



AMERICAN PHILANTHROPIC  
STRENGTHENING CIVIL SOCIETY

# SPECIAL LEISURE SERVICES FOUNDATION

*Strategic Plan Development Calendar*

*2018-2020*

PHILADELPHIA | CHICAGO | PHOENIX

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## 2017

### Q2

#### April 2017

##### *Time on Task*

- 17 – Begin preparing job description.
- 18 - Consider skills needed for the position and describe the ideal candidate.
- 20 - Write a public-facing description of no more than three paragraphs describing the nature of the position and work, as well as the ideal candidate and any other requirements. Describe how interested applicants should apply.
- 24 - Post job description in local and online venues, on the SLSF and NWSRA websites, and on LinkedIn. Email the job description to all NWSRA and SLSF contacts.
- 24 - Consider internal applicants, if applicable.

#### May 2017

##### *Time on Task*

- 15 - Field resumes and conduct interviews, as necessary, focusing not only skill level and cultural fit but also a passion for the mission of SLSF.

#### June 2017

##### *Time on Task*

- 15 - Field resumes and conduct interviews, etc. (on-going as necessary).
- 15 - Develop a timeline for transfer of responsibilities from Nanette and Cathy to new events coordinator.
- 15 - SLSF should strive to make the implicit knowledge they have from years of running the events into explicit sets of procedures and instructions that the Events Coordinator can easily follow.

### Q3

#### July 2017

##### *Time on Task*

- 1 - Negotiate contract and hire events coordinator.
- Regularly schedule times for Nanette and Cathy to sit with new Events Coordinator and explain tasks, review performance, and discuss issues and questions.
- Over the course of the first six weeks, have new employee shadow Nanette and Cathy as they take care of events-related tasks, make phone calls and secure deals for event sponsorships, visit sponsors, etc.

### *Planned Giving*

- 1 - Review other examples of planned giving programs for nonprofits.
- 10 - Brainstorm a name for the planned giving society, possibly invoking the founder of NWSRA/SLSF.

### August 2017

#### *Time on Task*

- Over the course of the first six weeks, have new employee shadow Nanette and Cathy, etc.

### *Planned Giving*

- 1 - Think of reasonable and feasible ways to recognize members of the planned giving society.
- 15 - Come up with a name, stock language, and benefits for SLSF's planned giving society members.

### September 2017

#### *Time on Task*

- Regularly schedule times for Nanette and Cathy to sit with new Events Coordinator, etc.
- 1 - After six weeks, switch roles: allow new employee to take charge of activities with Nanette and Cathy shadowing, answering questions, and being at-hand to help, as necessary.

### *Planned Giving*

- 10 - Write a short description of the society that lets donors know how their giving can become part of a great legacy of support for a worthy cause.

## *Q4*

### October 2017

#### *Direct Mail*

- 1 - Discuss potential approaches to prospect mailing including:
  - Renting or exchanging lists with like-minded or local organizations;
  - Renting ZIP code or geographic area lists from the post office based on high-net worth areas of NWSRA's service region.

### *Planned Giving*

- 10 - If possible, find an existing planned gift or acquire one from a dedicated supporter or board member who is willing to step up and provide a testimonial about why they made SLSF a part of their legacy plans.
- 20 - Research types of planned gifts and think about what would be required to

accept them.

- 25 - Begin to create a simple planned giving brochure that lets donors know about the possibility of making a planned gift.

## **November 2017**

### ***Time on Task***

- Regularly schedule times for Nanette and Cathy to sit with new Events Coordinator, etc.
- 1 - After another six weeks, begin to diminish Nanette and Cathy's participation in events, while remaining available to new employee to answer questions.

### ***Direct Mail***

- 1 - Compose a 6-8 page prospecting letter introducing potential donors to SLSF.

### ***Planned Giving***

- 10 - Implement necessary structures for receiving planned gifts, such as opening a brokerage account for SLSF and having a lawyer or financial advisor to call in a situation where SLSF would need more detailed advice on a particular situation.
- 15 - Design brochure, integrating images, language on the giving society, and some brief notes on how to make an estate gift to SLSF.

## **December 2017**

### ***Direct Mail***

- 1 - Create a one-page reply form, business reply envelope (with the post office), invest in nonprofit postage (with post office, if not done already), and consider possible inserts for the letter (i.e., an SLSF magnet).

### ***Planned Giving***

- 5 - Find a professional printer who can produce a supply of high-quality brochures, and print out a few hundred to have on hand for meetings.
- 10 - Familiarize SLSF development staff with some of the basics of accepting and handling planned gifts especially those staff members who will be meeting with major donors.
- 20 - Launch a planned giving page on the SLSF website.

2018

*Q1*

## **January 2018**

### ***Time on Task***

- After six months, reduce Nanette and Cathy's time spent on events to approximately one day per week, each (or 16 hours per week combined).

### ***Major Gifts Program***

- 1 - Draft template meeting request letters, emails, and phone call scripts for current and prospective donors.
- 10 - Begin carrying out research on current and prospective donors that SLSF is aware of.
- 15 - Begin to build a database designed to store intel on the donors with whom SLSF will seek to carry out donor meetings.
- 20 - Build a moves-management system that can track past interactions, goals, and next steps with each prospect or donor.
- 22 - Assess the ability of SLSF's current database system to successfully store a variety of donor-related information, including background information, giving history, net worth, contact info, and call and meeting notes.
- 27 - Either within SLSF's database or on a separate excel sheet, lay out those donors who SLSF will prioritize for meetings.
- 30 - Create tabs for basic information, next and last moves, goals, and notes, updating notes and status on each donor whenever an interaction happens.
- Always remember to bring collateral materials to meetings to share with donors.
- Always remember to thank donors with a hand-written thank you note sent the day after the meeting.

### ***Foundations Program***

- 5 - Begin looking over current foundation solicitation materials and revise as necessary to reflect a donor-centric, mission-oriented, and personal request.
- Consistently carry out research on new foundation prospects.
- Maintain good relationships with existing foundation donors.
- Attempt to meet with foundation contact annually or more, as SLSF has been doing. Determine appropriate meeting dates for foundations and add to foundation tracking sheet and this calendar, if helpful.
- 15 - Review contact history with each current funder to determine if and when last meetings have taken place. Prioritize those that have never been met with or not met with recently and set engagement strategy.
- 25 - Begin executing foundation meeting strategies as outlined in tracking sheet.

### ***Direct Mail***

- January 5, 2018: Begin preparing first prospecting piece.
- 5 - Coordinate with list brokers to acquire mailing lists.
- 10 - Find a printer to handle production, stamping, and sending of letters.
- January 20, 2018: Begin preparing spring appeal.

- Test the results from a 9x12 envelope versus a half sheet 6x9 envelope. Postage costs will be greater for the 9x12, but we often see better results from the larger package.

### *Planned Giving*

- 15 - Integrate planned giving options on all relevant donor materials (for example, include an “I would like to learn more about planned giving to SLSF” and an “I have already made plans to include SLSF in my estate” checkbox on annual appeal reply form).
- 20 - Once a year, conduct a planned giving mail campaign, sending a cover letter and planned giving brochure to key audiences.

## **February 2018**

### *Major Gifts Program*

- 1 - Decide whether SLSF needs to invest in a new database system.
- 1 - Take SLSF’s current database of donors, families, and event attendees and conduct a wealth screening to determine net worth and five year giving capacity.
- 1 - Begin prioritizing current donors and donor prospects for meeting outreach.
- 4 - Create a system of prioritization based on donor longevity, frequency of giving, gift size, and net worth.
- 5 - Establish conditions for varying levels of priority.
- 7 - Perform due diligence research of publicly available information on those donors with the highest giving to SLSF, most frequent giving, greatest longevity of giving and (especially in the case of prospects) highest net worth and highest frequency of event attendance.
- 10 - Rank donors and donor prospects into three priority categories for meetings (high priority—meeting necessary, medium priority—meeting if time permits, and low priority—cultivate through other means).
- 14 - Research potential database options such as Salesforce or DonorPerfect (if applicable).
- Refer to tracking sheet weekly to stay on top of donor relationships.
- 15 - Begin systematically reaching out to donors in order of priority for donor meetings.

### *Foundations Program*

- 1 - Create a dashboard or Excel sheet of current and prospective foundation supporters, complete with basic information, application due dates, date of last meeting, date of next meeting, latest communication, goals, and notes.
- 5 - Prepare updated templates: general operations letter of inquiry and general operations grant proposal.
- 5 - Incorporate current funders into foundation tracking sheet, including key dates and deadlines.

- 10 - Task staff member or outside contractor with foundation prospect research.
- 15 - Using a foundation database or search engine, identify foundations based in the districts where SLSF operates.
- 15 - Review and re-strategize approach with current contacts, as necessary.
- 25 - Research whether these foundations would be a good match for SLSF by visiting their websites or looking at their 990s (the latter are available through Foundation Directory or a free subscription to Guidestar).
- 28 - Add all new foundation prospects to tracking sheet.
- 28 - Formulate a “next move” with each (usually meeting request letter or call, since relationships are key with foundations), as well as a gift goal (based on their average gift size on their 990), adding this information to the tracking sheet.

### ***Direct Mail***

- February 20, 2018: Drop first prospecting piece.
- 25 - Create a tracking sheet that records the effectiveness of each mailing, broken down by lists used or package specs tested.

### **March 2018**

#### ***Major Gifts Program***

- Research potential wealth screening and research tools (including an outside contractor).
- 1 - Call or e-mail 5 top priority donors, requesting the opportunity to meet with them.
- 3 - Call or e-mail 5 top priority donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 top priority donors, requesting the opportunity to meet with them.
- 7 - Research 1-2 other local nonprofit organizations or organizations with similar or comparable missions. Review their annual reports for their top donors, research those donors, and determine which may be good prospects for SLSF.
- 9 - Call or e-mail 5 top priority donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 top priority donors, requesting the opportunity to meet with them.
- 15 - Create a shortlist of options, weighing the benefits of each system.
- Refer to tracking sheet weekly to stay on top of donor relationships.

#### ***Foundations Program***

- 1- Review each current foundation relationship and assess likelihood of a. renewal of current grant level and b. upgrade of gift size.

- 1 - Review and update this tracking sheet at least monthly, recording all interactions, new foundation prospects, new deadlines, new goals, new gifts, new rejections, etc.
- 1 - Add key dates (such as inquiry, application, and reporting deadlines) for 2018-2020 to this development calendar, in addition to foundation tracking sheet, if helpful.
- 10 - Invest in a subscription to Foundation Directory and train staff member on use, if research is to be completed in house.
- 12 - Incorporate lapsed funders and other past prospects into tracking sheet. Develop re-approach strategies with target dates.
- 15 - Using a foundation database or search engine, identify foundations based in the districts where SLSF operates.
- 25 - Research whether these foundations would be a good match for SLSF.
- 28 - Add all new foundation prospects to tracking sheet.
- 28 - Formulate a “next move” with each foundation prospect.

### *Direct Mail*

- March 15, 2018: Put spring appeal in the mail.
- Accompany each appeal with an e-campaign (end of year e-campaign should be the largest).
- Spring through fall campaigns should be 3-5 e-mails, the first introducing a campaign goal (a concrete amount, i.e., \$5,000) with a “soft ask,” the second to last making a hard ask, and the last letting everyone know that the campaign is over and that you met X% of the goal (while still offering a donate button so that people can give after the campaign).
- Thank all donors who give through the appeals, following a set system for which level of donors are recognized in what ways.

### *Planned Giving*

- Include the planned giving brochure among collateral materials at SLSF events.

## *Q2*

### April 2018

#### *Time on Task*

- By April 2018, ensure that Nanette and Cathy are spending only about 10% of their time on events, and on the highest-value tasks related to the events, such as bringing in major sponsors or recognizing donors at the event.

### *Major Gifts Program*

- 1 - Begin using new database and train all SLSF on using it adequately (if applicable).
- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.



- 7 - Task outside contractor or staff member with regularly providing donor prospect research.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 15 - Invest in a wealth research tool such as Wealth Engine or iWave (or invest in an outside contractor to conduct donor research and wealth screenings).
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Always remember to bring collateral materials to meetings to share with donors.

### *Foundations Program*

- 1 - Review and update tracking sheet at least monthly.
- 1 - Include current foundation funders on non-solicitation mailings and event invitations.
- 1 - Develop and begin executing re-approach strategies for all lapsed funders.
- 15 - Using a foundation database or search engine, identify foundations based in the districts where SLSF operates.
- 15 - Starting with the foundations researched and added to the tracking sheet, utilize meeting request letters and phone calls to establish contact with foundation prospects.
- 25 - Research whether these foundations would be a good match for SLSF.
- 27 - Research board members and trustees of foundations (information available on 990) and determine whether SLSF has existing connections.
- 28 - Add all new foundation prospects to tracking sheet.
- 28 - Formulate a “next move” with each foundation prospect.
- At meetings with foundations request permission to submit a proposal; consider inviting foundation representatives to events and recognizing them in that context.

### *Direct Mail*

- 15 - Make sure that the database is equipped to track individual donor giving over time.
- April 20, 2018: Begin preparing summer appeal.
- Research all donors who give through appeal letters and select the highest ranking (highest net worth, longest giving history, largest gift, and greatest frequency of giving) among them for meeting requests.

### *Planned Giving*

- Have planned giving brochures on hand to share at donor meetings, when appropriate.

## May 2018

### *Major Gifts Program*

- 7 - Every three months, or as needed, review and research new entries into SLSF's database to assess whether they would be good donor prospects.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Use some meetings to make an ask, some to build relationships. An ideal ratio is two meetings (or phone calls) without an ask for every meeting or call with an ask.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.

### *Foundations Program*

- 1 - Review and update tracking sheet at least monthly.
- 3 - Leverage board and trustee connections, sometimes "approaching" the foundation through a board member to increase chances of support and receive insider advice on how to apply, how much to request, etc.
- 5 - Prepare at least three updated templates of specialized program letters of inquiry and grant proposals, as they become necessary to suit foundation requirements.
- 10 - Task staff member or outside contractor with foundation prospect research.
- 15 - Using a foundation database or search engine, identify foundations based in the districts where SLSF operates.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- 25 - Research whether these foundations would be a good match for SLSF.
- 28 - Add all new foundation prospects to tracking sheet.
- 28 - Formulate a "next move" with each foundation prospect.
- Be persistent in attempting to establish contact, as foundations can often be busy or hard to reach—persistence pays off. Frequently, it will take an initial letter and three or more phone calls or emails to establish contact and receive a satisfactory response.
- In the case of a successful meeting, promptly submit a proposal or application.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- In the case of a successful meeting, promptly submit a proposal or application.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.
- From the beginning of the process, be sure to follow all foundation directives about how and when to apply, which may be found online or on the

foundation's tax filings.

### *Direct Mail*

- Continue to track results of each appeal letter, including results of split tests (i.e., longer letter v. postcard).

## **June 2018**

### *Major Gifts Program*

- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - Research 1-2 local nonprofit organizations, reviewing their annual report for good donor prospects.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Always remember to thank donors with a hand-written thank you note sent the day after the meeting.

### *Foundations Program*

- 1 - Review and update tracking sheet at least monthly.
- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF's materials.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Using a foundation database or search engine, identify foundations based in the districts where SLSF operates.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- 25 - Research whether these foundations would be a good match for SLSF.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.
- 28 - Add all new foundation prospects to tracking sheet.
- 28 - Formulate a "next move" with each foundation prospect.
- Consider sending invitations to events to local foundation addresses as appropriate.

### *Direct Mail*

- June 1, 2018: Put summer appeal in the mail.
- Accompany summer appeal with e-campaign, 3-5 emails.
- Thank all donors who give through the appeals, following a set system for which level of donors are recognized in what ways.

## ***Q3***

## **July 2018**

### ***Time on Task***

- Offer Events Coordinator opportunities for professional development and if possible the ability to grow in their position and responsibilities over time.

### ***Major Gifts Program***

- 7 - Task outside contractor or staff member to provide 10-15 donor prospects.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Always remember to bring collateral materials to meetings to share with donors.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 20 - Revisit ranking sheet for donors and donor prospects, and strategize meeting schedule for coming quarter

### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 1 - Include current foundation funders on non-solicitation mailings and event invitations.
- 3 - Leverage board and trustee connections, sometimes “approaching” the foundation through a board member to increase chances of support.
- 15 - Identify wider Chicago-area prospects that may have an affinity for SLSF’s mission.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- 25 - Research whether these would be a good match for SLSF by visiting their websites or looking at their 990s.
- 28 - Add all new foundation prospects to tracking sheet.
- 28 - Formulate a “next move” with each foundation prospect.
- Determine appropriate meeting dates for foundations and add to foundation tracking sheet and this calendar, if helpful.
- At meetings with foundations request permission to submit a proposal; consider inviting foundation representatives to events and recognizing them in that context.
- In the case of a successful meeting, promptly submit a proposal or application.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.

### ***Direct Mail***

- July 20, 2018: Begin preparing fall appeal.

- Research all donors who give through appeal letters and select the highest ranking (highest net worth, longest giving history, largest gift, and greatest frequency of giving) among them for meeting requests.

## **August 2018**

### ***Major Gifts Program***

- 7 - review and research new entries into SLSF's database to assess whether they would be good donor prospects.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Use some meetings to make an ask, some to build relationships. An ideal ratio is two meetings (or phone calls) without an ask for every meeting or call with an ask.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.

### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF's materials.
- 10 - Task staff member or outside contractor with foundation prospect research.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Identify wider Chicago-area prospects that may have an affinity for SLSF's mission.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Be persistent in attempting to establish contact, as foundations can often be busy or hard to reach—persistence pays off. Frequently, it will take an initial letter and three or more phone calls or emails to establish contact and receive a satisfactory response.
- 25 - Research whether these would be a good match for SLSF by visiting their websites or looking at their 990s.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.
- 28 - Add all new foundation prospects to tracking sheet.
- 28 - Formulate a "next move" with each foundation prospect.

### ***Direct Mail***

- Continue to track results of each appeal letter, including results of split tests (i.e., longer letter v. postcard).
- August 1, 2018: Begin preparing second prospecting piece.
- Test the results from a 9x12 envelope versus a half sheet 6x9 envelope. Postage

costs will be greater for the 9x12, but we often see better results from the larger package.

- 5 - Coordinate with list brokers to acquire mailing lists.
- 10 - Find a printer to handle production, stamping, and sending of letters.

## **September 2018**

### ***Major Gifts Program***

- Refer to tracking sheet weekly to stay on top of donor relationships.
- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 1 - Review and update tracking sheet at least monthly.
- 1 - Add key dates from tracking sheet to this development calendar, if helpful.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Always remember to thank donors with a hand-written thank you note sent the day after the meeting.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 15 - Identify wider Chicago-area prospects that may have an affinity for SLSF's mission.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- 25 - Research whether these would be a good match for SLSF by visiting their websites or looking at their 990s.
- 28 - Add all new foundation prospects to tracking sheet.
- Consider sending invitations to events to local foundation addresses as appropriate.
- In the case of a successful meeting, promptly submit a proposal or application.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- In the case of a successful meeting, promptly submit a proposal or application.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.

### ***Direct Mail***

- September 15, 2018: Put fall appeal in the mail.
- September 20, 2018: Begin preparing end of year appeal.
- Accompany fall appeal with e-campaign, 3-5 emails.
- Thank all donors who give through the appeals, following a set system for which level of donors are recognized in what ways.

### ***Planned Giving***

- Include the planned giving brochure among collateral materials at SLSF events.

## Q4

### **October 2018**

#### ***Major Gifts Program***

- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Always remember to bring collateral materials to meetings to share with donors.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - Task outside contractor or staff member to provide 10-15 donor prospects.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- 20 - Revisit ranking sheet for donors and donor prospects, and strategize meeting schedule for coming quarter.

#### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 1 - Include current foundation funders on non-solicitation mailings and event invitations.
- 3 - Leverage board and trustee connections, sometimes “approaching” the foundation through a board member to increase chances of support.
- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF’s materials.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Identify wider Chicago-area prospects that may have an affinity for SLSF’s mission.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- 25 - Research whether these would be a good match for SLSF by visiting their websites or looking at their 990s.
- 28 - Add all new foundation prospects to tracking sheet.
- 28 - Formulate a “next move” with each foundation prospect.
- At meetings with foundations request permission to submit a proposal; consider inviting foundation representatives to events and recognizing them in that context.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.
- Try again with rejections after 6-12 months.

#### ***Direct Mail***

- October 1, 2018: Begin preparing brief non-solicitation update letter.
- October 1, 2018: Drop first prospecting piece.
- 5 - Create a tracking sheet that records the effectiveness of each mailing, broken

down by lists used or package specs tested.

- October 20, 2018: Send brief non-solicitation update letter to housefile.
- Research all donors who give through appeal letters and select the highest ranking (highest net worth, longest giving history, largest gift, and greatest frequency of giving) among them for meeting requests.

### *Planned Giving*

- Have planned giving brochures on hand to share at donor meetings, when appropriate.

### **November 2018**

#### *Major Gifts Program*

- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - review and research new entries into SLSF's database to assess whether they would be good donor prospects.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Use some meetings to make an ask, some to build relationships. An ideal ratio is two meetings (or phone calls) without an ask for every meeting or call with an ask.

#### *Foundations Program*

- 1 - Review and update tracking sheet at least monthly.
- 1 - Execute re-approach strategies for all lapsed funders.
- 10 - Task staff member or outside contractor with foundation prospect research.
- 15 - Identify wider Chicago-area prospects that may have an affinity for SLSF's mission.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- 25 - Research whether these would be a good match for SLSF by visiting their websites or looking at their 990s.
- 28 - Add all new foundation prospects to tracking sheet.
- 28 - Formulate a "next move" with each foundation prospect.
- Be persistent in attempting to establish contact, as foundations can often be busy or hard to reach—persistence pays off. Frequently, it will take an initial letter and three or more phone calls or emails to establish contact and receive a satisfactory response.
- In the case of a successful meeting, promptly submit a proposal or application.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- In the case of a successful meeting, promptly submit a proposal or application.



- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.

### *Direct Mail*

- November 20, 2018: Put end of year appeal in the mail.
- Accompany EOY appeal with e-campaign, 5-7 emails.
- Thank all donors who give through the appeals, following a set system for which level of donors are recognized in what ways.

## **December 2018**

### *Major Gifts Program*

- 1 - Review and update tracking sheet at least monthly.
- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them. 7 - Research 1-2 local nonprofit organizations, reviewing their annual report for good donor prospects.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Always remember to thank donors with a hand-written thank you note sent the day after the meeting.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Refer to tracking sheet weekly to stay on top of donor relationships.

### *Foundations Program*

- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF's materials.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Review and re-strategize approach with current contacts, as necessary.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Consider sending invitations to events to local foundation addresses as appropriate.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.

### *Direct Mail*

- 1 - Evaluate results of year's prospecting and set coming year's strategy accordingly.
- December 20, 2018: Consider sending a reminder postcard for the end of year appeal that will land right before Dec. 31.
- Carry out a Giving Tuesday campaign or a "last minute" campaign, offering donors the opportunity to donate one last time for a charitable donation within the fiscal year. Set a campaign goal along with 4-6 emails.

- Research all donors who give through appeal letters and select the highest ranking (highest net worth, longest giving history, largest gift, and greatest frequency of giving) among them for meeting requests.

# 2019

## Q1

### January 2019

#### *Time on Task*

- Offer Events Coordinator opportunities for professional development and if possible the ability to grow in their position and responsibilities over time.

#### *Major Gifts Program*

- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 1 - Review and update tracking sheet at least monthly.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - Task outside contractor or staff member to provide 10-15 donor prospects.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Always remember to bring collateral materials to meetings to share with donors.
- 20 - Revisit ranking sheet for donors and donor prospects, and strategize meeting schedule for coming quarter.

#### *Foundations Program*

- 1 - Review and update tracking sheet at least monthly.
- 1 - Include current foundation funders on non-solicitation mailings and event invitations.
- 3 - Leverage board and trustee connections, sometimes “approaching” the foundation through a board member to increase chances of support.
- Determine appropriate meeting dates for foundations and add to foundation tracking sheet and this calendar, if helpful.
- 15 - Review contact history with each current funder to determine if and when last meetings have taken place. Prioritize those that have never been met with or not met with recently and set engagement strategy.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- At meetings with foundations request permission to submit a proposal; consider inviting foundation representatives to events and recognizing them in that context.
- In the case of a successful meeting, promptly submit a proposal or application.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.

### *Direct Mail*

- January 5, 2019: Begin preparing first prospecting piece.
- 5 - Coordinate with list brokers to acquire mailing lists.
- 10 - Find a printer to handle production, stamping, and sending of letters.
- January 20, 2019: Begin preparing spring appeal.
- Continue to track results of each appeal letter, including results of split tests (i.e., longer letter v. postcard).
- Test the results from a 9x12 envelope versus a half sheet 6x9 envelope. Postage costs will be greater for the 9x12, but we often see better results from the larger package.

### *Planned Giving*

- 20 - Once a year, conduct a planned giving mail campaign, sending a cover letter and planned giving brochure to key audiences.

## **February 2019**

### *Major Gifts Program*

- 7 - review and research new entries into SLSF's database to assess whether they would be good donor prospects.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Use some meetings to make an ask, some to build relationships. An ideal ratio is two meetings (or phone calls) without an ask for every meeting or call with an ask.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.

### *Foundations Program*

- 1 - Review and update tracking sheet at least monthly.
- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF's materials.
- 10 - Task staff member or outside contractor with foundation prospect research.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Be persistent in attempting to establish contact, as foundations can often be busy or hard to reach—persistence pays off. Frequently, it will take an initial letter and three or more phone calls or emails to establish contact and receive a satisfactory response.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.

### *Direct Mail*

- February 20, 2019: Drop first prospecting piece.
- 25 - Create a tracking sheet that records the effectiveness of each mailing, broken down by lists used or package specs tested.

### March 2019

#### *Major Gifts Program*

- Refer to tracking sheet weekly to stay on top of donor relationships.
- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Always remember to thank donors with a hand-written thank you note sent the day after the meeting.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.

#### *Foundations Program*

- 1 - Review and update tracking sheet at least monthly.
- 1 - Add key dates from tracking sheet to this development calendar, if helpful.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Consider sending invitations to events to local foundation addresses as appropriate.
- In the case of a successful meeting, promptly submit a proposal or application.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- In the case of a successful meeting, promptly submit a proposal or application.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.

### *Direct Mail*

- March 15, 2019: Put spring appeal in the mail.
- Accompany spring appeal with e-campaign, 3-5 emails.
- Thank all donors who give through the appeals, following a set system for which level of donors are recognized in what ways.

### *Planned Giving*

- Include the planned giving brochure among collateral materials at SLSF events.

## *Q2*

### April 2019

### ***Major Gifts Program***

- 7 - Task outside contractor or staff member to provide 10-15 donor prospects.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Always remember to bring collateral materials to meetings to share with donors.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 20 - Revisit ranking sheet for donors and donor prospects, and strategize meeting schedule for coming quarter.

### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 1 - Include current foundation funders on non-solicitation mailings and event invitations.
- 3 - Leverage board and trustee connections, sometimes “approaching” the foundation through a board member to increase chances of support.
- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF’s materials.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- At meetings with foundations request permission to submit a proposal; consider inviting foundation representatives to events and recognizing them in that context.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.
- Try again with rejections after 6-12 months.

### ***Direct Mail***

- April 20, 2019: Begin preparing summer appeal.
- Research all donors who give through appeal letters and select the highest ranking (highest net worth, longest giving history, largest gift, and greatest frequency of giving) among them for meeting requests.

### ***Planned Giving***

- Have planned giving brochures on hand to share at donor meetings, when appropriate.

### **May 2019**

#### ***Major Gifts Program***

- 7 - review and research new entries into SLSF’s database to assess whether they would be good donor prospects.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Use some meetings to make an ask, some to build relationships. An ideal ratio is

two meetings (or phone calls) without an ask for every meeting or call with an ask.

- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.

### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 1 - Execute re-approach strategies for all lapsed funders.
- 10 - Task staff member or outside contractor with foundation prospect research.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Be persistent in attempting to establish contact, as foundations can often be busy or hard to reach—persistence pays off. Frequently, it will take an initial letter and three or more phone calls or emails to establish contact and receive a satisfactory response.
- In the case of a successful meeting, promptly submit a proposal or application.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.
- Be sure to follow all foundation directives about how and when to apply, which may be found online or on the foundation's tax filings.

### ***Direct Mail***

- Continue to track results of each appeal letter, including results of split tests (i.e., longer letter v. postcard).

### **June 2019**

### ***Major Gifts Program***

- 7 - Research 1-2 local nonprofit organizations, reviewing their annual report for good donor prospects.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Always remember to thank donors with a hand-written thank you note sent the day after the meeting.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.

### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.

- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF's materials.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Consider sending invitations to events to local foundation addresses as appropriate.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.

### *Direct Mail*

- June 1, 2019: Put summer appeal in the mail.
- Accompany summer appeal with e-campaign, 3-5 emails.
- Thank all donors who give through the appeals, following a set system for which level of donors are recognized in what ways.

## *Q3*

### July 2019

#### *Major Gifts Program*

- 7 - Task outside contractor or staff member to provide 10-15 donor prospects.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Always remember to bring collateral materials to meetings to share with donors.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 20 - Revisit ranking sheet for donors and donor prospects, and strategize meeting schedule for coming quarter.

### *Direct Mail*

- 1 - Review and update tracking sheet at least monthly.
- 1 - Include current foundation funders on non-solicitation mailings and event invitations.
- 3 - Leverage board and trustee connections, sometimes "approaching" the foundation through a board member to increase chances of support.
- Determine appropriate meeting dates for foundations and add to foundation tracking sheet and this calendar, if helpful.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- At meetings with foundations request permission to submit a proposal; consider inviting foundation representatives to events and recognizing them in that context.



- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- In the case of a successful meeting, promptly submit a proposal or application.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.

### *Direct Mail*

- July 20, 2019: Begin preparing fall appeal.
- Research all donors who give through appeal letters and select the highest ranking (highest net worth, longest giving history, largest gift, and greatest frequency of giving) among them for meeting requests.

## August 2019

### *Major Gifts Program*

- 7 - review and research new entries into SLSF's database to assess whether they would be good donor prospects.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Use some meetings to make an ask, some to build relationships. An ideal ratio is two meetings (or phone calls) without an ask for every meeting or call with an ask.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.

### *Foundations Program*

- 1 - Review and update tracking sheet at least monthly.
- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF's materials.
- 10 - Task staff member or outside contractor with foundation prospect research.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Be persistent in attempting to establish contact, as foundations can often be busy or hard to reach—persistence pays off. Frequently, it will take an initial letter and three or more phone calls or emails to establish contact and receive a satisfactory response.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.

### *Direct Mail*

- Continue to track results of each appeal letter, including results of split tests (i.e.,

longer letter v. postcard).

- August 1, 2019: Begin preparing second prospecting piece.
- Test the results from a 9x12 envelope versus a half sheet 6x9 envelope. Postage costs will be greater for the 9x12, but we often see better results from the larger package.
- 5 - Coordinate with list brokers to acquire mailing lists.
- 10 - Find a printer to handle production, stamping, and sending of letters.

## **September 2019**

### ***Major Gifts Program***

- Refer to tracking sheet weekly to stay on top of donor relationships.
- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Always remember to thank donors with a hand-written thank you note sent the day after the meeting.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.

### ***Foundations Program***

- 1 - Add key dates from tracking sheet to this development calendar, if helpful.
- 1 - Review and update tracking sheet at least monthly.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Consider sending invitations to events to local foundation addresses as appropriate.
- In the case of a successful meeting, promptly submit a proposal or application.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- In the case of a successful meeting, promptly submit a proposal or application.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.

### ***Direct Mail***

- September 15, 2019: Put fall appeal in the mail.
- September 20, 2019: Begin preparing end of year appeal.
- Accompany fall appeal with e-campaign, 3-5 emails.
- Thank all donors who give through the appeals, following a set system for which level of donors are recognized in what ways.

### ***Planned Giving***

- Include the planned giving brochure among collateral materials at SLSF events.

## ***Q4***

## **October 2019**

### ***Time on Task***

- Offer Events Coordinator opportunities for professional development and if possible the ability to grow in their position and responsibilities over time.

### ***Major Gifts Program***

- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - Task outside contractor or staff member to provide 10-15 donor prospects.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 20 - Revisit ranking sheet for donors and donor prospects, and strategize meeting schedule for coming quarter
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Always remember to bring collateral materials to meetings to share with donors.

### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 1 - Include current foundation funders on non-solicitation mailings and event invitations.
- 3 - Leverage board and trustee connections, sometimes “approaching” the foundation through a board member to increase chances of support.
- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF’s materials.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- At meetings with foundations request permission to submit a proposal; consider inviting foundation representatives to events and recognizing them in that context.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.
- Try again with rejections after 6-12 months.

### ***Direct Mail***

- October 1, 2019: Begin preparing brief non-solicitation update letter.
- October 1, 2019: Drop first prospecting piece.
- 5 - Create a tracking sheet that records the effectiveness of each mailing, broken down by lists used or package specs tested.
- October 20, 2019: Send brief non-solicitation update letter to housefile.
- Research all donors who give through appeal letters and select the highest ranking (highest net worth, longest giving history, largest gift, and greatest frequency of giving) among them for meeting requests.

## *Planned Giving*

- Have planned giving brochures on hand to share at donor meetings, when appropriate.

## **November 2019**

### *Major Gifts Program*

- 1 - Review and update tracking sheet at least monthly.
- 7 - review and research new entries into SLSF's database to assess whether they would be good donor prospects.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Use some meetings to make an ask, some to build relationships. An ideal ratio is two meetings (or phone calls) without an ask for every meeting or call with an ask.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 10 - Task staff member or outside contractor with foundation prospect research.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.

### *Foundations Program*

- 1 - Execute re-approach strategies for all lapsed funders.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Be persistent in attempting to establish contact, as foundations can often be busy or hard to reach—persistence pays off. Frequently, it will take an initial letter and three or more phone calls or emails to establish contact and receive a satisfactory response.
- In the case of a successful meeting, promptly submit a proposal or application.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.

### *Direct Mail*

- November 20, 2019: Put end of year appeal in the mail.
- Accompany EOY appeal with e-campaign, 5-7 emails.
- Thank all donors who give through the appeals, following a set system for which level of donors are recognized in what ways.

## **December 2019**

### *Major Gifts Program*

- 1 - Review and update tracking sheet at least monthly.
- 7 - Research 1-2 local nonprofit organizations, reviewing their annual report for good donor prospects.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Always remember to thank donors with a hand-written thank you note sent the day after the meeting.
- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF's materials.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Review and re-strategize approach with current contacts, as necessary.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Consider sending invitations to events to local foundation addresses as appropriate.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.

### *Direct Mail*

- 1 - Evaluate results of year's prospecting and set coming year's strategy accordingly.
- December 20, 2019: Consider sending a reminder postcard for the end of year appeal that will land right before Dec. 31.
- Carry out a Giving Tuesday campaign or a "last minute" campaign, offering donors the opportunity to donate one last time for a charitable donation within the fiscal year. Set a campaign goal along with 4-6 emails.
- Research all donors who give through appeal letters and select the highest ranking (highest net worth, longest giving history, largest gift, and greatest frequency of giving) among them for meeting requests.

# 2020

## Q1

### January 2020

#### *Major Gifts Program*

- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - Task outside contractor or staff member to provide 10-15 donor prospects.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 20 - Revisit ranking sheet for donors and donor prospects, and strategize meeting schedule for coming quarter.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Always remember to bring collateral materials to meetings to share with donors.

#### *Foundations Program*

- 1 - Review and update tracking sheet at least monthly.
- 1 - Include current foundation funders on non-solicitation mailings and event invitations.
- 3 - Leverage board and trustee connections, sometimes “approaching” the foundation through a board member to increase chances of support.
- Determine appropriate meeting dates for foundations and add to foundation tracking sheet and this calendar, if helpful.
- 15 - Review contact history with each current funder to determine if and when last meetings have taken place. Prioritize those that have never been met with or not met with recently and set engagement strategy.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- At meetings with foundations request permission to submit a proposal; consider inviting foundation representatives to events and recognizing them in that context.
- In the case of a successful meeting, promptly submit a proposal or application.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.

#### *Direct Mail*

- January 5, 2020: Begin preparing first prospecting piece.
- 5 - Coordinate with list brokers to acquire mailing lists.
- 10 - Find a printer to handle production, stamping, and sending of letters.

- January 20, 2020: Begin preparing spring appeal.
- Continue to track results of each appeal letter, including results of split tests (i.e., longer letter v. postcard).
- Test the results from a 9x12 envelope versus a half sheet 6x9 envelope. Postage costs will be greater for the 9x12, but we often see better results from the larger package.

### *Planned Giving*

- 20 - Once a year, conduct a planned giving mail campaign, sending a cover letter and planned giving brochure to key audiences.

### February 2020

#### *Major Gifts Program*

- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - review and research new entries into SLSF's database to assess whether they would be good donor prospects.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Use some meetings to make an ask, some to build relationships. An ideal ratio is two meetings (or phone calls) without an ask for every meeting or call with an ask.

#### *Foundations Program*

- 1 - Review and update tracking sheet at least monthly.
- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF's materials.
- 10 - Task staff member or outside contractor with foundation prospect research.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Be persistent in attempting to establish contact, as foundations can often be busy or hard to reach—persistence pays off. Frequently, it will take an initial letter and three or more phone calls or emails to establish contact and receive a satisfactory response.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.

#### *Direct Mail*

- February 20, 2020: Drop first prospecting piece.
- 25 - Create a tracking sheet that records the effectiveness of each mailing, broken down by lists used or package specs tested.

## **March 2020**

### ***Major Gifts Program***

- Refer to tracking sheet weekly to stay on top of donor relationships.
- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Always remember to thank donors with a hand-written thank you note sent the day after the meeting.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.

### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 1 - Add key dates from tracking sheet to this development calendar, if helpful.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Consider sending invitations to events to local foundation addresses as appropriate.
- In the case of a successful meeting, promptly submit a proposal or application.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- In the case of a successful meeting, promptly submit a proposal or application.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.

### ***Direct Mail***

- March 15, 2020: Put spring appeal in the mail.
- Accompany spring appeal with e-campaign, 3-5 emails.
- Thank all donors who give through the appeals, following a set system for which level of donors are recognized in what ways.

### ***Planned Giving***

- Include the planned giving brochure among collateral materials at SLSF events.

## ***Q2***

## **April 2020**

### ***Major Gifts Program***

- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - Task outside contractor or staff member to provide 10-15 donor prospects.



- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 20 - Revisit ranking sheet for donors and donor prospects, and strategize meeting schedule for coming quarter
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Always remember to bring collateral materials to meetings to share with donors.

### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 1 - Include current foundation funders on non-solicitation mailings and event invitations.
- 3 - Leverage board and trustee connections, sometimes “approaching” the foundation through a board member to increase chances of support.
- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF’s materials.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- At meetings with foundations request permission to submit a proposal; consider inviting foundation representatives to events and recognizing them in that context.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.
- Try again with rejections after 6-12 months.

### ***Direct Mail***

- April 20, 2020: Begin preparing summer appeal.
- Research all donors who give through appeal letters and select the highest ranking (highest net worth, longest giving history, largest gift, and greatest frequency of giving) among them for meeting requests.

### ***Planned Giving***

- Have planned giving brochures on hand to share at donor meetings, when appropriate.

## **May 2020**

### ***Major Gifts Program***

- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - review and research new entries into SLSF’s database to assess whether they would be good donor prospects.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Refer to tracking sheet weekly to stay on top of donor relationships.

- Use some meetings to make an ask, some to build relationships. An ideal ratio is two meetings (or phone calls) without an ask for every meeting or call with an ask.

### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 1 - Execute re-approach strategies for all lapsed funders.
- 10 - Task staff member or outside contractor with foundation prospect research.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Be persistent in attempting to establish contact, as foundations can often be busy or hard to reach—persistence pays off. Frequently, it will take an initial letter and three or more phone calls or emails to establish contact and receive a satisfactory response.
- In the case of a successful meeting, promptly submit a proposal or application.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.
- Be sure to follow all foundation directives about how and when to apply, which may be found online or on the foundation's tax filings.

### ***Direct Mail***

- Continue to track results of each appeal letter, including results of split tests (i.e., longer letter v. postcard).

### **June 2020**

### ***Major Gifts Program***

- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - Research 1-2 local nonprofit organizations, reviewing their annual report for good donor prospects.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Always remember to thank donors with a hand-written thank you note sent the day after the meeting.

### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF's materials.

- 14 - Continue to follow up consistently until contact can be established.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Consider sending invitations to events to local foundation addresses as appropriate.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.

### ***Direct Mail***

- June 1, 2020: Put summer appeal in the mail.
- Accompany summer appeal with e-campaign, 3-5 emails.
- Thank all donors who give through the appeals, following a set system for which level of donors are recognized in what ways.

## ***Q3***

### **July 2020**

#### ***Time on Task***

- Offer Events Coordinator opportunities for professional development and if possible the ability to grow in their position and responsibilities over time.

#### ***Major Gifts Program***

- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - Task outside contractor or staff member to provide 10-15 donor prospects.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 20 - Revisit ranking sheet for donors and donor prospects, and strategize meeting schedule for coming quarter
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Always remember to bring collateral materials to meetings to share with donors.

#### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 1 - Include current foundation funders on non-solicitation mailings and event invitations.
- 3 - Leverage board and trustee connections, sometimes “approaching” the foundation through a board member to increase chances of support.
- Determine appropriate meeting dates for foundations and add to foundation tracking sheet and this calendar, if helpful.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- At meetings with foundations request permission to submit a proposal; consider inviting foundation representatives to events and recognizing them in

that context.

- In the case of a successful meeting, promptly submit a proposal or application.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.

### ***Direct Mail***

- July 20, 2020: Begin preparing fall appeal.
- Research all donors who give through appeal letters and select the highest ranking (highest net worth, longest giving history, largest gift, and greatest frequency of giving) among them for meeting requests.

### **August 2020**

#### ***Major Gifts Program***

- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - review and research new entries into SLSF's database to assess whether they would be good donor prospects.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Use some meetings to make an ask, some to build relationships. An ideal ratio is two meetings (or phone calls) without an ask for every meeting or call with an ask.

#### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF's materials.
- 10 - Task staff member or outside contractor with foundation prospect research.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Be persistent in attempting to establish contact, as foundations can often be busy or hard to reach—persistence pays off. Frequently, it will take an initial letter and three or more phone calls or emails to establish contact and receive a satisfactory response.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.

### *Direct Mail*

- Continue to track results of each appeal letter, including results of split tests (i.e., longer letter v. postcard).
- August 1, 2020: Begin preparing second prospecting piece.
- Test the results from a 9x12 envelope versus a half sheet 6x9 envelope. Postage costs will be greater for the 9x12, but we often see better results from the larger package.
- 5 - Coordinate with list brokers to acquire mailing lists.
- 10 - Find a printer to handle production, stamping, and sending of letters.

### **September 2020**

#### *Major Gifts Program*

- Refer to tracking sheet weekly to stay on top of donor relationships.
- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Always remember to thank donors with a hand-written thank you note sent the day after the meeting.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.

#### *Foundations Program*

- 1 - Review and update tracking sheet at least monthly.
- 1 - Add key dates from tracking sheet to this development calendar, if helpful.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- In the case of a successful meeting, promptly submit a proposal or application.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible, or after a successful meeting.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.

### *Direct Mail*

- September 15, 2020: Put fall appeal in the mail.
- September 20, 2020: Begin preparing end of year appeal.
- Accompany fall appeal with e-campaign, 3-5 emails.
- Thank all donors who give through the appeals, following a set system for which level of donors are recognized in what ways.

### *Planned Giving*

- Include the planned giving brochure among collateral materials at SLSF events.

## *Q4*

## **October 2020**

### ***Major Gifts Program***

- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - Task outside contractor or staff member to provide 10-15 donor prospects.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Always remember to bring collateral materials to meetings to share with donors.
- 20 - Revisit ranking sheet for donors and donor prospects, and strategize meeting schedule for coming quarter

### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 1 - Include current foundation funders on non-solicitation mailings and event invitations.
- 3 - Leverage board and trustee connections, sometimes “approaching” the foundation through a board member to increase chances of support.
- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF’s materials.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- At meetings with foundations request permission to submit a proposal; consider inviting foundation representatives to events and recognizing them in that context.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.
- Try again with rejections after 6-12 months.

### ***Direct Mail***

- October 1, 2020: Begin preparing brief non-solicitation update letter.
- 5 - Create a tracking sheet that records the effectiveness of each mailing, broken down by lists used or package specs tested.
- October 20, 2020: Send brief non-solicitation update letter to housefile.
- Research all donors who give through appeal letters and select the highest ranking (highest net worth, longest giving history, largest gift, and greatest frequency of giving) among them for meeting requests.

### ***Planned Giving***

- Have planned giving brochures on hand to share at donor meetings, when appropriate.

## **November 2020**

### ***Major Gifts Program***

- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 5 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - review and research new entries into SLSF's database to assess whether they would be good donor prospects.
- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Use some meetings to make an ask, some to build relationships. An ideal ratio is two meetings (or phone calls) without an ask for every meeting or call with an ask.

### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 1 - Execute re-approach strategies for all lapsed funders.
- 10 - Task staff member or outside contractor with foundation prospect research.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Be persistent in attempting to establish contact, as foundations can often be busy or hard to reach—persistence pays off. Frequently, it will take an initial letter and three or more phone calls or emails to establish contact and receive a satisfactory response.
- In the case of a successful meeting, promptly submit a proposal or application.
- 30 - Consistently send letters of inquiry, or proposals as appropriate, when an initial meeting or phone call is not possible.
- In the case of rejection, thank the foundation and let them know that you will be including them on your newsletter so that they can stay abreast of developments.

### ***Direct Mail***

- November 20, 2020: Put end of year appeal in the mail.
- Accompany EOY appeal with e-campaign, 5-7 emails.
- Thank all donors who give through the appeals, following a set system for which level of donors are recognized in what ways.

## **December 2020**

### ***Major Gifts Program***

- 1 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 3 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 7 - Research 1-2 local nonprofit organizations, reviewing their annual report for good donor prospects.

- 9 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- 13 - Call or e-mail 5 donors, requesting the opportunity to meet with them.
- Refer to tracking sheet weekly to stay on top of donor relationships.
- Always remember to thank donors with a hand-written thank you note sent the day after the meeting.

### ***Foundations Program***

- 1 - Review and update tracking sheet at least monthly.
- 7 - Follow up a week after sending letter of inquiry or proposal to ensure that the foundation has received SLSF's materials.
- 14 - Continue to follow up consistently until contact can be established.
- 15 - Send meeting request letters and make phone calls to establish contact with foundation prospects. Seek to set a meeting date.
- Consider sending invitations to events to local foundation addresses as appropriate.
- 27 - Research board members and trustees of foundations and determine whether SLSF has existing connections.

### ***Direct Mail***

- 1 - Evaluate results of year's prospecting and set coming year's strategy accordingly.
- December 20, 2020: Consider sending a reminder postcard for the end of year appeal that will land right before Dec. 31.
- Carry out a Giving Tuesday campaign or a "last minute" campaign, offering donors the opportunity to donate one last time for a charitable donation within the fiscal year. Set a campaign goal along with 4-6 emails.
- Research all donors who give through appeal letters and select the highest ranking (highest net worth, longest giving history, largest gift, and greatest frequency of giving) among them for meeting requests.