

Sample Fundraising Plan

Strategy	Goal	Progress to Date	Action Steps	Who	When	Notes
Major Donor Development	\$35,000	\$3,500 10%	Identify 15 new major donor prospects and set up meetings with ED & Board Chair	Annie	1-Feb	
			Schedule spring stewardship visits with 15 major donors from last year	Annie	20-Apr	
			Schedule fall stewardship visits with 15 major donors from last year	Annie	15-Sep	
			Schedule and hold ask visits with all new and renewing major donors	Annie	15-Nov	
Give NOLA Day	\$12,000	\$12,760 106%	Send three email reminders	Robert	13-Mar, 15-Apr, 2-May	
			Draft and schedule appeal email	Robert	1-May	
			Create social media plan & schedule posts	Robert	1-May	Photos and waivers are on shared backup drive
			Send thank you notes	Annie	4-May	
			Enter all donors into database	Annie	4-May	
Year-End Appeal Letter	\$15,000	\$0 0%	Draft appeal letter	Frances	15-Oct	
			Approve appeal letter	Annie/ Frances	20-Oct	
			Finalize mailing list	Frances	25-Oct	
			Recruit volunteers to help address envelopes	Frances	5-Nov	Minimum 8 volunteers needed; 10 is ideal
			Stuff envelopes, address, and send	Frances	15-Nov	
Donor Stewardship	75% donor retention	74% donor retention	Send quarterly newsletter	Frances	28-Feb, 31-May, 31-Aug, 30-Nov	
			Organize board phone bank to thank donors	Robert	15-Mar, 15-Sept	
Grants	\$65,000	\$48,000 74%	Submit Smith Family Foundation proposal	Peggy	15-Feb	
			Send in Smith Family mid-year reporting	Peggy	15-Oct	CC Amelia Florence on email
			Submit Louisiana Improvement Foundation proposal	Peggy	1-Apr	
			Submit Great Works Foundation proposal	Peggy	20-May	
			Send in New Futures Together Foundation quarterly reports	Peggy	September, December	
			Hand-write notes for newsletters and send to current funders	Peggy	May, November	

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Annual Dinner	\$18,000	\$19,735 110%	Send update to last year's sponsors	Robert	15-Jan	
			Identify 15 new prospective sponsors and send packet	Robert	1-Mar	
			Send packet to last year's sponsors	Robert	1-Mar	
			Call all prospective sponsors to follow up	Robert	7-Mar - 15-Apr	
			Send save the date to all donors	Robert	1-Jun	
			Send email for ticket purchases	Robert	1-Jul, 1-Aug, 1-Sept, 7-Sept, 14-Sept	
			Post ticket purchase info on social media	Robert	1-Jul, 1-Aug, 1-Sept, 7-Sept, 14-Sept	
			Get ticket sales commitments from all board members	Helen	1-Jun	
			Book venue, caterer, and band	Robert	15-Apr	
			Create online ticket order page	Robert	1-Jun	
			Do final walk through	Robert	15-Sep	
			Send thank you notes to sponsors and attendees and update donor database	Robert	17-Sep	
Board giving	\$15,000	\$8,000 54%	Set up meetings with board members to discuss annual pledge	Helen	15-Jun	
			Send reminder emails to all board members	Helen/ Annie	1-Dec	
TOTAL	\$160,000	\$91,995 57%				