Devising a One-Year Development Plan

Quarterly Learning Lab for Fiscally Sponsored Projects

Agenda

Welcome + Introduction

Key components of a development plan

SWOT Analysis

Assessing the current landscape

Goal setting & detailed priorities

Creating your timeline

Evaluating and adapting your plan

Q & A

Call to action

Close Out

What is a development plan?

A strategic roadmap of targets and activities that outline your fundraising and donor engagement efforts over a specific period. A living document that guides your project toward achieving its financial and sustainability goals.

Components of a Development Plan

SWOT Analysis

Assessment & planning tool

Goals & Priorities

Statement of needs, goals and priorities

Timeline

Fundraising calendar tailored to your goals, priorities, and opportunities.

Execution

Detailed overview of programming and activities to meet your goals

SWOT Analysis

Strengths

Internal

Weaknesses

Internal

Opportunities

External

Threats

External

SWOT Analysis: STRENGTHS
(internal)

Assessing strengths:

- Past successful fundraising efforts
- Relationships within your field or with funders
- Active programming
- Staff or volunteer capacity
- Growth or increased engagement

SWOT Analysis: Weaknesses
(Internal)

Assessing weaknesses :

- Over representation of certain funding streams
- Do we have limited capacity?
- Can we better utilize tools or platforms?
- Can our internal systems improve or be restructured?
- Are we clear in our messaging and communication?

SWOT Analysis: Opportunities
(External)

Assessing opportunities:

- Can we strengthen relationships with funders, donors, network?
- What connections or capacity does our network have?
- What are current events in our community? at the national, state, or local levels?
- Upcoming programming, events, or activities.
- Relevant dates or holidays

SWOT Analysis: Threats
(External)

Assessing threats:

- Funder trends, shifting priorities
- Competition within your field
- Political climate
- Community challenges

Goal Setting

- Create goals for each distinct funding stream; individual gifts, foundations, grassroots funds etc.
- Consider grant renewals, multi year gifts, and earned revenue
- Consider your individual capacity and your team/network's capacity. Your goals should be ambitious but achievable.

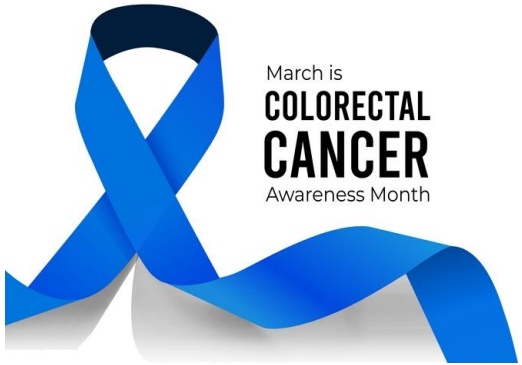
Establishing Priorities

- How: set priorities based on your SWOT analysis, team capacity, and your project's needs.
- What : provide a detailed overview of the planned activities associated with each of your fundraising goals.
- Who: clarify who is responsible for each of the activities.
    - Include follow up, communications, and evaluation in your detailed priorities.
- When: what is the timeline for executing these priorities?

Creating Your Timeline

Your development calendar should include:

- Upcoming programming or external events
- Relevant dates, holidays or high activity months.
- Current grant reporting deadlines
- Upcoming grant application cycles or opportunities for renewals
- Donor stewardship opportunities
- Schedule evaluation periods. These plans should be living documents that we return to and that grow with us.



GIVING TUESDAY

Evaluating and Adapting Your Plan

Evaluation

Evaluate often. Consider the following opportunities to evaluate:

- Organizational changes.
- Staff, board, or volunteer turnover.
- Successful activities
- Stalled progress

Adapt

Be prepared to shift, adjust or adapt your plan.

- Schedule regular development check-ins.
- Adapt your plan according to political shifts, unexpected gifts, natural disasters, changing funder priorities etc.

Q & A

Call to Action

- Guiding Questions & SWOT Analysis Template
- How much time can you commit to development planning over the next month?
- Next Peer Leadership Group:
    - Monday, December 16th 12pm EST

Closeout