

THE DO-ABLE

DEVELOPMENT PLAN:

Realistic Fundraising for the Small Shop



Stephanie Cory | AFP Capital Conference

Discussion Questions

- What do you want to learn today?
- Where are you now in terms of formalized planning?





Strategic Plan

Development
Plan

Success!



To Know from Your Strategic Plan

- What are you raising funds for?
- What are your organization's priorities?



Setting Development Goals

- Realistic goals are not:
 - Other revenue minus expenses
 - Prior year results plus “random” percentage increase
 - An arbitrary multiple of fundraising staff salaries
- Take into consideration:
 - Size and responsiveness of donor base
 - Staff and volunteer time and capabilities
 - Un-renewable prior year gifts



Goals versus Objectives

- **Goals:** broad statements of what you aim to achieve (ends)
- **Objectives:** specific statements of how you will achieve your goals (means)
 - Should be SMART



Pitfalls to Avoid

- Failure to balance staff, board, and volunteer roles
- Adding new tactics without resources
- Lack of strategy
- Putting the plan on the shelf



Benefits of a Plan

- Allows you to evaluate progress and assess the effectiveness of different fundraising channels
- Great excuse to say “no” to bad suggestions
- Helps development office justify its budget
- Way to measure individual staff success objectively



Development Plan Basics

- Is unique to your organization
 - Your own needs, goals, strengths, and priorities
- A dynamic, not a static document
- Varies depending on organization's development life stage
 - Fundraising > Development > Philanthropy



Fundraising

- **Activities** focus on asking for money to support the organization and approaching donors with a description of what needs to support
- **Methodology** includes direct mail, special events
- **Responsibility** rests with staff
- **Results** are small gifts and friends, “gift income”



Development

- **Activities** focus on increasing donor interest in organization over time and inviting donors to get more involved in the organization
- **Methodology** includes personal contact, smaller targeted events
- **Responsibility** is shared by all organizational leadership
- **Results** are supporters and larger gifts, “support”



Philanthropy

- **Activities** focus aligning donors' interests and passions with the organization's future plans and engaging donors as advisors
- **Methodology** includes personal contact, one-on-one meetings
- **Responsibility** is shared by organizational leadership and all staff
- **Results** are investors and major and planned gifts, "philanthropy"



Levels of Board Engagement

One	Two	Three
<ul style="list-style-type: none">□ Listen to staff reports□ Typically fundraise in groups□ Approve staff plans and help set goals□ Not all are donors	<ul style="list-style-type: none">□ Begin passive engagement with staff□ Begin cultivation and outreach□ Participate in “friendraiser” events□ All are donors	<ul style="list-style-type: none">□ Fully engaged with own prospects□ Make personal asks□ Whole board is focused on major gift prospects□ All are generous donors

Three Basic Questions

- How much money do you need to raise?
- From whom will you raise it?
- How much money can you spend to raise what you need?



Key Components

- Fundraising goals
- Analysis of potential constituencies
- Strategies for reaching goals
 - Action plan and time table with income benchmarks
 - Assignment of responsibility
 - Budget



Required Information

- Previous experience in asking for and receiving gifts
- Outcomes of prospect and donor research activities
- Gift potential for each constituency
- Available resources



The Process

- Assess your internal and external environments
- Assess your current and potential donors
- Outline your goals
- Identify your objectives
- Identify your tactics (who, what, when, where, how)
- Identify your budget and resources



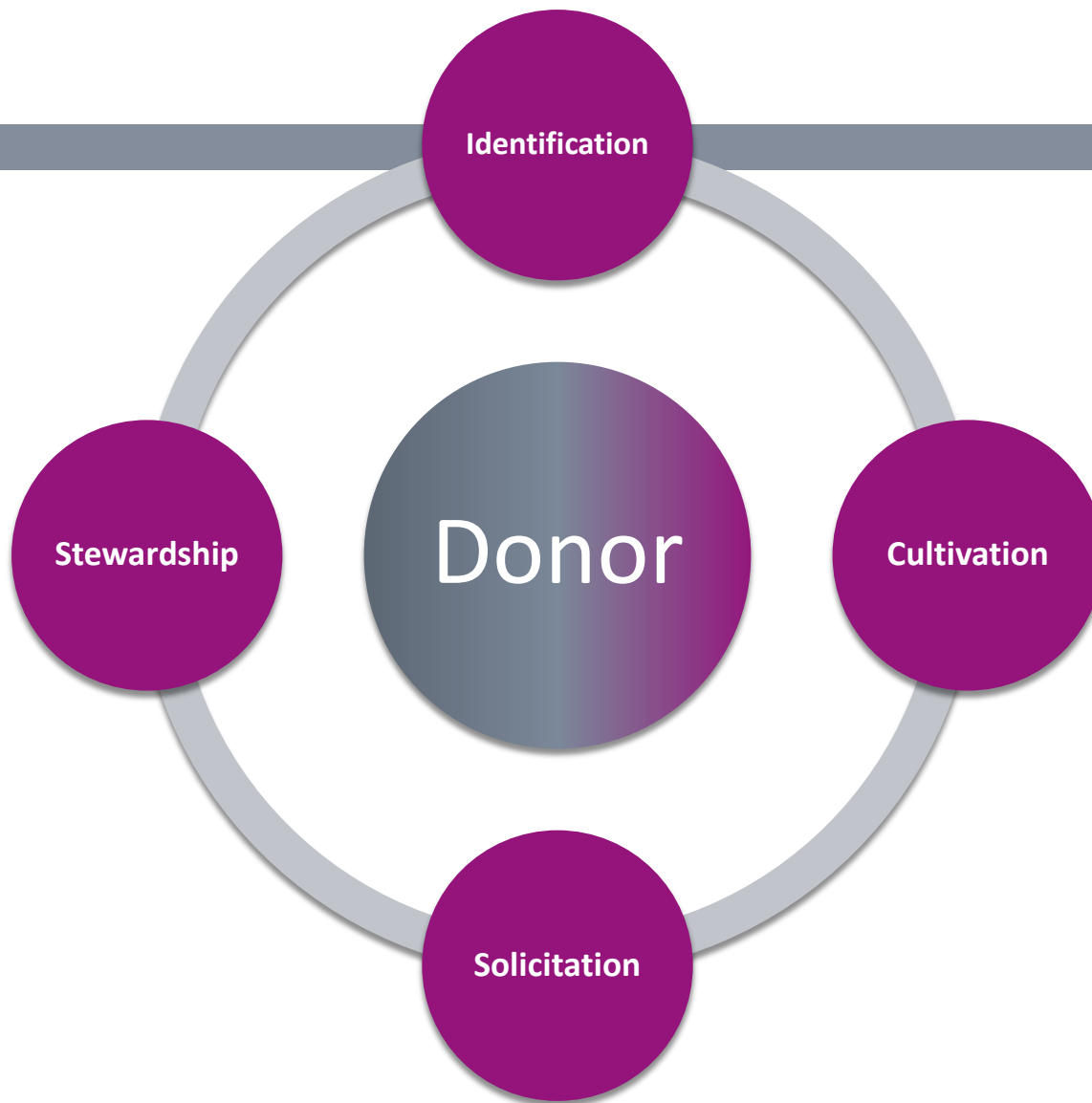
Plan Characteristics & Format

- Specific
- As short as possible
- Easy to read
- Word, Excel, your choice
- Need to be able to include goals, objectives, measurements, assignments, and time tables



Structuring Your Plan





Example Formats

Goal:

Objectives	Tactics	Action Plans	Outcomes	Responsibility	Due Date
-------------------	----------------	---------------------	-----------------	-----------------------	-----------------

Goal:

Strategy:

Project	Staff	Audience	Timetable	Goal
----------------	--------------	-----------------	------------------	-------------



Visual Plan

Key Activities	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Acquisition mailing				X						X		
Board campaign								X	X			
E-newsletter	X	X		X		X	X		X	X		
E-appeal		X						X		X		X
Renewal/upgrade mailing	X			X	X	X	X		X			
Grants	X	X	X	X	X	X	X	X	X	X	X	X
Mail newsletter			X		X			X			X	
Planned giving seminar			X					X			X	
Special events			X						X			X
Volunteer phonathon			X							X		
Donor recognition events			X							X		

Adapted from *The Complete Guide to Fundraising Management*, 4th edition (2017) by Stanley Weinstein & Pamela Barden

Calendar

- In the development plan or as an addendum
- Include:
 - Content/design/mailing dates for appeals, invitations, newsletters, etc.
 - Event timelines and dates
 - Proposal deadlines



Once You Have Your Plan

- Board approval
- Regular review
- Regular evaluation
- At least annual updates



Evaluation

- What can you measure?
 - Year-over-year comparisons
 - Acquisition, retention, upgrades
 - Average gift sizes
 - Cost to raise a dollar
 - Number of prospects identified
 - Number of donor appointments and proposals



Factors Impacting Success

- Organization's reputation and credibility
- Urgency of case
- Availability and readiness of volunteers to solicit
- Well-researched database
- Operational readiness of the development office



Challenges

- What gets in the way of your planning?
- What gets in the way of implementing your plan?



Fundraising Methods

- Direct response
- Written proposals
- Events
- In-person
- Peer-to-peer
- Telephone
- Cause marketing
- Advertising
- Social media
- Face-to-face

Two Ways to Raise More Money

- Acquire new donors
- Upgrade existing donors



What Are Your Development Goals?



Next Steps

- What are you going to do differently in your planning process?
- What will you do when you return to your office?



Questions?



Contact Information

Stephanie Cory

(302) 729-3179

stephanie@stephaniecory.com

