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## Sample Development Plan for small to mid-size nonprofit organizations

*\*It is helpful to start with a summary of where you are as an organization. Are you experiencing growth? What are your challenges? How much do you need to raise? Then, list your development goals below. For example:*

This year, we have expanded our services to assist \_\_\_ more people in our community. Our budget has grown from \$\_\_\_\_\_ to \$\_\_\_\_\_, and we have a clear need to expand our development program to ensure that our operations can sustain into the long term. With this in mind, our development goals for this year are:

- To better facilitate board member engagement in fundraising
- To bolster and expand upon existing initiatives
- To keep a minimum of 6 months operating budget in the operating account at all times
- To continue increasing our visibility within the community on our way to becoming a top tier local nonprofit
- To increase our number of major donors
- To build successful sustainability strategies, which include expanding Planned Giving initiatives and growing our Endowment

We will accomplish these goals through:

*\*Here, you'll list what your strategy is for reaching those goals. Give as much detail as possible and identify responsibilities. Note anything that you want to do now vs. what you think you should work towards in the future. This is an expansive list, but you can start much smaller. Give thought to your organizational capacity before creating your plan, and make sure that you are challenging, but not over-extending, yourselves.*

### Fundamental Fundraising Activities

- At least one appeal letter per year – can also do a mid-year and a year-end appeal (make it personal)
- All board members must make an annual donation to the organization that is significant within the context of their personal financial situation
- Consider leveraging a board member or major donor annual pledge as a match challenge to encourage people to donate (this can be for one of your appeals, a separate campaign, or funding a specific need)
- Add a prominent donate now button on website and on e-newsletters

### Donor Retention, Upgrading and Re-engagement of Lapsed Donors

- Board members write handwritten thank you notes or make personal thank you calls to donors
- Identify current donors who are potential high-dollar donors and seek out board or staff members to steward those relationships and steer them toward a larger ask

- Provide resources and training for those assigned to this task
- Set goals for conversions to larger donation amounts
- Board members identify people they know in your database and work with development staff to find ways to deepen their relationship with the organization
- Segmentation of donor and volunteer database to send out more targeted communications
- Set up meetings with local faith communities to strengthen relationships

### **Recurring Revenue Initiatives**

- Grow recurring donor base
  - Create a recurring donor “club” for people to join
  - Target lower dollar donors, younger families, and lapsed donors for a \$10/month commitment
  - Present other recurring giving amounts and frequencies to give people more options
  - Offer incentives, such as a donor match challenge – for example, a donor will match the first month’s donation for the next \_\_\_\_\_ recurring donors who sign up (This is a great opportunity for a board member to leverage their annual donation)

### **New Donor Relationships**

- Encourage board and staff to think about their personal circles and identify people/organizations that they can introduce to the organization. They can steward the relationship themselves, or facilitate an introduction to someone else in the organization
- Develop a Case for Support, and decide how to best utilize it (present to potential major donors, make available on website, etc.)
- Look for opportunities to give presentations to local community groups to raise awareness for your mission and cultivate new relationships with potential donors
- Offer facility tours for potential donors (at least one key staff member should be present, as well as the board member who made the invitation)

### **Grant Program**

- Maintain a robust grant calendar
- Work to identify new grant opportunities
- Streamline grant reporting process; work with program staff to identify and track key metrics

### **Local Government Involvement**

- Reach out to local municipalities to apply for American Recovery Plan funding
- Invite County and Town Council members and Commissioners for a tour and update on our program
- Present a case for Town and County adding our organization to their annual budget
- Reach out to Town and County Economic Development

### **Fundraising/Engagement Events**

- Create a calendar of fundraising events (Remember to be very thoughtful about the time and energy you are spending on event planning. Perhaps plan one major event per year to start, then focus on smaller events throughout the year. Try to think of a unique approach to your event to help your organization stand out.)
- Series of “micro-events”
  - Board member-hosted home events or virtual cocktail hours

- Identify non-board supporters who would be willing to host events in their homes or virtual events
- Reach out to community groups to host events for your benefit
- Follow up after events to keep attendees, participants, and sponsors engaged with our mission (this is the most important part of events!)
  - Who is going to be in charge of the follow-up?

### **Board Member Recruitment**

- Areas of focus:
  - As a board, think about the types of people, skills, areas of the community, etc. that would help you build a well-rounded board and list these areas here
- The whole board should be looking for people who fit these descriptions, and introducing them to the nominating committee, who will follow up
- Prospective board members should be well-informed about board member roles and responsibilities, as well as the expectation that they will have to participate in fundraising for the organization

### **Business Partnership Plan**

- Create simple partnership levels with benefits that are easy to fulfill (think listings on your website and e-newsletters, event sponsorships, etc.)
- Identify national businesses operating locally that are lesser known with the goal of approaching them for larger financial donations
- Identify smaller local businesses for annual monetary commitment OR donation of goods and services that will help save or make money
- Key staff or board members attend networking events to make connections that can be converted into meetings/facility tours
- Engage board members in approaching local businesses to at least set up a meeting/facility tour with Development Director or Executive Director

### **Legacy (Planned) Giving**

- Long-term goal – create a Legacy “club” with benefits for members who have made a legacy commitment
- To start: Annual testimonial mailer about legacy giving, written by a board member or donor who has included you in their will
- Add legacy giving information to website (this does not have to be complicated to start – you can begin by encouraging people to add you to their will and/or make you a beneficiary of their IRA or annuity)

### **Endowment**

- Development Director work with board to establish the desired size of the Endowment
- Create a strategy to grow Endowment without diverting funding from annual operating needs
  - This will include planned giving, but there are other strategies you will need to employ

### **Marketing Initiatives**

- Monthly or quarterly e-newsletters (also consider a quarterly mailed newsletters for donors whose emails you do not have)

- Create an Ambassador Program that teaches dedicated volunteers about the history and mission of the organization and how to answer frequently asked questions. These people can represent the organization at tabling events and spread the word in the community
  - Board member, volunteer, and donor testimonials
  - More video content
    - Educational programming about your mission, as well as the overall problem you are helping to solve
    - Video profiles and staff, board, and volunteers
    - Virtual facility tour
    - Video updates for social media and newsletters
    - Consider adding video thank yous as an option along with handwritten thank yous and phone calls
  - Social Media
    - Incorporate scheduled posts along with more timely content
    - Join local community groups as your organization and post in them along with on your page
    - Post more educational content – position yourselves as the local experts on
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- Share stories as frequently as possible – provide those “warm fuzzies” and let donors know their impact
  - Make donor and volunteer communications more personalized
  - Increased media engagement
    - More frequent press releases
    - Cultivate relationships with local tv and newspaper reporters so that you are the go-to contacts when they are running a story related to your mission