will consider in the future.

5. Thank-You Calls to Donors & Supporters

This part of the fundraising plan 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 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 _____

6. Other Ways to Support Fundraising

I have expertise or interest in the following areas: _____

I have foundation and/or corporate contacts that I can share: _____

7. Personal Contributions

Board members are each expected to make an annual financial contribution. There is no minimum amount; we ask that you consider an amount that represents a significant gift to you. (If there is an amount, include here). To make this gift, consider pledging an amount early in the year and making pledge payments over the course of the year. You should also include any gift match possibilities from your employer if applicable.

My personal donation for _____: _____.

I will pay my pledge: _____ at one time,
by _____ (date); _____ in 4 quarterly payments; _____ in 12 monthly payments.

My employer match for my total gift to _____: _____

_____ I’d like further support in setting my fundraising goals - _____ Committee,
please contact me!

Additional Comments:

I agree to fulfill the above-stated fundraising goals to the best of my ability for the stated calendar year.

Board Member

Date

Board Member

Date

*Adapted from William Cordery of Astraea Lesbian Foundation for Justice in Grassroots Fundraising Journal, January – February 2014