

# **Planning for Success**

## **Creating the Policies & Plans To Execute a Successful Fundraising Program**

Fundraising success is most effectively and successfully executed when certain policies and plans are in place within the nonprofit development infrastructure. This workshop will discuss four critical policies and plans that advance fundraising efforts. The workshop will cover writing a Gift Acceptance Policy, a Donor Cultivation Plan, a Record Keeping Policy, and a Donor Recognition Policy.

### **Workshop Objectives:**

- Understand the importance of creating the policies and plans necessary for implementing a successful fundraising program
- How the policies and plans work together to create successful donor relationships
- Identify the key elements of each of the policies and plans.
- Take away examples of policies and plans.

### **Workshop Presenters:**

Christina Adams, President, Custom Recognition, LLC  
Diana Hoyt, CFRE, President, Heritage Designs