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
### Calendar Mapping and Tracking the Fiscal Year

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<th>Fundraising Events</th>
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### OTHER - non revenue producing

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**REPORTINGS:**
- Quarterly Full Board Meeting (reports due 1 week prior)
- Development Committee (reports due 1 week prior)
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/

Minnesota Council of Nonprofits, minnesotanonprofits.org

Propel Nonprofits, 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!**
I have questions.
Contact Information

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Rebecca Haddad, rhaddad@smm.org