**Steps in Developing a Fundraising Plan**

1. *Fundraising Self-Assessment Audit*
   - Prioritize organizational needs (via npo strategic plan)
2. Prioritize funding needs & clarify the case for donating
3. Identify target donor constituencies for each funding need, along with strategies to raise funds from each constituency
4. Compile into development plan document; gain approvals
5. Implement, review, evaluate, update
# i. FUNDRAISING SELF-ASSESSMENT/AUDIT

Use this assessment to create a shared picture of your fund development program. Then, Board & Staff together, outline strategies to address areas to improve.

Excerpted from the *AFP CFRE Review Course*, Association of Fundraising Professionals, 2008

- **Organization’s Readiness for Fundraising**
- **Board & Staff Fundraising Roles**
- **Systems & Procedures**
- **Cultivation & Stewardship**
- **Is there an integrated development plan in place?**

## To what degree does our nonprofit have...

<table>
<thead>
<tr>
<th>+</th>
<th>~</th>
<th>-</th>
<th>?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>A justifiable reason, recognized by the community-at-large, to raise public and private contributions?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Services and programs that are deemed worthy by our constituents and the community-at-large?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>A mission statement that can be accurately summarized in a few sentences?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>A strategic plan that addresses program goals, markets, and fundraising needs (both operating and capital) over a period of 3-5 years?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>A process to review, update, and extend this strategic plan on a regular basis?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td>A positive public image?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td>An accurate record of clients/audience, volunteers, and donors?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td>Ongoing strategies to build our constituent base and cultivate relationships?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td>A process that identifies constituents and new markets and outlines strategies to develop and strengthen relationships with these groups (constituency development)?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td>Ongoing evaluation processes that assess program and board effectiveness? And a commitment to intervene as needed?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11.</td>
<td>Management systems which fulfill accountability and reporting requirements to government, donors, and clients?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12.</td>
<td>Adequate financial management which includes annual budgeting and revision processes, monthly statement of revenue and expense compared to budget, fund accounting, a Finance Committee, and an annual external audit?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13.</td>
<td>Plans already outlined for programs and projects--before fundraising begins?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14.</td>
<td>A process to identify, cultivate, and recruit new committee and board members?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15.</td>
<td>A process to remove ineffective committee and board members?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### i. Fundraising Self-Assessment/Audit

<table>
<thead>
<tr>
<th>+</th>
<th>~</th>
<th>-</th>
<th>?</th>
<th><strong>To what degree does our nonprofit have...</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>16.</td>
<td></td>
<td></td>
<td></td>
<td>Fundraising expertise and community contacts on the board?</td>
</tr>
<tr>
<td>17.</td>
<td></td>
<td></td>
<td></td>
<td>An active and committed board whose members are willing to fundraise to secure the nonprofit’s mission?</td>
</tr>
<tr>
<td>18.</td>
<td></td>
<td></td>
<td></td>
<td>Annual financial contributions to the organization by 100% of the board members? 100% of senior staff?</td>
</tr>
<tr>
<td>19.</td>
<td></td>
<td></td>
<td></td>
<td>A strong board committee structure including fundraising committees as necessary for the fundraising plan?</td>
</tr>
<tr>
<td>20.</td>
<td></td>
<td></td>
<td></td>
<td>Board willingness to budget dollars necessary to fund fundraising?</td>
</tr>
<tr>
<td>21.</td>
<td></td>
<td></td>
<td></td>
<td>High caliber professional fundraising assistance available as-needed, through a volunteer, consultant, and/or staff?</td>
</tr>
<tr>
<td>22.</td>
<td></td>
<td></td>
<td></td>
<td>Administrative support for fundraising?</td>
</tr>
<tr>
<td>23.</td>
<td></td>
<td></td>
<td></td>
<td>Discussion of fundraising progress at every board meeting?</td>
</tr>
<tr>
<td>24.</td>
<td></td>
<td></td>
<td></td>
<td>A persuasive, written case statement for each project?</td>
</tr>
<tr>
<td>25.</td>
<td></td>
<td></td>
<td></td>
<td>Commitment to securing a diversified funding base (i.e., grants, corporate, and individual gifts)?</td>
</tr>
<tr>
<td>26.</td>
<td></td>
<td></td>
<td></td>
<td>The desire to develop an annual fundraising plan, with solicitation strategies, personnel responsible &amp; deadlines.</td>
</tr>
<tr>
<td>27.</td>
<td></td>
<td></td>
<td></td>
<td>An accurate record of all fundraising projects and results for the past several years?</td>
</tr>
<tr>
<td>28.</td>
<td></td>
<td></td>
<td></td>
<td>Fundraising record systems that include a donor file on each contributor; with ability to analyze by gift size, approach, campaign, etc.?</td>
</tr>
<tr>
<td>29.</td>
<td></td>
<td></td>
<td></td>
<td>A system to acknowledge all gifts within 1 week of receipt?</td>
</tr>
<tr>
<td>30.</td>
<td></td>
<td></td>
<td></td>
<td>A system to recognize donors and their gifts?</td>
</tr>
<tr>
<td>31.</td>
<td></td>
<td></td>
<td></td>
<td>A process to continuously identify new prospects for individual gifts, foundation grants, corporate sponsors and government funding?</td>
</tr>
<tr>
<td>32.</td>
<td></td>
<td></td>
<td></td>
<td>A process to regularly research and cultivate individuals, corporations, foundations and government funding sources?</td>
</tr>
</tbody>
</table>
STEP #1: PRIORITIZE ORG NEEDS VIA STRATEGIC PLANNING

Guiding Principles

<table>
<thead>
<tr>
<th>Mission</th>
<th>Values</th>
<th>Critical Success Factors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal #1</td>
<td>Goal #2</td>
<td>Goal #3</td>
</tr>
</tbody>
</table>

Big Goals

| Goal #4 | Goal #5 |

Business Strategies

<table>
<thead>
<tr>
<th>Program Delivery</th>
<th>Marketing</th>
<th>Client Service</th>
<th>Finance, Funding &amp; HR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Delivery</td>
<td>Marketing</td>
<td>Client Service</td>
<td>Finance, Funding &amp; HR</td>
</tr>
<tr>
<td>Program Delivery</td>
<td>Marketing</td>
<td>Client Service</td>
<td>Finance, Funding &amp; HR</td>
</tr>
<tr>
<td>Program Delivery</td>
<td>Marketing</td>
<td>Client Service</td>
<td>Finance, Funding &amp; HR</td>
</tr>
<tr>
<td>Program Delivery</td>
<td>Marketing</td>
<td>Client Service</td>
<td>Finance, Funding &amp; HR</td>
</tr>
</tbody>
</table>
1. **What’s the need to be met?**
   *clear understanding of what the donor is being asked to support*

2. **Why is it important to the world?**
   *strong & moving case for support*

3. **How is our nonprofit going to meet the need?**
   *solid plan for meeting goals*

4. **How much will it cost?**
   *cost/benefit, amongst other priorities*

5. **Who else is involved?**
   *evidence of other support ... sense of leadership*

6. **What do you need from me, the donor?**
   *how do I fit in?*

7. **What’s in it for me, the donor?**
   *avenues for meaningful involvement, participation, recognition/anonymity as desired*

8. **How will we know when we’ve accomplished what we aim to do?**
   *sense of impact*

Offer donors a buffet of options, so they can select what’s right for them.
**Step #3: Identify Target Markets & Approaches**

**Level 1**
- Social Media,
- Public Relations

**Level 2**
- Events,
- Annual Appeal

**Level 3**
- Individual Follow Up
- Volunteer Engagement

**Level 4**
- Major Donors

**Level 5**
- Planned Deferred Donors
**Step #3: Identify Target Markets & Approaches**

**Target Markets**
- Geography
- Age
- Income/wealth
- Psychographics
- Closeness to cause
- Introducer/door opener
- Asker

**Gift Size**
- Large $$$$$
- Medium $$$$
- Small $$$
- Very Small $$

**Sources**
- Individual gifts
- Foundation grants
- Corporate sponsors
- Government funding

**Approaches**
- Large group
- Medium group
- Small group
- Individual meeting
- Social media
- Event in person
- E-mail, text
- Mail *bulk, personalized, handwritten*
- Talk by phone *1:1, phon-a-thon, paid solicitor*
- Meet in person
**Step #4: Compile Development Plan Document**

**Action Outline**
- Tactics
- Due Dates
- Assignments

**Goals**
- Number of prospects
- Number of donors/participants
- Number of gifts/participants
- Number of dollars
**Step #5: Implement, Review, Evaluate & Update**

Raising funds is NOT enough.....

<table>
<thead>
<tr>
<th>Ascertain fund-raising results</th>
<th>Ascertain friend-raising results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compare actual result$ to goal$</td>
<td>Relational, not transactional</td>
</tr>
<tr>
<td>What worked? What didn’t work?</td>
<td>The ultimate aim is to deepen supportive relationships</td>
</tr>
<tr>
<td>Revise &amp; update plans</td>
<td>Aim is not just raising money for today’s needs. Aim is cultivating supportive partners for the long-term</td>
</tr>
</tbody>
</table>
**FUNDRAISING MATH**

**INDIVIDUAL ASKING ROI**

Costs Less & Generates More

### ARMS LENGTH
- 20% of funds
- 80% of donors

- Overall broad introduction
- Direct mail, social media, events, phone solicitations
- Labor & resource intensive
- Staff implements solicitation
- Higher costs & modest financial returns

### RELATIONSHIP - BASED
- 80% of funds
- 20% of donors

- Highest impact
- Major gifts, campaigns, deferred planned gifts
- Requires less up-front cash
- Volunteers crucial to opening doors & cultivating. Staff usually solicits.
- Lowest costs, highest returns
- Ideal for major donors, market influencers, board recruitment
- Takes time to cultivate authentic, trusting relationships
• “I’ll do anything but ask for money.”

• “That’s not what I signed up for.”

• “That’s the staff’s job!”

• “I give my time – that’s the same thing.”

• “Galas, grants & golf! That’s my fundraising.”

“You can’t be a conscientious objector to our campaign — you’ve got to make your calls.”

© Chris Cole/Relief Society
TAKE THE FEAR OUT OF FUNDRAISING
FUNDRAISING ROLES: AMBASSADOR TO STEWARD CONTINUUM

• **Major gift solicitors are made, not born, to the role.** For most people, asking other people to part with their money is difficult at best. Practice helps. Passion is key.
• **Developing and sustaining major donors is a circular process that is ongoing & regenerating.**
• **The majority of the nonprofit-donor relationship has nothing to do with actually asking for money.**
• Here are 6 ways that Board Members help develop enthusiastic donors for nonprofits:

#1-Be a Donor
Make your own **stretch gift.**
Confirm your own commitment & confidently convey worlds of commitment to others.

#2-Be an Ambassador
Ambassadors **naturally talk about our nonprofit** wherever they go. To be a good ambassador:
• Understand and overcome your own roadblocks to talking about our nonprofit.
• Think of past opportunities you have had to talk about our nonprofit.
• Observe good ambassadors in action.
• Identify situations where you can share your personal feelings about our cause.
• Select potential donors to talk with about our nonprofit.
• Practice! Practice! Practice! Talk about our nonprofit...
  - at home
  - at work
  - with close friends
  - with strangers
To be a good Sleuth:
• Know what kinds of people our nonprofit aims to develop partnerships with.

• Test if someone is given to philanthropy by recounting a personally fulfilling experience with our nonprofit, as a lead in to evoking a parallel feeling from the prospect about a nonprofit of their choice. Establish common ground about the satisfaction of participating as a volunteer.

• Tell the prospect that you would like to put their name on our nonprofit’s mailing list. Ask if they would like to come visit our nonprofit at some point.

• Ask people who know our nonprofit to suggest other individuals who might be interested in us.

• Look for leads in the press, social media, and other nonprofits’ materials.
TAKE THE FEAR OUT OF FUNDRAISING

FUNDRAISING ROLES: AMBASSADOR TO STEWARD CONTINUUM

#4-Be a Cultivator
A cultivator actively participates in structured activities that are part of our nonprofit’s organized fundraising process. Cultivation is pre-planned & carried out explicitly over time, as a precursor to soliciting the prospect. It is important to plan the process with volunteer & staff leadership. Cultivators should have:

- a list of ways to involve the prospect (tours, receptions, 1:1 meetings, volunteer opportunities)
- materials (fact sheet, annual report, event fliers)
- a confidential prospect profile
- coaching sessions, including how to communicate about major and planned gifts

#5-Be a Solicitor
Solicitors ask a prospect, face-to-face, for a gift. Practice helps.

#6-Be a Steward
Stewards make sure that care goes into sustaining and growing partnerships with our nonprofit’s donors after receipt of a gift. This includes: follow up site visits; review of strategic plans & annual reports; formal & informal question/answer sessions.
**Keys to Successful Individual Donor Fundraising**

1. **Compelling Purpose**
   - Strong, moving *case for support* that addresses personal needs & interests
   - Specific *goals*: clear understanding of what the donor is being asked to support
   - Solid *plan* for meeting goals & completing the defined work
   - Evidence that the gift will have meaningful *impact*

2. **Meaningful Cultivation & Relationship Development**
   - Strong *leadership* (board, staff, volunteers)
   - Methods to *promote engagement* & ownership
   - Understanding donor’s *motivations* & frames of reference
   - Cultivation, solicitation & stewardship by people who have *already given*, & are asking others to do the same
   - Evidence of *other support*
   - Opportunities for *recognition*, if desired
   - Avenues for involvement & *meaningful participation*
Sample Annual Fund Development Plan
ABC LITERACY CENTER, INC.
FY 20xx FUND DEVELOPMENT PLAN

INTRODUCTION
The purpose of developing an annual giving development plan is to help the staff and board set realistic income goals with respect to the annual budgeting process. The plan also outlines the strategic steps required to reach those goals, as well as board and staff responsibilities in accomplishing the plan. This proposed FY plan identifies targeted financial goals necessary to support the FY operating budget being recommended by the Finance and Executive Committees as of (date). The plan will be revised and updated on an as-needed basis in conjunction with revisions to the operating budget.

I. FINANCIAL GOALS

<table>
<thead>
<tr>
<th>INCOME</th>
<th>FYXX Projections</th>
<th>FY LY Actual</th>
<th>% of Total FYXX Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Govt: Federal Grants</td>
<td>200,000</td>
<td>225,000</td>
<td>24%</td>
</tr>
<tr>
<td>Govt: County Grants</td>
<td>100,000</td>
<td>75,000</td>
<td>12%</td>
</tr>
<tr>
<td>Business Sponsors</td>
<td>75,000</td>
<td>65,000</td>
<td>9%</td>
</tr>
<tr>
<td>Foundation Grants</td>
<td>80,000</td>
<td>60,000</td>
<td>10%</td>
</tr>
<tr>
<td>Federated Campaigns: UW</td>
<td>25,000</td>
<td>25,000</td>
<td>3%</td>
</tr>
<tr>
<td>Individuals: Board</td>
<td>25,000</td>
<td>20,000</td>
<td>3%</td>
</tr>
<tr>
<td>Individuals</td>
<td>250,000</td>
<td>225,000</td>
<td>30%</td>
</tr>
<tr>
<td>Special Events</td>
<td>75,000</td>
<td>65,000</td>
<td>9%</td>
</tr>
<tr>
<td><strong>TOTAL CONTRIB INCOME</strong></td>
<td><strong>830,000</strong></td>
<td><strong>760,000</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

II. STRATEGIC GOALS (non-monetary goals impacting success of plan)
- 100% giving by ABC Board, executive director, and key staff (92% giving was achieved in previous FY).
- 100% participation by board in some fundraising task, including cultivation of donors (65% participation achieved previous FY).
- Enhanced communications re: fund development within the board & with prospects, including regular presentations at board meetings by fund development chair.
- Develop plan for ongoing recruitment/training of fundraising volunteers. Recruit a minimum of 10 non-board volunteers to help in fund development.
- Develop new prospects for personal solicitation campaign and direct mail solicitation; cultivate family foundations.
- Actively involve ABC staff and students in special events and fundraising activities (e.g., in previous FY students helped with several direct mails, supported phonathon, walk; staff coordinated concert, participated in walk, and received Achievement Award for their increased participation in the last United Way campaign.)
- Strengthen coordination between the PR & fund development committees to further support fundraising efforts.
- Maintain systems for ongoing monitoring/evaluation of progress in all areas of fund development.

Monitoring the Fund Development Plan and Process
-The Fund Development Committee will meet 6 times a year to review the progress of the plan and, with fund development staff, will identify problems and solutions. Development staff and committee chair will discuss development issues on a regular basis. Committee chair and development staff will monitor sub-committee chairs; committee chair will follow-up re: problems. Development Committee will discuss fund development plan and progress at monthly board meetings. Development staff will provide financial and statistical data with which to help evaluate progress.
III. SOLICITATION STRATEGIES

A. Personal Solicitation Campaign

1. Board Solicitation (Chairs: President, Fund Development Chair)
   - Time Frame: September-December, 20xx
   - # of Prospects: 26
   - Goal: 100% giving; $25,000 (Amount raised in previous FY: $20,000)
   - Method: Personal solicitation. Request amounts based on donor history (one-time annual giving in lieu of multiple direct mail solicitations; these individuals will, however, get notice of special events.)
   - Solicitors: President and Fund Development Chair

2. Individual Solicitation (Chair(s): Name(s), with 12 team solicitors)
   - Time Frame: September-December, 20xx
   - # of Prospects: 50-75 top individual donors, Advisory Board, committee members
   - Goal: $250,000; 60% renewals, 15% gift upgrades
   - Method: Personal solicitation by board and non-board volunteers (one-time annual giving in lieu of multiple solicitations)
   - Solicitors: (names)

3. Fundraising Event: Walk for Literacy (Walk Chair: Name)
   - Time Frame: October 2, 20xx
   - # of Walkers: 100
   - Goal: $ 6,000 gross/$14,800 net (FY 20xx Walk grossed $16,100)
   - Method: Social media. Mailing: 2,500 pieces; to recruit walkers, pledgers, donations; news articles and other promotional publicity; other personal recruitment by board, staff, students.

4. Benefit Concert (Chair(s): Name(s))
   - Time Frame: March 25, 20xx
   - Attendance Goal: 350
   - Goal: $2,000 gross/$1,500 net (concert raised $2,000 in March 20xx)
   - Solicitors: staff, volunteers, other?
B. Direct Mail
Each direct mailing has a different theme to encourage multiple gifts and to reach individuals with varied interests. Direct mail is responsibility of finance director and fundraising assistant.

1. Direct Mail
   Time Frame: December 20xx
   # of Prospects: 2,500 (1,000 new)
   # of Donors: 200
   Goal: $8,000; 60% renewal, 15% gift upgrades, 5% new donors ($8,000 raised in most recent Holiday Drive)
   Method: Mailing with remit enclosure; follow-up articles in newsletter; holiday mailing possibly signed by individual students from each class. Follow-up mailing to major donors in previous campaign who have not renewed their gift.

2. Direct Mail
   Time Frame: April-May, 20xx
   # of Prospects: 3,000 (1,000 new)
   # of Donors: 200
   Goal: $8,000; 60% renewal, 15% gift upgrades, 5% new donors ($6,000 raised in 20xx Friends Drive)
   Method: Mailing with remit enclosure; follow-up articles in newsletter; and follow-up letter within one month to non-respondents. Mailing signed by selected board members and students. Follow-up mailing to major donors in previous campaign who have not renewed their gift.

C. Government and Foundation Grants
   Time Frame: On-going throughout the year
   # of Reports: 165
   # of New Prospects: at least 10
   Goal: $365,528: 9 government applications; $30,000: 15 foundation proposals; $65,000: United Way Grant
   Method: Finance Director & program staff
IV. Cultivation Strategies (Making "Friends")

The purpose of cultivation is:
1) To add prospects to our donor base and develop them to become active supporters and regular donors; and
2) To improve relationships with current board members, donors, volunteers, and other friends of ABC, building a greater understanding of how they can help achieve our mission.

Donor and volunteer recognition are critical to the cultivation process. Cultivation needs to be discussed regularly at board meetings to encourage each board member to become part of the cultivation process.

A. Open Houses:
Responsibility of the PR Committee; chair(s) to be named through that committee.
Time: Twice per year: December 20xx (Donor Recognition) & April 20xx (Volunteer Recognition)
Goal: Appreciation evenings at ABC, Inc. for donors and volunteers; opportunity to see facilities, meet staff and students; recruitment of potential volunteers; and cultivation of potential donors.
Method: Social media; special mailings with invitations; newsletter articles; personal invitations by board.
Responsible: board, staff, students, other volunteers

B. Communications

Holiday Card: Holiday greeting card to 300 friends and major donors (this is not a solicitation)

E-Newsletter: 4x per year. Sent to agency e-mail list (3,500+) provides regular updates on agency programs, student writings, activities, and special events.
Mailing list includes funders, donors, volunteers, home-based students, elected officials, other agency executives, and service providers.

Annual Report: Annually to coincide with July 1 fiscal year. Mailing in September.
This is a major communications tool sent to government and private funding sources, large donors, agency executives, and public officials, and is submitted with most proposals and requests to large donor prospects.

C. Other Publicity/Public Relations: A separate public relations plan will be developed by PR Committee to help reinforce cultivation efforts of this Fund Development Plan. A close communications linkage between the Fund Development and PR Committees is needed. PR plan may include such strategies as:
- Radio and TV PSAs. - TV coverage of special events. - Newspaper and magazine articles. - Articles in ABC, Inc. and other agency newsletters. - Community Bulletin Board announcements to publicize events. - Radio and TV interviews. - Displays in public buildings. - Brochures. - Bookmark. - Posters/Flyers. - Video and/or slide show presentation. - Speakers Bureau (board and staff volunteers).
- Publicity/outreach to private and government workplaces to encourage participation in federated campaigns (posters, brochures, etc)
V. Fund Development Calendar FY 20xx

**July**
- Prepare Annual Report
- Review results of June Recognition Dinner

**Aug**
- Annual Report mailed with cover letter
- Plan PR for UW, gov’t employee Campaigns
- Send letters to UW, gov’t and CFC Donors (Direct Mail #1)

**Sept**
- Mailing/phonathon/other publicity for Literacy Walk
- Personal solicitation of board members (Sept.-Nov.)
  - United Way employee campaign at ABC, Inc.

**Oct**
- Literacy Walk
  - Follow-up re: walk pledges
  - Personal campaign with large donors (Sept.-Dec.)
- Direct Mail #2 planned

**Nov**
- Discuss cultivation strategies (On-going)
- Evaluate results of Literacy Walk
- Prepare holiday mailing/mailing lists
- PR Committee plans Open House
- Evaluate previous ad campaign; plan 20xx campaign

**Dec**
- Direct Mail #2
  - Holiday Open House
  - Advance solicitation for corporate sponsors of yearbook
- Review progress of personal annual campaign

**March**
- Finalize plans for Direct Mail #3
  - Update progress on ad campaign
  - Review results of Federated Campaigns (UW, ST, CTC)
  - Benefit concert
- See February

**April**
- Volunteer Recognition Evening
  - Process Direct Mail #3
  - Review results of benefit concert
  - Update Progress re: ad book campaign
  - Update Progress re: Recognition Evening

**May**
- Complete ad campaign
  - Review progress re: Direct Mail #3
  - Update Progress re: Recognition Evening
  - Mailing for Recognition Dinner
  - Begin planning for 5th Annual Literacy Walk

**June**
- Recognition Evening
  - Review results of ad campaign and dinner ticket sales
  - Update results of Direct Mail #3
  - Full board to approve FY 200xx Fund Development Plan
  - and operating budget

---