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# Building a Realistic Development Plan

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**Does fundraising make you feel like this?**



# Today's Goals

1. Leave empowered and eager to build/update your development plan
2. Understand the fundamentals of a development plan
3. Leave with bite size - or snackable - nuggets of information that are immediately actionable for your organization
4. Be realistic with how much time you have

# Case Statement



## ❖ Case Statement

- A document that states why your organization deserves philanthropic support and why one should make a contribution in support of the cause
- Internal and external case statements
- Many resources online
  - Do not start with your mission or start with the history of your organization
  - Get to the core of your statement by continually asking, “So what?”
  - Consider starting with a quote that goes to the essence of why your organization exists, or a relevant statistic

## ❖ Case for Support

# Financial Goals

- ★ Annual budget - 3 years
- ★ Realistic vs. reach goal
  - What do you need to raise?
  - What do you want to raise?



1. Individual Philanthropy
  - a. Annual Fund
  - b. Major Gifts
  - c. Planned Gifts
2. Corporate Philanthropy
3. Sponsorship
4. Grants
5. Earned Revenue

# Strategic Goals



- Align with organizational strategic plan /priority projects
  - Work directly from strategic plan or business plan
- Align with department budgeted revenue goals / initiatives
  - Collaborate closely with various departments to ensure all budgets align and roll up to fundraising budget
- Align with fundraising growth objectives
  - Determine trajectory of growth by analyzing past goals and metrics

# Solicitation Strategies

- Personal Solicitation Campaign
  - Strategic cultivation and building relationships that last
- Solicitation events
  - Directly asking for a contribution of money or resources
- Email/Direct Mail/Social Media
  - Using technology in a personal and engaging way
- Corporate and Foundation Grants
  - Prospect research, determining connections to open doors
- Sponsorships
  - Organizational business partners

# Cultivation Strategies

- Communications
- Response to donations
- Monthly donor plan
- Donor stewardship plan

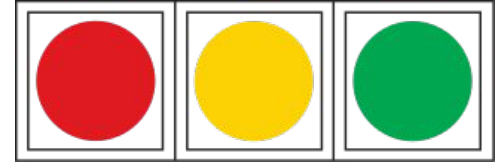
- Newsletters and Annual Reports
  - Email and mail campaign strategies
  - Incentives and benefits
  - Special events and recognition
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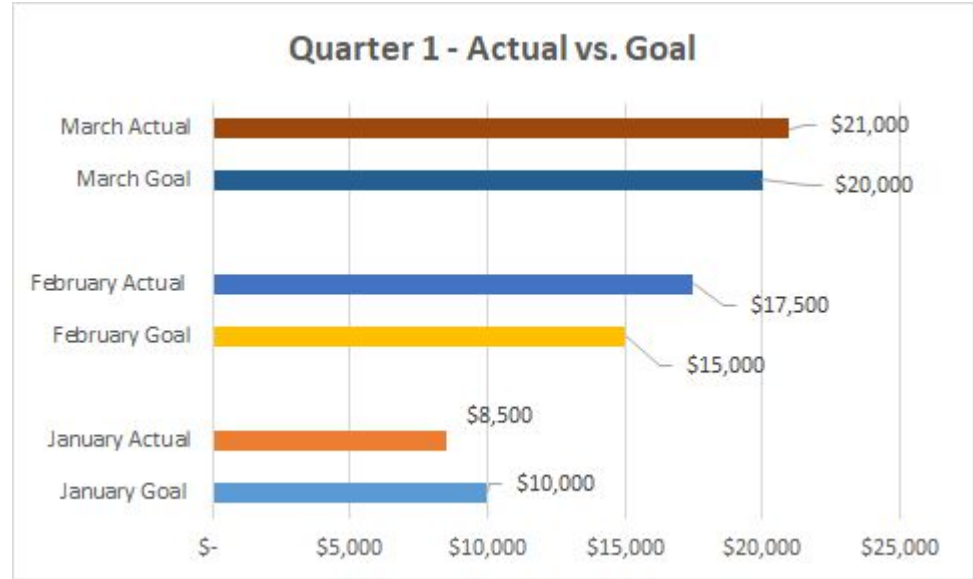
# Calendar Mapping and Tracking the Fiscal Year

[illegible]

# Monitoring the Plan



- Indicators tie to Development Plan (e.g. actual to goal, year over year, trends by constituent, etc.)
- Use of templates to increase efficiency
- Use of dashboards to communicate at-a-glance, visual depictions of measurable results (e.g. red, yellow, green color coding)
- Data-driven decisions and proactive adjustments



**DATA → INSIGHT → ACTION**

Total Actual: \$47,000  
Q1 Goal: \$45,000  
Favorable to Goal: 104.4%

# Additional Resources & Trainings

Association of Fundraising Professionals - Minnesota Chapter, [afpminnesota.org/](https://afpminnesota.org/)

Minnesota Council of Nonprofits, [minnesotanonprofits.org](https://minnesotanonprofits.org)

Propel Nonprofits, [propelnonprofits.org/](https://propelnonprofits.org/)

# 28 Days Later.

- Make goals reasonable to avoid becoming overwhelmed by tasks
- Calendar - schedule time one month out, and throughout the year - be intentional!
- Accountability - work with a team member, a board member, or someone to help keep you accountable
- Adjust if needed - what will work for you to ensure this doesn't get put on the back burner
- **KEEP THE PLAN VISIBLE!**



Q & A

**I have  
questions.**

## Contact Information

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