MP
MOORE PHILANTHROPY

Sample Development Plan FX(X)

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SWOT Analysis

Strengths (Internal)	Weaknesses (Internal)
● Strong fundraising performance in the previous year ● Cultivation of long-term individual donors ● Network expanding ● Growth in individual giving ● Programming garnering project-specific and grassroots support	● Overly reliant on foundations ● Some long-term foundations fatigued by strategy timeline ● Need to grow individual donors, especially those giving larger annual contributions.
Opportunities (External)	**Threats (External)**
● Strengthen relationships with existing foundations and secure renewals ● Opportunity to expand donor base advisory board member ● Past election cycle provides a window of opportunity for relevant initiatives	● Increased funder churn as foundations shift strategy or end grants ● Competition with other organizations for the same donors ● Difficulty engaging local corporate donors with narrow focus areas ● Election cycle drawing attention and funding away from the nonprofit sector

Snapshot of Development Goals

Priority 1: Raise $X, including:
- $X from foundations
- $X from corporations
- $X from individual gifts
- $X from grassroots support

Priority 2: Increase multi-year gifts to raise $X.

Priority 3: Grow and nurture network
- Increase # and % of recurring donors
- Nurture network leadership
- Increase presence in the field

Priority 4: Develop and test new revenue-generating strategies.

Priority 5: Leverage sponsorships and project-specific grants to increase donors and revenue.

Detailed Priorities

Priority 1: Raise $X locally for FY(x)

A. **Foundations: $X**

Prospect for new foundation partners

- Research new foundation prospects quarterly. Refer to peer organizations' funder lists to generate new prospects to the pipeline. Research new funders we identify to vet them for viability.
- Develop and share a Top Prospects list with network and advisory board leadership for strategic introductions.
    - Create donor profiles for any prospect on the Top Prospect list.
    - Strategize on how to use Top Prospect list to create opportunities and how to leverage current funders/others in our network to serve as validators.
    - Continue to add/modify the Top Prospects list on a monthly or bi-monthly basis.
- Cultivate and steward relationships with current and new foundation partners

Qualify and cultivate new foundation prospects

- Work with current funders to introduce new funding partners. Current funders, advisory board and network leaders will serve as validators and potential "door openers."
    - Identify the best connector to secure a meeting - whether that is a staff member, advisory board member, network leader, current supporter, or cold outreach as a last resort.
- Reach out for meetings with qualified prospects within one week of qualification
    - Seek to gain meetings with qualified prospects within one month of qualification
- Tailoring storytelling to align with prospect foundation priorities.

- Determine when to make the ask for support depending on what is learned in meetings.

Steward relationships with new/existing foundation partners

- Create individual stewardship plans for each donor likely including:
  - Meet or talk twice per year: one meeting/call before renewal conversations, and at least one more meeting/call to talk about progress mid-year
  - Send monthly communication- if possible/necessary
  - Invite to events as appropriate
  - Quarterly informal check-ins via email
  - Meet all application and report deadlines

B. **Individual Giving: $X**

- Seek to raise $X from existing individual supporters
- Seek to raise $X from new individual supporters
  - Conduct prospect research for individuals using wealth search tools and networks.
  - Craft compelling messaging for individual donors. Create materials and high-impact messaging that inspires people to make an investment.
  - Work with communications team (staff or volunteer) to enhance digital and social media outreach

- Work with advisory board members to identify top prospects
- Steward existing and new individual donors
  - Aim to connect with all individual donors at least two times per year. Create individual stewardship plans for each donor, likely including:
    - Twice yearly phone calls
    - Monthly email communications
    - Event invitations as appropriate
  - Send a personalized quarterly email to major donors and prospects about a topic/article/event related to their interests

(IE: "I saw this article and thought of you. Let me know your thoughts!" or "I'm going to this event that I thought you might be interested in, too. Let me know if you plan to go.").

○ With all communication, ensure timely follow-up on all meetings (by next day for all meetings/calls) and timely acknowledgments (thank you cards sent by Friday of the week of a gift)

C. Business and Corporate Giving: $X

- Seek sponsorships for key programs
- Create a clear, concise message/one-pager that outlines the benefits of sponsorship of the event or program.
- Develop a strong sponsorship plan that includes prospect lists, ask amounts, outreach timelines, assigned roles, and materials needed
- Research additional opportunities through sponsor lists from similar events

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Priority 2: Increase Multi-Year Gifts for and in order to raise $X

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1. Identify targets based on relationship longevity and strategic alignment
2. Utilize key programs and events as opportunities to build recurring support
3. Develop methods to demonstrate impact over time
4. Create a program for sustaining donors to increase long-term engagement (example: "Sustaining Backer" or "Core Supporter" Program)
5. Use social media and other marketing efforts to inform and excite supporters about recurring giving opportunities.

Priority 3: Grow and Nurture Network

A. Existing Network
- Increase # of recurring donors from the existing network
  - Ask current donors to consider switching to recurring donations. Highlight the benefits of giving monthly, such as less frequent asks and greater overall impact.

- ○ Tailor messaging to individual one-time donors. Consider which donors may need a more compelling case to sign up for recurring gifts and which messaging might be most effective.
- ○ Publicly thank your recurring donors (if they're comfortable with it) in newsletters, on social media, or at events to encourage others to follow suit.

- Increase the donation level of existing recurring donors
  - ○ Tailor messaging to each donor's giving history. Acknowledge their current level of support and highlight the impact they've already made.
  - ○ Communicate any increased need for funding, whether it's due to growing demand for your services, the launch of new programs, or a funding gap
    - Provide small, achievable opportunities for incremental increases.
    - Regularly update donors on how their recurring gift is being used. Share success stories and tangible outcomes that their contributions are helping achieve.

B. Network Leadership

- Identify strong and committed network members and cultivate them toward deeper network leadership.
  - ○ Invite network leaders into meetings, share strategic plans, and leverage them toward fundraising and donor stewardship goals.
    - Align the criteria for network leaders and what will inspire them to take leadership roles.
    - Ask network leaders to host, speak at, or invite contacts to two fundraising events per year (Identify top prospects through event invite lists, attendees, and new donors brought in at events)
    - Leverage connections to secure introductions to new potential donors
    - Ensure strategic asks and introductions for fundraising.
- Revise commitment forms for network leaders to clearly outline fundraising and participation expectations
- Regularly review network leaders' engagement and contributions

○ Assess utilization of network leaders and adjust according to strengths, interests, networks, and personal development goals.

C. Increase Presence in the Field

- Identify opportunities to amplify presence in existing field networks (coalitions, learning communities, partnerships with aligned organizations)
- Create a calendar of coalition meetings, partner or aligned organizations programming, or learning community spaces. Plan to attend or send a representative to attend each of these dates.
  ○ track connections made and include follow-up communications on your calendars.

Priority 4: Develop and Test New Revenue-Generating Strategies

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- Brainstorm potential earned revenue opportunities
  ○ Optional donation for large events.
  ○ Offering paid programming/leadership development.
- Design and pilot revenue-generating programs aligned with organizational goals
- Assess pilot programs and recommend future strategies

Notes on Development Operations Best Practices

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1. Implement and utilize donor management software
2. Foster collaboration between external affairs and development teams for donor-facing materials
3. Ensure timely data entry and tracking of donor interactions
4. Contribute to shared project resources
5. Ensure accurate and compelling communication with donors and partners
6. Gather and assess feedback from funders to understand barriers to deeper involvement
7. Ensure all proposals and reports are submitted on time and are well-crafted