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| PHILANTHROPIC ACTIVITIES 2022 GOAL 2022 ACTUAL |
| RAISING///////////// |  |  Pledge to make a personally significant gift to ORGANIZATION (*amount personal*) | *Confidential*  | *Confidential* |
|  Pledge to raise the following sum for ORGANIZATION | $ | $ |
|  Send personal notes to lapsed donors to encourage them to donate again | # | # |
|  Accompany staff on solicitation visits | # | # |
|  Accompany staff on cultivation visits | # | # |
|  Secure a gift from my company in the amount of | $ | $ |
|  Secure sponsors or sell tables for the annual awards dinner | # | # |
|  Invite a prospect or donor to meet and ask for a gift to ORGANIZATION during the year (total #) | # | # |
| # of these prospects will come from my personal contacts | # | # |
| # of these prospects will be supplied to me by ORGANIZATION | # | # |
|  |  |  |
| THANKING  |  |  Take a major donor to lunch just to say thank you | # | # |
|  Make personal calls to thank donors for their recent gift | # | # |
|  Send personal emails to thank donors for their recent gift | # | # |
|  Write personal thank you notes to donors | # | # |
|  Write a personal note to a major donor and include a relevant news article or program update (article or update provided by development staff) | # | # |
|  |  |  |
| PROMOTING  |  |  Share my personal story of connection to ORGANIZATION during a meeting  with a donor or prospect - though I am not yet comfortable asking for a gift | # | # |
|  Speak at an event of an organization where I’m involved (e.g. Toronto Region Board of Trade, Rotary, service groups, house of worship) etc.) | # | # |
|  Write notes on invitations to ORGANIZATION’s events |  |  |
|  Write notes on annual appeal letters to past donors and prospects | # | # |
|  Host a “Lunch and Learn” for employees at my company to learn  about ORGANIZATION, as well as volunteer and gift opportunities |  |  |
|  Co/Host a breakfast to introduce prospects to ORGANIZATION |  |  |
|  Share personal contacts list to build the pipeline of prospects and donors  to ORGANIZATION | # | # |

A copy of this plan is also maintained by the Philanthropy Committee which will check-in with you

throughout 2022 to help you reach your philanthropic goals on behalf of ORGANIZATION