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|  | **2016** |
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| **FUND DEVELOPMENT PLAN****SAMPLE TEMPLATE** |
|  |

**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**

1.
2.
3.

**Current Internal and External Environment**

|  |  |
| --- | --- |
| **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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