

Creating a Development Plan and Strategy

Prepared for the North Penn Nonprofit Academy – March 2005
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Rate your organization in each area using the following rating scale:
 (1 – An area of concern; 2 – Fair; 3 – Good; 4 – Excellent)

ELEMENTS OF A FUNDRAISING PROGRAM	RATING (Check one using the scale above)				NOTES
	1	2	3	4	

<i>Organizational Plans</i>					
1. <i>Strategic Plan.</i> Organization has a current strategic plan which includes vision, values, mission, goals, and long term financial needs.					
2. <i>Business Plan.</i> Organization has a business plan identifying specific operating goals and strategies for its services and programs.					
<i>Analysis</i>					
1. <i>Fundraising Analysis.</i> Organization has an analysis of the efficiency and effectiveness of its past fundraising activities.					

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Needs and Goals

1. <i>Needs.</i> Organization has identified specific projects or activities needing philanthropic support.					
2. <i>Goal.</i> Organization has set a goal for private contributions in the coming year based on an assessment of actual donors and prospects.					
3. <i>Breakdown.</i> The goal is broken down (1) by philanthropic markets (individuals, corporations, and foundations) and (2) by fundraising strategies.					
4. <i>Individual Breakdown.</i> The goal for individuals is broken down into renewal income and new income needed.					

Case

1. <i>Case Statement.</i> Organization has a 1 to 2 page statement outlining the most compelling elements of its case for support.					
2. <i>Case Arguments.</i> Organization has articulated the most compelling reasons for support by each major constituency (e.g. individuals, local business owners, foundations, etc.)					
3. <i>Urgency.</i> Organization's leadership has articulated which gifts are particularly important in the coming year.					
4. <i>Donor Feedback.</i> Organization regularly solicits donor feedback on its case.					

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Constituencies and Prospects

1. <i>Constituencies.</i> Organization has identified its likely fundraising constituencies in the local individual, foundation, and business markets.					
2. <i>Prospect Identification.</i> Organization regularly generates names of new prospects from its board, staff, and close friends, and through various public activities targeting likely constituencies.					
3. <i>Prospect List.</i> Organization has a list of donors and prospects to approach for gifts.					
4. <i>Rating.</i> Prospective donors have been rated in terms of giving ability and inclination.					
5. <i>Top Donor Focus.</i> Organization has individualized plans for approaching the top 20% of its prospect list.					

Fundraising Strategies

1. <i>Donor-based Strategies.</i> Organization has selected a set of fundraising activities based on strategies that are most effective with prospects and donors.					
2. <i>Cultivation.</i> Organization has an ongoing program to bring donors and prospects closer to the organization.					
3. <i>Planning.</i> Organization has a plan for each activity including allocation of volunteer and staff effort, budget, and implementation timelines.					

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<i>Leadership</i>					
1. <i>Engagement.</i> Board members are actively engaged in setting policy and developing plans for the future of the organization.					
2. <i>Personal Gifts.</i> Each board member makes a personally significant gift.					
3. <i>Helping Fundraise.</i> Each board member accepts responsibility for helping with fundraising.					
4. <i>Training.</i> Board members receive training and support in carrying out their fundraising roles.					
5. <i>Leaders.</i> One or more board members takes a leadership role in activating other board members in their fundraising roles.					
6. <i>Development Committee.</i> The board has a development committee.					
7. <i>New Members.</i> The board has a goal of regularly recruiting new members who will provide substantial help with fundraising.					

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Communications

1. <i>Mailings.</i> Organization maintains regular communications with its donors and prospects through a newsletter or other mailing at least 6 times a year.					
2. <i>Web Site.</i> Organization has a web site that includes case information, key staff information, board of directors list, and contact information.					
3. <i>Key Donor Contact.</i> Top staff and board members maintain regular contact, including soliciting feedback, with key donors and prospects.					

Staff

1. <i>Executive Director.</i> Executive Director is comfortable with and committed to fundraising.					
2. <i>Development Director.</i> A Development Director or another staff person is charged with coordinating the development program.					
3. <i>Support.</i> There is a staff person assigned to provide administrative support such as producing mailings, sending thank you letters, and maintaining records of gifts received.					

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<i>Systems</i>					
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1. <i>Database.</i> There a database for recording all gifts received including name, address, date, amount, donor type, how solicited and by whom.					
2. <i>Gift History.</i> Organization has a detailed record of all gifts received going back at least three years.					
3. <i>Contact Records.</i> There is a system for recording all contacts and follow up tasks with major donor prospects.					
4. <i>Major Donor Information.</i> There a system for recording background information about each major donor prospect.					

<i>Budget</i>					
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1. Organization has a development program budget broken down by major fundraising activities.					

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Time and Timetable

1. <i>Time.</i> Board and staff have “budgeted” sufficient time for fundraising activities.					
2. <i>Timetables.</i> There are timetables for each donor development activity and strategy. There is a master timetable.					

Other

FUND RAISING BIBLIOGRAPHY AND RESOURCE ORGANIZATIONS

Publications and Web Sites

American Association of Fund Raising Counsel, "Giving USA," <http://www.aafr.org/>

"The Chronicle of Philanthropy," <http://www.philanthropy.com/>

"Grassroots Fund Raising Journal," Chardon Press, <http://www.chardonpress.com/>

Klein, Kim, "Fund Raising for Social Change" 4th Ed, Chardon Press, 2000,
<http://www.chardonpress.com/>

Rosso, Henry A. and Associates, "Achieving Excellence in Fund Raising," Jossey-Bass, 1991

"Writing a Business Plan," paper written for North Penn Nonprofit Academy workshop
October 20, 2004, www.npchf.org

Organizations

Association of Fundraising Professionals, <http://www.nsfre.org/>

The Foundation Center, <http://fdncenter.org/>

The Fund Raising School, <http://www.philanthropy.iupui.edu/funds.html>

Independent Sector, <http://www.independentsector.org/>