

Example Annual Plan

| Month | Event | Category | Initiator/ Path |
|--------------|------------------------------|-----------------|------------------------|
| January | Meet with 1/3 Major Donors | 1 | DTC/ PC |
| February | Valentine Day Note | 1,2,3 | ED/ OM |
| | Meet with 1/3 Major Donors | 1 | DTC/ PC |
| March | Meet with 1/3 Major Donors | 1 | DTC/ PC |
| | Tour for new donors | 1,2,4 | ED/ DTC |
| | Secure Match for Giving Day | 1 | DTC/ PC |
| April | Spring Festival | 3,4 | ED/ OM |
| | Secure Pledges 1/2 Tier 2 | 2 | DTC/ PC |
| May | Letter Update | 1,2 | ED/ OM |
| | Secure Pledges 1/2 Tier 2 | 2 | DTC/ PC |
| | Giving Day | 3 | ED/ OM |
| June | Personal TY Notes | 1 | OM/ PC |
| | Summer Newsletter | 1,2,3 | ED/ OM |
| July | Mass Email to all donors | 1,2,3 | ED/ OM |
| August | Meet with ½ face-to-face | 1 | DTC/ PC |
| | Golf Tournament | 2,4 | ED/ OM/ PC |
| Sept | Meet with ½ face-to-face | 1 | DTC/ PC |
| | Phone call with 1/2 | 2 | DTC/ PC |
| October | Meet with ½ face-to-face | 1 | DTC/ PC |
| | Phone call with 1/2 | 2 | DTC/ PC |
| November | Onsite Tours | 1,2 | ED/ PC |
| | Begin Work on New Case | 1,2 | DTC/ ED |
| | Thanksgiving Card | 1,2,3 | ED/ OM |
| December | Finalize New Case | 1,2 | ED/ DTC |
| | Personal Christmas Cards | 1,2 | OM/ PC |
| | Christmas Cards | 3 | OM/ ED |
| | End of Year Letter to lapsed | 3,4 | ED |

The Dev Committee Has the Following Positions:

“DTC” = Development Team Chair
 “ED”= Executive Director
 “PC” = Primary Caller
 “OM” = Office Manager

Other Explanations:

Tier 1= \$5K+
 Tier 2= \$1-5K
 Tier 3= >1K
 Tier 4= Possible 1 or 2