



Fund Development Framework

Building Sustainable Philanthropic Capacity

Purpose

Fund development is more than fundraising—it is the intentional process of building long-term relationships, diversified revenue, organizational credibility, and financial sustainability.

This framework helps executive leaders, development professionals, and governing boards strengthen philanthropic capacity through strategic planning, disciplined execution, and measurable accountability.

Organization Information

Organization Name:

Fiscal Year:

Prepared By:

Date:

Executive Planning Questions

Before developing the annual fund development plan, leadership should consider the following.

Organizational Funding Priorities

What strategic initiatives require philanthropic investment?

Funding Goals

What level of contributed revenue is required to achieve organizational objectives?

Donor Value Proposition

Why should donors invest in our mission?

Organizational Readiness

Is the organization prepared to steward increased philanthropic investment?

☐ Yes

☐ No

Comments

Revenue Goals

Funding Source	Prior Year	Current Goal	Notes
Individual Giving			
Major Gifts			
Foundations			
Corporate Giving			
Government Grants			
Special Events			
Membership			
Planned Giving			
Other			

TOTAL FUND DEVELOPMENT GOAL

Donor Portfolio Assessment

Evaluate the current donor portfolio.

Area	Strong	Adequate	Needs Attention
Individual Giving	☐	☐	☐
Major Donors	☐	☐	☐
Foundation Relationships	☐	☐	☐
Corporate Partnerships	☐	☐	☐
Donor Stewardship	☐	☐	☐
Donor Retention	☐	☐	☐
Prospect Pipeline	☐	☐	☐
Board Engagement	☐	☐	☐

Development Strategies

Individual Giving

Major Gifts

Foundations

Corporate Partnerships

Government Funding

Planned Giving

Campaign Planning

Initiative Goal Executive Owner Timeline

Donor Stewardship Plan

How will donors be acknowledged and engaged?

- ☐ Thank-you Process
- ☐ Donor Recognition
- ☐ Impact Reporting
- ☐ Executive Engagement
- ☐ Board Stewardship
- ☐ Annual Reports
- ☐ Site Visits
- ☐ Special Events

Additional Notes

Board Responsibilities

Board members should actively support fund development by:

- ☐ Making a Personal Gift
- ☐ Identifying Prospective Donors
- ☐ Opening Doors
- ☐ Participating in Stewardship
- ☐ Attending Fundraising Events
- ☐ Serving as Ambassadors
- ☐ Supporting Major Gift Conversations

Additional Commitments

Performance Measures

Objective	KPI	Target	Review Frequency
Total Contributions			
Donor Retention			
New Donors			
Major Gifts			
Foundation Awards			
Campaign Performance			

Organizational Risks

Potential barriers to successful fund development.

- ☐ Donor Concentration
- ☐ Economic Conditions
- ☐ Staff Capacity
- ☐ Leadership Transition
- ☐ Board Engagement
- ☐ Competition
- ☐ Grant Dependency
- ☐ Other _____

Mitigation Strategies

Quarterly Fund Development Review

Quarter 1

Major Accomplishments

Challenges

Actions

Quarter 2

Major Accomplishments

Challenges

Actions

Quarter 3

Major Accomplishments

Challenges

Actions

Quarter 4

Major Accomplishments

Challenges

Actions

LEAP Executive Perspective

Successful fund development is built on relationships—not transactions.

Organizations that sustain philanthropic growth consistently align mission, strategy, stewardship, accountability, and organizational capacity.

The strongest fundraising organizations cultivate trust long before they request financial support.

Sustainable philanthropy reflects organizational excellence.

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