

NCJW Sample Fund Development Plan

I. Financial Goals

Projected Operating Budget 2021: \$470,000

Income Categories	FY 2020 Actual	FY 2021 Projected	% of Total 2021
<i>Dues</i>	\$48,200.00	\$50,000.00	10%
<i>Grants-Foundation</i>	\$26,000.00	\$25,000.00	6%
<i>Grants-Government</i>	\$10,000.00	\$0.00	2%
<i>Annual Campaign</i>	\$95,000.00	\$100,000.00	20%
<i>Hannah Solomon Campaign</i>	\$140,000.00	\$150,000.00	30%
<i>Special Events</i>	\$102,000.00	\$100,000.00	22%
<i>Interest Income</i>	\$15,500.00	\$15,000.00	3%
<i>Board Campaign</i>	\$23,500.00	\$25,000.00	5%
<i>Misc Income</i>	\$5,000.00	\$5,000.00	1%
<i>Totals</i>	\$465,200.00	\$470,000.00	100%

II. Strategic Goals

- a. 100% Board Giving
- b. Dues Renewal at 85%
- c. Enhanced communication: fund development within the board and membership
- d. Development plan to train and recruit volunteers—recruit at least 10 board members to work in fund development
- e. Identify 10 new HGS donors (\$1000 unrestricted gift)
- f. Strengthen donor cultivation program

III. Resources

- a. Volunteer
 1. VP of Development
 2. Fundraising Committee
 3. Special Events Committee
- b. Staff
 1. Executive Director/Director of Development

- c. Outside Consultant
 - 1. None this year
- d. Outside mail house
 - 1. XYZ mail processing company to handle all direct mail

IV. Solicitation Strategies

- a. Dues
 - 1. Direct mail Campaign
 - 2. 3 mailers a year, June, September, December
 - 3. Follow up with Board phone calls for renewal
- b. Grants-Foundation
 - 1. Target previous donors (3@ \$5000 each)
 - 2. Identify 5 new donors (secure 2@ \$5000 each)
 - 3. Write and submit grants—volunteer and/or development staff
- c. Grants-Government
 - 1. Renew \$10,000 grant for Women’s Center therapy program
- d. Annual Campaign
 - 1. Mail 3x a year
 - 2. Target 580 members, 250 supporters
- e. Hannah Solomon Campaign
 - 1. Phone Outreach to 15 high donors (\$5000+)
 - 2. Mail follow up to 125 previous donors @\$1000 each
 - 3. Follow up phone calls to secure donations
- f. Special Events
 - 1. Establish special events committees for annual luncheon, trivia night and golf tournament
 - 2. Set goals for each event.
 - 3. Engage Board to assist with sponsorships and underwriting, setting goals for each event.
- g. Interest Income
 - 1. Finance committee to continue monitoring section investments
- h. Board Campaign
 - 1. Time frame: July-September
 - 2. Prospects: 32 board members-goal is 100% participation
 - 3. Goal: \$25,000
 - 4. Solicit 15 board members at \$500 each
 - 5. Solicit 5 board members at \$1000 each
 - 6. Solicit 2 board members at \$5000 each
 - 7. Solicit 10 board members at \$250 each
- i. Misc. Income
 - 1. Grocery Store Scrip
 - 2. Bequests that come in unplanned
 - 3. Amazon Smile

V. Cultivation Strategies

- a. Develop a plan for donor thank you’s
- b. Develop a plan for donor recognition
- c. Marketing/PR plan
 - 1. Newsletter
 - 2. Annual Report
 - 3. Thank you ad in local Jewish newspaper

4. Thank you phone calls from Board leadership
- VI. Monitoring the plan and process**
- a. Development committee will meet 6 times a year to review progress
 - b. Issues will be addressed as soon as possible
 - c. VP Development will monitor all committees and their work
 - d. Section will provide financial support to implement the plan
- VII. Development Calendar**
- June**
- First Dues renewal mailer
 - Prepare Annual Report
 - Review results from previous year and set goals for next year
- July**
- Mail annual report to all donors
 - Develop grant writing calendar with all due dates
 - Prepare first annual campaign mailer
 - Begin personal Hannah Solomon solicitations
- August**
- Begin Board solicitation campaign
- September**
- Hold annual fall luncheon
 - Review status of campaign
 - Conclude Board campaign
 - 2nd Dues renewal mailer
- October**
- Prepare second annual campaign mailer
- November**
- Personal campaign with large donors
 - Grant writing
- December**
- Follow up on personal gifts and annual campaign—goal to get donations in by year end
 - 3rd Dues Renewal mailer
- January**
- Trivia Night
 - Grant writing
- February**
- Review status of campaign
- March**
- Campaign thank you event
- April**
- Golf Tournament
 - Final annual campaign appeals
- May**
- Review status of campaign
 - Prepare for donor listing in newsletter
 - Develop plan for next fiscal year
- June**
- Present next year's plan for approval