

Sample Resource Development Three Year Plan

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CURRENT SITUATION:

Give a summary of your current situation: financial, environmental, artistic, etc.

SUCCESS DEFINED:

List what success looks like when this development plan is working. Examples:

- An expanded and diversified community of donors and advocates
- More reliable funding levels
- Clearly defined giving opportunities targeted to the interests of key donor segments

SIX KEY STRATEGIES FOR THE FUTURE:

Identify a list of strategies for the future of the organization regarding your overall development plan.

Examples might include:

1. Identify Our Targets and Key Measures
2. Strengthen the Case for our Chorus – “Why Should I Give?”
3. Provide Meaningful Recognition to All Contributors
4. Build the “Meaningful Ask” into the Ongoing Work of Chorus Leadership
5. Develop the “Pipeline:” The Ongoing Process to Identify and Engage Prospective Donors
6. Standardize all Giving Cycle Activities into a Manageable Program

FUNDRAISING PREPAREDNESS: PEOPLE

Prepare an analysis of your key players involved with resource development. Give an honest assessment of the current situation (how engaged are these people with development, what are their strengths, what tools would help them, etc.), questions to think about (a couple of examples are listed) and Key recommendations to make things work better.

	CURRENT ASSESSMENT	QUESTIONS TO CONSIDER	KEY RECOMMENDATIONS
STAFF: Chorus Manager Artistic Director Marketing Manager (volunteer)	What is the current level of commitment, preparedness to be actively involved in fundraising?	Whose job is it to create, review and adjust the development plan?	What are the recommendations for improvement – how can these individuals become more involved?
BOARD OF DIRECTORS	What is the current level of commitment, preparedness to be actively involved in fundraising?	Is 100% of the board willing to give, assist with cultivation and prospect identification? Is at least 50% of the board willing to be active in the solicitation process (accompanying staff or other board members on solicitation calls, adding personal notes to appeal letters, arranging introductions to prospective donors)?	What are the recommendations for improvement – how can these individuals become more involved?
CHORUS / SINGING MEMBERSHIP	What is the current level of commitment, preparedness to be actively involved in fundraising?	Who are the individuals who are willing to (or might, if invited) participate in fundraising?	What are the recommendations for improvement – how can these individuals become more involved?

SHORT TERM GOALS: REMAINDER OF CURRENT FISCAL YEAR

List goals that you can complete now, during the remainder of your current fiscal year.

SIX KEY STRATEGIES

Identify goals for your strategies, with specific tactics to achieve each goal. List these out for the three years of your plan

1. Identify Our Targets and Measures

- Targets
 - A. Year 1:
 - Tactics listed here
 - B. Year 2:
 - Tactics listed here
 - C. Year 3:
 - Tactics listed here
- Key Measures (to be developed by staff and Resource Development Committee)
 1. Identify Key Performance Indicators
 - ▪ Total dollars raised/pledged – put hard numbers to this based on your donor pool and likely gifts
 - ▪ # of donors (expanding donor pool) – perhaps a 3-year goal to recapture and surpass former donor levels
 - ▪ Increased donor retention – need to first analyze what your retention has been
 - ▪ Average gift amount – a 3-year goal to recapture and surpass former levels
 - ▪ # of contacts made
 - ▪ Increased participation at events (not just the usual suspects)
 - ▪ Growth – forward momentum
 - ▪ Impact of artistic change
 - ▪ Increased communication with prospects
 - ▪ Increased profile of corporate donors (define targets such as General Mills, Target, etc. and what kind of gifts would signal success)
 2. Build a Monthly Dashboard that lists Development, Ticket Sales and Other Measures

2. Strengthen Case for the Chorus – “Why Should I Give?”

Frame the answer for specific prospects and constituents. Have clear and compelling answers. **Talking Points:** to generate excitement and momentum with potential donors. Refer to Case Statement examples on the GALA Choruses resource center website.

3. Provide meaningful recognition and thanks to all contributors

Enhance our relationships with donors and prospective donors, to inform, cultivate and reward individuals by increasing their access to people and information. This kind of activity will be especially valuable to those donors who enjoy an “insider” perspective or personal involvement.

4. Build the “meaningful ask” into the ongoing work of leadership

Donors don’t give unless they are asked. Building a ‘culture’ of asking will increase the opportunities for donors to contribute.

- **Standardize the solicitation process**

- **Provide appropriate training,** support and follow up to each solicitor
- **Creatively reinforce fundraising messages** at chorus events.

5. Develop the “Pipeline:” the ongoing process to identify and then engage prospective donors

Create a system in which to continuously add new prospects and manage current ones.

- **Capture names**
- **Categorize**

Prospects and current donors are filtered into categories. Each will get attention according to level of capacity for change:

- *Major Gift Prospects:* defined as those who have the capacity for greatest change; those who have the capacity of contributing \$X or greater.
- *Builders:* defined as those who have capacity for change. This group is defined as those who have capacity of contributing \$X or greater.
- *Boosters:* considered to be fans/allies; those who capacity of contributing \$X or more, OR have been giving for over 10 years.
- *Friends:* defined as casual or occasional donors. These are people who have capacity of contributing up to \$X.
- *Other Prospects:* These are names that have not been categorized. They will eventually be categorized as Major Gifts;
- Builders, Boosters, or Friends. If they cannot be defined in those categories, they will be removed as prospects.

Other Prospects yet to be identified will be put before the board on a regular basis for identification and/or removal from the prospect list. Any affiliation or connections with businesses or board members will be noted and entered in our donor database.

Once prospects are categorized, they will be coded in our database as follows: Major Gift Prospects, Builders, Boosters or Friends. o If they cannot be defined in those categories, they will be removed as prospects.

- **Follow Through**

o Prospects get invitations to cultivation events and functions based on category/code.

o Goal is to solicit all prospects by the end of the fiscal year, at which point, they should be relabeled based on response (either removed from prospect list if it's a 'no' or bumped into another category)

- **Create consistent, timely “next steps”** – 1) thank you, 2) further cultivation, 3) solicitation, as appropriate.

o Follow up on all guests/prospects to events, parties, and contacts

o Board, staff, and volunteers will commit to ensure all attendees to activities are followed up

o At all events: donor forms are available and the intention to follow up is explicit

6. Standardize all Giving Cycle activities into a manageable program

- **Design giving cycle activities/schedule** (create your work plan)
- **Clubs for \$1,000+ donors, multi-year pledges**
- **Commission Fund** (or is the “Showmanship Fund” for commissions, sets, hiring musicians, new arrangements – something broader than just commissions) **and Other Funds**
- **Implement New Board Engagement / Commitment Form at the Beginning of FY13**
- **Engage all Board members in process at key points throughout the year**
- **Set specific \$ and # of gifts by level by giving period and by year** (see appendices for examples)
- **Confirm system for tracking prospects and gifts**

- Evaluate effectiveness of program regularly