

CREATING DEVELOPMENT PLANS

1

Identify a template that works for your team for consistency and adoptability. Align the plan to your organization's mission, vision, strategic plan initiatives, and goals.

Q1

Do you have an existing template that can be used or a work management platform that can make the plan actionable?

Q2

Will you need to create your plan from scratch? If so, establish a plan and process to successfully collect responses.

For new development plans or for a fresh perspective, we recommend using the following structure:

Fundraising program or strategy

Goals (financial or qualitative)

Overview

Strategies

Responsibilities (primary and supporting)

Do you currently have a template that works? YES / NO

What team members will be an important part of putting your development plan together?

2

Next, gather your team, debrief current processes, and document fundraising programs (and connected strategies) that should go into your Development Plan.

Q1

Find the categories for your fundraising programs and important strategies to document. Consider larger department categories to organize your work.

- Major Gifts, Annual Giving, Foundation Giving, Planned Giving, Membership Giving, Events, etc.

Q2

What are the important mechanisms or processes to document?

- Stewardship, Moves Management, Data & Analysis, segmentation strategy, relationship definitions, partnerships, constituent engagement, etc.

Note: You may have sub-categories for the larger fundraising programs outlined above. Within those larger programs, you may have specific initiatives to document like appeals, specific events, or specific giving initiatives.

Identify your most developed fundraising program:

What other fundraising programs or strategies will you need to document?

3

Facilitate this process by having staff document the fundraising programs they are responsible for. **This can be done individually or through a survey process.** A survey would collect the fundraising program name, goals for this coming year, a description of the program via an overview, the strategies to execute, and any collaboration needed to complete the program.

Q1

Define the fundraising program or strategy.

Q2

Goals: What financial goals or donor metrics can be associated with this fundraising program. Additionally, what qualitative goals align with the strategy if you can't quantify the program.

Q3

Overview: How do you define the core of this fundraising program or process? State the high-level strategy in a single paragraph.

Q4

Strategy: How do you achieve results for this fundraising program, what are the details that someone would need to know to execute this fundraising program or process?

Q5

Responsibility: Who is the main responsible team member and what other team members do you rely on to complete this program or process?

For your most developed program, work through the questions above:

Goals:

Overview:

Strategy:

Responsibility:

4

Collect all the response, check for accuracy, and implement into one cohesive Development Plan. Make sure to check goals for alignment with organization goals. Have discussions if there needs to be any adjustments or clarification.

5

Make the plan actionable to hold yourself accountable. Set reasonable goals and metrics to track throughout the year. Use document bookmarks to allow for navigation or use work management tools to track goal progress online.

6

Make the plan sustainable by establishing a review process to ensure the plan is a living document and does not become static.

- **Quarterly all-staff review:** Come together as a staff to do major review of the document. What's ahead of schedule or needs adjustment? Are there opportunities to test new strategies?
- **1:1 staff meetings:** Staff and direct supervisors should review the plan on a more frequent (weekly or bi-weekly) basis. Especially for highly collaborative projects or recurring deadline projects.
- **Tool management:** Leverage work management tool or existing organization tools to make tracking progress more efficient.

