Development Calendar

Incorrect Assumptions

"Let's post a generic message on social media so everyone knows we are raising money for our mission."

"Once a donor stops being involved in the organization, we can remove them from our records."

Correct Assumptions

"Let's identify segments of donors with capacity, access, and relevance to our mission and craft specific messaging to connect them personally to our mission and what their gift can help us accomplish."

It is important to keep past donors actively involved in your ongoing communications and event invitations. It is easier to market to individuals who know you and your mission, rather than constantly searching for new donors. Effective donor communications, including thank you notes, help you retain and grow your support base.

Exercise: Build Your Development Calendar

Key Participants

- Executive Director / Development Director / Board Leadership

Discussion Questions

1. What is the best method to reach our target prospects?

2. What does our current fundraising calendar look like? How can we improve what we are doing?

3. Are there activities that we need to stop doing in order to create bandwidth for more individual relationship building?

4. If you were a new donor, how would you like to receive information and be contacted throughout the year?

5. Is our event mission-centric? Are there ways to improve the message or better weave the mission into the event?

6. Do we have good records on all event attendees? Is there a follow-up strategy?

7. Do all of our communications focus on our mission, its current impact, and the importance of donor participation in future growth?

Develop an Annual Development Calendar

An example is included on the following page.

Transitioning to a relationship-based fundraising strategy may require you to stop doing some things that have been part of your calendar for many years in order to find the bandwidth to take on something new.

Exercise: Build Your Development Calendar

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Grants	Identify Spring / Summer Prospects	Set Spring / Summer Grants Calendar					Identify Fall / Winter Prospects	Set Fall / Winter Grants Calendar				
Donor Portfolios			Quarterly Portfolio Review			Quarterly Portfolio Review			Quarterly Portfolio Review			Quarterly Portfolio Review
Personal Donor Recognition		Thank You with Impact Stories from Past Year									Personal Note Cards	
General Acknowledgements	EOY Thank You											Draft EOY Thank You Letter
Event #1	Finalize	Event #1		Obtain Mission Story	Film Video for Next Event					Develop Approach	Create Materials & Appeal Strategy	Start Preparation
Event #2				Obtain Mission Story	Film Video for Next Event	Develop Approach	Create Materials & Appeal Strategy	Start Preparation	Finalize	Event #2		
Newsletter	Develop Approach	Create Appeal Strategy	Create Materials	Spring Newsletter			Develop Approach	Create Appeal Strategy	Create Materials	Fall Newsletter		
Community Giving Day						Develop Approach	Start Preparation & Social Content	Finalize	Community Giving Day			
Annual Appeal	Create Materials & Appeal Strategy	Prep Mailing	Start Campaign	Social Media	Social Media							
Donor Open House				Develop Approach	Invite Top Donors	Open House						
Volunteer Day									Coordinate with Volunteer Coordinator	Develop Approach	Volunteer Appreciation Day	

mission
ADVANCEMENT

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mission
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