|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 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