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|  | **2016** |
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| **FUND DEVELOPMENT PLAN**  **SAMPLE TEMPLATE** |
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**Fund Development Planning Tool**

1. **ORGANIZATIONAL ANALYSIS**
2. **Mission Statement**
3. **Vision Statement**
4. **VALUES:**
5. **History**
6. **Major Programs**
7. **Populations Served**
8. **Geographic Areas Served**
9. **Analysis of Past Revenue Sources**

**PAST AND PROJECTED CHANGES IN FUNDING SOURCES**

|  |  |  |
| --- | --- | --- |
| **Funding Source** | ***$ Changes***  ***Between***  ***(2014-2016)*** | **Projections & Replacement Sources** |
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| **Type of Sources** | **Total**  **(3 year Avg.)** | **% of Total Revenue** | ***Goal for 2017*** | ***Goal for 2018*** |
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**ANALYZING INDIVIDUAL GIFTS**

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| **Size of Gift** | **Number of Gifts** | **Number of Donors** | **Total** |
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**FUNDING ANALYSIS BY PROGRAM OR FUNCTION**

**A. Function / Program** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(E.g., Administration, Teen Programs, etc.)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Funding Source** | **Change in Giving Patterns over Past 3 years ($ Up or down)** | **Projected Trend**  **($ Up or down)** | **Delta to Raise** | **Development Goal** | **Potential Sources** |
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**B. Function / Program** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(E.g., Administration, Teen Programs, etc.)

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| **Funding Source** | **Change in Giving Patterns over Past 3 years ($ Up or down)** | **Projected Trend**  **($ Up or down)** | **Delta to Raise** | **Development Goal** | **Potential Sources** |
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**C. Function / Program** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(E.g., Administration, Teen Programs, etc.)

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| **Funding Source** | **Change in Giving Patterns over Past 3 years ($ Up or down)** | **Projected Trend**  **($ Up or down)** | **Delta to Raise** | **Development Goal** | **Potential Sources** |
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**Organizational Resources Dedicated to Fund Development**



**Current Internal and External Environment**

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| --- | --- |
| **Strengths** | **Challenges** |
|  |  |

**Opportunities:**

**Potential Strategies for Building on Strengths and Responding to Challenges and Opportunities:**

1. **Analysis of Fund Development Partners and Competitors**

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| **Organization** | **P or C** | **COMMENTS** |
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| **Organization** | **P or C** | **COMMENTS** |
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| **Organization** | **P or C** | **COMMENTS** |
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| **Organization** | **P or C** | **COMMENTS** |
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| **Organization** | **P or C** | **COMMENTS** |
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**Others:**

1. **CURRENT ORGANIZATIONAL STRATEGIC GOALS (From the Strategic Plan)**
2. **STATEMENT OF PURPOSE OF THE FUND DEVELOPMENT PLAN**
3. **CASE STATEMENT FOR SUPPORTING THE ORGANIZATION**

**V. STRATEGIC FUND DEVELOPMENT GOALS AND IMPLEMENTATION PLANS**

**GOAL 1:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Activities** | **Lead** | **Resources Needed/ Cost** | **Timeframe** |
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**GOAL 2:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Activities** | **Lead** | **Resources Needed/ Cost** | **Timeframe** |
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**GOAL 3:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Activities** | **Lead** | **Resources Needed/ Cost** | **Timeframe** |
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**VI. OPERATIONAL PLAN**

**A. Structural and Management Tools that Will Support Resource Development.**

* + Database and other tools to organize and manage fund development.
  + Communications resources and materials to support fund development.
  + Marketing plan and promotional materials (print, PSA’s) website and Facebook.)

**B. Board Structure for Fund Development**

**C. Staffing for Resource Development**

**D. Summary Budget for Implementing First Year Activities**

|  |  |
| --- | --- |
| **Item** | **Cost** |
| Personnel |  |
| * Salaries and Benefits |  |
| * Professional Development |  |
| Database |  |
| Other Technology (e.g. website) |  |
| Printing |  |
| Travel / mileage |  |
| Contracts |  |
| Board meetings / retreats |  |
| Other |  |
|  |  |
|  |  |
| **Total Budget** |  |

**E. EVALUATION**

1. How will success be measured? Specific Indictors

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1. How, how often and by whom will the plan’s progress be evaluated?

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