

# ESSENTIALS *of* DEVELOPMENT

## ANNUAL FUND DEVELOPMENT STRATEGY AND PLAN

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# World of Fundraising

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There are only three ways to raise money...

1. Direct Solicitation
2. Events
3. Planned Giving

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# Three Basic Methods in Raising Money

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- Individual Solicitation
  - Face-to-Face (Tier 1)
  - Telephone (preceded by a letter) (Tier 2)
- Group Solicitation
  - Large Group (i.e. Annual Banquet) (Tier 3)
  - Small Group (i.e. small group desserts) (Tier 2)
- Events (Auctions, Golf Tournaments, etc.)

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# Annual Fund Development Plan . . .

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. . . is an annual calendar of all of your organizations fundraising activity including:

- Updating Fundraising Materials
- Development Team Meetings
- Fundraising Events
- Donor Cultivation Events
- Donor Communication
- Donor Solicitations
- Print and Online Communication
- Planned Giving

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# Annual Fund Development Plan . . .

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## Master Plan 2012-2013

Month	Event	Category	Initiator/Path
January	Email Note to All Donors	1,2,3	Treasurer/OM
February	Newsletter	1,2,3	DD/OM
	Camp Scholarship Appeal	1,2,3	Secretary/OM
March	Donor Dinner	1,2,3	Secretary/OM
April	Financial Update	1,2,3	Treasurer/OM
May	Online Newsletter	1,2,3	Secretary/OM
	Golf Tournament	1,2,3,4	VC/Golf Chair
	Written Thanks	1,2	TDS Chair/OM
June	Begin Next Ask Meetings	1	TDSC/PC

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# Fundraising Strategy

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“Who are the least number of donors you can meet with to raised the largest amount of your budget?”

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# Annual Plan Key Principles

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- Implement a 60-40 strategy with your donors for your annual fund (versus 90-10 for Capital Campaigns)
- Development Team works with the Tier 1 and 2
- Four personal contacts with all donors each year (but only one time to ask for money)
- Ask for Annual Pledges once per year.

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# Planned Giving Trigger Points

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- Estate Planning
- Sale of Real Estate
- Sale of a Business
- High Income



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# Grants and Foundations

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- Do your research
- It's often WHO YOU KNOW
- Avoid counting on this for operating funds  
(but as new project money)