



# 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