


JANUARY 24, 2013

Log in to NPQ

Username  
 Password  
 Remember Me  
[Forgot password or username?](#)  
[Need an account? Register now](#)


[SUBSCRIBE TODAY!](#)

---

[HOME](#)
[NEWS](#)
[POLICY/SOCIAL CONTEXT](#)
[PHILANTHROPY](#)
[GOVERNANCE/VOICE](#)
[MANAGEMENT](#)
[OPINION](#)
[DONATE](#)
[MAGAZINE](#)

NPQ Newswire: [Unpaid Wages Spark "Gangnam Style" Protest Dance](#)

SEARCH

MANAGEMENT

# What Should Your Fund Development Plan Include?

WRITTEN BY SIMONE JOYAUX, ACFRE, JOYAUX ASSOCIATES  
 CREATED ON THURSDAY, 02 FEBRUARY 2012 15:01

[comment](#)

In my last column, I wrote about the process for creating a fund development plan that produces ownership and results. Now, let's talk about the content of the plan. Here's some of what I want in my fund development plan:

**\* Relationship-building strategies**  
 Your relationship-building program is, perhaps, the single most important part of a comprehensive fund development program. As such, relationship-building strategies (and measures) are a central component of your written plan. And, I expect to see both donor-centered communications and extraordinary experiences outlined.

**\* Solicitation strategies**  
 Of course, you do have to ask. So, include solicitation strategies, too. And please make sure that your plan includes personal, face-to-face solicitation. Board members help make these solicitations. I believe that personal, face-to-face solicitation needs to be a major component of your fundraising.

**\* Measures**  
 Define what you will measure. And remember that you should measure more than money and your number of donors. Make sure you measure the comprehensiveness and effectiveness of your relationship-building strategies. Measure board member performance. Measure loyalty. For more about measures, see *Keep Your Donors and Strategic Fund Development* (3rd edition).

**\* Timeframes**  
 I always include a calendar, organized by months of the fiscal year. I plot out the solicitation and relationship-building strategies on the calendar.

**\* Assignments of accountability**  
 I also want assignments of accountability. What work belongs to staff? What tasks will board members take on? Where do the board and its fund development committee fit in?

**\* Process for monitoring progress and evaluating effectiveness**  
 But I want more. I want the fund development plan to document other actions to improve strategy. Here's an example from one of the fund development plans that I've written:

Goal: Professionalize the process of fund development within the institution.



**Smartphone = PayPal**

Get low transaction fees with the PayPal Here™ card reader.

[Learn more](#)

Type your e-mail and press enter

- We won't sell or disclose your info without permission.
- Newswire: A daily digest of the most compelling stories. [View sample »](#)
  - Editor's Notes: A weekly message from Editor in Chief Ruth McCambridge. [View sample »](#)
  - Cohen Report: Rick Cohen on nonprofits, policy, and politics. [View sample »](#)

GET NPQ IN YOUR INBOX



CONNECT WITH NPQ

The Digital Edition of the  
**NONPROFIT QUARTERLY**  
 Is Now Online

ADD COMMENT

YOUR NAME (WILL APPEAR NEXT TO COMMENT) \*

YOUR EMAIL (WILL NOT BE DISPLAYED FOR CONTACT WITH EDITORIAL ONLY) \*

ADD YOUR COMMENT

PLEASE FILL OUT THE FORM BELOW TO SEND YOUR COMMENT

Comment as a guest or Login

< Prev Article Next Article >

Terms: Financial Management, Fundraising, Opinion, Unraveling Development

Last (3rd edition). For more details and sample plans, see *Strategic Fund Development: Building Profitable Relationships That*

This fund development plan—which essentially describes the institution's fund development program—is a really big deal. This planning process and the resulting plan warrants attention from the highest levels of your institution. And I expect board and board member participation.

4. Strengthen staff's capacity to enable board members to participate in fund development. reduce their anxiety.

3. Provide training opportunities for board members to expand their familiarity with fund development and development expectations of board members, along with other performance measures.

2. Ensure that screening interviews with candidates clearly communicate the philanthropy and fund members, including specifics related to fund development.

1. Adopt policies defining the role of the board (governance) and performance expectations of board members, including screening interviews with candidates clearly communicate the philanthropy and fund development.

Goal: Improve board support for philanthropy and fund development. And here's yet another example:

3. Engage staff, committees, and the board in strategic conversation to support quality decisions.

2. Prepare fund development reports that analyze trends and implications.

1. Optimize use of a management information system to collect information about donors and prospects.

Strategies:

Goal: Assure quality information to support strategic conversation and decision-making.

Here's another example:

5. Build a culture of philanthropy throughout the organization.

4. Set up a management information system that maintains quality information about donors and prospects.

3. Establish a board-level strategic fund development committee.

2. Provide training and coaching for staff.

1. Put in place the appropriate systems, policies, and procedures to support a comprehensive development program.

1. Charleston, S.C. Ballet Company in a Tangle
2. The Right Tools Can Make Evaluation Less Painful, More Productive
3. The Right Tools Can Make Evaluation Less Painful, More Productive
4. Don't Those Development Directors
5. Choosing Your Fundraising Strategies

**CONTINUOUS INCOME STREAM AT NO COST TO YOU OR YOUR SUPPORTERS**

**Click To Join**

**SupportingPals**

855.SUPPORTPALS (855.787.7257)

www.supportingpals.com

With Lessons for U.S., U.K. Report Eyes Nonprofit Sector Autonomy

NFL Push for Minority Coaches Tackled for a Loss As Komen Fundraising Comes up Short, Where to Place the Blame?

The Right Tools Can Make Evaluation Less Painful, More Productive

Another Nonprofit/For-Profit News Partnership

Choosing Your Fundraising Strategies

**MORE IN MANAGEMENT**

Become a NewsWire Contributor

Pitch a Story / Talk to a Journalist

Send Us a Tip

WRITE FOR NPQ

**Subscribe to our newsletter for a chance to win a FREE subscription to NPQ's world class print journal.**

**Enjoying this article?**