

Five Steps to Create a Development Plan

Step 1: Getting started

- Development procedures
- Gift acceptance policy/practices/think about what your organization can and can't accept
- Knowledge of organizational budget

Step 2: Strategic plan/work plan

- What is your organization actually doing on a day-to-day basis?
- Use to guide your development plan.

Step 3: Basic organization information

- Mission/Vision
- History
- Organization Description
- Positioning
- Case for Support

Step 4: Goals, objectives, strategies, activities

To develop these, you will:

- Analyze what's actually working.
- Let go of what is not working.
- Emphasize your strengths.
- Acknowledge and improve on your/your organization's weaknesses.



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Goals: broad statements of desired outcomes. They provide a framework for measureable objectives.

Sample goals:

1. Secure unrestricted gifts from individual donors.
2. Secure foundation, corporate and government grants to support special initiatives, programs, and gen op.

Objectives: specific, measurable steps taken to reach goals. They are developed from existing data whenever possible.

Sample objectives:

1. Retain 65% of current donors.
2. Recruit new monthly donors with combined giving of \$500/month.
3. Sell \$10,000 in sponsorships to the gala.

Strategies: general approaches taken to achieve the objectives.

Sample strategies:

1. Thank all donors as quickly and genuinely as possible.
2. Continue recognition program for major donors.
3. Develop relationships with local corporations through volunteering.

Activities: specific actions that implement the strategies.

Sample activities:

1. Mail appeals in February, July, and December.
2. Send donor newsletters in March, August, and October.
3. Board members make thank you calls in November and December to donors over \$1,000 in annual gifts.

Sample activity planning table:

| Campaign | Annual | Spring | Summer |
|----------------------|---------------|---------------|---------------|
| Activities | | | |
| Timeline | | | |
| Dollar target | | | |
| Donor target | | | |

Step 5: Implementation and timeline

- Track your activities using a calendar, spreadsheet, or other tool.
- Run reports on the success of each initiative.
- Ongoing review of plan – a weekly meeting, board meeting, or other regular checkpoint.
- Work closely with finance/accounting to ensure that funds are spent as requested.
- Use the development plan as a framework – you don't have to have every detail spelled out for the entire year.