

# Fund Development Continuum

**FOUNDATION LEVEL**  
The 9 You Need

**ADVANCING LEVEL**  
The 9 to Proceed

**MASTERY LEVEL**  
The 9 to Succeed

**LEGACY LEVEL**  
The 9 to lead

**INFRASTRUCTURE**

DATA MANAGEMENT

Donor Database

Data Analytics & Prospect Research

Advanced CRM Administration

Strategic Data Appending

STAFFING & PROFESSIONAL DEVELOPMENT

Dedicated Staff

Professional Development & Staffing Strategies

Comprehensive Fund Development Staffing Structure & Succession

Advanced Leadership Development

POLICIES & PROCEDURES

Written Donor/Gift Policies & Procedures

Gift Processing & Planned Giving Procedures

Funding Priority Guidelines

Endowment Policies

**PLANNING**

COMMUNICATIONS

Case for Support

Marketing Plan

Fund Development Communications & Digital Engagement Plan

Strategic Advocacy

FUND DEVELOPMENT

Fund Development Plan

Stretch Goals

GF 2025 Strategic Fund Development Plan

Endowment & Reinvestment Plan

STEWARDSHIP & RETENTION

Stewardship Plan

Donor Retention Analysis

Donor Retention Plan

Above Average Donor Retention Rate

**STRATEGY**

BOARD ENGAGEMENT

100% Board Engagement in Fund Development

100% Board Giving & Development Plans

Dedicated Major Gift Board Core Team

Strategic Board Diversification

DIVERSE REVENUE

Income (Revenue) Analysis

Diverse Revenue Portfolio

Balanced Revenue Portfolio

Sustainable Revenue Portfolio

GIFT STRATEGIES

Annual Fund/Campaign

Advanced Donor Giving, Discovery & Cultivation Strategies

Comprehensive Fund Development Strategies

Collaborative & Sustainable Fundraising Strategies