



Massachusetts
Nonprofit Network

Ready, Aim, Fire: Building Your Development Plan

2016 MNN Annual Conference

Moving Forward for a Better Commonwealth

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ORGANIZATION NAME Development Plan

FY 16 – FY18

***RULE #1:
Development Plans need to be
MULTI YEAR!***

Strategic Plan and Fund Raising Goals

Strategic Plan Goals *(to be shared with philanthropic community)*

1. Youth Served: GOAL ONE
2. Enduring Relationships: GOAL TWO
3. Thought Leadership: GOAL THREE
4. Sustainability: GOAL FOUR

RULE #2: Why are you raising the \$\$\$?

RULE #3: Build the Plan Around Your Total Multi-Year \$\$ Goal

Financial Goals: *\$4.5M over the next 3 years*

FY15	FY16	FY17	FY18
\$1M	\$1.3M	\$1.5M	\$1.7M

Development Plan Goals

1. Increase Financial Support from Philanthropic Individuals and Families
2. Increase Donor Retention of \$1K+ Donors from __% to __%
3. Attract Increased Multi-Year Commitments, growing revenue pledged at start of fiscal year from __% to __%
4. Increase <NAME> Event Net Revenue to \$____,____
5. Increase Corporate and Foundation Grants __% to \$____K
6. Fund Strategic Plan and Raise \$____M By Conducting a Comprehensive Campaign
7. Expand Board Leadership by at least ____ New Members/Year to Increase Revenues to a Minimum of \$____K from Board Directed and Leveraged Contributions
8. Add Infrastructure Resources to Support Fund Raising Effort to Raise \$____M Over Next 3 Years

Development Plan Goal #1:

Increase Financial Support from Philanthropic Individuals and Families

Rule #4: #1 Source of Giving Potential = High Net Worth Individuals

Strategies to Achieve Objective

Phase 1

- Build a Formal Major and Leadership Gift Individual and Families Giving Program
- Increase CEO focus on opportunities of 5 and 6 figure gifts
 - Conduct an 'ability vs affinity' prioritization analysis
 - Screen donor roster and prospect pipeline to prioritize
 - Focus on 1 meeting per week in year one and two meetings per week in year 2
- Design formal event strategy to extend beyond <NAME> Event and host 'friend raisers' (house parties, corporate executive convenings) to deepen engagement of HNW population.
 - Host one cultivation event per quarter focused on attracting HNW audience.
 - Develop high focused follow-up plan to convert educated -> interested -> supporters -> advocates
- Establish 'Friends of <ORG NAME>' to deepen base of future leadership supporters.
 - Build 'Friends of ...' Profile and Description (ie 1 mtg/year, personally contribute a leadership gift, be resource to CEO/ advocate on behalf of <ORG NAME>)
 - Recruit stakeholders and champions to serve as Founding members
- Identify, screen and research prospect list of future leadership supporters from <ORG NAME> champions, friends, and mentors.

Phase 1.5

- Better connect leadership donors to <ORG NAME>'s work.
 - Develop 1 – 3 signature engagement opportunities that are meaningful and for which you can easily deliver a great experience.

Phase 2

- Define and launch formal leadership donor giving/membership/recognition program.
 - Brand giving program to <ORG NAME>
 - Determine levels of support
 - Recruit volunteer leadership to chair effort
 - Define benefits of membership
- Create peer based cultivation and solicitation strategy to leverage support.

Phase 2.5

- Launch philanthropic advisors strategy to increase awareness and support realized from advisors' clients.
 - Identify philanthropic advisors and connections to each.

Major and Leadership Giving: Financial Goals (Family Foundations & Individual Giving)

Rule #5: That which gets measured gets done!

		FY15	FY16	FY17	FY18
Total \$ Raised	\$	\$686K	\$800K	\$1.05M	\$1.3M
	#	821/75	700/111	750/156	800/201
\$25,000 +	\$	\$307K	\$360K	\$475K	\$585K
	#	7	10	15	20
\$10,000 - \$24,999	\$	\$127K	\$184K	\$242K	\$300K
	#	10	17	23	29
\$5,000 - \$9,999	\$	\$ 44K	\$ 40K	\$ 53K	\$ 65K
	#	8	8	11	14
\$2,500 - \$4,999	\$	\$ 51K	\$ 48K	\$ 63K	\$ 78K
	#	16	16	22	28
\$1,000 - \$2,499	\$	\$ 64K	\$ 80K	\$105K	\$130K
	#	45	60	85	110

Development Plan Goal #2:

Strengthen Donor Relationships and Increase Donor Retention of \$1K+ Donors from ____% to ____%

Rule #6: Stewardship is Fund Raising's Silver Bullet!

Strategies to Achieve Objective

Phase 1 (FY16)

- Design formal stewardship plan to increase cultivation and donor engagement.
 - Define stewardship plan at high level based on funding source and gift level. (ie personal thank you note or call by CEO vs. 'thank-a-thon' to donors who contribute smaller gifts)
 - Test plan with select funders (ie board members) to ensure activities are meaningful
- Develop donor-specific stewardship plans and prospect-specific cultivation plans for each potential funder that can contribute \$1,000 or more.
- Assign top donors/prospects to select staff and select volunteers to steward the relationship.

Phase 2 (FY17)

- Increase # of donors and prospects who have at least one meeting per year with staff or volunteers.

*(*Includes grants)*

FY15	FY16	FY17	FY18
____%	____%	____%	____%

Development Plan Goal #3:

Attract Increased Multi-Year Commitments

Strategies to Achieve Objective

Phase 1 (FY16)

- Recruit a community of investors who share in <ORG NAME>'s interest and desire to <ACHIEVE GOAL>
 - Determine which past donors/prospects could potentially be asked to consider a m-y gift without compromising a future campaign appeal.
 - Conduct a 'capacity v connection' analysis to help prioritize opportunities.
 - Develop donor-specific cultivation and solicitation plans.

Phase 1.5 or 2 (FY16 Q3, Q4 or FY17)

- Conduct a feasibility study to assess likelihood of success to conduct a formal comprehensive campaign.

Phase 2 (FY17)

- If feasible, launch a formal comprehensive campaign to fund the strategic plan. (Phase 2)
 - Design campaign to include defined case, volunteer leadership, 'pyramid' of support, qualification and prioritization of prospects, recognition, etc.
- If not feasible, focus on appealing for more donors to make multi-year commitments. (Phase 2)

	FY15	FY16	FY17	FY18
Multi-year \$ Raised	\$240K	\$377K	\$510K	\$680K
# of Donors	#	#	#	#
% of \$ Raised in advance of FY Start	24%	29%	34%	40%

Development Plan Goal #4:

Increase <NAME> Event Net Revenue to \$_____

Strategies to Achieve Objective

Phase 1 (FY16)

- Evaluate <NAME> Event to define event potential
 - Prepare data analysis and qualitative analysis to identify top ingredients that lead to revenue success.
 - Build upon revenue drivers and add new features to increase revenue (ie additional honorees, seated tables, strategic attendance plan, etc.)
- Improve formal 'night of' appeal.
- Expand chairs and committee (minimum = 25) to attract more attendees with philanthropic resources.
 - Recruit chair leadership reflective of the attendee you seek.
- As part of Board 'give/get' responsibilities, include commitment of one table for <NAME> event (via 'give' or 'get')

FY16	FY17	FY18	FY19
\$175K	\$225K	\$260K	\$300K

Development Plan Goal #5:

Increase Corporate and Foundation Programmatic Grants __% to \$__K

Strategies to Achieve Objective

Phase 1 (FY16 Q1, Q2)

- Identify local and national institutional prospects who share in <ORG NAME>'s interest in order to scale organization
- Recruit program officer(s) to host introduction meeting(s) to other funders – either 1:1 or by hosting gathering
- Conduct mapping of prospects to funders/volunteers to make 'warm' introductions.

Phase 1.5 (FY16 Q3, Q4)

- Increase CEO time focused on cultivating local and national institutional gifts of \$25K or more.
- Development cultivation plan for each prospect and stewardship plan for each investor.

Phase 2 (FY17)

- Partner with non-profit to feature share subject of interest to both organizations and invite institutional funding community.

FY16	FY17	FY18	FY19
\$____K	\$____K	\$____K	\$____K

Development Plan Goal #6:

Fund Strategic Plan and Raise \$_____M By Conducting a Comprehensive Campaign

Strategies to Achieve Objective

Phase 2 (FY17 Q1, Q2)

- Design campaign framework to articulate case, goals, volunteer leadership needs, prospects, funders needed, cultivation events, recognition, etc.
- Recruit volunteer leadership to spearhead campaign
- Develop cultivation and solicitation plan for each campaign prospect
- Do 'capability' vs 'connection' analysis to define prioritization and sequencing

Phase 2.5 (FY17 Q3, Q4)

- Secure lead investors and early gifts
- Design and implement stewardship plan for each investor

Phase 3 (FY18)

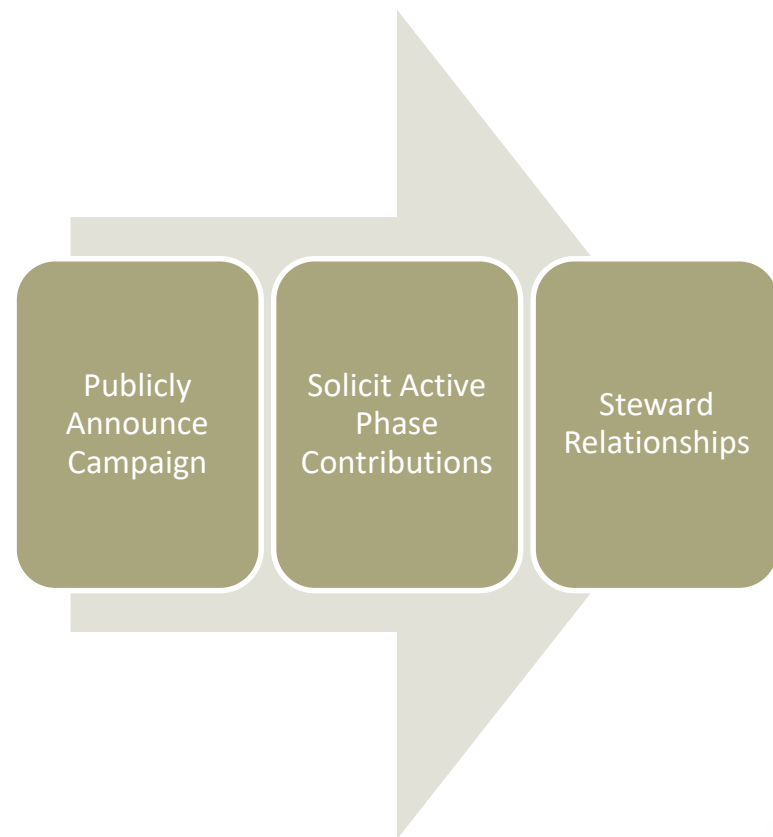
- Update investors twice a year on strategic plan achievement and campaign progress (can also start in FY17 Q3 or 4)

Comprehensive Campaign

Quiet Phase



Active Phase



Development Plan Goal #7:

Increase Revenues to a Minimum of \$_____K from Board Directed and Leveraged Contributions

Rule #7: Development Plans Have to Include Board Expectations!

Strategies to Achieve Objective

Phase 1 (FY16 Q1, Q2)

- Expand membership on the board from the philanthropic community.
 - Perform Board Assessment and Identify Gaps
 - Focus <CEO Name>'s time on board expansion. Add 3 new members in each year of plan.
- Recruit a board member to champion board's increase role in fund raising and serve as a peer motivator and champion
- Formalize management of board fundraising work
 - Meet annually with each board member to define the role in fundraising in order to meet 'give/get'
 - Provide quarterly progress reports to monitor board member performance and progress

Phase 1.5 (FY16 Q3, Q4)

- Deepen the education, support and expectations of new board members to serve as champions and fundraisers on <ORG NAME>'s behalf, increasing peer-to-peer ambassadorship toward relationships and revenue
- Strengthen membership and deepen engagement of development committee to provide strategic guidance to fund raising effort

	FY15		FY16		FY17		FY18	
Give	4.1%	\$41K	6%	\$ 78K	8%	\$120K	10%	\$170K
Get	9.4%	\$94K	15%	\$195K	20%	\$300K	25%	\$425K

Development Plan Goal #8:

Add Infrastructure Resources to Support Fund Raising Effort to Raise \$___M Over Next __ Years

Add the following staff capacities: **Rule #8: Infrastructure is key: staff and technology!**

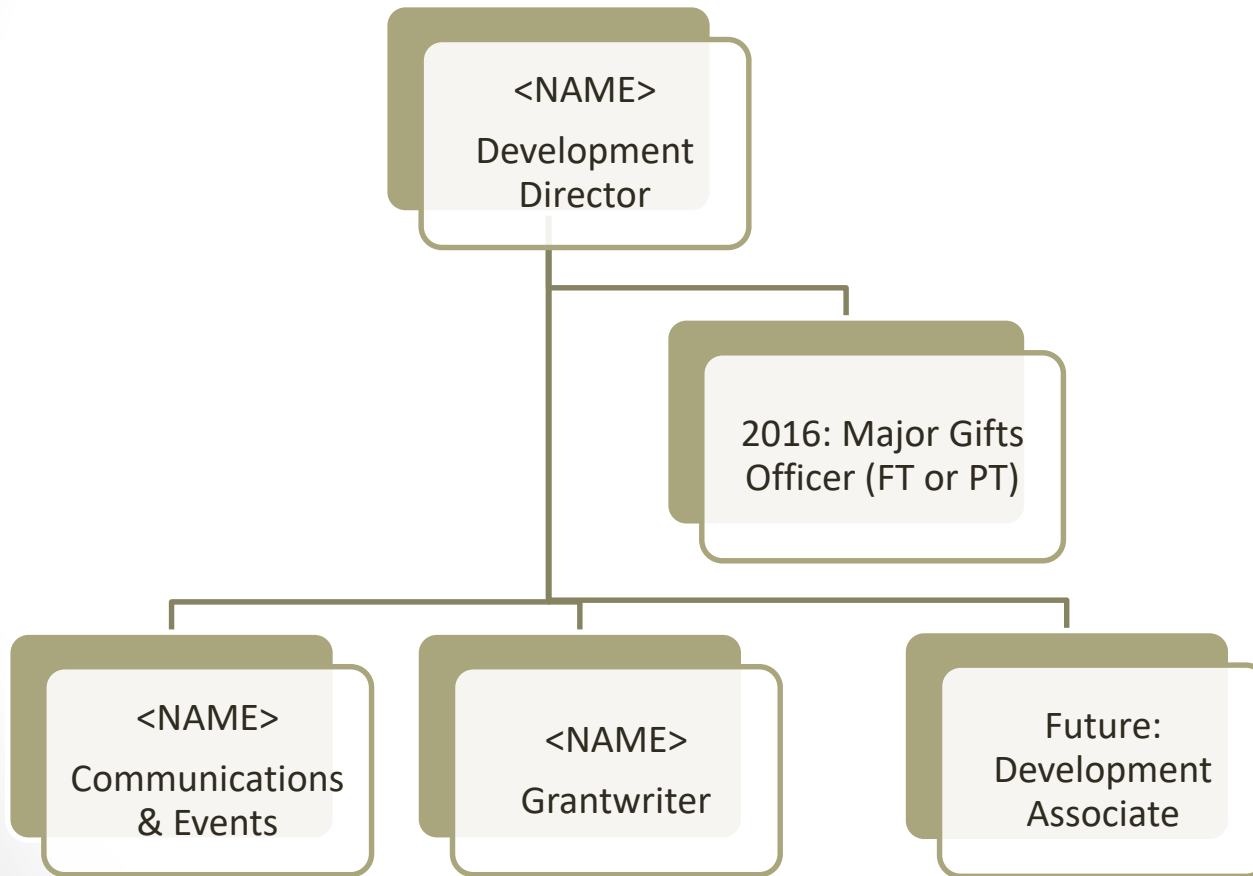
Phase 1 (FY16): Staffing

- Add Major Gifts Officer (full-time or part-time)

Phase 2 (FY17):

- Add Development Associate (in order to deepen focus on larger individual/family gifts with added resource and by better leveraging <CEO Name>'s leverage relationship management system to manage progress
- Confirm gift acceptance policies, documentation of processes and internal coordination between finance and development.

Future Staffing Structure



What's Missing?

- Planned and deferred giving
- Annual Appeals
- Formal Special Event Strategy: \$\$ and/or Pipeline Building
 - Other Signature Events
- Social Media Appeals
- Workplace Giving Strategies
- Other

Questions Discussion

The New Kensington Group

Helping education and nonprofit leaders grow their organizations

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