**[ORGANIZATION] Development Plan for [YEAR]**

**[Date Created]**

**Prepared by [NAME]**

**Mission**

Insert your mission here.

**Vision**

Insert vision here. Some organizations replace this with a values statement.

**Unique value proposition**

What makes you different from every other organization? Get to the root of it and insert that here.

**Strategic priorities for the organization**

List in bulleted or numbered format major priorities for the organization even if they are not things that you can specifically raise money for. Typically these come directly from the strategic plan.

**Development goals for this period**

List in bulleted or numbered format your major goals. I recommend no more than three big buckets. Possible goals include:

* Overall financial goal, with a number of donors goal too (this goal bucket must be included)
  + Financial goals for specific projects
* Relationship building goals
  + Donor engagement or stewardship goals
  + Community engagement or cultivation goals
  + May include marketing and communications goals
* Operational or infrastructure goals
  + Policy and procedure review or revision
  + Professional development
  + New or revised staffing
* Stretch goal—a goal that scares you a little bit
  + Financial?
  + Operational?

**Environmental conditions**

What’s going on in the community, your organization, the world that might impact your organization? These are usually things you can’t really control.

**Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis**

|  |  |
| --- | --- |
| Strengths | Weaknesses |
| These are internal to the organization | These are internal to the organization  These also may be problems or conditions—problems you can solve; conditions you must manage |
| Opportunities | Threats |
| External to the organization | External to the organization  May be problems or conditions |

**Key constituents**

Who are your major audiences? Samples are:

*Board*

*Area businesses*

*Individual supporters*

*Volunteers*

*Clients*

*Staff*

*Government*

*Providers*

*Service clubs*

**Ideal donor avatar(s)**

Who is your typical or ideal donor that you can retain? Describe demographics, psychographics, gift capacity, average gift, etc.

**Financial results and projections**

You may want to replace this table with a spreadsheet. You can also track far more than these, but these stats are the basics.

|  |  |  |
| --- | --- | --- |
|  | Last period | Upcoming period |
| Dollars raised (total) |  |  |
| Dollars raised by tactic (add lines as needed) |  |  |
| Number of donors |  |  |
| New donors acquired during the period |  |  |
| Repeat donors during the period |  |  |
| Donors not renewed during the period |  |  |
| Acquisition rate |  |  |
| Retention rate |  |  |
| Lapsed rate |  |  |

**Tactics**

What activities will get you to your goal?

Possibilities are

* Annual giving
* Events
* Direct mail
* Major gifts and planned giving
* Corporate Giving
* Non-traditional revenue
* Foundation/Grants
* In-kind contributions

**Timeline**

You may need to change to landscape orientation or attach or link to a different document to fit everything on the timeline.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Month | Tactic | Goal (financial or otherwise) | Person responsible | Notes |
| January (or first month of your year) |  |  |  |  |
| February |  |  |  |  |
| March |  |  |  |  |
| April |  |  |  |  |
| May |  |  |  |  |
| June |  |  |  |  |
| July |  |  |  |  |
| August |  |  |  |  |
| September |  |  |  |  |
| October |  |  |  |  |
| November |  |  |  |  |
| December |  |  |  |  |

**Additional Resources Needed**

Insert additional staff, budget, etc. that may be needed to implement your plan.