

## Development Plan Sample

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### Draft 2.1

#### Faith Based School Development Plan

Prepared by the Faith-based School Development Committee  
August 21, 2013



**Faith  
Based  
School**

### Introduction

The Faith-based School began when members of the Metropolis community recognized that struggling families in the city were not being adequately served by current options for faith-based education for their children. Asking them about their needs and desires and researching successful models in other cities led a feasibility team to form a governing board for a new school to open in September of next year and to acquire a facility on the site in the city's central core. Though several benefactors have provided generous donations to cover many of the start-up costs, the school must implement a systematic Development Plan which addresses both short-range and long-range needs if it is to meet the hopes of its founders and the community.

#### 1. **Case for support of Faith-based School**

The first critical factor in the success of the FBS Development Plan is how compelling a case it can make for support of the school. A case is a value proposition in which the needs of the school are presented in such a way that potential donors can see not only how the funds sought will be used, but how they will benefit the school, its students, society and the donor him or herself.

The case for support is rooted in the school's mission, and the strategic plan the school has formulated to accomplish that mission. It should be expressed in visionary and outcome-based language. It will take several forms, adapted to the solicitations being made and the types of marketing materials prepared to make those asks.

#### **FBS Mission Statement:**

The school's mission statement reads as follows:

Faith-based School is a Catholic school dedicated to graduating students who are committed to their faith, academically prepared for the 21<sup>st</sup> Century and ready to live lives of service to this community and the world.

#### **Strategic Plan**

Although the general needs of the school are well-understood, the Development Plan will be strengthened by the formulation of a Board-approved, comprehensive, 5-10 year Strategic Plan with broad and meaningful participation by the school’s stakeholders. The Development Committee urges the Board to complete a process to produce such a plan as soon as practical.

While greater clarity in the strategic goals for the school is needed, several imperatives in the next 3 to 5 years are nevertheless clear if the school is to meet the needs of families in Metropolis. As the formal Strategic Plan comes on stream, these will be adjusted, but they include:

- Securing sponsorships to cover the annual costs of educating each student over 5 years
- Expanding from 30 students currently to full capacity of 400 students
- Expanding from the current 9-12 grades by adding grades 7 and 8
- Funding a temporary facility using modular structures for the school’s first 3-5 years.
- Securing a permanent location and facility in proximity to the community the school will serve that can house the students and staff when at full capacity.
- Funding technology to support a 1:1 internet access program for all students
- Funding a professional development and spiritual formation program for the faculty
- Establish endowment sufficient to stabilize the program when other revenue sources vary.

**Outcomes and vision**

Spreading the Good News and having Gospel values permeate our culture happens one person at a time. If Faith-based School achieves the goals of this Development Plan, it will be able to provide the rich educational environment needed to prepare Christian leaders for the 21<sup>st</sup> Century. Families in Metropolis will have a school that gives their child the personal attention and individualized instruction they need; fosters their child’s academic, physical and spiritual growth; and supports becoming servant leaders as they enter adult life. Through such students, a new spirit will grow and thrive in Metropolis and the many communities that FBS graduates will touch.

**Dollar goals for development**

For FBS to accomplish its mission, the development effort will have to accomplish the following results over a 5 year period:

- Sponsorships - \$4.2 million (20 students X \$15,000 X # classes per year)
  - Annual Giving - \$2.1 million (for operating costs beyond Sponsorships)
  - Capital Giving - \$6 million (for facility acquisition and construction)
  - Endowment - \$2 million (Invested for income)
- 5 year TOTAL - \$14.3 million

**Funding needed by year:**

In 2013-14	<ul style="list-style-type: none"> <li>● Sponsorships - \$300,000</li> <li>● Annual Giving - 200,000               <ul style="list-style-type: none"> <li>● Capital - 250,000</li> </ul> </li> <li>● Endowment – <u>50,000</u></li> <li style="text-align: right;">TOTAL - \$800,000</li> </ul>
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In 2014-15	<ul style="list-style-type: none"> <li>● Sponsorships – \$600,000</li> <li>● Annual Giving - 400,000 <ul style="list-style-type: none"> <li>● Capital – 250,000</li> </ul> </li> <li>● Endowment – <u>100,000</u></li> <li>● TOTAL - \$1,350,000</li> </ul>
In 2015-16	<ul style="list-style-type: none"> <li>● Sponsorships – \$900,000</li> <li>● Annual Giving – 500,000 <ul style="list-style-type: none"> <li>● Capital – 500,000</li> </ul> </li> <li>● Endowment – <u>300,000</u></li> <li>TOTAL - \$2,200,000</li> </ul>
In 2016-17	<ul style="list-style-type: none"> <li>● Sponsorships - \$1,200,000</li> <li>● Annual Giving – 500,000 <ul style="list-style-type: none"> <li>● Capital – 2,000,000</li> </ul> </li> <li>● Endowment – <u>550,000</u></li> <li>● TOTAL \$4,250,000</li> </ul>
In 2017-18	<ul style="list-style-type: none"> <li>● Sponsorships - \$1,200,000</li> <li>● Annual Giving – 500,000 <ul style="list-style-type: none"> <li>● Capital – 3,000,000</li> </ul> </li> <li>● Endowment – <u>1,000,000</u></li> <li>TOTAL \$5,700,000</li> </ul>

## 2. Prospects

The second critical factor in accomplishing the goals of this Development Plan is the availability of prospects who can become donors to the school. This plan will require a few donors making large gifts and many other donors giving at various levels. Not all those who have capacity to make gifts, even if we think they should value what FBS is doing, will make gifts at the level we hope. They may have other philanthropic priorities, financial constraints or simply lack a habit of philanthropy. Actual donors will be drawn from a larger pool of prospective donors identified by the school and drawn into some level of relationship with it. The Gift Table below show how many donors, giving at what level, will be needed to raise a certain amount of money. The current assumptions reflected in the table below show that just to raise \$12.77 million over 5 years (\$1.5 million less than our projected need), over 2300 donors would be needed, and that would require a pool of over 11,000 prospects. This table at this point is highly theoretical. It may be we can attract more high end-gifts, including one more at the \$1 million level or higher. It may also be that more than 1 in five prospects commit to making gifts. However, changing the assumptions below should not be done arbitrarily, but based on sound prospect research and evaluation, as well as actual results.

Gift Table (Based on cumulative giving over a 5 year period)

Gift Size	# Needed	Prospects Needed	Level Total	Cum Total
2,000,000	1	5	2,000,000	2,000,000

Gift Size	# Needed	Prospects Needed	Level Total	Cum Total
1,000,000	1	5	1,000,000	1,000,000
500,000	4	20	2,000,000	3,000,000
250,000	6	30	1,500,000	4,500,000
100,000	12	60	1,200,000	5,700,000
50,000	24	120	1,200,000	6,900,000
25,000	48	240	1,200,000	8,100,000
10,000	96	480	960,000	9,060,000
5,000	192	960	960,000	10,020,000
1,000	350	1,750	350,000	10,370,000
500	600	3,000	300,000	10,670,000
100	1,000	5,000	100,000	10,770,000
	2,334	11,670	12,770,000	

Currently, the school has about 2,000 names on its newsletter list and about 900 names have more complete contact information. So of utmost urgency is identifying additional potential donors who can be added to the prospect list, conducting an initial screening for capacity, and focusing research, cultivation and solicitation activities on those who show greatest potential.

Methods to be employed for adding to the prospect pool include:

- Board & Development Committee Members and school staff bringing the names of people they know
- Holding events which might draw not only those identified, but others as well
- Asking partner schools to include fundraising for FBS in their events (eg raise the paddle at an auction)
- Involving other volunteers in the school start-up as prospects or for identifying prospects
- Encouraging those who receive current communications to forward them to others or subscribe them
- Purchasing direct mail lists and sending donor acquisition packets
- Advertising on the internet to attract additional supporters
- Putting sign-ups for subscription to newsletter etc. on FBS Website
- Advertising in church bulletins and other publications that likely prospects might read
- Affiliating with an on-line non-profit project incubator site like Kick-starter

### 3. Asks

The third critical factor in the success of the Development Plan is our ability to ask for gifts. As much as possible each ask should observe the “four rights:” the right person asking for the right amount at the right time for the right project. Optimal incorporation of the four rights in an ask is time- and resource-consuming, so the extent to which we do so will depend on the gift potential of any given prospect.

Beginning with the initial capacity screening mentioned above, prospective donors will be segmented based on whether their perceived gift capacity puts them in the top 5-10 individuals in the prospect pool, the next 3-5%, the next 10%, the next 50% or the rest. Development time and resources for prospect research, cultivation, solicitation and follow-up will be allocated based on this capacity prioritization. The chart below shows the basic strategies for each segment. These will be adjusted based on experience and time and resources available, but in any event the strategy will be to allocate available resources based on perceived capacity.

	Research	Cultivation	Ask method	Follow-up
Top 5-10	Maintain FBS Gift history; Maintain history of all contacts with donor; Do Google search; Research publicly available information about wealth and interests; Hire a contract researcher; Interview people who know them; Ask them about themselves in get acquainted meeting; Create donor profile.	Meet with President and other staff; Possible election to Board or part of “kitchen cabinet,” Serve on Strategic Planning Steering Comm; President invites to events and sits with; Feature at events; Feature in publication; Interview in Feasibility Study; Ask to host events, etc.	Personalized proposal geared to specific interest; Named Gift Opportunity if appropriate; Involve President, possibly Principal, Board Chair, influential peer, local Church leaders.	President or Board chair to follow up until decision is made. Personal thank you from President and Board Chair & significant others, for pledge made; implement Named Gift Opportunity; Feature (eg interview article) in publications; Special recognition at a hosted event at school. School Award (eg The “Faith Medal”)
Next 3-5%	FBS Gift history; Maintain history of all contacts with donor; do Google Search; Interview people who know them. Ask them about themselves in get acquainted meeting	Invite to special events. Invite to serve on Board or Committee. Recognize in publications. Serve on a Strategic Planning committee. Interview in feasibility study.	Face to Face ask with President, Chair or key Board member. Personalized request geared toward interests; Named Gift Opportunity if approp.	Follow up by solicitor, with encouragement of staff, till decision made; If pledge made, personal thanks from President; implement Named Gift Opportunity; feature in publication; recognize at event at school;
Next 10%	Maintain biographical info and contact history on database; Include in Peer Evaluation sessions;	Invite to events, send publications; include in thankathon; Face to face information mtg with school volunteer.	Face to Face ask by volunteer or school staff, for a specific amount.	Volunteer with support of staff or staff themselves re-contact till decision is made; If pledge is made personalized letter signed by President with PS; Include in thankathon; name in Annual Report
Next 50%	Maintain contact information and giving	Invite to events and send publications	Personalized ask by phone, letter or	Include in scheduled follow-up mailings and

	history on database; record any signif biographical info that might suggest a higher evaluation.		combination.	phonathons.
The rest	Maintain contact info by sending publications at least 2 times per year.	Send publications; invite to appropriate events.	Solicitation letter once, maybe twice, per year	Thank yous for pledges made and mention in the Annual Report as appropriate.

### Development Events.

Often, especially during an organization’s early phase, events are seen as synonymous with development. While they are critical to the prospect identification and cultivation process, events will be added, eliminated and designed based on their ability to cultivate relationships with prospective donors that lead to philanthropic support, with greater attention to what will motivate donors at the top of the Gift Table.

Events used currently by FBS are:

- Annual Auction (top 50%)
- Student chocolate sale (all)
- Informational lunches (top 10%)
- President’s thank you dinner (top 10%)
- Sports breakfast (Top 50%)

Future events being planned:

- Scholarship (or sponsorship) Luncheon (Top 10%)
- Monthly or bi-monthly brownbag lunches for current and prospective class sponsors (Top 10%)

### Cultivation, solicitation and marketing materials

The school has some materials to assist in marketing and the cultivation/solicitation process, but will need to develop others.

Existing materials:

- Powerpoint
- Brochures
- Story Boards
- Pledge forms

Other materials needed:

- Case statement
- Strategic Plan
- Video
- Presentation Folders and inserts
- Facilities plans and drawings

### Donor recognition

Donor recognition needs to be designed to encourage giving at the levels sought in the Gift Table. The following named gift levels will be used for recognition in the annual report and other venues:

For Gifts to Capital and Endowment (over a 5 year period)

Amount	Giving Level	Recognition forms	Named Gift Opportunities
\$1,000,000 and more	Angels	Naming opportunity. Listing in Annual report for 5 years, Listing on permanent donor recognition wall, article in newsletter, special recognition event	EG: Entire Campus
\$500,000 to 1 million	Founders	Naming opportunity. Listing in Annual report for 5 years, Listing on permanent donor recognition wall, article in newsletter, special recognition at an event	EG: School Building
\$250,000 to 500,000	Builders	Naming opportunity. Listing in Annual report for 5 years, Listing on permanent donor recognition wall, article in newsletter, recognition at an event	EG: Library
100,000 to 250,000	Benefactors	Naming opportunity. Listing in Annual report for 5 years, Listing on permanent donor recognition wall, article in newsletter	EG: Chem Lab, Studio
50,000 to 100,000	Philanthropists	Naming opportunity. Listing in Annual report for 5 years, Listing on permanent donor recognition wall	EG: Hallway
25,000-50,000	Superheroes	Naming opportunity. Listing in Annual report for 5 years, Listing on permanent donor recognition wall	EG: Classroom
10,000-25,000	Heroes	Listing in Annual report for 5 years, Listing on permanent donor recognition wall	
5,000-10,000	Knights	Listing in Annual report for 5 years, Listing on permanent donor recognition wall	
1,000-5,000	Leaders	Listing in Annual report, Listing on permanent donor recognition wall	

For Gifts to Operating (Annual Giving)

Amount	Giving Level	Recognition forms
\$25,000 and more	Diamond	Listing in Annual Report, Special lunch or dinner with President
\$10,000 to	Ruby	Listing in Annual Report, special retreat offered

25,000		by president
\$5,000 to 10,000	Platinum	Listing in Annual report. Invitation to President's Thank you event
\$1,000 to 5,000	Gold	Listing in Annual report.
\$500 to 1,000	Silver	Listing in Annual report.
\$100 to \$500	Bronze	Listing in Annual report.
\$1 to 100	Donors	

For Planned Gifts through the donor's estate

Living	Member, FBS Legacy Society	Listing in Annual Report
Deceased	Permanent Member, FBS Legacy Society	Listing in Annual Report and on permanent plaque

### Progress Tracking

It will be important to the success of the plan to track progress with prospects, whether they have been assigned to school staff or to volunteers. This will require the use of the school's development software to record "moves management" information, prospect biographical information and summaries of call reports as well as pledge tracking. A sub-plan for doing this will need to be developed.

#### 4. Askers

The fourth critical factor to the success of the Development Plan is having people who will do the asking. Gift solicitation can be a time-consuming process, for both staff and volunteers, especially in those cases that require a high quality level.

#### Staffing.

This Development Plan will depend on some level of support from the school's paid staff, yet the school's business model, especially in the early years, assumes very lean staffing. The Development Plan assumes the following availability of current staff for managing donor research, cultivation, solicitation and follow up, and in the case of the Director of Development, managing the asking process:

- President (25%)
- Principal (10%)
- Director of Development (30%)

Further, the Plan envisions that staff will be added as the development effort grows:

- Year 1: No additions
- Years 2-3: A part time office support person
- Years 3-5: A full time office manager, a Major Gifts/Annual Giving Director and a part time events coordinator

**Staff training.** Staff will need to be trained to be productive askers

- A consultant or experienced development professional will conduct a 4 hour training with staff.
- The staff will have monthly or bi-monthly booster meetings on solicitation training and/or role playing, during staff meetings.

**Staff accountability.** Staff will complete call reports weekly and submit to the Development Director, who will provide periodic reports to the president and the Development Committee. Call reports will indicate who has been researched, cultivated, asked and closed, by giving level.

## **Volunteers**

The school is currently relying heavily on volunteers and will continue to do so, both within and outside of the development effort. Volunteers will:

- Identify prospects,
- Provide information about prospects,
- Assist with cultivation by conducting information meetings, inviting to events
- Participate in major gift calls as appropriate
- Host events
- Make face to face calls
- Participate in phonathons and thankathons
- Assist with office operations and possibly database management
- Sign solicitation letters and thank yous as appropriate

**Volunteer recruitment.** Volunteer askers for the Development Plan will be recruited using the following principles:

- Volunteers will be recruited by the Development Committee and Staff
- Solicitation committees to augment the Development Committee will be set up for the Annual Giving Campaign as well as Capital and Endowment campaign(s)
- The number of volunteers recruited will be based on the number of prospects needing personal contact, assuming that no volunteer will be responsible for more than 5 prospects at any given time

**Volunteer training.** Like staff, volunteers will be trained so that they can be more productive askers, by a consultant or experienced development professional in a two hour session set aside during a scheduled meeting. In addition, each volunteer solicitation committee will set aside time for method refreshers, role-playing and/or handling prospect objections.

**Assigning prospects to volunteers.** Prospects will be assigned by one of the following methods (depending on the capacity level of the prospect):

- The volunteer will identify and offer to solicit a prospect
- The Director of Development or development staff will ask a volunteer to take responsibility for soliciting a prospect based on the staff's evaluation
- A pool of prospects will be made available to volunteers and they will be asked to choose the 5 prospects they feel they have the highest potential with
- In any event, volunteers must clear their lists with the Development Office to make sure there is no duplication.

**Volunteer accountability.** As with staff, there must be a system of accountability for volunteers to assure that their work is consistent with the plan's goals.

- Volunteers will be asked to complete call reports to capture important information they receive as a result of contact with their prospects.

- Volunteers will give progress reports at meetings of their solicitation committees, and if they cannot attend, they will give their report to the committee chair or Director of Development to report for them.
- Volunteers who fail to follow through will be contacted by the solicitation committee chair to determine what assistance they need and whether they are able to continue in their role.

### 5. Resources/Budget:

The fifth and final critical factor for the success of the Development Plan is having enough resources to execute it. The following table shows the current budget and targets for 5 years out. The projections will be refined as the school's Strategic Plan develops and fundraising goals and time-lines become clearer.

	2013-14 Budget	2017-18 Budget	5 year total
a. Staff (includes allocation of President's and others' time)			
i. Salaries and Benefits	95,000	250,000	900,000
ii. Office and supplies	1,000	10,000	40,000
iii. Business and travel expenses	300	5,000	20,000
iv. Training	0	5,000	15,000
b. Technology and software	3,000	5,000	23,000
c. General Supplies	2,000	5,000	22,000
d. Fundraising Counsel	0	50,000	150,000
e. Publications and marketing materials	2,000	20,000	80,000
f. Events	5,000	50,000	190,000
g. Donor Recognition	2,000	10,000	20,000
<b>TOTAL</b>	<b>110,300</b>	<b>410,000</b>	<b>1,460,000</b>

### Key action steps for implementing the Development Plan

Step	Person or Group Responsible	Due Date
Kick off Annl Gvg Campaign	Devel Dir, staff	Sept, 2013
Personal calls on top 5% of prospects	Pres, Devel Dir, staff, Dev Comm.	Nov, 2013

Annl Gvg Phonathon	Devel Dir, staff	Nov, 2013
Build up pool & files for 3,000 prospects	Dir of Devel, Devel Comm	Feb, 2014
Initial Screening of prospect pool	Dir of Devel, staff	March, 2014
President meets with top 10 donors	President, Dir of Devel	May, 2014
President Thank You Dinner	President, Dev Staff, Dev. Comm,	May, 2014

## Conclusion

The foregoing Development Plan for Faith-based School sets out the main elements that will have to be in place and the main steps to be executed to build the resource based needed to accomplish the FBS mission. This plan is intended to be a blueprint for achieving our goals, one that will be revised as new opportunities and challenges arise and as we learn from our mistakes and successes. It will not be easy to accomplish, but if we pursue our goals with courage and generosity the dreams that we and many others have for FBS can be realized. We invite you to direct your feedback and questions about the

Development Plan to:

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And we invite you to find out how you can join us in this noble educational endeavor.