

PROCESS FOR IMPLEMENTING A SUSTAINABLE RESOURCE DEVELOPMENT PLAN

Why Plan for Resource Development?

The typical approach to resource development is reactive. Many organizations respond to opportunities as they arise, so the resource development plan consists simply of meeting the next deadline. However, getting out proposals in response to RFPs might meet short-term financial needs, but won't provide long-term stability. Resource development planning can help avoid this situation. It provides a more systematic approach to identifying and meeting short- and longer-term resource needs. It requires two critical components. First, assessing organizational resource development capacity and determining resource development needs. Then a written resource development plan is generated which outlines monthly and quarterly steps and goals to achieve the revenue project.

A resource development plan can take many different forms. The only requirement is that it be complete and clear. Usually, it is helpful to start out with a one-year plan, although some longer-term objectives (e.g., to have at least two large foundation grants within two years, or to have a general support base of \$50,000 per year within three years) should be included.

What Goes into a Resource Development Plan?

- ✓ Total funding needs for the year as well as needs by project or component
- ✓ Specific objectives stating the amount of money need raise from different types of funders and also addressing the development of increased resource development and program capacity within the organization
- ✓ A work plan, with monthly and quarterly benchmarks, including activities, responsibilities, and time deadlines, to ensure that objectives are being met.

Getting Started Recommendations:

1. Revisit and refine organization's mission and vision as part of the resource development planning process. Engaging in a longer-term strategic planning process to set organizational goals and priorities will result in framework for a clear and compelling "Case for Support".
2. Revisit and refine organization's "Case for Support" as a comprehensive strategy that connects program to resource development to public relations to evaluation. The Case is bigger than the organization and relates to a *cause*. The Case clearly and boldly articulates the "niche work" of the organization – *its unique role locally* – and claims all of the reasons to support the organization in its effort to address the cause. In short, the Case accomplishes the following:
 - Cause identified
 - Action addressing cause
 - Statement of goals
 - Expected Results
3. Investigate role of Strategic Partnerships to advance the organization's goals, programs and results. Consider forming a Resource Development Advisory Committee of donors who meet quarterly with ED and RD Committee to advance goals. Consider creating a membership campaign to engage neighbors, faith communities, and small businesses.
4. With the above accomplished, an annual resource development plan can be drafted.

Resource Development Plan

The following outline describes the elements of the Resource Development Plan. Critical to the development of the plan is the updating of the organization's case for support as described in the recommendation section. Once the case for support document is completed with associated materials, the creation of the resource development plan can then occur. The result would be a written plan that includes:

Overview

- Mission, History, and Accomplishments
- Long-term and Five Year Vision
 - Pledge to achieve specific results in the next five years
- What organization will do specifically to achieve five-year pledge/vision (organizational and program capacity building, strategic partnerships, and resource development)

Organizational Sustainability

- History of Support & Future Path (year by year chart of Expenses and Total Funds Raised with breakout by Foundations, Corporations, Donors, Events, and Board)
- Resource Development Strategy and Goals to achieve five-year pledge/vision
- Resource Development major components to achieve current year goal (annual campaign, major donors, planned giving, events, endowment)
- Gift model (chart by donor level, number of prospects, number of anticipated donors, total dollar amount requested from all prospects, total anticipated.)

Prospects and Donors

- Alpha List of all Donors and Prospects identifying last amount provided and when or potential gift amount
- Gift Model Level List (Donors and Prospects sorted by Gift Level)

Calendar of Activities

- Month by month tasks to completed and who will accomplish by when (proposal deadlines and submissions, donor contacts, fundraising activities i.e. special events, newsletters, direct mail, website update)

The above requires the following work to be done:

- Updated Case Statement with mission, vision and goals
- Organizational Budget – Expenses/Revenues to reflect updated case
- Governance Statement
- Resources (staff and volunteer) required to reflect updated case
- Donor recognition and stewardship policy to reflect updated case
- All necessary program budgets for “asks” to reflect updated case
- Develop and implement the Board Annual Action Plan including RD committee roles and tasks
- Continue identification of Board network (who knows who) and expand prospect list
- Specific plan to position all Board member contacts for “asks”
- Continue to develop all necessary administrative systems to support resource
- Continue to identify new foundation, corporation and major donor contacts and begin preliminary discussions

SAMPLE OF POSSIBLE RESOURCE DEVELOPMENT PLAN GOALS

To carry out its program priorities, the (NAME OF ORGANIZATION) will require funding of \$xxxxxx in the next fiscal year.

Needed is:

Flexible funding: \$xxxxxx .

Project X: \$xxxxxx .

Project Y: \$xxxxxx.

Fundraising Objectives:

1. To raise \$xxxxxx in flexible funding.
2. To raise funding of \$xxxxxx by mid-fy to initiate Project X.
3. To raise \$xxxxx by XXX month of xxxxx to support Project Y.
4. To raise at least \$xxxxx of the required core funding through a fundraising event in FY.
5. To have the Board generate at least \$xxxxx in funding through contributions and other fundraising assistance. These funds should be used wherever they are most needed.

Other Resource Development and Related Organizational "Process" Objectives:

1. To develop an updated organizational vision and mission statement for resource development use.
2. To revise the organization's mission statement, with Board approval obtained at the spring meeting.
3. To establish an Resource Development Advisory Committee and Board Resource Development Committee by the beginning of fiscal year. The Committee could consist primarily of funder representatives from corporations, foundations, and small businesses.
4. To obtain at least one significant multi-year public or private grant totaling at least \$xxxxx per year, by the end of fiscal, to initiate a new project to do X.
5. To obtain funding from at least three foundations by the end of xxxx.
6. To add at least three new corporate funders in fy.
7. To have 100% of Board members make contributions .
8. To have a Board-focused resource development plan for the year with approval at the spring meeting before the beginning of the fiscal year.
9. To have every Board member provide some form of resource development assistance on behalf of organization this year.

WHERE (NAME OF ORGANIZATION) NEEDS TO BE NEXT YEAR!

Annual Process for Resource Development Planning based on a Fiscal Year

(note: this is just a starting point – assuming there is a previous resource development task and timeline in place. Additional tasks such as event planning, newsletters, new donor contact, etc can be added when RD plan is finalized.)

March 2014

- Third quarter review of revenue in and revenue projected
- Plan to address any short-falls
- Revisit mission, vision, values and update case for support
- Continue/revise/update with RD plan

April 2014

- Begin planning next FY budget (see attachment 1 for sample planning goals)
- Establish next years RD Committee, determine structure, roles, and responsibilities, and recruit members
- Obtain Board approval of plans
- Select and obtain agreement to serve from at least five members
- Determine meeting structure
- Finalize case for support
- Continue/revise/update with RD plan (Monthly meeting)

May 2014

- Finalize next FY budget (see attachment 1 for sample planning goals)
- Review all donors and prospects and prepare draft RD plan by donor and ask
- Prepare Gift model for RD plan
- Prepare tasks/timelines and checkpoints plan
- Present next FY budget and RD plan to full Board for approval
- Continue/revise/update with RD plan (Monthly meeting)

June 2014

- Continue/revise/update with previous RD plan (quarterly meeting)
- Revise /update new FY budget and Resource Development plan based on year end results

July – September 2014

- Continue/revise/update new fiscal RD plan (monthly and quarterly meetings)
- Revise /update Resource Development plan based on monthly and quarterly results

October – December 2014

- Continue/revise/update new fiscal RD plan (monthly and quarterly meetings)
- Revise /update Resource Development plan based on monthly and quarterly results

January – February 2015

- Continue/revise/update new fiscal RD plan (monthly meetings)
- Revise /update FY budget and Resource Development plan based on monthly and quarterly results

