**ORGANIZATION Development Plan, DATES (no more than 3 years recommended)**
**Date Created**
**Prepared by [CHIEF DEVELOPMENT OFFICER]**

**Purpose of this document**

With the participation of the CEO and Board, the following plan serves as a guide for development initiatives through END DATE. It is intended that this will be assessed, revised and updated on an annual basis. This plan supports the efforts of the ORGANIZATION strategic plan, and as changes are made to the strategic plan, this document will be updated to reflect that.

**Brief History**

Insert a very short history of your organization including founders, year founded, budget growth, program accomplishments, etc. The purpose of including the history is to give people a sense of story. This is also something you can include in your case materials.

**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**

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.

**Roles and Responsibilities of the Development Program (OPTIONAL)**

Definition of a development program: the development program involves raising funds, developing relationships and connecting people with causes they are passionate about. Roles within a development program include connectors, who tie together people and causes; experts, who speak knowledgably and passionately about the mission of an organization; and closers, who ask for support.

Mission: the ORGANIZATION development program supports the strategic priorities of ORGANIZATION by securing funding from diverse sources and building positive relationships throughout the community.

(OPTIONAL) Philosophy: Insert a guiding philosophy here. *A sample: the development program is the responsibility of all, including all staff, volunteers, board*

*and committees, but is respectful of the quality of life of those participating and conscious of preventing burnout.*

## 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 (INTERNAL TO ORGANIZATION, factors of organization)
Weaknesses (INTERNAL)
Opportunities (EXTERNAL TO ORGANIZATION)
Threats (EXTERNAL)

## Development Priorities

Insert your department or program priorities. Some sample ones are:
*Implement best practices*
> *Efficient and effective involvement of volunteers*
> *Appropriate tools and resources*

*Long term and stable funding strategy*
> *Perpetual: Endowment*
> *Diversified: includes major giving, planned giving, reliable annual giving*
> *Expanded: upgrade current donors and acquire new ones*

*Uniform and clear marketing message*
> *Redesign of brochures*
> *Top of mind presence in community*

## Key constituents

Who are your major audiences? Samples are:
*Board*
*Area businesses*
*Individual supporters*
*Volunteers*
*Clients*
*Staff*
*Government*
*Providers*
*Service clubs*

**Development Audit**

All programs need to be examined on a regular basis to evaluate effectiveness (are we still raising money?), efficiency (is our cost per dollar raised still where it should be?), and energy (are we burned out on this?).

Financial Results
You may want to insert a chart here.

Analysis
What do the numbers mean? Which are your most effective programs? Which need work? Which should be retired?

**Development Tactics**

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

**Timeline**

Short-term (12 months, month by month tasks)
Mid-term (next year)
Long-term (year after that)

**Financial Projections**
Insert your budget projections for the first year here.

**Additional Resources Needed**
Insert additional staff, budget, etc. that may be needed to implement your plan.