



# Sample Development Plan

## A. Foundation Statements

- 1) School's Mission
- 2) School's Vision
- 3) School's Tagline
- 4) Development Office Mission
- 5) Development Office Goals
- 6) Case for Support

## B. Key Elements

- 1) Recruitment
  - Recruitment
  - Enrolment
  - Re-recruitment
- 2) Community Relations
  - Marketing & Communications
  - Building Current Family Community
  - Building the Broader Family Community
  - Building Church Community
  - Building Corporate Community
- 3) Fund Development
  - Fundraising Events
  - Annual Giving
  - Major Gift Giving
  - Planned Giving Program
  - Grant Proposals
  - Capital Campaign
- 4) Administration
  - Annual Development Program
  - Database
  - Fundraising Program Reviews
  - Policies
  - Leadership
  - Development Plan Review

# The Development Plan

## A. Foundation Statements

### 1) School's Mission Statement

### 2) School's Vision

### 3) School's Tagline

### 4) Development Office Mission Statement

To support the education program of \_\_\_\_\_ School through mission-driven enrolment, community building and fund development.

### 5) Development Office Goals

**Enrolment:** To continually ensure viable levels of enrollment of mission appropriate families in Langley Christian School. *(Each school is unique with its own mission and needs to be purposeful in attracting families that fit with that mission).*

*"The admissions process does not exist in a vacuum. It links fundamentally to the philosophical framework of the school." Jan Stump, Past Director of Development ACSI*

**Community Relations:** To build school community in order to retain current families and ensure these families are an integral part of \_\_\_\_\_ School, shaping the school through the giving of their time and resources in keeping with the mission of \_\_\_\_\_ School.

**Fund Development:** To generate funds for specific purposes, capital projects and long term financial sustainability for \_\_\_\_\_ School.

*"It is difficult to say what is impossible, for the dream of yesterday is the hope of today and the reality of tomorrow." Robert H. Goddard*

### 6) Case for Support

Why should a donor give to your school? The appeal should include both a rational and emotional element. (History and Current Story)

---

---

---

---

---

## B. Key Elements of the Development Plan

### 1) Recruitment

Goal:

---

---

#### a. Recruitment

Objectives:

- Evaluate the current enrolment health of your school by \_\_\_\_\_
- Develop a Recruitment Plan by \_\_\_\_\_

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Review Enrolment Trends
- Marketing Plan for Recruitment
- Tracking system for all potential new families
- Website

#### b. Enrolment

Objectives:

- To increase enrolment by # \_\_\_\_\_ by \_\_\_\_\_

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Review Application Policy
- Develop Admissions Process
- Research Enrolment Trends
- Communications
- Printed Materials
- Website

#### c. Re-recruitment

Objectives:

- To decrease student attrition by 10% student retention rate by \_\_\_\_\_
- To reach a 90% student retention rate by \_\_\_\_\_

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Review/Develop a Re-enrolment Process
- Develop Transition Activities (i.e. Preschool to Kindergarten, Elementary to Middle School, Middle School to High School)

### 2) Community Relations

Goal:

---

---

**a. Marketing & Communications**

**Objectives:**

- To develop a marketing plan for the school by \_\_\_\_\_

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Determine Market Segmentation
- Research Demographics
- School's Branding
  - Evaluate
  - If needed, prepare a request for designers
  - Review Options
  - Complete Design
  - Launch Design
  - Implement Standards of Use
- Website
  - Evaluate
  - If needed, prepare a request for designers
  - Review Options
  - Complete Design
  - Launch Design
- Review Publications
- Revise Publications as needed
- Evaluate Current Advertising
- Revise Advertising as needed
- Develop protocols around Social Media, Email, & Written Communications

**b. Building Current Family Community**

**Objectives:**

- To integrate new families successfully into the school community by \_\_\_\_\_
- To increase parent volunteerism by % \_\_\_\_\_ by \_\_\_\_\_

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Develop a Host Family Program
- Host annual Membership Evenings
- Conduct New family visits
- Create meaningful Volunteer Opportunities that meet parents' skills & abilities
- Conduct an Annual Satisfaction Survey
- Newsletter Communications

**c. Building The Broader Family Community**

**Objectives:**

- To increase participation at school community events by \_\_\_\_\_
- To increase financial giving to the school by % \_\_\_\_\_ by \_\_\_\_\_
- To develop a plan to build positive relationships with alumni, alumni parents and grandparents by \_\_\_\_\_

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Research how best to communicate to each group
- Invite to School Community Events
- Create events specific to alumni (alumni game)
- Create event specific to alumni parents
- Create event specific to grandparents
- Newsletter Communications
- Develop a process for acknowledging gifts

**d. Building Church Community**

**Objectives:**

- To create opportunities to engage and inform about school events by \_\_\_\_\_
- To develop a partnership between church and school by \_\_\_\_\_

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Welcome to new churches represented at the school
- Send invitations to school events
- Invite churches to have a presence on the school website

**e. Building Corporate Community**

**Objectives:**

- To create opportunities for corporate participation in community events by \_\_\_\_\_
- To create opportunities for corporate sponsorship of community events by \_\_\_\_\_

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Research companies to approach for corporate involvement
- Develop a communications plan for corresponding with businesses
- Segment companies for involvement in specific events
- Invite to participate in and/or sponsor specific event(s)
- Recognition Policy for sponsors and donors
- Track involvement in events
- Acknowledge support

### 3) Fund Development

Goal:

---

---

#### a. Fundraising Events

**Objectives:**

- To raise \$\_\_\_\_\_ through community fundraising events annually.
- To increase participation in fundraising events by %\_\_\_\_\_ by \_\_\_\_\_

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Evaluate Current Fundraisers (ROI)
- Determine number and type of events to be held
- Set a fundraising target for each event
- Set a community participation target for each event
- Implement Events

Action Steps For Each Fundraising Event: (include the person(s) responsible, budget, & timeline)

- Determine Designation of Funds for each
- Determine Target Market for each
- Marketing/Promotions
- Volunteer Strategy
- Implementation Plan

#### b. Annual Giving (*invites interest*)

**Objectives:**

- To raise \$\_\_\_\_\_ through the Annual Fund annually.
- To increase \$ raised through the Annual Fund by \_\_% annually.

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Determine the \$ target for Annual Fund giving over the next 3 years
- Determine Funds Designation (may be to multiple: i.e. information technology, program enhancement, debt reduction, etc.....)
- Determine Target Markets
- Develop Structure of Campaign
- Develop Materials
- Implement Campaign
- Campaign Follow-up
- Acknowledge Donations
- Receipt Donations

**c. Major Gift Giving** (*involved & interested donors*)

**Objectives:**

- To raise \$\_\_\_\_\_ annual through major gifts
- To increase \$ raised through major gifts by \_\_\_% annually

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Research Donor Prospects
- Develop Communications strategy
- Conduct Visits with Prospective Donors
- Track Communications/Visits
- Track Donations
- Acknowledge Donations
- Receipt Donations

**d. Planned Giving Program** (*established relationships, faithful donors – will consider a legacy gift*)

**Objectives:**

- To develop a Planned Giving Program for the school by \_\_\_\_\_

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Develop a proposal for establishment of a Planned Giving Program
- Obtain approval
- Develop an overall goal for the Program: (*i.e. to provide tuition assistance for school families in need, to provide scholarships for the school's graduating students and to ensure the funding of future major capital expenditures for the school*)
- Develop the objectives of the Program: (*i.e. To establish and maintain Endowment Funds for the benefit of the school; to provide prizes, bursaries, fellowships, scholarships or otherwise for the benefit of students graduating from the school; to provide for major capital expenditures for the school*)
- Determine the structure of the Program, including any partnerships
- Marketing plan for the Program
- Promotional Materials
- Policies
- Apply for Charitable Tax Status (if establishing a Foundation)
- Implement the Program

**e. Grant Proposals**

**Objectives:**

- To write #\_\_\_ grant proposals annually
- To receive \$\_\_\_ through grants annually

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Research Possible Grants
- Write Grant Proposal(s)

**f. Capital Campaign**

**Objectives:**

- To raise \$\_\_\_\_\_to build a new school building

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Feasibility Study
- Determine Target Markets
- Determine Structure of the Campaign
- Develop a Marketing Strategy
- Develop Promotional Materials
- Develop Communications Strategy
- Implement the Campaign
- Campaign Follow-up
- Track Donations
- Receipt Donations

**4) Administration**

**Goal:**

---

---

**a. Annual Development Program**

**Objectives:**

- To create an Annual Development Program by \_\_\_\_\_

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Prioritize Activities that will be undertaken in the Current Year
- Activity Category (i.e. Recruitment & Re-Recruitment)
- Action Step (i.e. review Enrolment Trends)
- Strategies (what specific tasks need to be done, meetings that need to be held, etc.)
- Person(s) Responsible/Involved
- Budget
- Timeline for Completion
- Review Progress
- Evaluate
- Determine the Annual Program for the following year



**b. Database**

**Objectives:**

- To implement a database (contact management system) for the Development Office by \_\_\_\_\_

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Evaluate current system
- Determine needs: relationship management, resource management, Donation Tracking, Event Management, Communications, Task Management, Volunteer Management, etc.
- If new system needed:
  - Research possibilities
  - Tender proposals or buy system
  - Implement System
  - Train all users of system
- Database Management

**c. Fundraising Program Reviews**

**Objectives:**

- To evaluate all Fundraising Programs annually.

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Conduct a Costs/Benefits Analysis: ROI
  - Determine viability for continuing the program
  - If needed, research new initiatives that will better meet objectives

**d. Policies**

**Objectives:**

- To ensure that the Development Office has all necessary policies in place by \_\_\_\_\_

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Admissions Policy
- Waiting List Policy
- Website Privacy Policy
- Social Media Policy
- Logo Standards / Protocols
- Gift Acceptance Policy
- Fundraising Policy
- Donor Recognition Policy

**e. Leadership**

**Objectives:**

- To have in place the necessary people resources by \_\_\_\_\_
- To have written descriptions of roles and responsibilities by \_\_\_\_\_

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Description of Board's Involvement in Development Plan and Initiatives
- Description of Administration involvement in Development Plan and Initiatives
- Development Staff Job Descriptions
- Development Staff Hired
- Volunteer Structure
- Description of Volunteer areas of Involvement

**f. Development Plan Review**

**Objectives:**

- To Review the Development Plan every \_\_\_\_\_ years.

Action Steps: (for each of these include the person(s) responsible, budget, & timeline)

- Evaluate Plan
- Adjust Plan as necessary

Cathy Kits, Development Consultant, 2014



*With thanks to Linda Lysakowski: The Development Plan*

## The Annual Development Program

The Annual Development Program is a description of all of the activities engaged in each year. It will include the Activity Category, Related Action Step, Strategies (specific tasks), Person(s) Involved, Budget, and Timeline.

