

## Camp Plan for Donors and Foundations- Roles and Responsibilities

|                                       | <b>Identification of Potential Donors &amp; Foundations</b>                                                                                                                                                                                                                                               | <b>Research of Donors &amp; Foundations</b>                                                                                                                                                                                                                                                                                                                                                                                  | <b>Cultivation of Donors</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <b>Solicitation of Donors &amp; Foundations</b>                                                                                                                                                                                                                                                                                                                                         | <b>Stewardship of Donors</b>                                                                                                                                                                                                                                                                                                                                                                       |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Board Members</b>                  | <ul style="list-style-type: none"> <li>-Give names/info on prospects they know in key locations. Be willing to serve as an entry point into camp for them.</li> <li>-Same for Foundations</li> </ul>                                                                                                      | <ul style="list-style-type: none"> <li>-Screen other prospect names (new and lapsed donors) to see if any contacts.</li> <li>-Help dev. Staff to survey current major donors as to what the like/would like in terms of cultivation and stewardship from us.</li> <li>-Help dev. Staff to prioritize foundation by reviewing list of potential foundations.</li> </ul>                                                       | <ul style="list-style-type: none"> <li>-Invite friends to Fundraising Event</li> <li>-Attend events like Fundraising Event, House Parties</li> <li>-Phone calls to contacts before events to remind, send camp materials.</li> <li>-Phone calls to contacts (lapsed donors/major donor prospects) to tell about work, ask how they want to be involved.</li> <li>Networking!</li> </ul>                                                                                                      | <ul style="list-style-type: none"> <li>-Personal giving-maintaining 100% participation.</li> <li>-For Board members willing, small number of direct solicitations.</li> <li>-Accompany dev. Staff on select number of solicitation meetings 9w/o being the person to ask)</li> <li>-Accompany dev. Staff to meetings with Foundations</li> </ul>                                        | <ul style="list-style-type: none"> <li>-Phone call to contacts &amp; select other individuals after gift/event to say thank you, get feedback on the event, or their involvement with camp.</li> <li>-Visit to individuals if gift is particularly meaningful.</li> </ul>                                                                                                                          |
| <b>Development Committee</b>          | <ul style="list-style-type: none"> <li>Ask Board/staff/key donors for names of contacts.</li> <li>Friends and Family Campaign</li> </ul>                                                                                                                                                                  | <ul style="list-style-type: none"> <li>-Help to coordinate screening of prospect names (new and lapsed donors) with dev. staff.</li> <li>-Help develop plan with dev. staff for holding House Parties in three new locations this year i.e. going national.</li> </ul>                                                                                                                                                       | <ul style="list-style-type: none"> <li>-Invite individuals to Fundraising Event.</li> <li>-Support/host/plan events like Fundraising Event, House Parties.</li> <li>-Phone calls to lapsed donors/major donor prospects to share our work.</li> </ul>                                                                                                                                                                                                                                        | <ul style="list-style-type: none"> <li>Personal giving</li> </ul>                                                                                                                                                                                                                                                                                                                       | <ul style="list-style-type: none"> <li>Phone call to individuals after gift/event to say thank you, get feedback on the event, or their involvement with camp.</li> </ul>                                                                                                                                                                                                                          |
| <b>Key Donors</b>                     | <ul style="list-style-type: none"> <li>-Give names/info on prospects they know in key locations</li> <li>-Connect us to other family foundations</li> </ul>                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                              | <ul style="list-style-type: none"> <li>-Invite to Fundraising Event</li> <li>-Host House Parties/ help their contacts host</li> </ul>                                                                                                                                                                                                                                                                                                                                                        | <ul style="list-style-type: none"> <li>Personal giving</li> </ul>                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Executive Director</b>             | <ul style="list-style-type: none"> <li>-Give names/info on prospects in key locations.</li> <li>-Identify Board prospects, with development in mind.</li> <li>-Meet with foundation program officers.</li> <li>-Attend fdn. Gatherings</li> </ul>                                                         | <ul style="list-style-type: none"> <li>Screen prospect names (new and lapsed donors) and suggest contacts.</li> </ul>                                                                                                                                                                                                                                                                                                        | <ul style="list-style-type: none"> <li>-Support/host Fundraising Event</li> <li>-Attend House Parties</li> <li>-Speak at other events such as web-based seminar, teleconference, panel discussion, special talk.</li> <li>-One-on-one phone calls/meetings &amp; correspondence with key donors.</li> </ul>                                                                                                                                                                                  | <ul style="list-style-type: none"> <li>Personal giving</li> <li>Accompany dev. staff on select number of solicitation meetings, at times doing the "ask" and at times not.</li> </ul>                                                                                                                                                                                                   | <ul style="list-style-type: none"> <li>Phone call select individuals after gift/event to say thank you, get feedback on their involvement, what their experience has been like, etc.</li> <li>-Hand-written note to select individuals after gift/event.</li> </ul>                                                                                                                                |
| <b>Development Staff</b>              | <ul style="list-style-type: none"> <li>-Ask Board/ staff / key donors for names of contacts.</li> <li>-Attend workshops/ conference with other staff when opportunity presents of meeting/networking with donors &amp; prospects.</li> <li>-Buy/share mailing lists with similar institutions.</li> </ul> | <ul style="list-style-type: none"> <li>-Coordinate screening of prospect names.</li> <li>-Conduct further research into connections and capacity to give and develop profiles on donors.</li> <li>-Survey current major donors as to what the like/would like in terms of cultivation and stewardship from us.</li> <li>-Develop database system for storing all biographical and personal information on donors.</li> </ul> | <ul style="list-style-type: none"> <li>-Develop &amp; distribute material (case statement, planned giving, Investor's Circle, strategic plan, newsletter, House Party Toolkit) for use in meetings &amp; events.</li> <li>-Plan and execute events like Fundraising Event, House Parties.</li> <li>-Develop individual plans for top donors &amp; prospects.</li> <li>-Plan targeted direct mail correspondence.</li> <li>-Develop/present opportunities for involvement in camp.</li> </ul> | <ul style="list-style-type: none"> <li>-Personal giving</li> <li>-Solicitation at events like Fundraising Event, House Parties.</li> <li>-One-on-one solicitations or attending solicitation meetings of all major donors.</li> <li>-Direct mail or phone solicitation of major donor prospects and major donors who prefer this method.</li> <li>-Further develop web site.</li> </ul> | <ul style="list-style-type: none"> <li>-Develop gift acknowledgement policy.</li> <li>-Write thank you's for all gifts.</li> <li>-Phone call to select individuals after gift/event to say thank you, get feedback, etc.</li> <li>-Phone call/ correspondence with those who couldn't attend event.</li> <li>-Develop individual plan for thanks/recognition/next steps for top donors.</li> </ul> |
| <b>Director of Ed. &amp; Training</b> | <ul style="list-style-type: none"> <li>Past history of foundations and donors</li> </ul>                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                              | <ul style="list-style-type: none"> <li>-Coordinate program and dev. to enable to attend events outside area.</li> <li>-one-on one cultivation when appropriate</li> </ul>                                                                                                                                                                                                                                                                                                                    | <ul style="list-style-type: none"> <li>-Personal giving.</li> <li>-Attending select solicitation of major donors.</li> </ul>                                                                                                                                                                                                                                                            | <ul style="list-style-type: none"> <li>Phone calls to individuals that they invited to events to say thank you, get feedback</li> </ul>                                                                                                                                                                                                                                                            |
| <b>Other Staff</b>                    | <ul style="list-style-type: none"> <li>-Friends &amp; Family Campaign</li> <li>-Have antennae up, as all people who use our services are potential donors.</li> <li>Generate list of Fundraising Event invitees.</li> </ul>                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                              | <ul style="list-style-type: none"> <li>-Attend/host Fundraising Event</li> <li>-Attend House Parties, as needed or other event, as needed.</li> </ul>                                                                                                                                                                                                                                                                                                                                        | <ul style="list-style-type: none"> <li>Personal giving-aiming for 100% participation for all staff.</li> </ul>                                                                                                                                                                                                                                                                          | <ul style="list-style-type: none"> <li>Phone calls to individuals that they invited to events to say thank you, get feedback.</li> </ul>                                                                                                                                                                                                                                                           |

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### **\*Definition of terms used in the solicitation process:**

- Identification    Person is chosen, suggested, somehow gets on our list.  
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- Research        We find out more information on the person, biographical, financial, personal so that we can determine capacity (ability to give a gift, i.e. wealth) and inclination (how interested a person is in us, commitment, involvement) and from there, create a plan  
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- Cultivation     Development of the relationship before was ask for a gift, the “getting to know you” phase. Always includes giving them more information on camp and may include inviting to tour camp, attending a house party, participating in a seminar, attending Fundraising Event, receiving a personal visit.  
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- Solicitation    The ask. Usually a personal visit or phone call (or an masse at the Fundraising Event)  
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- Stewardship    Nurturing of the relationship after the gift. Always includes a thank you for their gift and may include hosting a house party, participating in a seminar, attending a special dinner, receiving a personal phone call, being honored in a newsletter, receiving special publications/ information.