
Building a Realistic Development Plan

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Does fundraising make you feel like this?



Accountable

Actionable

Adaptable

Today's Goals

- Preparatory work for creating a development plan
- Templates and tools (to create and track your plan)
- Feel eager to fundraise
- Take away bite size actionable items

Prep work (next few slides)

Budget and Case Statement

➤ Budget Framework

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

➤ 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!



Calendar Mapping a Fiscal Year

Growing the Baseline: retention + new prospects

“It usually costs less to retain and motivate an existing donor that to attract a new one. For most organizations - and especially those that are sustaining losses or achieving only modest net gains in gifts and donors - **taking positive steps to reduce gift and donor losses is the least expensive strategy for increasing net fundraising gains.”**

(2018 Fundraising Effectiveness Survey Report, Fundraising Effectiveness Project)



Mapping the Workflow: Significant projects and deadlines. Develop and refine your annual workflow.

Proactive vs. Reactive: Flexible and opportunistic. Avoid reactive behavior. Maximize time management, efficiency, forecasting, and adjustments.

Resources to Implement Plan

➤ Database - What do you need from your database?

How many of you have databases that do what you need?

- Assess your database, determine if you are tracking gifts and communication that ensure consistency
- Train staff on key functionalities of the database, and for smaller organizations make sure there is a point person on all things database related (operating guide)

➤ People - Staff, board, volunteers

- Utilize the board and volunteers to their full advantage, develop a volunteer program even if it is small, meet with board members along with your Executive Director (when appropriate)



Resources to Implement Plan

➤ **Technology - Social Media**

- Determine what your technology needs are
- If you don't have internal resources look at external possibilities (board members, volunteers, pro bono)
- Balance - traditional and technological

➤ **Buildings and Programs - Time for a Capital Campaign?**

- Bricks and mortar, assess program and building needs
- Are programs running at full capacity?

The Development Plan

- Case for support
- Financial Goals
- Strategic Goals
- Solicitation Strategies
- Cultivation Strategies
- Monitoring the Plan

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
- Community need for funds (CASE statement)

I. 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			

II. STRATEGIC GOALS

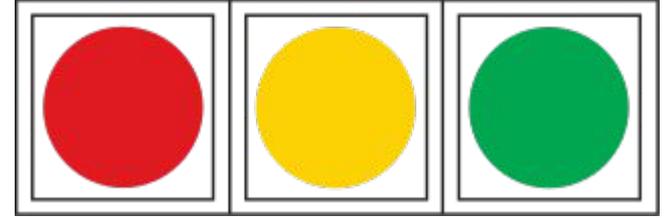
- Align with organizational strategic plan /priority projects*
- Align with department budgeted revenue goals / initiatives*
- Align with fundraising growth objectives*

III. SOLICITATION STRATEGIES AND ACTIVITIES

A. Personal Solicitation Campaign

1. Board Solicitation
Time Frame: ongoing
Goal: 100% giving

Tracking Tools



Data Driven Decisions & Dashboards

- **Systematic, manageable**
- **Visual, at-a-glance indicators tie to Development Plan**
- **Adjust to over/under performance**
- **Reporting (e.g. actuals-to-budget, year-over-year, increases or decreases by constituent, etc.)**

“Dashboards mind your organization’s gap between merely collecting data and turning data into insights used for decision-making. In addition, they are a great tool for not only tracking progress, but also for communicating it. For example, board and staff can quickly review the dashboard and focus on things that need their attention. To do this effectively, many people use signal lights (green = celebrate, yellow = caution and red = act).”

Example Resource: *Minding the Gap with Dashboards* by Suzanne Smith | Apr 12, 2017

<https://socialimpactarchitects.com/nonprofit-dashboards/>

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 that will 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!**



Accountable
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Adaptable



Q&A

**I have
questions.**

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