**Sample Development Plan**

**ABC Community Cafe**

**FY 2020 Development Plan**

**Introduction**

The purpose of developing an annual giving development plan is to help the staff and board set realistic income goals with respect to the annual budgeting process. The plan also outlines the strategic steps required to reach those goals, as well as Board and staff responsibilities in accomplishing the plan.

This proposed FY plan identifies targeted financial goals necessary to support the FY operating budget being recommended by the Finance and Executive Committees as of (date). The plan will be revised and updated on an as-needed basis in conjunction with revisions to the operating budget.

**Financial Goals**

**Projected FY Operating Budget: $283,500**

|  |  |  |  |
| --- | --- | --- | --- |
| **Income Categories** | **FY 2019 Income Actual** | **FY 2020 Income Projections** | **% of Total**  **2020 Income** |
| Government | $25,000 | $20,000 | 7% |
| Foundations | $10,000 | $15,000 | 5% |
| Individuals/Family Trusts | $39,300 | $49,000 | 17% |
| Service Organizations | $3,000 | $4,000 | 1% |
| Federated Campaigns  (ST, CFC, United Way) | $3,500 | $4,000 | 1% |
| Special Events | $26,100 | $25,000 | 9% |
| Other (Unsolicited Income) | $5,000 | $3,000 | 0% |
| Interest Income | $1,500 | $1,500 | 1% |
| Program Revenue | $150,000 | $165,000 | 58% |
| TOTAL INCOME | $263,400 | $283,500 | 100% |

**Strategic Goals (non-monetary goals impacting success of plan)**

- 100% giving by ABC, Inc. board, executive director, and key staff (92% giving was achieved in previous FY).

- 100% participation by board in some fundraising task, including cultivation of donors (65% participation was achieved in previous FY).

- Enhanced communications re: development within the board and with prospects, including regular presentations at board meetings by development chair.

- Develop plan for ongoing recruitment/training of fundraising volunteers. Recruit a minimum of ten non-board volunteers to work in development.

- Develop new prospects for both personal solicitation campaign and direct mail solicitation; cultivate family foundations/trusts.

- Strengthen donor cultivation program and board and staff understanding of the purpose and process of cultivation.

- Strengthen coordination between the public relations and development committees to further support fundraising efforts.

- Maintain systems for ongoing monitoring/evaluation of progress in all areas of development.

**Solicitation Strategies**

**A. Personal Solicitation Campaign**

1. Board Solicitation Chairs: President, Development Chair

Time Frame: July - December, 20xx

# of Prospects: 26

Goal: 100% giving; $7,000 (amount raised in previous FY: $7,800)

Method: Personal solicitation. Request amounts based on donor history (one-time annual giving in lieu of multiple direct mail solicitations; these individuals will, however, get notice of special events)

Solicitors: President and Development Chair

2. Individual Solicitation Chair(s): Name(s), with 12 team solicitors

Time Frame: January - December, 20xx

# of Prospects: 15-25 top individual donors, Advisory Board, family trusts/foundations

Goal: $30,000; 60% renewals, 15% gift upgrades ($28,500 received/pledged for FY 20xx)

Method: Personal solicitation by board and non-board volunteers (one-time annual giving in lieu of multiple solicitations.)

Solicitors: (names)

**B. Special Events**

1. Valentine’s Dinner Event Chair: Name

Phonathon Co-Chairs: Names

Time Frame: February 14, 20xx

# of Attendees: 100

Goal: $16,000 gross/$14,800 net (previous Dinner grossed $16,100)

Method: Mailing: 1,500 pieces; phonathon 2 weeks later to recruit diners, pledgers, donations

News articles and other promotional publicity

Other personal recruitment by board, staff, students

2. Volunteer Recognition Evening Chair(s): Name

Time Frame: April 12, 20xy

# of Prospects: 650 individuals (previous attendees/invitees, new)

Goal: $3,500 gross/$0 net; 350 guests, volunteers, and sponsors ($4,000 raised at previous Recognition Evening)

Method: Invitation mailed; follow-up phone calls, face-to-face soliciting; newsletter announcement

4. Benefit Concert Chair(s): Name(s)

Time Frame: June 25, 20xx

Attendance Goal: 350

Goal: $8,000 gross/$6,000 net (previous concert raised $6,000)

Method: Mailings, radio and TV PR., flyers, posters, newsletters

Solicitors: Staff, volunteers, other?

**C. Direct Mail**

Each direct mail will have a different theme to encourage multiple gifts and to reach individuals with varied interests. Direct mail is responsibility of finance director and fundraising assistant.

1. Direct Mail #1 Federated Campaign Mailings:

Letter to previous donors through United Way, state/province, and CFC campaigns to encourage renewal in the 20xx campaign and possible gift upgrade

Time Frame: March, 20xx

# of Prospects: 191 previous donors (including board members who choose to contribute through Donor Option Program)

Goal: United Way: $3,000; 75% renewal, 15% upgraded gifts

($3,000 raised in most recent campaign)

ST & CFC: $1,000 ($1,300 raised in most recent campaign)

Method: Mailings; newsletter articles, publicity in workplaces

2. Direct Mail #2

Time Frame: September, 20xx

# of Prospects: 2,500 (1,000 new)

# of Donors: 200

Goal: $8,000; 60% renewal, 15% gift upgrades, 5% new donors

Method: Mailing with remit enclosure

Follow-up articles in newsletter

Holiday mailing possibly signed by individual students

Follow-up mailing to major donors who have not renewed their gift

3. Direct Mail #3

Time Frame: November, 20xx

# of Prospects: 2,000 (1,000 new)

# of Donors: 200

Goal: $4,000; 60% renewal, 15% gift upgrades, 5% new donors

Method: Mailing with remit enclosure

Follow-up articles in newsletter

Follow-up letter within one month to non-respondents

Mailing possibly signed by selected board members and students

Mailing to lapsed major donors in previous campaign

**D. Government and Foundation Grants**

Time Frame: On-going throughout the year

# of Reports: 10

# of New Prospects: at least 5

Goal: $20,000: 4 government applications

$15,000: 10 foundation proposals

$4,000: United Way Grant (include in Federated Campaign Total)

Method: Finance Director and relevant program staff prepare grant applications

**Cultivation Strategies (Making “Friends”)**

The purpose of cultivation is:

1) To add prospects to donor base and develop them to become active supporters and regular donors

2) To improve relationships with current board members, donors, volunteers, and other friends of ABC, Inc., to build a greater understanding of how they can help our agency achieve its mission.

Donor and volunteer recognition are critical to the cultivation process. Cultivation needs to be discussed regularly at board meetings to encourage each board member to become part of the cultivation process.

**A. Open Houses:** This is a responsibility of the P.R. Committee; chair(s) to be named through that committee.

Time: Twice per year:

April, 20xx (Event tied to open house)

October, 20xy (Event tied to open house)

Goal: Appreciation evenings at ABC, Inc. for donors and volunteers; opportunity to see facilities, meet staff and students; recruitment of potential volunteers; and cultivation of potential donors.

Method: Special mailings with invitations; newsletter articles; public announcements; personal invitations by board.

Responsible: Board, staff, students, other volunteers

**B. Communications**

Holiday Card: Holiday greeting card to 300 friends and major donors (this is not a solicitation)

Newsletter: 6x per year. Sent to agency mailing list (3,500+) provides regular updates on agency programs, student writings, activities and special events. Mailing list includes funders, donors, volunteers, home-based students, elected officials, other agency executives and service providers.

Annual Report: Annually to coincide with January 1 fiscal year. Mailing in March.

This is a major communications tool sent to government and private funding sources, large donors, agency executives, public officials, and is submitted with most proposals and requests to large donor prospects.

Other Publicity/Public Relations:

A separate public relations plan will be developed by P.R. Committee to reinforce cultivation efforts of this Development Plan. A close communications linkage between the Development and P.R. Committees needs to be maintained to adequately support the objectives of the Development Plan.

Our P.R. plan may include such strategies as:

- Radio and TV PSAs

- TV coverage of special events

- Newspaper and magazine articles

- Articles in ABC, Inc. and other agency newsletters

- Community Bulletin Board Announcements to publicize events

- Radio and TV interviews

- Displays in public buildings

- Brochures

- Bookmark

- Posters/Flyers

- Video and/or slide show presentation

- Speakers Bureau (board and staff volunteers)

- Publicity/outreach to private, state/province, and national workplaces to encourage participation in federated campaigns (posters, brochures, etc.)

**Monitoring the Development Plan and Process**

- The Development Committee will meet 6 times a year to review the progress of the plan and, with development staff, will identify problems and solutions.

- Development staff and committee chair will discuss development issues on a regular basis.

- Committee chair and development staff will monitor sub-committee chairs; committee chair will follow-up re: problems.

- Development committee will discuss development plan and progress at monthly board meetings.

- Development staff will provide financial and statistical data with which to help evaluate progress of the plan.

**Development Calendar FY 20xx**

January Preparation of Annual Report

Begin: Personal Campaign with large donors (January - Dec.)

Mailing/phonathon/other publicity for Valentine’s Dinner

February Valentine’s Dinner

Plan P.R. for United Way, state/province and national employee campaigns

March Direct Mail #1 United Way employee campaign at ABC, Inc.

Follow-up: Valentine’s Dinner

Annual Report mailed with cover letter

Review progress of large donor solicitations

April Volunteer Recognition Dinner

Open House

May Discuss cultivation strategies (ongoing)

Follow up: Recognition Dinner

P.R. Committee will plan Open House

June Concert Event

Review progress of large donor solicitations

July Personal solicitation of board members (July - Dec.)

Review results of personal campaign

August Prepare Direct Mail #2

Continue discussions of cultivation strategies

September Send: Direct Mail #2

Review results of federated campaigns (United Way, ST, CFC)

Review progress of board member solicitations

Review progress of large donor solicitations

October Prepare Direct Mail #3

Continue Cultivation Strategies disucssion

Begin FY 20xy development planning process

Open House

November Send: Direct Mail #3

Update progress re: Recognition Evening

Follow up: Open House attendees

December Recognition Dinner

Update results of Direct Mail #3

Holiday Cultivation Mailing

Full board to approve FY 20xy Development Plan and agency operating budget