

Formulating a Development Plan

jackpeterson@managingformission.com

www.managingformission.com

The following is a set of norms for preparing a Development Plan built around the [5 Requisites for Development Success](#): Case, Prospects, Asks, Askers and Resources. The instructions can be used with a [Development Plan Template](#) available for free from *Managing for Mission*. Although they are very specific, the calculations and norms presented here are rules of thumb and must be adapted to the specific circumstances of the individual schools. Beginning development officers will find them to be a good starting point when they have no basis for setting benchmarks for the plan. Experienced development officers can rely more on their own intuition, but these calculations and norms can still be a good check to challenge and help them focus their assumptions.

Introduction: A brief introduction should provide a compelling lead-in and framing of the plan being presented to the reader

1. Case for Support

- a. **Mission:** Simply insert your school's [Mission Statement](#), by incorporating it into the narrative or highlighting it in a separate box. If it is longer than a paragraph, the school may want to consider producing a sort-form version for documents like this where the longer form would be too detailed.
- b. **Strategic Plan:**
 - i. Hopefully the school already has an overall Strategic Plan on which the Development Plan can base its goals, but in many cases this will not be true. In such cases the school's development staff or committee should encourage the chief administrator and/or board to engage in a strategic planning process. The development team should encourage a process that has broad involvement of potential donors and other stakeholders.

With or without a Strategic Plan the development team should articulate as best it can the major strategic priorities facing the school.

- ii. **Goals:** What are the specific goals which the school needs to meet in order to improve or at least continue achieving its mission? These should be strategic level goals, ones which will significantly enhance the school's ability to accomplish its mission.
- iii. **Vision:** What will accomplishing that mission will look like over the next 5-10 years? Here it is best to use inspirational and sensory language. This language may already be in the Strategic Plan and can be adapted to this section. Otherwise the development team should do its best to describe, in a way that people can picture in their imaginations, the hoped for reality of the school.

- iv. What has to be accomplished by Development to achieve these goals? The most important implications of the Strategic Plan for this Plan are the funding priorities that will require philanthropic support to be realized. List those here.
- v. How much needs to be raised? Here we have a table which extends out five years and breaks down dollars needed to be raised into Operating, Capital and Endowment. It extends out five years but additional rows can be added if the school wants to project its needs out further. This table is able to perform calculations of totals by following the instructions. Just remember to update the calculation fields when numbers are added or changed. The formulas may need to be updated if rows are added.

2. Prospects

- a. Gift Table: Instructions should be included in the Development Plan about the prospect identification and evaluation process (see [Development Plan Template](#)) because they will be helpful to readers of the Plan as well as those preparing it. The main purpose of the Gift Table is to begin thinking about the numbers and types of prospects that will be needed. The Gift Table begins as a theoretical projection, but should be revised to reflect actual data as prospect research and fundraising proceed.
- b. Identify:
 - i. Number of prospective donors currently in your database
 - ii. Prospective donors in the database for which you have current contact information

4. Asks

- a. Asking strategies
 - i. Top 10-20 prospects by capacity and likelihood: Determine best individual cultivation/ask strategy, to include the following:
 - 1. Face-to-face meeting
 - 2. Events (See 4b below)
 - 3. Personalized proposal for a specific amount for a specific purpose
 - 4. Named gift opportunity
 - 5. Recruit and manage best asker(s) available
 - ii. Next top 3-5% of prospects: Determine best individual cultivation/ask strategy, to include the following:
 - 1. Face-to-face meeting
 - 2. Events (See 4b below)
 - 3. Specific ask amount for specific project(s)
 - 4. Use stock presentation materials, customized for ask
 - 5. Assign to and manage available askers
 - iii. Next 10% of prospects: Determine best cultivation/ask strategy for this group, to include the following:
 - 1. Personal contact
 - a. Meeting
 - b. Phone
 - c. Mailing
 - 2. Events (See 4b below)
 - 3. Specific ask Amount
 - 4. Use stock presentation materials, personalized

5. Assign to managers who may assign to volunteers
- iv. Next 50%
 1. Cultivate via:
 - a. Mailing(s)
 - b. Events
 2. Ask via
 - a. Mailing
 - b. Phonathon
 3. Ask amount in gift range
 4. Use stock presentation materials, perhaps personalized
 5. Tracked by Moves Manager
- v. The rest
 1. Send 1-2 cultivation/request mailings per year
 2. Invite to events via advertising
- b. Events
 - i. Decide which fit into the strategies for:
 1. Top 10-20 prospects by capacity and likelihood
 2. Next 3-5%
 3. Next 10%
 4. Next 50%
 5. The rest
 - ii. Design events to support asks in 4a, above
 1. Identify who is attending
 - a. RSVP's
 - b. Pre-registration
 - c. Sign-ins
 - d. Door prizes
 2. Cultivate appropriately to capacity level using the event
 - a. Education
 - b. Acknowledgement
 - c. Engagement
 - d. Relationship-building
 - iii. Evaluate and add or delete events
 1. Evaluate events in terms of which levels of prospects they cultivate. For each event, add up the number of prospects expected from each category, multiplied by the following numbers.
 - a. No. in top 10 to 20 expected to attend x100
 - b. No. in Next 3-5% expected to attend x10
 - c. No. Next 10% expected to attend x5
 - d. No. in Next 50% expected to attend x1
 2. Add up the totals and rank each event according to this calculation
 3. Add any prospective or planned events to the appropriate place on the list based on the same calculation
 4. Looking at staff available, determine how many events can be sustained while still having time for appropriate asks to the top 4 groups.
 5. Draw a line at this point

6. All events below the line should be discontinued or outsourced to volunteer groups or, if it matches their mission, to other departments in the school
- iv. Adjust timing of events to support appropriate ask
 1. Events used to cultivate various levels of prospects should be timed prior to when asks for those groups are to be made
 2. In some cases, it will be more appropriate to adjust the timing of asks rather than the event, but that should not be the first option.
 3. Normally, events should be timed so that those aimed at higher capacity prospects precede those for lower so that a higher capacity donor doesn't get asked to make a below-capacity gift.

5. Askers

- a. Determine if the school will use staff or volunteers or a mixture of both
- b. Determine the numbers and types of askers needed to make the asks
 - i. Top 10-20
 1. Will require .5 FTE of head of school's time for one year, or
 2. .3 FTE of head's time plus .25 FTE of Development staff support time, or
 3. 3-6 volunteers with .3 FTE Development staff support
 - ii. Next 3-5% -- For every 100 prospects will require:
 1. 1 Development FTE (#prospects times .01), or
 2. .25 FTE (#prospects X .0025) and 33 Volunteers (#prospects X .33)
 - iii. Next 10% -- For every 300 prospects will require:
 1. 1 Development FTE (#prospects X .03), or
 2. .33 FTE staff (#prospects X .0033) and 30 volunteers (#prospects X .1)
 - iv. Next 50% -- For every 1,000 prospects, will require:
 1. 1 Development FTE (#prospects X .001), or
 2. .2 FTE staff (#prospects X .0002) and 20 volunteers (#prospects X .02)
 - v. The rest -- For every 1,000 prospects, will require:
 1. .2 Development FTE (#prospects X .0002)
- c. Training: All Askers will need training
 - i. Staff:
 1. Provide multi-day workshop(s)
 - a. Making the appointment
 - b. Preparing for the call
 - c. Asking questions
 - d. The Case: Features and benefits
 - e. Buying signs
 - f. Trial close
 - g. Handling objections
 - h. Making the ask
 - i. Closing and Following-up
 2. Semi-annual refreshers
 3. Role-playing before important calls
 4. Training on overall development theory
 5. Training on volunteer management
 6. Call reporting system for accountability (see 3e, above)
 - ii. Volunteers

1. One or two sessions of solicitation training within a month of beginning to ask
 2. Role playing before important calls
 3. Follow-ups and encouragement
 4. Helping with objections
 5. Periodic reporting to volunteer solicitation committee
 6. Getting results back and onto database
- d. Order for adding staff. The following is the most likely order adding staff
- i. Here is what a complete staff for a school development office might look like, in order of the level of expertise required:
 1. Development Director
 2. Major Gifts Officer(s)
 3. Planned Giving Officer
 4. Annual Giving Director
 5. Alumni Director
 6. Special Events Director
 7. Moves Manager
 8. Communications Specialist
 9. Development Office Manager
 10. Data manager
 - ii. Here is the order in which those positions should be added as the development office grows:
 1. Development Director
 2. Development Office Manager
 3. Special Events Director
 4. Annual Giving Director
 5. Data Manager
 6. Alumni Director
 7. Major Gifts Officer
 8. Moves Manager
 9. Planned Giving Officer
 10. Communications specialist
 - iii. In the foregoing, people will share the roles of positions not yet added, and even then, strict specialization will not begin until the staff becomes larger than 10.
6. Resources (Budget)
- a. The biggest item in the budget is for staffing, and Section 5 will assist in calculating the investment in staffing
 - i. 5di, above, lists the staff members in order of their likely compensation levels. Each position will have to be compensated to attract and retain capable people in a competitive market with high mobility. Sometimes faith-based schools can attract top talent for below market compensation, but this is difficult to count on.
 - ii. Benefits
 - iii. Office, supplies, technology,
 - iv. Business and travel expenses
 - v. Training
 - b. Technology
 - c. General Supplies

- d. Campaign Counsel (often the second biggest cost)
 - i. Adds
 - 1. Expertise on latest campaign methods
 - 2. Credibility
 - 3. Pressure to perform because the meter is running
 - 4. Extra (but expensive) hands for the work load
 - ii. Understand what you expect of them
 - iii. Fee usually does not include reimbursables like travel, lodging and meals
- e. Publications and marketing materials
 - i. Design
 - ii. Brochures
 - iii. Presentation materials
 - iv. Videos
 - v. Photography
 - vi. Banners
 - vii. Advertising
 - viii. Tchotchkes
- f. Events
 - i. Kick-offs
 - ii. Cultivation
 - iii. Groundbreakings
 - iv. Victory celebrations
- g. Donor Recognition
 - i. Thank you events & publications (if not in above)
 - ii. Room and building signs
 - iii. Donor wall

ii. A companion *Development Plan Template* in Word Format is available at no cost from jackpeterson@managingformission.com.