

1

---

---

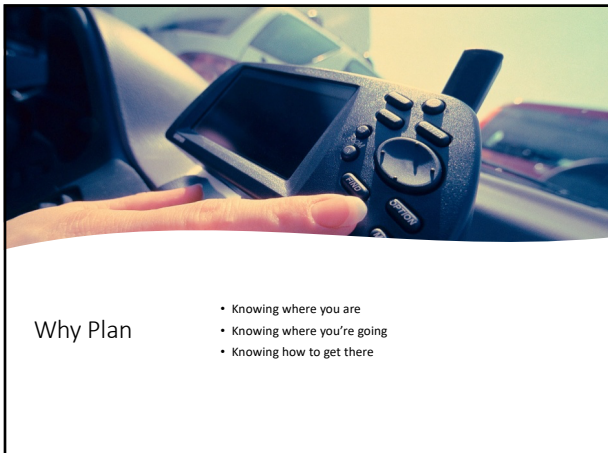
---

---

---

---

---



2

---

---

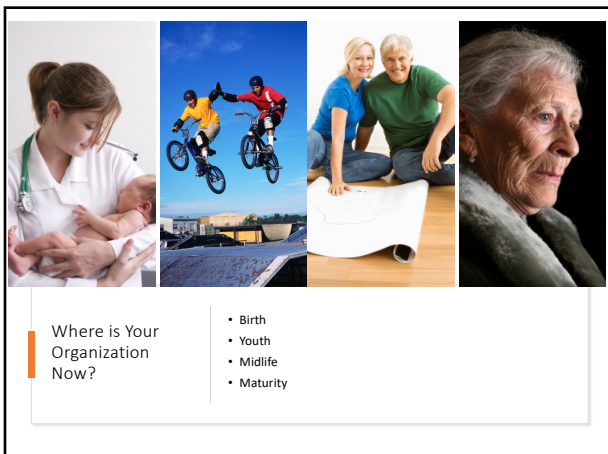
---

---

---

---

---



3

---

---


---

---

---

---

---



Where is Your Development Program Now?

- Birth
- Youth
- Midlife
- Maturity

4

---

---

---

---

---

---

---

---



Who Needs to be Involved in the Development Planning Process?

- Development Staff
- Non-Development Staff
- Board
- Development Committee
- Consultants

5

---

---

---

---

---

---

---

---



Who Needs to be Involved in the Development Planning Process?

The Role of Staff

- Fundraising Staff
- Non-Fundraising Staff

- The CEO
- The Program Staff
- Fundraising is everybody's business

6

---

---

---

---

---

---

---

---

Who Needs to be Involved in the Development Planning Process?

**Board**

- Board's role will be different depending on the size and role of the staff
- Board should always be involved at goal setting stage

7

---

---

---

---

---

---

---

---



**The Role of the Board in Implementing the Plan**

Identifying, Cultivating, Soliciting, and Stewarding—individuals, businesses, foundations, government contacts

8

---

---

---


---

---

---

---

---



**Who Needs to be Involved in the Development Planning Process?**

**Volunteers**

- Fundraising Committee
- Other volunteers/possibly donors can be asked for input

9

---

---

---

---

---

---

---

---



Who Needs to be Involved in the Development Planning Process?

Consultants

- Evaluation phase
- Putting the plan together

10

---

---

---

---

---

---

---

---



The Four Steps of Fundraising That Should be Included in Your Plan

- Remember that the goal of all fundraising activities should be to move donors up the donor pyramid.
- Identifying, Cultivating, Soliciting, Stewarding

11

---

---

---

---

---

---

---

---



Identifying

- Electronic Screening
- Every board member, staff member, and volunteer has a sphere of influence

12

---

---

---

---

---

---

---

---



- One-on-one activities
- Cultivation events

Cultivating

13

---

---

---


---

---

---

---

---



Going on calls with potential donors, funders

Soliciting

14

---

---

---


---

---

---

---

---



- Thanking
- Recognizing
- Legal and ethical responsibilities

Stewarding

15

---

---

---

---

---

---

---

---





Staff Role

Fundraising Staff

- Leadership
- Support Staff

16

---

---

---


---

---

---

---

---



CHIEF EXECUTIVE OFFICER

Staff Role

Non-Fundraising Staff

- CEO
- CFO
- Program Staff

17

---

---

---

---

---

---

---

---



What Does a Development Office Need?

- Infrastructure
- Staff
- Commitment

18

---

---

---

---

---

---

---

---



Infrastructure

- Software Needs
- Policies
- Procedures
- The Development Budget
- Case for Support

19

---

---

---

---

---

---

---

---



They key to a good development plan is.....

- Diversify, diversify, diversify.....
- What does your "pie" look like?

20

---

---

---

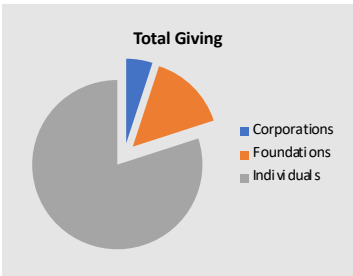
---

---

---

---

---



Where is the money? Does your plan include all your constituencies?

Total Giving

- Corporations
- Foundations
- Individuals

21

---

---

---

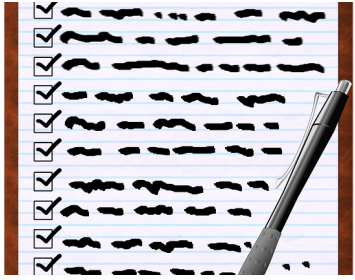
---

---

---

---

---



Assessing Current Programs

- SWOT Analysis
- History
- Development Audit
- Philanthropic Profile Assessment

22

---

---

---

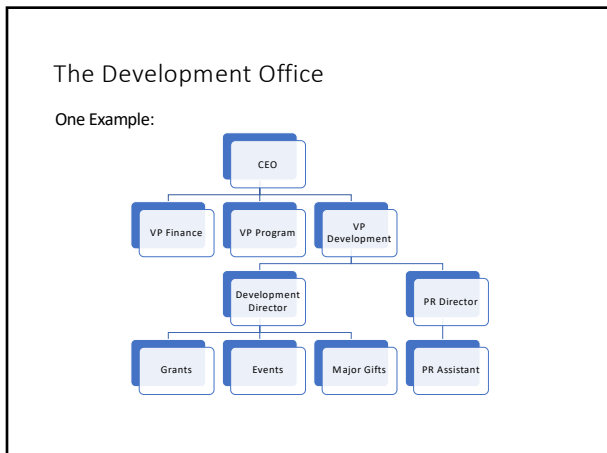
---

---

---

---

---



23

---

---

---

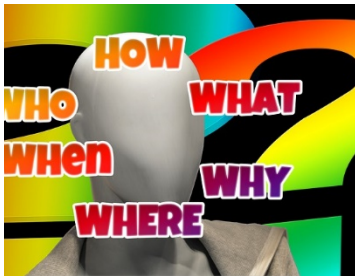
---

---

---

---

---



What should your plan look like?

- Goals
- Objectives
- Action steps are not in place:
  - Who is responsible?
  - How much will it cost/raise?
  - When is it going to be completed?

24

---

---

---

---

---

---

---

---

What should your plan look like?

Goal	A	Description	Responsibility	Income	Expenses	Start Date	End Date
Objective	1						
Tasks	1.1						
	1.2						
	1.3						
	1.4						
	1.5						
	1.6						
		Objective subtotal					

---

---

---

---

---

---

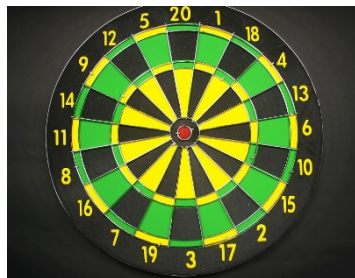
---

---

---

---

25



### SETTING GOALS

- Monetary and non-monetary goals
- The first year is the hardest
- Look at past history
- Consider percentage of increase goals
- Participation goals
- Plan your time—remember the 95/5 rule!
- Don't forget objectives and action steps

---

---

---

---

---

---

---

---

---

---

26



The reasons many plans sit on a shelf

- The right people were not involved
- Action steps are not in place:
  - Who is responsible?
  - How much will it cost/raise?
  - When is it going to be completed?
- Evaluation systems are not in place

---

---

---

---

---

---

---


---

---

---

27

Legal and Ethical Issues



- Why are ethics important?
  - The Donor Bill of Rights/Codes of Ethics/Standards
- What legal issues do fundraisers need to be aware of?
  - IRS regulations (in USA), state registration (in USA), local regulations

28

---

---

---


---

---

---

---

---



Questions

29

---

---

---

---

---

---

---

---

My Course on The Development Plan is Just \$99 curing COVID-19  
 Contact Linda

<https://LindaLysakowskiCourses.com>  
[Linda@LindaLysakowski.com](mailto:Linda@LindaLysakowski.com)

30

---

---

---

---

---

---

---

---