

ORGANIZATION NAME

2017

ANNUAL RESOURCE DEVELOPMENT PLAN

An annual resource development plan is a key component of a successful program.

The plan insures that staff and Board are in alignment about priorities, strategies, and roles.

Annual Resource Development Plan

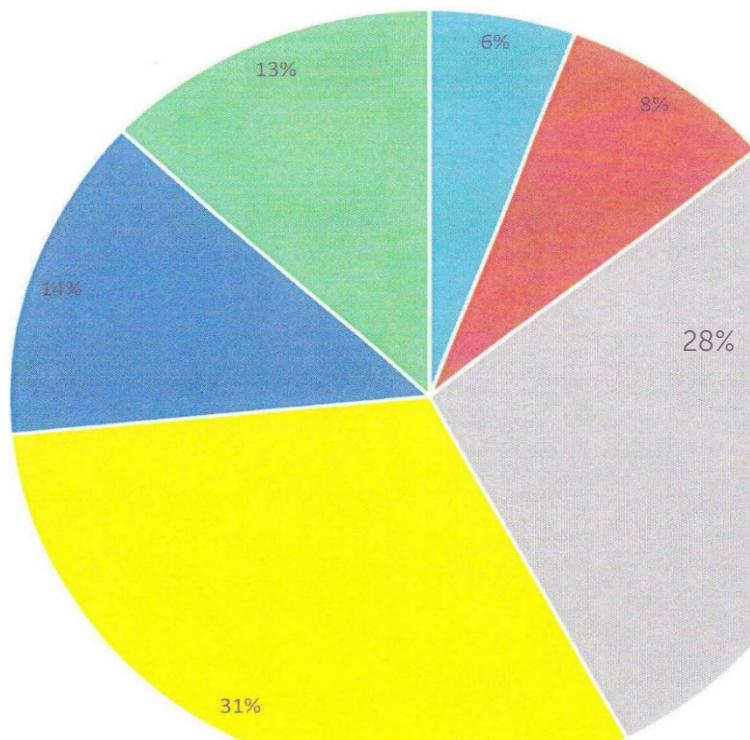
Exploring the Data

ABC Organization seeks to raise a total of \$XXX in the 2017 fiscal year. In order to accomplish this goal, it is important to analyze past fiscal year data that will help both staff and board make informed decisions, course corrections, and plan strategically for growth.

Funding Revenue by Source 2016

2016 Funding Revenue by Source

Create a pie chart in Excel or Word to be placed here.



- Individual Contributions 6%
- Corporate Contributions 8%
- Grants & Foundations 28%
- Special Event Income 31%
- Run Fees 14%
- Peer-to-Peer 13%

Donor Retention Rate 2016

12

25

3

40

NEW DONORS

RETAINED DONORS

REACTIVATED
DONORS

ACTIVE DONORS

Use the DMS to find your Donor Retention Rate

ATTRITION RATE: 51%

RETENTION RATE: 49%

To create your own gift table visit www.giftrangecalculator.com

SAMPLE 2017 Gift Table

2016 #	2016 \$	Gift Range	# of Gifts	Prospects Needed	Subtotal	Cumulative Total	Cumulative
	\$10,010	\$5,000.00	3	3	\$15,000.00	\$15,000.00	27.27%
0	\$0	\$2,400.00	2	6	\$4,800.00	\$19,800.00	36.00%
5	\$5,500	\$1,200.00	10	30	\$12,000.00	\$31,800.00	57.82%
3	\$1,700	\$600.00	15	45	\$9,000.00	\$40,800.00	74.18%
13	\$3,960	\$300.00	30	90	\$9,000.00	\$34,800.00	63.27%
17	\$1,518	< \$300	30	90	\$5,200.00	\$55,000.00	100.00%
40	\$22,688	Totals	90	264		\$55,000.0	

OBJECTIVES

Developing Objectives

The following objectives are categorized into eight areas and identified on data analysis and giving trends and predictions:

- Individual Giving
Sample: Increase individual givers from 40 to 90 individuals
- Major & Planned Gifts
Cultivate 1 new major donor to give a gift of \$5,000 or more
Start working on putting Heritage Club **Major Donor giving levels** into place
- Board Giving
100% of Board Members will contribute an annual gift in 2017
75% of Board Members will participate in donor cultivation & stewardship
- Corporate Giving
Increase cause-related marketing
Increase corporate sponsorships
- Grants & Foundations
Decrease grant dependency while continuing to meet organization needs
- Special Events
Highlight Club's mission & convert contributors to enthusiasts
Leverage special events as donor recruitment events
Events will continue to meet budget requirements Increase Net
- Endowment
Complete paperwork on endowment and activate endowment board
- Marketing
Quantify marketing efforts
Increase online presence

STRATEGIES

INDIVIDUAL GIVING

Objective:

Increase individual givers from 40 to 90 individuals

Strategy 1: Market Club Impact (Monthly Giving Program) Online, In Print, and at Events

Strategy 2: Deep dive into information and reactivating lapsed donors

Strategy 3: Develop sustainer program year-round and stewardship plan

Strategy 4: Utilize crowdfunding technology to increase opportunities to give

MAJOR & PLANNED GIFTS

Objective:

Start working on putting Heritage Club into place

Strategy 1: Identify a "Champion" of the Heritage Club.

Strategy 2: Staff will work to create a Heritage Club.

BOARD GIVING

Objective:

100% of Board Members will make an annual gift in 2017

Strategy 1: Board President and CEO will meet face to face with each board member to discuss annual contribution.

Strategy 2: Board Members will continue to receive impact reports throughout the year.

CORPORATE GIVING

Objective:

Increase cause related marketing

Strategy 1: Approach five corporations about considering a partnership with organization after staff-led cultivation.

Objective:

Increase corporate sponsorship

Strategy 1: Focus on increasing sponsorships for Golf Tournament, Hall of Fame Banquet, and sports sponsorship

GRANTS & FOUNDATIONS

Objective:

Decrease grant dependency while continuing to meet organizational needs.

Strategy 1: Increase focus on individual giving.

SPECIAL EVENTS

Objective:

Highlight Club mission & convert contributors to enthusiasts

Strategy 1: Incorporate "Mission Moments" and testimony into marketing materials and event agenda.

Strategy 2: Utilize youth at events where necessary, when appropriate.

Objective:

Leverage special events as donor recruitment events

Strategy 1: Identified donors will receive personal invites from staff and board.

Strategy 2: Staff will attempt to collect attendee information at all events.

Strategy 3: Attendees who don't contribute will be considered "warm leads" and will receive additional cultivation and opportunities to give.

Objective:

Events will continue to meet budget requirements

Strategy 1: Continue to evaluate budget requirements and set goals (attendees, contribution, cost) prior to events.

Objective:
Increase Net

Strategy 1: Staff and Board will continue to evaluate budget constraints and cost effective strategies to minimize event cost.

Strategy 2: The Org Return on Investment Calculator will be utilized for Golf Tournament, Hall of Fame Banquet, and Youth of the Year Banquet.

ENDOWMENT

Objective:
Complete paperwork on endowment and activate endowment board

Strategy 1: Complete paperwork for endowment

Strategy 2: Activate endowment board

MARKETING

Objective:
Quantify marketing efforts

Strategy 1: Measure online, print, television, and radio marketing.

Objective:
Increase online presence

Strategy 1: Hire part time web manager to maximize websites.

Strategy 2: Staff post on social media regularly (Facebook, Twitter).

POLICIES

- A. The Corporate Board must approve all fundraising activities of the Organization, with an expense budget of over \$5,000.
- B. Special Events and fundraising efforts using the Organization name will be approved by the Corporate Board.
- C. Special Events must produce net income of 60% or more of total revenue.
- D. Special Events will be reviewed annually by the Corporate Board to determine if they are meeting these minimum requirements and then approved for continuation.
- E. All donations made to the Organization will be acknowledged by staff within 72 hours of receipt.
- F. All gifts over \$500 will be acknowledged with a personal letter.
- G. A stewardship and recognition program will include board member input.
- H. All donations and gifts are subject to approval by the Corporate Board.
- I. Operating reserve will require a majority of the Corporate Board to approve allocations to the general operating fund to meet payroll and other expenses as necessary.

As of February 28, 2017

Fundraising Performance Dashboard				
Source	2017 Actual Fundraising Goal*	2017 Actual Revenue Raised to Date**	2017 Fundraising Goal Remaining	
Individuals	\$ 42,000	\$ 492	\$ 41,508	
Major Gifts	\$ 15,000	\$ 5,000	\$ 10,000	
Foundations	\$ 132,000	\$ 1,000	\$ 131,000	
Corporations	\$ 74,000	\$ 12,900	\$ 61,100	
Planned Gift s/ Bequests	\$	\$	\$	
United Way	\$ 52,675	\$ 17,226	\$ 35,449	
Government Grants	\$ 123,600	\$ 17,366	\$ 106,234	
Totals		\$ 53,984	\$ 385,291	

Stewardship Calendar for 2017

Ongoing:

- Thank you notes-within 48 hours of receipt of gift.
- Corporate Board or CEO make thank you calls within 48 hours of receipt of significant gifts.
- Handwritten thank you notes from staff and Board for significant gifts.
- Share articles and press about the Club and issues facing youth in the community.
- Invitations to Club events.
- Birthday cards to top donors.
- Donor visits to share Impact reports and news from the Club

January	Simple report to all donors of previous year	Impact and accountability reports with statement of gifts
February	Electronic newsletter Holiday Cards from members Volunteer and Youth of the Year Banquet	Handmade cards for top 10% only Invite major donors
March	Impact mailing	All donors
April	Targeted article in local newspaper	
May	Electronic newsletter First Friday coffee	All donors Top 25% only
June	Breakfast with members Impact Mailing	Top 10% only All donors
July	Breakfast with members	Top 10% only
August	Invite donors on a tour	Invite all donors
September	Targeted article in local newspaper	
October	Holiday Cards from members Impact Mailing	Top 10% only All donors
November	Electronic newsletter Thanksgiving Cards Hall of Fame	Preprinted cards for 11 to 25% Handmade cards for top 10% only Invite major donors
December	Holiday Cards from members Christmas celebration with kids	Handmade cards for top 10% only Invite major donors