Sample Organization

FY 2015/2016

Sample Development Plan

Created: July, 2015

Board Approved: October, 2015

Main Contact Info

Fund Development is a group activity that begins with the Board of Directors and the President/CEO, and includes management, staff, and volunteers. Commitment to give to SAMPLE ORGANIZATION *AND* help the organization reach out to, educate, build relationships with, solicit, and steward others is necessary to successfully fund SAMPLE ORGANIZATION's mission.

This document outlines the 2015/2016 Development Goal and what steps will be taken to reach the goal. The Development Committee will work with the Dev. Dir. to help ensure that activities undertaken by the board throughout the year are in strategic alignment with the Dev. Plan.

The Development Plan outlines our goals and objectives for the year. Specific tactical/logistical details for each area may be found in individual Project Plans.

Overall Development Goal FY 15/16: $1,000,000

Components of the Total Goal

Individual Contributions   **$700,000**

Board Giving	$100,000
Cause Marketing	$0
Direct Mail	$75,000
Third Party Fundraising	$0
Giving Challenge	$25,000
Online Gifts	$100,000
Planned Giving	Do not budget an amount
In Person Asks (Major Gifts)	$400,000
Endowment	Depending if separate or goal included here.

Events: **$100,000**

Grants: **$100,000**

United Way: **$100,000**

FY 2015/2016
How We Will Get There

Individual Contributions:	**$700,000**

Board Giving:

Objective: This campaign not only represents a significant portion of the monetary goal, but also represents strong board support to other donors and to grant-making organizations. *One hundred percent board participation is necessary for success.*

Goal: $100,000

Time of Year: Ask begins with new fiscal year. Request each give at least one gift by second board meeting of year.

Vehicles of appeal
(at board meeting, letter, etc):   Appeal letter, board chair ask at board meeting, follow up with calls from Dev. Committee and Dev Director

Who is responsible?   Board Chair/Dev Committee Chair
Dev. Dir

*Board Alumni are also target group for cultivation. Specific appeals to this group will fall under other categories such as direct mail and house gatherings.

*A staff giving campaign should be run after the Board Campaign is at 100%.

Cause Marketing:

Objective: Cause marketing opportunities are likely to be rare/sporadic. **They will come in to play when companies would like to sell a product while marketing the fact that a specific percent or dollar per item will benefit SAMPLE ORGANIZATION.** The objective of these opportunities is to raise funds (likely in relatively small amounts) and to gain exposure (marketing impressions) to the greater population that may not come in contact with SAMPLE ORGANIZATION regularly. These should be entered into carefully and should be accompanied by a SAMPLE ORGANIZATION Cause Marketing Agreement to ensure our brand is appropriately represented.

    Monetary goals, time of year, etc., will be determined relative to each unique cause marketing opportunity. One staff member will be the liaison to the company conducting the Cause Marketing.

Who is Responsible: Dev. Dir.

Goal:	$0

Direct Mail:

Objective: Direct mail is a good vehicle for 1. acquiring new donors, 2. increasing the level of current donors, 3. and is a good platform for sharing mission and success stories.

Goal: $75,000

Number of Planned Appeals   Early Fall 2015
                                November 2015
                                Spring 2016
                                Summer 2016 (run ROI on summer mailing)
                                Newsletters w/ giving envelope: Fall, Spring

This is not the place for a lot of information on segmentation for mailings, but if there are main demographic targets for which campaigns are planned to run, they can be described here.

Who is responsible?   Dev. Dir.

Subset: Newsletters. Appeal envelopes will be included with newsletters, and funds raised through this vehicle will be counted toward direct mail totals.

Third Party Fundraising:

Third Party Fundraising opportunities are likely to be rare/sporadic. **They will come in to play when individuals or groups want to host an event, some or all of which the net proceeds from will benefit SAMPLE ORGANIZATION.** These should be entered into carefully and be accompanied by a SAMPLE ORGANIZATION Third Party Fundraising Agreement to ensure our brand is appropriately represented.

Objective: The objective of these opportunities is to raise funds (likely in relatively small amounts) and to gain exposure (marketing impressions) to the greater population that may not come in contact with SAMPLE ORGANIZATION regularly.

Goal: $0
        No specific goal is set, as these events are sporadic and unplanned by nature.

Who is responsible?   Events Coordinator

Giving Challenge:

Objective: The Giving Challenge is facilitated by The Giving Partner program at the Community Foundation of Fake City. SAMPLE ORGANIZATION's objective and level of participation will likely depend on what is competing against the event at that time of year. Part of the objective is to steward SAMPLE ORGANIZATION's relationship with the Community Foundation.

As the rules of the Challenge are updated each year, a goal and level of participation will be determined closer to the time of the Challenge.

Goal: $25,000

Who is responsible? Dev. Dir., Development Committee, CEO

Online Gifts

Online and email campaigns. Will include direct campaigns and all gifts that come in through web site as a result of other marketing and networking efforts.

Goal: $100,000

Email Appeal Calendar:

Time of Year/ Topic: How many times a year, etc.
Make sure email campaigns are coordinated with direct mail campaigns and event invitations.

Planned Giving
A planned gift is any major gift, made in lifetime or at death as part of a donor's overall financial and/or estate planning. Planned giving, sometimes referred to as gift planning, may be defined as a method of supporting non-profits that enables philanthropic individuals or donors to make larger gifts than they could make from their income. While some planned gifts provide a life-long income to the donor, others use estate and tax planning techniques to provide for charity and other heirs in ways that maximize the gift and/or minimize its impact on the donor's estate.
*Annual Gifts are generally from a donor's yearly earned income. Planned Gifts are generally larger gifts from investments.
**More details can be found in the Planned Giving Project/Strategic Plan.

Goal: Planned Giving is not included as a projected budget revenue item, due to the unpredictable nature of the gifts (e.g., longevity, probate, etc). Cash from planned gifts may vary greatly from year to year.

Who is responsible?   CEO, Dir. Of Dev.

In-person Asks for Major Gifts

Goal: $400,000

Individual, direct asks for Major Gifts. These asks will be the result of targeted prospecting and cultivation and will likely be done by a team of the CEO or Development Director and board members and/or Development Committee members. SAMPLE ORGANIZATION defines a major gift as any gift $1,000 and over.
Annual Gifts are generally from a donor's yearly earned income. *Major Gifts* are often larger gifts from investments (e.g., $10,000, $25,000, etc).

For major gift solicitations, the Director of Development will conduct prospect research and create a donor giving pyramid of prospects for gifts over $10,000.

The Development Committee of the board will work with this list and the board to create cultivation and solicitation teams. The Dir. Of Dev. will work with each team to create a "touch plan" and goals for the prospect/donor relationship, along with setting the amount of the monetary ask using the donor screening tools.

If the organization has defined plans for how many prospects must be in the pipeline at any given time, here is a good place to outline that. Specific plans for each pairing will be created and documented. It is up to the Development Director to make sure the Dev. Committee and solicitation teams are each working their plans.

Endowment
An Endowment fund is a permanent, self-sustaining source of funding. Endowment assets are invested. Each year, a portion of the value of the fund is paid out to support the fund's purpose, and any earnings in excess of this distribution are used to build the fund's market value.

If SAMPLE ORGANIZATION has an endowment, here is a good place to describe if there are yearly goals for adding to the endowment, and if asks are made in conjunction with asks for the main organization.

The endowment may have its own board or its own committee. If so, define that here.

Events: $100,000

Objective: Each event may have a slightly different objective. The Annual Celebration Dinner is SAMPLE ORGANIZATION's most successful fundraiser, whereas the FR event is considered to be more of a friend-raiser, with the goal of creating lasting relationships that will result in monetary support in future years.

Total Goal (Gross): $100,000

Even 1: $50,000
Event 2: $50,000
House Gatherings   Income from gatherings of major donors in board member's homes will likely be counted under the major gifts category, and may or may not actually be given the night of the gathering.

Who is responsible: Events Coord, Event Committees, Board of Directors, CEO

It should be mentioned here if there is a "live ask" for fund at an event, how much it is (and whether it has a matching gift already set), and whether the money raised will count in the event's revenue or in another category.

Grants: $100,000

Generally come from community foundations, private foundations, and family foundations. Application schedules staggered throughout year.

Goal: $100,000

Who is responsible?   Grant Writer, Dir. Of Dev.

List grants applied to every year. And how much is generally received to make up the goal amount. Include how many new foundations it is the goal to apply to in the coming year.
If there is a grant tracking document, it can be referred to here.

United Way: $100,000

United Way applications are due each year at xxx date. United Way priorities change often, but we have been able to fit into xxx priority to date.

Goal: $100,000

Who is responsible?   CEO, Dev. Dir., Program Dir.

If certain programs are funded by United Way, describe it here.

Conclusion:

Reiterate here that fundraising is the job of every board member, and in fact all staff members must be involved in the process.

This is also a good place to list the location where someone can find the organization's full Strategic Plan as well as any project plans that roll up into this Development Plan.