

# WHAT TO INCLUDE IN A FUND DEVELOPMENT PLAN

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## **Introduction**

- Overview of the role development plays in the organization
- Overview of the current status of development efforts
- Summary of reasons to have an updated development plan:
  - set goals and measurable objectives and how to measure them
  - reinforce partnership of staff and board
  - set timeline/calendar
  - achieve maximum success in raising funds
  - maintain connection between organization's goals and development goals

## **List and description of elements and activities necessary for a balanced and successful development plan. Include specific goals.**

- Ongoing board education
- Annual giving/annual appeal (**individual and corporate**)
  - giving/membership club
  - direct mail for donor acquisition and upgrade
  - promote tribute gifts
  - promote monthly giving
  - special events
  - fundraising on-line
  - raffles/auctions if desired
- Grants
- Planned giving
- Major gifts program
- Special campaigns
- Management of donor and prospect information, donations and acknowledgements
- Donor cultivation, recognition and stewardship – a donor relations program
- Capital/endowment campaign
- Public relations/communications/marketing/social media

- Gift acceptance and investment policies
- Collaborations/partnerships
- Alternative revenue sources

### **Marketing and Communications Plan**

List and description of elements and activities necessary to build awareness, show impact, enhance fundraising capacity and educate regarding issues, dovetailing with your development efforts listed above

### **Summary**

Reinforce reasons for the plan and the potential for bringing in important financial resources for the organization