

My Individual Donor Giving Plan for Year 1

Due back to Laurence by {insert exact date}, by email to him at lpagnoni@lapafundraising.com

Author: _____ (Insert your name here)

(Use this outline as a guide for what to include. Add other questions or analysis as it fits your needs.)

The steps to advancing or establishing our individual donor giving plans are as follows:

1. Set a goal
2. Identify and train solicitors: how many? _____
3. Identify prospects: how many? _____
4. Prepare support materials
5. Assign prospects¹
6. Kick off campaign
7. Hold regular meetings by phone or in person to discuss progress
8. Celebrate the end of the campaign
9. Recognize donors and incorporate them into ongoing fundraising efforts.

OVERALL GOAL

I will raise \$_____. with this plan for the purpose of general operating support. In order to raise these funds by December 31, I will need to have _____ of active donors.

This goal is based on a 50% increase of what my agency was able to secure in GOS from individuals last year. (If your agency raised no funds last year from individuals for GOS, then the goal will have to be derived from reasonable projections made by taking the number of prospective donors multiplied by their projected average gift ranges.)

I have asked the following people to join me in this work and they have agreed to help: (Individual Donor Squad—the solicitors.)

- 1.
- 2.
- 3.

They will help by doing the following:

- 1.
- 2.
- 3.

I am committed to making sure to ask for money with a team member and not on my own. Here are three reasons why I see the value of asking for money with in a team:

- 1.
- 2.
- 3.

¹ Asking for major gifts usually involves the following four steps: 1) Identifying the donor and researching their past giving and resources; 2) Writing a brief note to say you will be calling; 3) Calling to secure a personal meeting; 4) Meeting to ask for and to secure a gift of a predetermined specific amount or within a range.

My plan has been approved and authorized by _____ on _____ (date.)

I can reasonably expect my supervisor or the Executive Director to make her or himself available _____ hours each week to help me with this plan.

I can reasonably expect my own available time to give to this implementing this plan to be _____ hours per week.

I have taken the following steps to let staff, board and colleagues know about my plan:

- 1.
- 2.
- 3.

I have asked them to support me in implementing the plan as follows:

- 1.
- 2.
- 3.

ANALYSIS OF CURRENT GIVING AT MY AGENCY

In the past year, _____% of our budget came from General Operating Support revenues.

Our GOS came from the following sources:

- 1.
- 2.
- 3.

The part of GOS that came from Individual donors was _____ %.

I record "data" on my prospective and/or current donors by using:

- a. A database software: the name of the software is _____
- b. A paper system: please describe it: _____

The person in charge of the data entry work has been (or will be) _____ and this person will work _____ hours on data entry.

We currently have _____ # of active donors. (Active is defined as having given in the past 12-months.)

We currently have _____ # of lapsed donors. (Lapsed is defined as having not given in the past 12-months.)

We currently have _____ # of prospective donors. (A prospect is defined as someone that you think has a high potential to connect with the mission and values of your agency and wanting to become involved with supporting it as a donor.)

We currently have _____ # of multiple year pledge donors who have made a pledge to my agency for a specific dollar amount.

A major gift for my agency is any gift over \$_____ (Determine this dollar amount by selecting the top 20% of your highest giving donors and take an average.)

I tie in (or will tie in) the donor dollar amount requested with the program service outcome in the following ways:

- 1.
- 2.
- 3.

REASONABLE PROJECTIONS OF DONORS NEEDED

In order to raise my annual goal I will need five prospects for every donor secured.

I project these donors to fall into the following ranges:

(This chart is used as a sample only.)

Gift Size	No. of Gifts Needed	Total
\$7,500	1	\$ 7,500
\$6,500	1	\$ 6,500
\$5,000	4	\$20,000
\$2,500	8	\$20,000
\$1,000	11	\$11,000
\$ 500	10	\$ 5,000
\$ 250	<u>20</u>	<u>\$ 5,000</u>
	55	\$75,000

Conservatively assuming a 20% rate of success, we would need 5X’s as many prospects—275—to ensure meeting our goal of 55 donors. With a 15-person board, this may mean that each board member could be asked to bring about 19 serious prospects. Prospects may also be drawn by calling current donors who have already proven to have a strong affiliation with our mission and asking them for suggestions of others that you could invite to tour your agency.

In order to surface those prospects I will do the following: (Treasure mapping)

- 1.
- 2.
- 3.
- 4.
- 5.

In order to capture contact information on people who come through the agency and may want to be on our donor list, I will do the following:

- 1.
- 2.
- 3.

ORGANIZATIONAL INTERFACE

I will share the values and vision of my agency with my current and/or prospective donors by doing the following things: (These are my ideas to attempt to cultivate donors to increase their passion for our work.)

- 1.
- 2.

- 3.
- 4.
- 5.

I will THANK and affirm current donors or new donors by doing the following things:

- 1.
- 2.
- 3.

I have secured the following client service data from my agency so as to make my case about the effectiveness of our services:

On an ongoing basis I will keep my client service data updated by doing the following:

What written materials about our agency's work already exist that I can use with donors to convey for the "Facts 101" packet?

What new materials do I need to create?

- 1.
- 2.
- 3.

(Do you have a donor reply envelope already printed? Do you have your facts 101 packets? Do you have business cards, presentation folders? Have you made it easy for the donor to respond?)

The tie in between this plan and our agency Web site is as follows:

- 1.
- 2.
- 3.

ONE-ON-ONE Meetings to ask for money

Of the prospects that have been identified, how many of them will I meet with to directly ask for money?

How will I go about securing those meetings?

What other one person from my team will join me for that meeting? What other teams will be also asking for money?

With whom will I practice before I actually have the meeting?

DIRECT MAIL TIE-IN

My agencies annual direct mail program’s schedule is as follows:

The connection between our direct mail program and my individual donor plan is as follows:

We will secure new prospective donor lists by the doing the following: _____

(Or we have no direct mail program and are not going to launch one at this time.)

THE PHONE CALLS

What phone call strategy will I need? What will it look like? Who will be making the calls? When will they make them? Will they make them in a group gathering or on their own? (see phone call flyer in handouts)

THE 90-minute “ASK” GATHERING

Am I going to have one this year? Yes or NO?

If no, why not? If yes, please explain your approach.

Will table captains be used? If yes, how will I train my table captains?

EVALUATING THE INDIVIDUAL DONOR GIVING PLAN:

I will evaluate this plan three times with my SQUAD on March 30, June 30, and September 30.

My evaluation process will be simple and structured as follows:

- 1.
- 2.
- 3.

The people I will ask to join me in the evaluation process are:

- 1.
- 2.
- 3.

The Evaluation Questions will be:

1. Did we meet our stated goal?
2. What obstacles did we overcome?
3. What obstacles overcame us?
4. What do we need to do to correct past mishaps?

5. Did we have enough people power to complete our plan?
6. Did we make our successes known to others?
7. How will we ask current givers for increased giving beyond their last highest gift?

My NEW PLAN

I will revise this plan by December 15 in order to prepare for next year and create a new plan based on what I have learned.