

SOROPTIMIST INTERNATIONAL OF THE AMERICAS, INC. ®

2022-2023 Fund Development Volunteers Tactical Plan

Plans are subject to change as we go through the year

2022-2023 Strategic Plan

- **Objectives**
 - Improve our donor experience.
 - Increase the number of donors.
 - Increase financial contributions.
- **Strategies**
 - Increase and diversify donor asks in support of the Dream Big Campaign, annual funds, and major gifts.
 - Develop new strategies for donor prospecting and lead acquisition.
 - Develop a donor experience that aids in engagement, retention, and stewardship efforts.
 - Collaborate with the board of directors and fundraising volunteers to raise funds from our members and clubs.

Fund Development Collaborative Team Tactics

- Monthly Fund Development Team meetings (Fundraising Council, Donor Relations Task Force, Dream Big Campaign Committee). One week in advance of the meeting, contributions reports are sent to the teams with the agenda. Each team chair is invited to all other meetings.
- Ongoing communication and collaboration across all teams to support collective goals
- Research potential corporate and cause partner leads
- Promote planned giving and recognition through Laurel Legacy
- Promote monthly giving and Stargazer Monthly Giving Program
- Develop an advisory taskforce to support the development and socialization of the GFRC
- Participate in fundraising training to stay up-to-date with best practices in the industry
- Develop post-Dream Big Campaign plan

2022-2023 FRC Tactics

- Quarterly Region Fundraising Chair Meetings
- Create and implement quarterly Development Dispatch
- Refresh and reimagine stewardship touch points for individuals and clubs
- Evaluate and consider revamp of Founders Pennies program
- Research and potentially implement gift annuities and QCD gifts
- FRC support for region governors and region fundraising chairs

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2022-2023 Donor Relations Task Force Tactics

- Collaborate with Dream Big Campaign Ambassadors on club outreach and presentation plan to solicit individual major gifts
- Cultivate, solicit and steward individual member donors for gifts of \$5,000 and greater
- Brainstorm next steps and approach for major gift solicitation post-campaign
- Attend in-person region conferences to strategically approach members for gifts in Q3 and Q4
- Utilize contact reporting form to streamline donor cultivation tracking
- Support follow-up on nonmember contacts provided by members

2022-2023 Dream Big Campaign Committee Tactics

- Market Dream Big Campaign recognition plan to inspire friendly fundraising competition between regions
- Meet with SIA Federation board members and leaders in respective regions to engage them in fundraising efforts for the campaign
- Utilize the “Share your Story” form to collect blog content from individuals and club contributors
- Develop program/presentation for 2023 Region Conferences
- Support follow-up on nonmember contacts provided by members

Actions Prior to September meetings:

- Set up google alerts for regions
- Contact Region leadership to ask about topics to discuss at team meetings
- Onboarding of new FRC Chair
- Update teams on Board of Directors’ decision at July 2022 meeting regarding proposed GFRC
- Save the date and high-level agenda for October extended teams meeting-

September 2022

Item	Date	Who
Send out report/pin request form to region chairs for District meetings	Early September	Staff
Roll out Q1 Marketing/Development Plan; Overview Fundraising teams tactical plan	9/6/2022	FRC, DBCC, DRTF
Introduce new Region Liaisons and schedule a one-on-one call if possible	Late August/Early September	All FRC Members
Return Confidentiality, Conflict of Interest & Leadership Commitment docs	9/30/2022	FRC, DRTF and DBCC
Send Top Dates for October appeal	9/15/2022	FRC, DRTF, DBCC

Meetings:

Fundraising Council	1 st Tuesday, 7p ET – 9/6/2022
Region Fundraising Chairs	None
Dream Big Campaign Committee	3 rd Wednesday, 8pm ET- 9/21/2022
Donor Relations Task Force	3 rd Thursday, 4pm ET- 9/15/2022

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October 2022

Item	Date	Who
Hold stewardship meeting with Japan Region Offices, TBD , Staff	TDB	Staff, Region Offices, Others?
Launch Violet Richardson Campaign	10/3	Staff, FRC, DRTF, DBCC
Review Gift Acceptance Guidelines	10/4	FRC
SIA District Meetings (RFC and DBC Presentations)	Varies by region	
Send Development Dispatch #1		Staff
Review Region Conference Resources with RFCs and Governors	10/19	Staff, FRC, RFCs, Governors, Governors-Elect
Send Top Dates for November appeal	10/15/2022	FRC, DRTF, DBCC
Board of Directors Meeting	10/25/2022 and 10/26/2022	BOD, FRC Chair, DBCC Chair, Staff

Meetings:

Fundraising Council	1 st Tuesday, 7pm ET – 10/4/2022
Region Fundraising Chairs	Wednesday, 7pm ET – 10/19/2022
Dream Big Campaign Committee	3 rd Wednesday, 8pm ET- 10/19/2022
Donor Relations Task Force	3 rd Thursday, 4pm ET- 10/20/2022

Awareness Months + Recognition Days

Domestic Violence Awareness Month	
Founders Day	10/3
International Day of the Girl	10/11
United Nations Day	10/24

November 2022

Item	Date	Who
Extended Fundraising Teams Meeting	11/1	FRC, DRTF, DBCC Chair
Share 5yr CG Report with RFCs	11/1	All FRC Members
Write region holiday cards	11/1 – 11/10	
Send top dates for December appeal	11/15/2022	FRC, DRTF, DBCC
#GivingTuesday appeal (International but honored more in the US)	11/23-11/30	
Thank you calls to #GivingTuesday donors	12/3	

Meetings:

Fundraising Council	1 st Tuesday, 7p ET – 11/1/2022
Region Fundraising Chairs	None
Donor Relations Task Force	1 st Tuesday, 7pm ET- 11/1/2022
Dream Big Campaign Committee	3 rd Wednesday, 8pm ET- 11/16/2022

Awareness Months + Recognition Days

Women Abuse Prevention Month (Canada)	11/1-11/30
International Day for the Elimination of Violence Against Women	11/25

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#GivingTuesday (International but honored more in the US) 11/29

December 2022

Item	Date	Who
Mailed Planned Giving Post Card	First week of December	Staff
Send Region Holiday cards	12/1	FRC
Send DBC Donor holiday cards	12/15	DBCC
Research foundation support via Foundation Center	Ongoing	FRC
Send top dates for January appeal	12/15/2022	FRC, DRTF, DBCC

Meetings:

Fundraising Council	1st Tuesday, 7p ET – 12/6/2022
Region Fundraising Chairs	None
Donor Relations Task Force	3 rd Thursday, 4pm ET- 12/15/2022
Dream Big Campaign Committee	None

January 2023

Item	Date	Who
Board of Directors Meeting	TBD	Staff and FRC Chair
Send top dates for February appeal	1/15/2023	FRC, DRTF, DBCC
Secure International Women’s Day appeal \$10,000 match	1/15/2023	Staff
Schedule calls with your Regions for Region Conference Planning	1/1 – 1/31	All FRC Members
Judge Celebrating Success Awards	TBD	All FRC Members
Recruit Clubs to hold Volunteer Days in May	TBD	North American RFCs

Meetings:

Fundraising Council	2nd Tuesday, 7p ET – 1/10/2023
Region Fundraising Chairs	None
Donor Relations Task Force	3 rd Thursday, 4p ET- 1/22/2023
Dream Big Campaign Committee	3 rd Wednesday, 8pm ET- 1/21/2023

Awareness Months + Recognition Days

Human Trafficking Awareness Month and Poverty Awareness Month.

February 2023

Item	Date	Who
Share 5yr CG Report with RFCs	2/1/2023	All FRC Members
Offer 1:1 Check-In w/ RFCs	Early February	FRC
Valentine’s Day Thank You Notes	2/10/2023	
Send top dates for March appeal	2/15/2023	FRC, DRTF, DBCC
Development Dispatch		Staff

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Meetings:

Fundraising Council	1st Tuesday, 7p ET – 2/7/2023
Region Fundraising Chairs	None
Donor Relations Task Force	3rd Thursday, 4pm ET- 2/16/2023
Dream Big Campaign Committee	3rd Wednesday, 8pm ET- 2/15/2023

Awareness Months + Recognition Days

Lunar New Year – Send message to appropriate clubs	2/12
Carnival (Brazil)	2/12-2/20

March 2023

Item	Date	Who
Extended Fundraising Teams Meeting	3/7	FRC, DRTF, DBCC Chair
Contact RFC's re Conference presentation questions	3/1	All FRC members
International Women's Day Appeal w/ \$10,000 matching gift	3/8	
Thank you calls to IWD donors	3/10-3/11	
Send top dates for April appeal	3/15/2023	FRC, DRTF, DBCC
Region Conference Report Requests (via JotForm)	Varies by Region	Staff
Start promoting May volunteer days		Staff, NA RFCs, Clubs

Meetings:

Fundraising Council	1 st Tuesday, 7pm EST – 3/7/2023
Region Fundraising Chairs	Wednesday, 7pm ET – 3/15/2023
Dream Big Campaign Committee	3 rd Wednesday, 8pm ET- 3/15/2023
Donor Relations Task Force	1 st Tuesday, 7pm EST- 3/7/2023

Awareness Months + Recognition Days

Women's History Month	
International Women's Day	3/8

April 2023

Item	Date	Who
Region Conference Consignment Orders (via JotForm due to HQ 3-4 weeks prior to Conference)	Varies by Region	RFCs
Region Conferences Begin	Varies by Region	
Club Giving Appeal	4/6/2022	Staff
Send top dates for May appeal	4/15/2023	FRC, DRTF, DBCC
Continue promoting May volunteer days		Staff, NA RFCs, Clubs

Meetings:

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Fundraising Council	1 st Tuesday, 7p ET – 4/4/2023
Region Fundraising Chairs	None
Donor Relations Task Force	3 rd Thursday, 4pm ET- 4/20/2023
Dream Big Campaign Committee	3 rd Wednesday, 8pm ET- 4/19/2023

Awareness Months + Recognition Days

Happy National Volunteer Month!
Sexual Violence Awareness Month

May 2023

Item	Date	Who
Send Club Giving Report & Recognition Period reminders	5/1 – 5/31	All FRC Members
Club Giving Final Push Should we be combining requests for last minute Club Giving donations with an ask for the club to also plan to give next year.	5/20-5/31	All FRC Members
Club Giving Recognition Ends (contribution due at HQ by 5/31)	5/31	
May volunteer days	TBD	Clubs
Send top dates for June appeal	6/15/2023	FRC, DRTF, DBCC

Meetings:

Fundraising Council	1 st Tuesday, 7p ET – 5/2/2023
Region Fundraising Chairs	None
Donor Relations Task Force	3 rd Thursday, 4p ET- 5/18/2023
Dream Big Campaign Committee	3 rd Wednesday, 8pm ET- 5/17/2023

Awareness Months + Recognition Days

Golden Week -- Celebrated in Japan as vacation time	4/29-5/5
Mother's Day (US)	5/8/22

June 2023

Item	Date	Who
Assign Regions for 2022 -2023 FRC	6/1	FRC Chair & Incoming Chair
Check-In with RFCs about outcomes from Region Conference	Early June	FRC
FRC Outgoing/Incoming Planning Call	TBD	Outgoing/Incoming Chair & Staff
Stargazer Stewardship?	6/9	Staff
Development Dispatch		Staff

Meetings:

Fundraising Council	1 st Tuesday, 7p ET – 6/6/2023
Region Fundraising Chairs	Wednesday, 7pm ET – 6/21/2023
Donor Relations Task Force	3 rd Thursday, 4pm ET- 6/22/2023

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Dream Big Campaign Committee

3rd Wednesday, 8pm ET- 6/21/2023

July 2023

Item	Date	Who
FRC Orientation Meeting	TBD	Staff and FRC
Board of Directors Meeting	TBD	FRC Chair, DBCC Chair, and Staff

Meetings:

Fundraising Council	None
Region Fundraising Chairs	None
Donor Relations Task Force	None
Dream Big Campaign Committee	None

August 2023

Item	Date	Who
Laurel Legacy Digital Appeal	Early August	Staff
Send Development Dispatch	8/22	Staff
Outgoing/Incoming Chair Handover Call	Late August	Outgoing/Incoming Chair & Staff

Meetings:

Fundraising Council	1 st Tuesday, 7pm ET – 8/1/2023
Region Fundraising Chairs	None
Donor Relations Task Force	3 rd Thursday, 4pm ET- 8/17/2023
Dream Big Campaign Committee	3 rd Wednesday, 8pm ET- 8/16/2023

Important Links:

FRC Login Page:

<https://www.soroptimist.org/for-clubs-and-members/fundraising-council.html>

Username: siafrc

Password: frc\$1709

RFC Page:

<https://www.soroptimist.org/for-clubs-and-members/region-chair-resources/fundraising-chairs.html>