

## Development plan template

A successful fundraising plan is based on the needs and capacity of the organization. Most plans contain the following elements though it varies depending on the organization and your goals. It always helps to find other plans and resources to find ideas to expand on your plan.

### **Introduction and overview**

The current state of the organization and its fundraising program  
Special circumstances that will shape the plan  
Time period for the plan (1 year, 3 years, etc.)  
Summary of the plan

**Defining roles and responsibilities- Who are the key stakeholders that will help execute the plan? What are their roles? Do they have the skills and training needed to complete their tasks with confidence?**

### **Last year's campaign numbers**

Example: 2018 YEA 323 donors 2019 Goal 400

### **Financial goals**

Revenue goals for each campaign/ revenue item and if it makes sense, compare to last year. See template.

### **Budget Goals for 2021 compared to the last fiscal year**

Income Categories	FY 2019 Actuals	FY 2020 Budget	FY 2021 Projections	% of income
Grants				
Luncheon				
Third Party events				
Churches				
Midyear Appeal				
YEA				
Individual unrestricted donations (unconnected to an event)				

### **Activities to set up success**

Activities that are not directly related to raising money but necessary to doing it well. Examples could be database maintenance, staffing recommendations, needs for further training, Campaign analysis suggestions. These ideas often come out of the assessment.

### **Development Strategies/Campaigns**

Suggestions on improving *current campaigns/ activities* and the introduction of *new methods*- this section contains instructions and strategies. These strategies include cultivation, stewardship and fundraising campaigns and activities.

### **Marketing and communications**

Includes a narrative section if there are new activities needed to support fundraising efforts and campaigns like Impact Reports, campaign support materials, PR efforts.

### **Keeping the team on track and updates in real time**

To make it possible for the entire team to review and update, task templates are converted to Google docs, or something similar that allows all to view, and outline the campaigns for the year.

### **Calendar section**

This section outlines when activities take place and who is accountable. This is a team effort- include key stakeholders. Include in this section dates to review and process the results of campaigns and take notes for next year. Translate this to a group calendar and set up calendar reminders.