

Development Plan FAQ

What is a development plan?

- Roadmap for staff and volunteers to follow in order to raise money
- A method to fund-raising madness
- Covenant between staff and volunteers that prevents wayward fund raising
- A thoughtful approach to keeping donors engaged
- Answers the question: what resources do we need to accomplish our mission?

What are the components of a successful development plan?

- Realistic goals that align with budget
- Shared responsibility
- Board commitment
- Built-in accountability mechanism (who is responsible?)

What are the elements of a development plan?

- Summary of goals
- Detailed list of prospects
- Solicitation and cultivation schedules
- Reporting mechanism

When Self-interest is OKAY

Business Needs and Non-profit Opportunities

Selected business needs:

- To sell product or service
- To be regarded as a “good corporate citizen/neighbor”
- To have happy/productive employees

Selected corporate giving methods:

- Give money/product away (“giving back to the community”)
- Volunteer/team building/employee morale booster events
- Workplace giving campaigns
- Employee-directed giving

Selected Business District needs:

- Strong, active membership
- Event and/or marketing funds
- Dynamic on-line presence
- Inexpensive (or free!) access to products and/or services

Selected business district benefits to corporate donors

- Sponsorship recognition/ “good corporate citizen” credibility
- Cooperative marketing/advertising
- Increased business district traffic
- Volunteer/team building/employee morale booster events

Aside: When and how to say “no thanks”

Saying “no” nicely:

“Thank you for thinking of us. Although your offer to discuss your product and offer a discount is generous, we don’t allow sales pitches at our membership meetings.

Redirecting volunteers to priority projects:

“Thank you for thinking of us. We don’t need office volunteers right now. However, we are planning a major event and could use help passing out maps.

Remember: *Thank* and *refer* and offer another project

Ask Script: Personal Visit to Small Business

Background: Designed for solicitation of neighborhood businesses. Try to keep the conversation broad-based (don't immediately ask for pizza if you can get a cash gift instead) and win-win by offering to be a resource. Take with you a formal request on letterhead to leave behind.

Hi, I'm _____. I'm a board member at _____.

We (describe in one sentence your work) _____.

I want to invite you to one of our events (give information). I wanted also to ask if you might consider talking to me about partnership opportunities. Is this a good time?

(if no) When would be a good time? Who is the appropriate person to talk to?
(negotiate and settle on a time)

(if yes) Great. We are looking for business sponsors and in return would advertise your business. Here's how many people we could reach:

We serve _____ each year

We partner with _____

Our newsletter and website reach _____

Each of these groups that I mentioned includes some of your customers and the rest are potential customers. Is sponsorship something you might consider?

(if yes) Great! Let me tell you about our sponsorship levels....

What sounds doable for you?

I would be happy to send a formal request in writing or an invoice for your check processing. Which would you prefer?

(if no) I understand. Is there any other way you could see yourself being involved, such as a gift of a product? We need _____.

Are there other businesses that you think I should call? Can you join us at our next event?

Thank you!!!

Unearthing Existing Relationships

So you think you don't have any leads on prospective donors? Think again! Use this tool to unearth existing relationships that require no cold-calling. List your current supporters/relationships. **It is important to name names.** Also, list what these supporters have in abundance. Individual donors are funding sources: list top 10 donors and what they have in abundance on the back (refer to profile).

A. Funding Sources

(example: Jean, staff at County office)

Abundance of ?

(knowledge of community need; connections to other county departments/sources of funding)

B. Vendors, Contractors

(example: John the printer)

(printing supplies, fishing gear)

C. Financial Institutions

(example: Rick the banker)

(money to lend/mandated loans to affordable housing; customers; employees; work)

D. Neighbors

(example: Frank at Big O Tires)

(tires; mechanics/employees on minimum wage)

E. Partners

(example: Susan at St. Mark's church)

(ministries/volunteers; parishioners; guilt; school kids)

F. Agency health care provider

(example: Jane at Kaiser)

(employees, doctors, dentists, \$ in corporate giving account)

G. Volunteers

(examples: Joe who helps with bulk mail)

(time, needs to be needed, clerical skills, retired executive)

H. Corporate connections via employees

(example: Tim on staff is married to Jill who works for Nike)

(Nike employee store access; matching gift funds; corp pressure to volunteer)

I. Personal relationships (family, friends, neighbors, school parents)

(example: Mom)

(retired teacher, time to shop, traveler)

Know Your Donor/Find the “Fit”

Gather information from the prospective donor by touching base on each one of these items during your conversation. Add follow-up questions. Take notes.

- Thank them for their past support (of your organization or another)
- How did you get involved with us? and/or How do you think we are doing?
LISTEN
- Are there aspects of our work that you most identify with? **LISTEN**
- What types of (other) community work are you involved with? Why did you choose these groups? **LISTEN**
- Is there anyway you could see yourself becoming more involved with us? For example (mention opportunities that might fit with their interests). Are there others you know who might be interested in our work? **LISTEN**
- Consider concluding by asking if they would consider getting together to further explore some of these possibilities. Face to face meeting on their turf is best.

Using a Gift Chart for planning

1. Start with your need/budget. Enter in bottom, right-hand corner
2. Look at giving from former years; identify levels and sources. Then, add levels of giving to chart.
3. Rule of thumb: if you ask four people for money,
 - 2 will say "no"
 - 1 will give you less
 - 1 will give you what you asked for
 So, you need to ask 3-4 times as many people as you expect to give.
 Likelihood of giving increases if you are asking current donors (renewals).
4. Match you need/budget/totals

Sample Gift Table				
	Ask	Receive	Source	Total
\$5,000	2	2	In-kind school dist., cash from found.	\$10,000
\$1,000	5	1	Businesses, service clubs	\$1,000
\$500	10	6	PTCs	\$3000
\$250	10	3	Businesses, service clubs	\$750
\$100	20	5	Volunteers	\$500
\$50	100	10	Volunteers, friends	\$500
\$25	100	10	Volunteers, friends	\$250
Need				\$16,000

Project Timeline

Deadline: _____ Project Manager: _____

Project: _____

This project ties to section _____ of our strategic/development/business plan and has been approved by the staff/board as a priority

<u>Action Item</u>	<u>Deadline</u>
1.	_____ (week)
2.	_____ (week)
3.	_____ (week)
4.	_____ (week)
5.	_____ (week)
6.	_____ (week)
7.	_____ (week)
8.	_____ (week)
9.	_____ (week)
10.	_____ (week)
Project completed	_____ (week)

SAMPLE Development PLAN

Goals

Goal #1: Steady Funding Base to ensure long-term financial viability of program

Goal #2: Increase funding base to better support volunteers

Objectives

Maintain: school district and foundation support; business support

Steady: parent club support

Increase: individual support

Strategies

Set contribution goals and timelines for each support group

Undertake solicitation and cultivation activities for each support group

Monitor progress, refine goals and activities

1. Monetary goals: Contribution goals by support group

	last year	this year	year 1	year 2	year 3	year 4
Individuals	1,542.00	188.00	465			
Businesses	350.00	456.00	3,700			
Foundations	0	1,000.00	1,250			
Public, incl. Gifts in Kind	4,617.00	4,617.00	4,617 3,150			
PTOs	4,014.00	1,500.00	1,750			
Service Club						
Other	1,561.00	1,310.00	398			
Total	12,084.00	9,071.00	15,330			
Cash/Total less in kind	7,467.00	4,454.00	7,563			

2. Activity Calendar: Undertake solicitation and cultivation activities for each support group

	Jan	Feb	Mar	Apr	May	Sept	Oct	Nov
Individuals					Volunteer appreciation	Volunteer training	Send annual report	Holiday Appeal
Businesses	request timeline							
Public, inc. Gifts in kind							Send annual report	
PTOs				send request PTO pres, cc principal			send annual report, copy	

3. Detail of solicitations (see attached lists of prospects, request and result)

SAMPLE DEVELOPMENT PLAN

Forward Stride

Summary of Fundraising Goals, Objectives and Strategies

GOAL

To empower members of the Forward Stride community to participate in friend- and fund-raising efforts that will result in financial and in-kind support of Forward Stride programs that help people with special needs gain independence and confidence through therapeutic recreation.

OBJECTIVE

To facilitate the giving of financial resources and in-kind support, volunteer time, and pro-bono services to the programs of Forward Stride from “partners” (people who value our mission), including, individuals and families (including our students and their families and relatives), the therapeutic recreation community, service groups, businesses, foundations, government sources, and medical and social service groups that work with our students.

STRATEGY/APPROACH

To implement a mission-driven, partnership-based solicitation and stewardship model emphasizing personal relationships with community members who value therapeutic recreation. Please see the attached monetary goals and strategies that will be realized by embracing the following fundraising approach:

- **Spend most of our fundraising energy on individuals and families who are aligned with our mission.** Update, refine and expand our donor prospect list of people and groups of people who have demonstrated support of our mission. Focus on ten donors or prospective donors who have the most capacity to give, then conduct one-on-one and small group cultivation solicitation and appreciation activities to inform, involve, solicit and thank these donors and friends.
- **Align Forward Stride with businesses that share our mission and can substantially support us.** Establish criteria for “strategic partners” and pursue top ten choices within each of the following communities: businesses, civic groups and associations, medical and social service groups that work with our students. Then, pursue opportunities for financial support, volunteerism, in-kind support and pro-bono services by working within partner’s existing community outreach structures.
- **Follow a grant proposal submission schedule.** Research private foundation and government sources that fund therapeutic recreation and strategically solicit a limited number of private and public sources.
- **Carefully choose community awareness opportunities that make good use of our time.** Provide opportunities for the greater community to participate in the

mission by learning and giving via a limited number of strategic, public awareness type opportunities.

Development Plan for Forward Stride

Overall Goal: **Annually raise a minimum of \$55,000** in cash, and additional funds in pledges, to support Forward Stride in our efforts to help people with special needs gain independence and confidence through therapeutic recreation.

Goal #1: Annually raise \$10,000+ from individuals and families

Timeline: Years 1, 2 and 3

Strategies: Design and implement gift club program focusing on multi-year pledges and stewardship. Solicit prospective donors one-on-one and via a mission-driven fundraising event that introduces the gift club. Prospective donor list to begin with:

- *Board members*
- *Current and former staff*
- *Current and former volunteers*
- *Current and former parents and relatives of students*
- *Past donors and their referrals*

Examples of gift/pledge amounts needed to meet \$10,000 goal:

- *1 pledge of \$10,000 (5-year pledge that yields \$2,000 annually)*
- *5 pledges of \$5,000 (5-year pledges yielding \$5,000 annually)*
- *10 pledges of \$500 (5-year pledges yielding \$1,000 annually)*
- *40 gifts of \$50 each (yielding \$2,000)*

Goal #2: Annually raise \$30,000+ from private foundations

Timeline: Years 1, 2 and 3

Strategies:

- Research and build list of 20 potential foundation supporters; establish and implement a proposal submission calendar; submit annually at least \$100,000 in requests in hopes of generating \$30,000 in grant monies.
- Create tools to streamline proposal writing and submission process

Goal #3: Annually raise \$12,000+ in in-kind gifts and services

Timeline: Years 1, 2 and 3

Strategies: Refine process for documenting current in-kind giving. Encourage further in-kind gifts by keeping wish lists current. Include in-kind donors in gift club recognition efforts.

Goal #4: Annually raise \$4,000+ from businesses

Timeline: Years 2 and 3

- Establish criteria for “business partners” and build relationships with ten businesses with the most capacity to give
- Work within business partners’ existing community involvement structures and activities to identify and capitalize on win-win opportunities, including employee giving campaigns, employee volunteer days, matching gift programs, in-kind gifts, and corporate grants.

Work with ten partners in order to secure 4 gifts of \$1,000 or more

Goal #5: Annually raise \$1,500+ from community groups

Timeline: Year 3

Strategies: Present annually to nine selected riding associations, civic, volunteer and community groups, and medical and social service groups that work with our students, and request support (outright gifts or proceeds from one of their events).

Goal #6: Annually raise \$5,000+ from public sources

Timeline: Year 3

Strategies: Meet with public officials and /or staff from city, county and state governments regarding special education funding that might be directed to Forward Stride. Respond to three “request for proposals” in order to secure one contract for \$5,000.

DRAFT 7/28/05

Fund Development Plan (Assumes Budget of \$289,202)

% of Budget	Donor Type & Goal	Strategy	Activity	Purpose	Who	When	Results thru 5/15/05
33%	Individual Contributions \$96,850 <i>Results thru 5/20/05: \$80,066</i>	Undertake New Activities \$11,250 Upgrading major donors will shift their donations away from previous activities)	Upgrade Major (>\$500) Donors <i>Goal \$3,000</i>	Upgrade donors	Board members	Begin Sept	n/a
			Upgrade Board Donors <i>Goal \$3,000</i>	Upgrade donors	Board members	Sept, Oct	Need to research
			Contacts for new board members <i>Goal \$3,000</i>	Acquire Donors	New members	Sept, Oct	n/a
			New contacts for all members <i>Goal \$2,250</i>	Acquire Donors	Board members	Begin Sept	n/a
			On-line Donations	Retain & Acquire	Tech consultant	Begin summer	n/a
			Spring Event <i>Goal ??????</i>	Retain &	Board/VISTA	Spring 2006	03-04 event \$9600
			Annual Report	Retain Donors	Kathy/Volunteers	Aug. 2005	n/a
		Repeat Proven Activities \$73,600	Annual Mailer <i>Goal: \$45,000</i>	Retain Donors	Kathy/Board/volunteers	Nov. 2005	\$43,999
			Newsletter <i>Goal: \$13,000</i>	Retain Donors	Kathy/volunteers	April 2006	\$11,600
		All incl. major donors. Decr. goals if major gifts/upgrades done	House Party <i>Goal: \$1,100</i>	Retain Donors	Dave W.	Oct 2005	\$1,024
			Willamette Week Give Guide <i>Goal: \$3,500</i>	Acquire Donors	Staff/volunteer	Nov-Dec 2005	\$2,965
			United Way Donor Option <i>Goal: \$5,000</i>	Retain Donors	No Active Role	Winter 2005	\$4,798
			Unsolicited Gifts. <i>Goal: \$6,000</i>	Retain Donors	No Active Role	n/a	\$6,225
		Patient Donations \$12,000	Suggest \$15 per patient donation. <i>Goal: \$12,000 (\$1,000/mo. or \$6.44/pt.)</i>	Acquire Funds	Clinic Coordinators	Each Clinic Night	\$6,562

4%	Faith Groups/ Associations \$11,000 Results thru5/20/05: \$10,064	Cultivate New Supporters \$2,000	F/U First United Methodist	Acquire Donors	VISTA	?	n/a
			Submit requests to new faith communities	Acquire Donors	VISTA	?	n/a
		Sustain Current supporters \$9,000	St. Luke Lutheran Goal:\$3,000	Retain Donors	VISTA/Bernie	?	
			Rose City Park Presb. Goal: \$300	Retain Donors	VISTA	?	
			Alpha Omega Alpha Goal: \$4,000	Retain Donors	VISTA/Jim	Spring 2006	
			Internal Medicine Interest Grp Goal: \$1,700	Retain Donors	VISTA/Jim	May 2006	
41%	Foundations \$120,000 Results thru5/20/05: \$43,274	Multi-year Capacity Building Grants \$85,000	Oregon Community Foundation-\$50,000 Allen Foundation \$25,000 Northwest Health Foundation \$10,000	Acquire Donors	n/a n/a Grant writer/Kathy	n/a n/a Summer 2005	Committed Decision Pending Inquiry subm.
		Unrestricted General Grants \$29,000	Olive Bridge Fund \$12,000 Layton Foundation \$4,000 Vera Smith Foundation \$4,000 Jackson Foundation \$4,000 Mills Family Fund \$3,000 Irwin Foundation \$2,000	Retain Donors	Unsol-?visit invite Unsol-?visit invite Unsol-?visit invite Grant writer/Kathy Grant writer/Kathy Grant writer/Kathy	? ? ? Dec 2005 Nov/Dec 2005 ?	\$15,000 \$5,000 \$5,000 \$4,000 \$3,000 0-\$2,000 prev yr
		Program Grants \$6,000	Portland Women's Union- \$6,000	Retain Donors	Grant writer/Kathy	Nov 2005	\$6,000
21%	Businesses \$61,352 Results thru5/20/05: \$75,745	Health Industry Support \$57,000	Regence BCBS-\$20,000 Providence Health Plans ?10,000 Kaiser/NW Health Fdtn ?12,000 Legacy Health System ?\$10,000 Family Care \$6,000 OHSU Foundation ??	Retain Donors	Grant writer/Kathy Grant writer/Kathy Grant writer/Kathy Grant writer/Kathy Grant writer/Kathy	Committed Fall 2005? Summer 05? Fall 2005? Fall 2005? May 2005	Committed

		Misc Business \$4,352	Arognaut: \$2,600 ?business Neighbors ?Latino Businesses ?Pharmacies/Pharmaceutical Cos Banks \$2,000	Acquire Donors	????? VISTA	?????	n/a
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Board Fundraising Roles and Responsibilities

Finding Your Comfort Level

(Please complete and give to staff to have on file)

Name _____ Date _____

TASK	Not Comfortable	Comfortable	Specific names	Specific Venues, Dates	Other thoughts
Donate \$			(self)		
Talk to friends/neighbors/colleagues about organization					
Host friends/neighbors/colleagues at events					
Speak publicly or introduce staff to speak about (list venues)					
Thank Donors In writing By phone In person					
Allow staff to solicit my friends					
Solicit (ask!) friends/neighbors/colleagues					
Solicit strangers					