
Sample Fundraising Plan

Capital City Dance Company 2004-2008 Strategic Plan

Goal : To Increase Contributed Income by 84% from \$107,100 to \$197,500

Board Solicitation:

Plan and Rationale: Our 18 board members have been pushed hard to give to their maximum over the last 5 years. They have given to the annual fund drive and capital campaign. There is little room for improved giving. Each board member is required to give to the best of his/her ability.

Strategy: Continue to have the Chair solicit the Executive Committee members and to have the Executive Committee members solicit the other board members. All solicitations will be made in person.

Staff Time:

Executive Director	5 Hours to help with "prospect research"
Secretary	10 Hours

Board Time:

Chair	6 Hours
Executive Committee Members	4 Hours each

Direct Cost: Minimal

Timetable: Board solicitation is to be completed within the month of September.

<u>Projected Income:</u>	<u>2004-05</u>	<u>2005-06</u>	<u>2006-07</u>	<u>2007-08</u>
	\$37,100	\$38,200	\$39,000	\$40,000

Individual Gift Solicitation:

- Plan and Rationale: Our board and staff do not have a lot of experience raising money from individuals. The plan is to start small and build on a strong base.
- Strategy: Develop a membership program where individual donors receive special privileges or benefits at different levels of giving. Memberships will range from \$35 to 51,000 annually.
- Rolodex Fundraising: Start personal solicitation of gifts from individuals. Establish a 7-8 member Individual Gifts Committee. The committee chair calls each board member and receives 15 names of individuals whom the board members feel are capable of gifts of \$100 a year or more. Staff compiles the 270 names in an alphabetical list and eliminates duplicates. The committee rates and screens the list to focus on the 80 most-likely prospects (the others are put on the mailing list). The committee determines who is best to cultivate and then to solicit these prospects. Utilize board members as much as possible. The prospects are personally invited by the "best" person to attend a performance and private reception afterwards. The following week, prospects are solicited (gift range of \$100 - \$1,000) to become high level members.
- Each year, personally solicit 80-100 new prospects to be high level members.
- Mail Campaign: All potential donors who are not part of the Rolodex effort will be solicited by mail to become members. The Individual Gifts Committee arranges for Rolodex people not personally solicited to receive letters with hand-written notes from people they know asking them for a high-level gift ("Please join me as a Patron-level member ..."). The committee identifies an additional 90-100 prospects to receive personal notes.
- Solicit all mailing list prospects for membership in the spring. Solicit them again in the fall if they have not signed up. Ask everyone to give a Christmas gift to the Company in December, and ask everyone to help sponsor a dancer in March. That way, each prospective donor will receive at last 3 direct solicitations a year. (This does not include special event solicitations.)
- Each year, send personal notes to additional 125-150 new prospects.
- Telephone Follow Up: The committee will organize telephone follow up for all prospects who received personal notes but who did not respond. Timing will be the first week of the month following the month of the mailing. Note: to encourage a better response, ask the volunteer callers to start calls with a "thank you" for past support and/or participation.

Staff Time:

Executive Director	10 Days to work with volunteers.
Development Associate	60 Days of coordinating, motivating, following up, & record keeping.
Secretary	15 Days of list & letter preparation.

Board Time:

Individual Gifts Committee	Attend 5 performances with guests.
Members (<i>each</i>)	4 Hours for personal solicitations. 2 Evenings for telephoning.
Chair (<i>in addition to above</i>)	10 Hours for calls to board members to create Rolodex fundraising list.
Other Board Members (<i>each</i>)	Attend 2 performances with guests. 2 Evenings for telephoning. Solicitation calls as appropriate.

Direct Cost:

Office Supplies & Mailings	\$3,800
Receptions	\$1,850
160 Complimentary Tickets	

<u>Projected Income:</u>	<u>2004-05</u>	<u>2005-06</u>	<u>2006-07</u>	<u>2007-08</u>
Rolodex	\$14,000	\$25,000	\$35,000	\$48,000
Mail & Phone	\$ 6,000	\$ 9,750	\$13,500	\$18,500

(The plan is to have nearly 400 high-level donors by 1999-2000, assuming we keep cultivating current donors as we add more.)

Special Fundraising Event:

Plan: Establish a Gala performance and dinner as annual Valentine's Day Social Event.

Strategy: We have recruited a former President of the Junior League to the board specifically to establish this event as an important community affair. She will set up a Valentine's Day Committee recruited from young couples on the subscription list.

Staff Time:

Executive Director	2 Weeks - first year 1 Week each year thereafter
Administrative Assistant	2 Months
Secretary	3 Weeks
Part-time Help	3 Months

Volunteer Time:

Chair	1 Day a week - 1st year 5 Hours a week thereafter
18 Committee Members	4 Hours a week each (9 couples)

Direct Cost: Includes artist fees, food, flowers, office supplies, publicist, decorations, part-time help, printing, etc.

First Year	\$82,000
Each Year thereafter	\$60,000

Timetable: Establish Committee in January, 13 months ahead of the Valentine's Day event, so each new Committee can analyze the event prior to the one for which they are responsible.

<u>Projected Net Income:</u>	<u>2004-05</u>	<u>2005-06</u>	<u>2006-07</u>	<u>2007-08</u>
	\$19,000	\$38,000	\$46,000	\$55,000

Local Government

Plan and Rationale: Our increased programming of local groups has strengthened our image with local politicians. We have recruited a new board member who was formerly a popular County Commissioner to lead a lobbying effort to solicit the County Commissioners for County funding.

Strategy: Ask County to match City support. Form ad-hoc board committee of 6 members to lead effort to solicit County Commissioners and City Council. Screen subscribers to see if any political types attend our programs - involve them in the lobbying effort.

Staff Time:

Executive Director	7 Days
Administrative Assistant	10 Days

Board Time:

6 Board members	12 Hours each for meetings, reception, phone calls, visits.
Committee Chair	1 Day a week (6 weeks) + 12 Hours.

Volunteer Time: 15 Volunteers to coordinate letter-writing campaign.

Direct Costs:

Office supplies & postage	\$550
Reception	600
56 complimentary tickets	

<u>Projections:</u>	<u>2004-05</u>	<u>2005-06</u>	<u>2006-07</u>	<u>2007-08</u>
City	\$14,000	\$14,000	\$14,000	\$14,000
County	\$ 7,000	\$ 9,000	\$11,000	\$14,000

State Arts Council:

Plan and Rationale: Our programs are proving to be quality presentations, and the comments of State Council staff have changed in tone from skeptical to enthusiastic. However, because decreased funding is making less money available for grants, we project a decrease in support from the State Arts Council.

Strategy: Continue to invite State staff to performances with personal invitations followed up by phone calls. Continue to offer complimentary tickets to State Arts Council board members. Start inviting staff and board to special cultivation events. Submit grant requests to both Dance and Presenting Programs on a timely basis.

Staff Time:

Executive Director	3 Days
Development Associate	8 Days

Volunteer Time: Board Chair 6 Hours

Direct Costs: Minimal - complimentary tickets

<u>Projected Income:</u>	<u>2004-05</u>	<u>2005-06</u>	<u>2006-07</u>	<u>2007-08</u>
	\$10,000	\$8,000	\$8,000	\$8,000