**Logo**

**Development Plan**

**Year**

**Include:**

**Executive Summary from Case for Support**

**Budget**

**SAMPLE DEVELOPMENT PLAN**

**Proposed Development Plan**

***Fiscal Year January 1, 2018-December 31, 2018***

Possible Income streams

Revised

|  |  |  |
| --- | --- | --- |
| **Summary** |   | Stretch |
| Board Gifts | $25,000 |  |
| Major Gifts | $100,000  |  |
| Government | $150,000  |  |
| United Way | $50,000  |  |
| Foundation Support | $100,000  |  |
| Special Event | $50,000  |  |
| Annual Giving | $50,000  |  |
|  |  |  |
| **TOTAL** | **$525,000**  |  |

**Board Gifts**

**Goal: $25,000 Last Year:**

Responsible: Board President

Time Frame: On going

# of prospects: 30

Target: $2,500 +

Method: In-person

Direct Costs:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Levels | Amounts | Possible names | Visit | Ask | Result |
| 1 | $5,000 | $5,000 |  |  |  |  |
| 6 | $2,500 | $15,000 |  |  |  |  |
| 5 | $1,000 | $5,000 |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  | **$25,000** |  |  |  |  |

**Major Gifts**

**Goal: $100,000 *Last year:*** $50,000

Responsible: Board, ED and Development

Time Frame: On going

# of prospects: 30

Target: $2,500 +

Method: In-person

Direct Costs:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Levels | Amounts | Possible names | Visit | Ask | Result |
| 1 | $25,000  | $25,000  |  |  |  |  |
| 4 | $10,000  | $40,000  |  |  |  |  |
| 5 | $5,000  | $25,000  |  |  |  |  |
| 10 |  $2,500 | $25,000  |  |  |  |  |
|  |  | **$115,000** |  |  |  |  |

**Suggestions:**

**This is where you work your list and assign potential amounts based on your research.**

**Government Funding**

**Total Goal: $150,000 Last year: $200,000**

Responsible: Staff

Time Frame: In-process

Target: Federal and State Dollars

Method: Proposal

Direct Costs: Staff time (how much? Need to track)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Levels | Amounts | Possible names | Inquire | Prepare | Due | Results |
|  |  |  |  |   |  |  |
|  |  |  |  |   |  |  |
|  |  |  |  |   |  |  |
|  |  |  |  |   |  |  |
| **TOTAL potential gifts** |  |  |  |  |  |  |

**Suggestions:**

**United Way**

**Goal: $50,000 Last year: $50,000**

**Program**

Responsible: Staff

Timeframe: United Way guidelines

Method:

Direct Costs: How much staff time?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Levels | Amounts | Visit/Inquire | Result |
|  |  |  |  |  |
|  |  |  |   |  |
|  |  |  |   |  |
|  |  |  |   |  |
| **TOTAL potential gifts** |  |  |  |  |

**Foundation Support:**

**Goal: $100,000 Last year: $**

**Program**

Responsible: Development Staff

Timeframe: Year-round

# of Prospects: 10

Target: Local Private and Corporate foundations who have donated

 In the past; other local private and corporate foundations

Method: Personal Contact

Determine grants due between January-December and possible amounts

Direct Costs: Staff time: Research, prepare, submit, report

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| # | Levels | Amounts | Possible names | Inquire/Visit | Prepare | Due | Results |
| 1 | $50,000 | $50,000 |   |  |  |  |  |
| 2 | $25,000 | $50,000 |   |  |  |  |  |
| 3 | $10,000 | $30,000 |   |  |  |  |  |
|  |  |  |   |  |  |  |  |
|  |  |  |  |  |  |  |  |
| **TOTAL potential gifts** |  | **$130,000** |  |  |  |  |  |

***Suggestions:***

Previous Foundation Support

Research new Foundation Support

**Special Events:**

**Total Goal: $50,000 Last year: $30,000**

**Special Event: SPONSORSHIPS**

Responsible: Board and Staff-plan and implement

Time Frame: Ongoing

# of prospects: n/a

Target: Community interest

Direct Costs: Staff time

 Volunteer time

 Board time

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Levels | Amounts | Possible names | Inquire/visit | Ask | Result |
|  |  |  |   |  |  |  |
|  |  |  |   |  |  |  |
|  |  |  |   |  |  |  |
|  |  |  |   |  |  |  |
| **TOTAL potential gifts** |  |  |  |  |  |  |

**Suggestions:**

From the fund development committee, create a committee for special event

Coordinate which sponsors will be asked for each event

Create Budget for the event. Need to determine expenses to make sure you **net** this amount for each event

Create Timeline for event.

**Annual Giving**

***Direct Mail***

**Goal: $50,000 Last year: $50,000**

Responsible: Staff plans, creates, prints and mail out

Board shares names and addresses/signs letters

Time Frame: 2 x times a year February/November

# of prospects: Target: $250 < (includes memorials and in honor of…)

Method: Direct Mail

Direct Costs: Postage, stationary and return envelopes

|  |  |  |
| --- | --- | --- |
| # | Levels |  |
| 10 | $1,000 | $10,000 |
| 10 | $500 | $5,000 |
| 75 | $100 | $7,500 |
| 50 | $50 | $2,500 |
| 100 | <$50 | $5,000 |
|  |  | **$30,000.00** |

 **Spring Appeal - Newsletter**

**Fall mail appeal**

|  |  |  |
| --- | --- | --- |
| # | Levels |  |
| 10 | $1,000 | $10,000 |
| 10 | $500 | $5,000 |
| 75 | $100 | $7,500 |
| 50 | $50 | $2,500 |
| 100 | <$50 | $5,000 |
|  |  | **$30,000.00** |

**Suggestions:**

Need to create names for various giving levels and types of recognition received

**Stewardship activities must be included in the Development Plan, however there are no monetary goals established.**

**Planned Giving should also be incorporated into the FR calendar.**

**Proposed** **Fundraising Schedule**

***January***

Policies and Procedures

* Review Development Audit and begin working on recommendations
* Review Gift Acceptance Policies, present to board for approval
* Begin to develop policies and procedures manual for the development office

Budget

* Finalize development budget to include income and expenses
* Review and finalize development plan

Foundations

* Review private, corporate and government Foundation lists and determine who to submit proposal to and for what amounts and for what projects (program or facility)
* Determine deadline dates and update calendar
* Update attachments for proposals – budgets, cover letter, case for support

Board Solicitation

Special Event

* Secure location and date
* Create and send invitations

Major Gifts

Stewardship

***February***

Development Plan

* Review

Foundations

* Prepare and submit grant proposal

Board Solicitation

Spring Appeal

* Write letter
* Create mailing list
* Review and update mailing list for those prospects giving $1,000 or less
* Assign names to giving levels
* Update giving cards to reflect giving levels and amounts
* Create letter for end of year appeal
* Create thank you letter for spring mail appeal

Major Gifts

Stewardship

***March***

Development Plan

* Review plan – are we on track with Development budget?

Major Gift Appeal

* Determine prospects giving $2,500+ for major gifts appeal
* Assign prospect names to giving levels
* Assign board volunteers to call upon prospects
* Finalize giving brochure to share as part of these calls.
* Determine when solicitation will begin
	+ - Create thank you letter for major gift appeal
		- Schedule follow-up meetings with teams to determine status
		- Continue acknowledgments of support as received

Spring Appeal

* Print
* Send to those giving $1,000 or less
* Prepare letters and have board members sign with personal notes

Foundation proposals

* Review lists

Major Gifts

Stewardship

***April***

Development Plan

* Review

Direct Mail

* Continue acknowledgment of support

Major Gifts

Stewardship

***May***

Development Plan

* Review

Major Gift Appeal Committee

* + - Complete solicitation
		- Schedule final meeting to share results

Special Event: Fall Event

* Review Budget and create task list
* Determine date – check UW and Chamber of Commerce Calendars for conflicts
* Review underwriting sponsorships levels
* Determine underwriting sponsors needed
* Create underwriting sponsorship letter
* Secure location for Banquet
* Determine need for audio/video and power point presentation
* Determine need for photographer
* Determine caterer, tables, chairs etc.

Stewardship

***June***

Development Plan

* Review plan – are we on track with Development budget?

Major Gifts

Stewardship

***July***

Development Plan

* Review

Major Gifts

Stewardship

***August***

Development Plan

* Review

Major Gifts

Stewardship

***September***

Development Plan

* Review plan – are we on track with Development budget?

Foundations

* Determine need for end of year funding
	+ Review foundation dates due and determines next round of grants.
* Prepare a timeline for proposal submission.

Major Gifts

Stewardship

***October***

Development Plan

* Create development budget for 2018 based on organizations needs and results from 2017 fundraising efforts.
* Finalize organizational budget to include income and expenses

Direct Mail Appeal

* Review and update mailing list for those prospects giving $1,000 or less
* Assign names to giving levels
* Update giving cards to reflect giving levels and amounts
* Create letter for end of year appeal
* Create thank you letter for fall mail appeal

Major Gifts

Stewardship

***November***

Development Plan

* Review

Direct Mail Appeal

* Direct Mail Appeal
* Prepare letters and have board members sign with personal notes
* Continue to send acknowledgments for support.

Major Gifts

Stewardship

***December***

Wrap up

Create 2019 Development Plan based on 2018 results and annual budget.

Major Gifts

Stewardship

* Send holiday card (not a request for money)

**\*Sample provided by Patti Ward, CFRE – adapted from Association of Fundraising Professional sample.\***