

Resource Development Action Plan

Program Name: _____ Resource Development Annual Action Plan FY: _____

METHODOLOGY	JAN	FEB	MAR	APR	MAY	JUN	6 MO. TOTAL
ANNUAL GIVING							
MAJOR	\$	\$	\$	\$	\$	\$	\$
<i>SPECIAL</i>	\$	\$	\$	\$	\$	\$	\$
<i>GENERAL</i>	\$	\$	\$	\$	\$	\$	\$
FEDERATED SUPPORT <i>UNITED WAY, ETC.</i>	\$	\$	\$	\$	\$	\$	\$
BUSINESS	\$	\$	\$	\$	\$	\$	\$
FOUNDATION	\$	\$	\$	\$	\$	\$	\$
GOVERNMENT <i>FEDERAL</i>	\$	\$	\$	\$	\$	\$	\$
<i>STATE</i>	\$	\$	\$	\$	\$	\$	\$
<i>LOCAL</i>	\$	\$	\$	\$	\$	\$	\$
PROSPECT	\$	\$	\$	\$	\$	\$	\$
PLANNED GIVING							
NEWSLETTER, OTHER PUBL.							
OPPORTUNITIES							

Actual: \$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____
 Goal: \$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____

Resource Development Action Plan

Program Name: _____ Resource Development Annual Action Plan FY: _____

METHODOLOGY	JULY	AUG	SEPT	OCT	NOV	DEC	6 MO. TOTAL
ANNUAL GIVING							
MAJOR	\$	\$	\$	\$	\$	\$	\$
<i>SPECIAL</i>	\$	\$	\$	\$	\$	\$	\$
<i>GENERAL</i>	\$	\$	\$	\$	\$	\$	\$
FEDERATED SUPPORT <i>UNITED WAY, ETC.</i>	\$	\$	\$	\$	\$	\$	\$
BUSINESS	\$	\$	\$	\$	\$	\$	\$
FOUNDATION	\$	\$	\$	\$	\$	\$	\$
GOVERNMENT <i>FEDERAL</i>	\$	\$	\$	\$	\$	\$	\$
<i>STATE</i>	\$	\$	\$	\$	\$	\$	\$
<i>LOCAL</i>	\$	\$	\$	\$	\$	\$	\$
PROSPECT	\$	\$	\$	\$	\$	\$	\$
PLANNED GIVING							
NEWSLETTER, OTHER PUBL.							
OPPORTUNITIES							

Actual: \$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____
 Goal: \$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____

Resource Development Action Plan Example

METHODOLOGY	JAN	FEB	MAR	APR	MAY	JUN	6 MO. TOTAL
PROSPECT			Newsletter - NL		VIP Reception Banquet		
ORG. KF/TW	1,500 sponsorship		1,500 sponsorship NL		1,500 sponsorship		4,500
BUS. KF/TW/JG	Croquet 10,000 Doc 5,000	Croquet 10,000 Business Strategy 10,000	Croquet 10,000 NL DOC 5,000	Croquet 30,000	Banc One 15,000 DOC 5,000	Business Strategy 10,000	110,000
GOVT. KL/HL		City of S_____ 100,000	NL				100,000
ANNUAL GIVING SOCIETY (5,000 +) JG/KF	Finish recruiting Cornerstone campaign team Conduct Cornerstone mtng. for strategy/giving goal for campaign Renewal News Update-RNU	Launch Cornerstone Campaign Conduct Cornerstone Training Begin visits/calls/contacts RNU	Campaign 50,000 (divide out among major gift categories) Continue visits/calls/contacts Reception 25,000 NL RNU	Campaign 50,000 (divide out among major gift categories) Continue visits/calls/contacts RNU	Campaign 200,000 (divide out among major gift categories) VIP Reception Banquet 50,000 (divide out among major gift categories) RNU	Spring Mailer 50,000 RNU	425,000
CORNER. (1000-4999) JG	Set strategy/giving goal for campaign RNU	RNU	NL RNU	RNU	VIP Reception Banquet RNU	RNU	TBD
M. TEAM (100 – 1,000) JG	Set strategy/giving goal for campaign		NL RNU			RNU	TBD
INDIV (5-99) JG/TEAM	10,000 mis/pledges	10,000 mis/pledges	NL 2,000 10,000 mis/pledges	10,000 mis/pledges	10,000 mis/pledges	10,000 mis/pledges	62,000
FOUND. KL		RWJ 300,000 Woolf 50,000	NL	La Children 20,000	CHRISTUS 50,000 Frost 30,000		450,000
CHUR. TH	1,500 pledge	1,500 pledge	1,500 pledge NL	1,500 pledge	1,500 pledge	1,500 pledge	9,000
PLANNED GIVING JG	<i>draw on advisor marketing action in 05)</i>	<i>expertise and implement</i>	NL				
OPPORTUNITIES							

Actual:	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Goal:	\$ 28,000	\$ 481,500	\$ 105,000	\$ 111,500	\$ 368,000	\$ 71,500	\$ 1,160,500

Resource Development Action Plan Example

METHODOLOGY	JUL	AUG	SEP	OCT	NOV	DEC	6MO TOTAL
PROSPECT	NL			NL		NL	
ORG. KF/TW	1,500 sponsorship NL		1,500 sponsorship Annual Community Conference	NL	1,500 sponsorship	NL	4,500
BUS. KF/TW/JG	Bancorp 10,000 Business Strategy 10,000 NL	Am South 10,000 DOC 5,000	Hibernia 7,500 Annual Community Conference	Int Paper 5,000 DOC 5,000 NL	Business Strategy 10,000 Centerpoint 2,500	NL	65,000
GOVT. KL/HL	NL		90,000 Federal Earmark Annual Community Conference	NL		NL	90,000
ANNUAL GIVING SOCIETY (5,000 +) JG/KF	NL RNU	Dev Team Calls 25,000 (divide out among major gift categories) RNU	Dev Team Calls 25,000 (divide out among major gift categories) Annual Community Conference Special Post Reception RNU	Dev Team Calls 25,000 (divide out among major gift categories) NL RNU	Dev Team Calls 25,000 (divide out among major gift categories) RNU	Dec – end 35,000 Society Reception 10,000 NL RNU	145,000
CORNER. (1000-4999) JG	NL RNU	RNU	Friendship Lunch 5,000 Annual Community Conference Special Post Reception RNU	Friendship Lunch 5,000 NL RNU	Friendship Lunch 5,000 RNU	Dec – end 30,000 NL RNU	45,000
M. TEAM (100 – 1,000) JG	NL	Attorney Letter and Luncheon 7,500	Annual Community Conference Special Post Reception RNU	NL		Dec.—end 25,000 NL RNU	32,500
INDIV (5-99). JG/TEAM	15,000 pledges NL 2,000	15,000 pledges	Annual Community Conference 15,000 pledges	Dir. Mail 35,000 15,000 pledges NL 2,000	Phonathon 15,000 15,000 pledges	15,000 pledges NL 10,000	154,000
FOUND. KL	30,000 Community Foundation NL	300,000 RWJ	Annual Community Conference	La Child 5,000 NL	25,000 Fam Found	25,000 Fam Found NL	385,000
CHUR. TH	1,500 pledge NL	1,500 pledge	Annual Community Conference 1,500 pledge	1,500 pledge 15,000 BBC NL	1,500 pledge	1,500 pledge NL	10,500
PLANNED GIVING JG	NL		Annual Community Conference	Host Planned Giving Luncheon NL		NL	
OPPORTUNITIES							

Actual:	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Goal:	\$ 70,000	\$ 364,000	\$ 145,500	\$ 113,500	\$ 100,500	\$ 71,500	\$ 931,500