**TEMPLATE**

**FUND DEVELOPMENT STRATEGY & TACTICAL PLAN**

**For the Period: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Background: (Insert relevant context/strategic direction language from strategic or other plans)**

**Our Known (or Potential) Milestones Over the Next Five Years**

These are any big initiatives on plan or being considered that will require significant planning and resources. They may also present new fundraising potential that will need to be incorporated with enough lead time to achieve desired revenue results.

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| YEAR |  | 2023 | 2024 | 2025 | 2026 | 2027 |
| INSERT ANY UPCOMING MILESTONES |  |  |  |  |  |  |

**Environmental Scan** Trends with the potential to impact us as we strive to achieve our fund development goals:

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| **POLITICAL** |  | Therefore, we will… |
| **ECONOMIC** |  | Therefore, we will… |
| **SOCIAL** |  | Therefore, we will… |
| **TECHNOLOGICAL** |  | Therefore, we will… |

**SWOT**

As part of our strategy development, we have examined internal factors (Strengths and Weaknesses) and external factors (Opportunities and Threats) that may impact our choices and implementation plans.

**Strengths:** What internal factors are working in our favour right now?

**Weaknesses:** What are the things that need to change internally in order for us to be more successful?

**Opportunities:** Externally, where can we tap into support or partnerships we may be overlooking or not fully leveraging?

**Threats:** Externally, what has the potential to negatively impact our plan or our organization? Is the threat a condition (something we need to manage, accept or adapt to) or is it a problem we can resolve?

**GOAL 1: (Insert wording around Infrastructure Goal in support of fundraising)**

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| MONTH  Determine start month |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | RESPONSIBLE | HOW WILL WE MEASURE SUCCESS? |

* 1. **Develop and approve foundational guiding policies and procedures**

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| 1.1.1 Establish fund development policies in accordance with best practice standards. At minimum:  -Gift Acceptance Policy  - Naming and Recognition Policy |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

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| 1.1.2 Establish documented donation processing procedures and forms to ensure regulatory compliance and best practice donor relations standards |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

* 1. **Manage donor information effectively**

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| 1.2.1 Determine baseline donor statistics to establish reasonable growth targets and create tracking dashboard |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

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| 1.2.2 Build out existing prospect/donor tracking system for interim and/or research/select software solution |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

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| 1.2.3 Develop a master calendar for key activity dates – application and reporting deadlines, events, donor solicitation mailings and other key communication dates |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

* 1. **Build internal capacity of staff and volunteers**

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| 1.3.1 Develop terms of reference for Fund Development Committee and recruitment strategy |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

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| 1.3.2 Conduct regular strategy / traction meetings with staff / volunteers to ensure momentum on plan |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

**GOAL 2: (Insert wording around Marketing and Communications Goal in support of fundraising)**

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**2.1 Produce compelling fund development materials**

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| 2.1.1 Write case for support based on organizational priorities and funding needs |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

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| 2.1.2 Create a digital toolkit of collateral materials to actively promote fund development:   * Key messaging for Board/Staff to use at events, presentations, social gatherings * A major gifts donation package (case for support, donation/pledge form, etc) * Power point presentation deck * General donation form/brochure |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

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| 2.1.3 Update and maintain print and online content in support of fundraising goals:   * Website * Online giving portals (eg Canada Helps, CHIMP, Benevity) * Calgary Foundation’s Community Knowledge Centre portal * Social media channels * Newsletter |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

**GOAL 3: (Insert wording around Fundraising Goal)**

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**3.1 Conduct and monitor fundraising activity to meet revenue target of $\_\_\_\_\_\_\_\_\_\_**

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| 3.1.1 Develop gift chart to confirm # of prospects and gifts and associated giving levels to achieve revenue goal. Conduct prospect identification and research to qualify and assign prospects and establish individual file strategies. |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

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| 3.1.2 Establish revenue channel goals and tactics: (Discuss and strategically select channels for year one – move future channels to parking lot for action when ready)   * Grantseeking (Foundations) * Major Gifts (1:1 asks Corporate/Individuals) * Social Enterprise * “Leaders Circle” (working title only - $1000 + circle) * Monthly giving program * Online giving * Special events * Third Party partnerships * Planned Giving |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

**3.2 Develop and implement a simple but meaningful donor stewardship program**

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| 3.2.1 Develop and implement a donor stewardship plan with appropriate touch points for various giving levels, including:   * Thank you process / methods (tax receipts, calls, notes, letters) * Required reporting (grants) * Gift impact reporting (to share results of donations) * Engagement invitations and opportunities |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

**GOAL 4: (Insert wording around Track, Evaluate and Forward Planning goal)**

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**4.1 Conduct year end evaluation and planning**

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| 4.1.1 Analyze results against plan and industry benchmarks |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

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| 4.1.2 Confirm new annual plan / metrics, incorporating new activities from future activities parking lot as appropriate and agency ready |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

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| 4.1.3 Update fund development case for support and collateral materials as necessary |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

**FUTURE ACTIVITIES PARKING LOT: (These items are not priorities for Year 1. Add on to plan as resources, time and urgency make them possible/necessary)**

* **X**
* **X**
* **X**