

NCJW Leading for Change Sample Development Plan

I. Financial Goals

Projected Operating Budget 2018: \$470,000

Income Categories	FY 2018 Actual	FY 2019 Projected	% of Total 2018
<i>Dues</i>	\$48,200.00	\$50,000.00	10%
<i>Grants-Foundation</i>	\$26,000.00	\$25,000.00	6%
<i>Grants-Government</i>	\$10,000.00	\$0.00	2%
<i>Annual Campaign</i>	\$95,000.00	\$100,000.00	20%
<i>Hannah Solomon Campaign</i>	\$140,000.00	\$150,000.00	30%
<i>Special Events</i>	\$102,000.00	\$100,000.00	22%
<i>Interest Income</i>	\$15,500.00	\$15,000.00	3%
<i>Board Campaign</i>	\$23,500.00	\$25,000.00	5%
<i>Misc Income</i>	\$5,000.00	\$5,000.00	1%
Totals	\$465,200.00	\$470,000.00	100%

II. Strategic Goals

- a. 100% Board Giving
- b. Dues Renewal at 85%
- c. Enhanced communication: fund development within the board and membership
- d. Development plan to train and recruit volunteers—recruit at least 10 board members to work in fund development
- e. Identify 10 new HGS donors

- f. Strengthen donor cultivation and recognition program

III. Resources

- a. Volunteer
 - 1. VP of Fund Development
 - 2. Fundraising Committee
 - 3. Special Events Committee
- b. Staff
 - 1. Executive Director/Director of Development
- c. Outside Consultant
 - 1. None this year
- d. Outside mail house
 - 1. XYZ mail processing company to handle all direct mail

IV. Solicitation Strategies

- a. Dues
 - 1. Direct mail Campaign
 - 2. 3 mailers a year, June, September, December
 - 3. Follow up with Board phone calls for renewal
- b. Grants-Foundation
 - 1. Target previous donors (3@ \$5000 each)
 - 2. Identify 5 new donors (secure 2@ \$5000 each)
 - 3. Write and submit grants—volunteer and/or development staff
- c. Grants-Government
 - 1. Renew \$10,000 grant for Women's Center therapy program
- d. Annual Campaign
 - 1. Mail 3x a year
 - 2. Target 580 members, 250 supporters
- e. Hannah Solomon Campaign
 - 1. Phone Outreach to 15 high donors (\$5000+)
 - 2. Mail follow up to 125 previous donors @\$1000 each
 - 3. Follow up phone calls to secure donations
- f. Special Events
 - 1. Establish special events committees for annual luncheon, trivia night and golf tournament
 - 2. Set goals for each event.
 - 3. Engage Board to assist with sponsorships and underwriting, setting goals for each event.
- g. Interest Income
 - 1. Finance committee to continue monitoring section investments
- h. Board Campaign
 - 1. Time frame: July-September
 - 2. Prospects: 32 board members-goal is 100% participation
 - 3. Goal: \$25,000

4. Solicit 15 board members at \$500 each
5. Solicit 5 board members at \$1000 each
6. Solicit 2 board members at \$5000 each
7. Solicit 10 board members at \$250 each
- i. Misc. Income
 1. Grocery Store Scrip
 2. Bequests that come in unplanned

V. Cultivation Strategies

- a. Develop a plan for donor thank you's
- b. Develop a plan for donor recognition
- c. Marketing/PR plan
 1. Newsletter
 2. Annual Report
 3. Thank you ad in local Jewish newspaper
 4. Thank you phone calls from Board leadership

VI. Monitoring the Plan & Process

- a. Development committee will meet 6 times a year to review progress
- b. Issues will be addressed as soon as possible
- c. VP Development will monitor all committees and their work
- d. Section will provide financial support to implement the plan

VII. Development Calendar

June

- First Dues renewal mailer
- Prepare Annual Report
- Review results from previous year and set goals for next year

July

- Mail annual report to all donors
- Develop grant writing calendar with all due dates
- Prepare first annual campaign mailer
- Begin personal Hannah Solomon solicitations

August

- Begin Board solicitation campaign

September

- Hold annual fall luncheon
- Review status of campaign
- Conclude Board campaign

2nd Dues renewal mailer

October

Prepare second annual campaign mailer

November

Personal campaign with large donors
Grant writing

December

Follow up on personal gifts and annual campaign—goal to get donations in by
year end
3rd Dues Renewal mailer

January

Trivia Night
Grant writing
February
Review status of campaign

March

Campaign thank you event

April

Golf Tournament
Final annual campaign appeals

May

Review status of campaign
Prepare for donor listing in newsletter
Develop plan for next fiscal year

June

Present next year's plan for approval