

**Partners in Reading, San Jose Public Library/ Pacific Library Partnership  
Individual Donor Development Plan**

**Roadmap to Creating a  
Fund Development Plan**

- **Define outcomes of plan development**
  - Develop Individual Donor Plan for a three year period
  - Identify compelling messages
  - Design methods for delivering messages
  
- **Select a consultant**
  - Establish criteria for selection. PAR's criteria included:
    - Successful experience developing individual donor campaigns and preparing organizations to implement campaigns.
    - Five years' experience with individual fundraising campaigns that achieved the intended outcomes.
    - Successfully developed compelling messages for donor segments.
    - Proven history of working collaboratively with organizations to achieve goals.
      - Experience working with libraries or educational programs preferred.
  - Research recognized fund developers
  - Obtain recommendations from community agencies and colleagues
  - Create a **Scope of Work Request for Proposal (RFP)**. Sample attached.
  - Distribute to organizations, foundations, individuals, nonprofit associations, and colleagues that have experience and/or contacts with fund development
  - Review RFP applications
  - Interview primary candidates
  - Select consultant
  
- **Determine communication plan with consultant**
  - Frequency
  - Method
  - Purpose
  
- **Audit donor history**
  - Collect data from the past 10 years of donor involvement
  - Include: name; type such as corporation, volunteer tutor, adult learner, etc: contact information; amount of donation and frequency of donation; communication history; and comments.
  - Analyze results and determine trends
  - Create distribution list
  
- **Analyze internal resources, support and challenges**
  - Review internal support for fund development and resources available
  - Define infrastructure
  - Identify internal challenges that may hamper fund development

- **Obtaining feedback from donors**
  - Determine what information is needed from donors such as the best way to reach them, messages they find engaging, the value they place on literacy and more.
  - Determine who the donors are
  - Determine a way of reaching donors and supporters of literacy such as online surveys, mailing questionnaires, phone interviews, etc.
  - Create a **survey** to distribute to donors. Sample attached.
  - Analyze responses.
  - Use feedback to inform communication, messaging and the fund development plan.
  
- **Create the fund development plan**
  - Establish annual goals for a minimum of three years
  - Create a brief case statement that all stakeholders understand and can communicate
  - Create a volunteer committee dedicated to fund raising if one does not exist
    - Identify criteria to consider for potential members
      - Contributed to and willing to contribute to agency
      - Strong connections with community groups, corporate entities, and funding agencies
      - Committed to mission of agency
      - Effective presenter / communicator
      - Comfort with asking for financial support
  - Identify how resources will be used
  - Decide how challenges will be overcome
  - Identify strategies for cultivating the target groups
  - Establish solicitation strategies used to engage donors
  - Determine strategies that will be employed to retain donors
  - Determine the roles of those who will support the plan such as staff, volunteers, board members, and others.
  - Create work plan for each year with timeline
  - Integrate feedback mechanisms to check effectiveness. Adjust where necessary.
  - Evaluate results
  - Sample **plan** included
  
- **Communication, messaging, and information tools**
  - Define the target audiences
  - Determine messages that are engaging and representative of the of the organization
  - Define how the messages are delivered: online, videos, print media, appeal letters, events, in person, and other means.
  - Create essential tools such as a remit envelope, website, and annual appeal.
  - Draft products, experiences and obtain feedback
  - Produce **products**. Samples postcards, learner stories and template for remit envelope included.
  - Use communication and information tools to support plan implementation
  - Sample **tool kit** included in the Messaging and Communication document.