**Template Development Plan**

**Organization Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**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 FY2020 Operating Budget: $\_\_\_\_\_\_\_**

|  |  |  |  |
| --- | --- | --- | --- |
| **Income Categories** | **FY 2020 Income Actual** | **FY 2020 Income Projections** | **% of Total** **2020 Income** |
| Government |  |  |  |
| Foundations |  |  |  |
| Individuals/Family Trusts |  |  |  |
| Service Organizations |  |  |  |
| Federated Campaigns (ST, CFC, United Way) |  |  |  |
| Special Events |  |  |  |
| Other (Unsolicited Income) |  |  |  |
| Interest Income |  |  |  |
| Program Revenue |  |  |  |
| TOTAL INCOME |  |  |  |

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

* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
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**Solicitation Strategies**

**A. Personal Solicitation Campaign**

 1. Solicitation

 Time Frame:

 # of Prospects:

 Goal:

 Method:

 Solicitors:

 2. Solicitation

 Time Frame:

 # of Prospects:

 Goal:

 Method:

 Solicitors:

 **B. Special Events**

 1. Event

 Time Frame:

# of Attendees:

 Goal:

 Method:

 2. Event

 Time Frame:

# of Attendees:

 Goal:

 Method:

 3. Event

 Time Frame:

# of Attendees:

 Goal:

 Method:

**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

 Descriptions:

 Time Frame:

 # of Prospects:

 Goal:

 Method:

2. Direct Mail #2

 Descriptions:

 Time Frame:

 # of Prospects:

 Goal:

 Method:

3. Direct Mail #3

 Descriptions:

 Time Frame:

 # of Prospects:

 Goal:

 Method:

**D. Government and Foundation Grants**

Time Frame:

# of Reports:

# of New Prospects:

Goals:

Methods:

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

The purpose of cultivation is:

1) To add prospects to donor base, develop them into 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. Strategy:**

 Time:

 Goal:

 Method:

 Responsible:

**Strategy: B. Strategy:**

 Time:

 Goal:

 Method:

 Responsible:

**C. Strategy:**

**Strategy:**

 Time:

 Goal:

 Method:

 Responsible:

 **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:

* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
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* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**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

 February

 March

 April

 May

 June

 July

 August

 September

 October

 November

 December