

ATTACHMENT

*Challenge to Change, Minnesota Council of Nonprofits - MCN Annual Conference
October 24-25, 2019 - Mayo Civic Center
Building a Realistic Development Plan
Presented by: Rebecca Haddad, Jennifer Scholl, and Sara Spiess*

DEVELOPMENT PLAN COMPONENTS

INTRODUCTION and CASE FOR SUPPORT

- The purpose of this development plan is to help the staff and board set realistic income goals with respect to the annual budgeting process. The plan outlines the strategic steps required to reach those goals.
- History of organization (Can write a brief summary)
- Community need for funds (CASE statement)

❖ FINANCIAL GOALS

Income Categories	FY 2019-2020 Income Actual	FY 2019-2020 Income Projection	% of Total 2019-2020 Income
Individuals			%
Grants			%
Sponsorships/Corporate			%
TOTAL Unearned Income			%
Earned Income			%
Total Income			

❖ STRATEGIC GOALS

*Align with organizational strategic plan /priority projects
Align with department budgeted revenue goals / initiatives
Align with fundraising growth objectives*

❖ SOLICITATION STRATEGIES AND ACTIVITIES

➤ **Personal Solicitation Campaign**

- Board Solicitation
Time Frame: ongoing
Goal: 100% giving
Method: Personalized outreach and philanthropic giving plans

➤ **Special events**

- Lectures, galas, silent auctions, etc.
Time Frame:
of participants:
Goal: 10% increase in net revenue

ATTACHMENT

Challenge to Change, Minnesota Council of Nonprofits - MCN Annual Conference

October 24-25, 2019 - Mayo Civic Center

Building a Realistic Development Plan

Presented by: Rebecca Haddad, Jennifer Scholl, and Sara Spiess

Method: Achieve special event goals through increased ticket sales/attendance, table sales, sponsorship package sales, increased value and number of auction items, etc.

➤ Email/Direct Mail/Social Media

- Monthly Giving

Time Frame:

of prospects:

Goal: Increase open rates, response rates, or donor conversion rates by 10%; grow monthly sustainer donor portfolio by 25%

Method:

- 2 e-blasts to entire list and promo in e-news
- Converting digital engagement to mission engagement/revenue (e.g. by purchasing a ticket to attend an event, by making a first-time charitable donation, signing up to be a monthly donor, etc.)

- Give to the Max Day

Time Frame:

of prospects:

Goal: 20% increase year-over-year; obtaining one major donor to match one-time gifts

Method:

- Increasing total number of donors
- Increasing average size of gift
- Offering a matching donation incentive
- Peer-to-peer fundraising operations for staff, volunteers, and participants, etc.

➤ Corporate and Foundation Grants

- Goal: 10% increase year-over-year
- Call or email prospects before any listed deadlines to confirm application instructions, ask for suggestions when applying, and to vet project ideas for interest and alignment
- Create annual 12-month grant calendar with deadlines
- Note “priority” foundations - those with a strong likelihood to give, or renewals
- Create suite of useful, updated templates to work efficiently: boilerplate letter of inquiry, general operating proposal, key program proposals, reports (modify/edit templates as needed), and standard attachment suite

ATTACHMENT

Challenge to Change, Minnesota Council of Nonprofits - MCN Annual Conference

October 24-25, 2019 - Mayo Civic Center

Building a Realistic Development Plan

Presented by: Rebecca Haddad, Jennifer Scholl, and Sara Spiess

- Conduct prospect research and add new prospects to solicitation calendar

Method:

- Goal achieved through a mix of renewal grants, increased annual gifts, re-engagement of lapsed donors, new donors/prospects

➤ Sponsorships

Goal: e.g. double the number of sponsors and increase revenue

- Create sponsorship packages with input from a cross-functional team Marketing, etc. and produce high quality collateral
- Contact prospects 6+ months in advance (or as early as possible) if working with an annual event
- Leverage board contacts, vendor relationships, and committee volunteers
- Follow up

Method:

- Goal achieved through proactive solicitation, leveraging high level strategic relationships, offering benefits with value, expanding your network of prospects by engaging committee members/volunteers

❖ CULTIVATION STRATEGIES

Communications

- Newsletter and listings: monthly to subscribers; align with events to drive attendance and interest for special events or special appeals
- Annual Report: mail in print to a select, targeted list of closest supporters and have the report available online for download
- Holiday cards/birthday cards
- Personal thank you calls: to all donors over \$100 in January

Response to Donations

- Auto-email
- Additional email
- Mail thank you letter
- Welcome newsletter to new donors
- Phone call for donations over \$100 or when applicable
- Special response to new monthly givers
- Executive thank you call for major gifts

ATTACHMENT

*Challenge to Change, Minnesota Council of Nonprofits - MCN Annual Conference
October 24-25, 2019 - Mayo Civic Center
Building a Realistic Development Plan
Presented by: Rebecca Haddad, Jennifer Scholl, and Sara Spiess*

Monthly Donor Plan

- Launch
- Offer incentive
- Send personal emails to people that are prospects
- Ask current monthly donors to upgrade

Donor Stewardship Plan

- Thank you calls/Thank-a-thon
- Invitation to special events - list curated by giving level to targeted events
- In-person engagement opportunities, e.g. tours, lunch-and-learn, etc.
- Expand ways to get involved through volunteer opportunities, advocacy if applicable, seasonal projects



MONITORING THE DEVELOPMENT PLAN AND PROCESS

- The Advancement Committee will meet throughout the year to review the progress of the plan and, with staff, identify problems and solutions (exact number of meetings/schedule TBD).
- Executive Director and Advancement Committee Chair and Development Director will discuss development issues on a regular basis.
- Advancement Committee Chair will discuss fund development plan and progress at board meetings.
- Executive Director and/or Development Director will provide financial and statistical data with which to help evaluate progress of the plan.
- Ongoing reporting and adjustments made as needed throughout the fiscal year.