08

**Fall**

**<NAME OF ORGANISATION> Fundraising Strategic Plan**

Stephen Mally, CFRE

19 March 2017

**Stephen Mally, Director Suite 2/128 Oxlade Dr New Farm QLD 4005 Phone: 04 3050 0524 E-Mail: stephen@fundraisingforce.com.au Web: www.fundraisingforce.com.au**

Table of Contents

1 FUNDRAISING OPERATING PLAN 8

1.1 FY12 – FY14 8

1.1.1 Introduction 8

2 EXECUTIVE SUMMARY 9

2.1 Introduction 9

2.2 Business Driver 9

2.3 Strategic Approach 9

2.4 Ownership 9

2.5 Structure of Fundraising Program 10

2.6 Fundraising Revenue History 11

2.7 Cost of Fundraising 12

2.8 Number of Donors 13

2.9 Projected Revenue 14

2.10 Expenses 15

2.11 Goals 16

2.12 Reporting and Analysis 16

2.13 Dynamic Document 16

2.14 Timeline 16

3 <NAME OF ORGANISATION> STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS (SWOT) 17

3.1 STRATEGIES TO OVERCOME KEY ISSUES IDENTIFIED FROM SWOT 17

4 COMPETITIVE LANDSCAPE 19

5 COMPARITIVE ANALYSIS 20

6 DIRECT MARKETING 21

6.1 Goal One 21

6.2 Objective One 21

6.3 Action Steps 21

6.4 Objective Two 21

6.5 Action Steps 21

6.6 Goal Two 22

6.7 Objective One 22

6.8 Action Steps 22

6.9 Objective Two 22

6.10 Action Steps 22

6.11 Goal Three 23

6.12 Objective One 23

6.13 Action Steps 23

6.14 Objective Two 23

6.15 Action Steps 23

7 PAYROLL GIVING 24

7.1 Goal One 24

7.2 Objective One 24

7.3 Action Steps 24

7.4 Objective Two 24

7.5 Action Steps 24

7.6 Goal Two 25

7.7 Objective One 25

7.8 Action Steps 25

7.9 Objective Two 25

7.10 Action Steps 25

7.11 Goal Three 26

7.12 Objective One 26

7.13 Action Steps 26

7.14 Objective Two 26

7.15 Action Steps 26

8 <NAME OF ORGANISATION> WORKPLACE GIVING 27

8.1 Goal One 27

8.2 Objective One 27

8.3 Action Steps 27

8.4 Objective Two 27

8.5 Action Steps 27

8.6 Goal Two 28

8.7 Objective One 28

8.8 Action Steps 28

8.9 Objective Two 28

8.10 Action Steps 28

8.11 Goal Three 29

8.12 Objective One 29

8.13 Action Steps 29

8.14 Objective Two 29

8.15 Action Steps 29

9 COMMUNITY FUNDRAISING 30

9.1 Goal One 30

9.2 Objective One 30

9.3 Action Steps 30

9.4 Objective Two 30

9.5 Action Steps 30

9.6 Goal Two 31

9.7 Objective One 31

9.8 Action Steps 31

9.9 Objective Two 31

9.10 Action Steps 31

9.11 Goal Three 32

9.12 Objective One 32

9.13 Action Steps 32

9.14 Objective Two 32

9.15 Action Steps 32

10 EVENTS 33

10.1 Goal One 33

10.2 Objective One 33

10.3 Action Steps 33

10.4 Objective Two 33

10.5 Action Steps 33

10.6 Goal Two 34

10.7 Objective One 34

10.8 Action Steps 34

10.9 Objective Two 34

10.10 Action Steps 34

10.11 Goal Three 35

10.12 Objective One 35

10.13 Action Steps 35

10.14 Objective Two 35

10.15 Action Steps 35

11 REGULAR GIVING 36

11.1 Goal One 36

11.2 Objective One 36

11.3 Action Steps 36

11.4 Objective Two 36

11.5 Action Steps 36

11.6 Goal Two 37

11.7 Objective One 37

11.8 Action Steps 37

11.9 Objective Two 37

11.10 Action Steps 37

11.11 Goal Three 38

11.12 Objective One 38

11.13 Action Steps 38

11.14 Objective Two 38

11.15 Action Steps 38

12 DONOR CLUBS/SOCIEITES 39

12.1 Goal One 39

12.2 Objective One 39

12.3 Action Steps 39

12.4 Objective Two 39

12.5 Action Steps 39

12.6 Goal Two 40

12.7 Objective One 40

12.8 Action Steps 40

12.9 Objective Two 40

12.10 Action Steps 40

12.11 Goal Three 41

12.12 Objective One 41

12.13 Action Steps 41

12.14 Objective Two 41

12.15 Action Steps 41

13 MAJOR GIFTS 42

13.1 Goal One 42

13.2 Objective One 42

13.3 Action Steps 42

13.4 Objective Two 42

13.5 Action Steps 42

13.6 Goal Two 43

13.7 Objective One 43

13.8 Action Steps 43

13.9 Objective Two 43

13.10 Action Steps 43

13.11 Goal Three 44

13.12 Objective One 44

13.13 Action Steps 44

13.14 Objective Two 44

13.15 Action Steps 44

14 BEQUESTS 45

14.1 Goal One 45

14.2 Objective One 45

14.3 Action Steps 45

14.4 Objective Two 45

14.5 Action Steps 45

14.6 Goal Two 46

14.7 Objective One 46

14.8 Action Steps 46

14.9 Objective Two 46

14.10 Action Steps 46

14.11 Goal Three 47

14.12 Objective One 47

14.13 Action Steps 47

14.14 Objective Two 47

14.15 Action Steps 47

15 CORPORATE PARTNERSHIPS 48

15.1 Goal One 48

15.2 Objective One 48

15.3 Action Steps 48

15.4 Objective Two 48

15.5 Action Steps 48

15.6 Goal Two 49

15.7 Objective One 49

15.8 Action Steps 49

15.9 Objective Two 49

15.10 Action Steps 49

15.11 Goal Three 50

15.12 Objective One 50

15.13 Action Steps 50

15.14 Objective Two 50

15.15 Action Steps 50

16 TRUSTS AND FOUNDATIONS 51

16.1 Goal One 51

16.2 Objective One 51

16.3 Action Steps 51

16.4 Objective Two 51

16.5 Action Steps 51

16.6 Goal Two 52

16.7 Objective One 52

16.8 Action Steps 52

16.9 Objective Two 52

16.10 Action Steps 52

16.11 Goal Three 53

16.12 Objective One 53

16.13 Action Steps 53

16.14 Objective Two 53

16.15 Action Steps 53

17 DONOR CARE AND STEWARDSHIP 54

17.1 Goal One 54

17.2 Objective One 54

17.3 Action Steps 54

17.4 Objective Two 54

17.5 Action Steps 54

17.6 Goal Two 55

17.7 Objective One 55

17.8 Action Steps 55

17.9 Objective Two 55

17.10 Action Steps 55

17.11 Goal Three 56

17.12 Objective One 56

17.13 Action Steps 56

17.14 Objective Two 56

17.15 Action Steps 56

18 BOARD AND LEADERSHIP DEVELOPMENT 57

18.1 Goal One 57

18.2 Objective One 57

18.3 Action Steps 57

18.4 Objective Two 57

18.5 Action Steps 57

18.6 Goal Two 58

18.7 Objective One 58

18.8 Action Steps 58

18.9 Objective Two 58

18.10 Action Steps 58

18.11 Goal Three 59

18.12 Objective One 59

18.13 Action Steps 59

18.14 Objective Two 59

18.15 Action Steps 59

Version Control

|  |  |  |
| --- | --- | --- |
| Date | Change | Version |
| <Date> | Document creation | 1.0 |
|  | Document enhancements | 2.0 |
|  | Document enhancements | 3.0 |
|  | Document enhancements | 4.0 |

# FUNDRAISING OPERATING PLAN

## FY12 – FY14

### Introduction

The resulting document is a Fundraising Strategic Plan by fundraising area: <NAME OF FUNDRAISING AREAS AND HYPERLINK TO EACH>

Each fundraising area has assigned action steps to responsible parties. These parties have been informed of their involvement in each of the plans. The combined plans, with the involvement of these responsible parties, create a comprehensive plan for the department and a powerful team to accomplish each of the goals and the overall combined goal. <NAME OF ORGANISATION> staff are proud of the plan developed. This plan is dynamic in nature and it will be monitored quarterly and annually. When necessary, it will be added to and adjusted accordingly.

**Responsibility Table <WILL BE COMLETED AFTER WORKSHOPS>**

|  |  |
| --- | --- |
| **Position** | **Position (Abbreviation)** |
| Chair of Board | COB |
| Board | BD |
| Chief Executive Officer | CEO |
| Fundraising Staff | FR |
| Donor Relations | DR |
| Marketing Coordinator | MC |
| Fundraising Committee | FRC |
| Supplier | SP |
| Volunteer | VOL |

# EXECUTIVE SUMMARY

## Introduction

Commencing in September, 2014, <NAME OF ORGANISATION> staff undertook an exercise to develop a Fundraising Strategic Plan (FSP) in order to increase capacity to raise funds for <NAME OF ORGANISATION> Institute. The process was driven by leadership, developed by a FundraisingForce Consultant, approved by <NAME OF ORGANISATION> leadership, and implemented jointly by the FundraisingForce Consultant and <NAME OF ORGANISATION>. The process involved the study of <NAME OF ORGANISATION>’s fundraising history and the development of goals, objectives and action steps based on this historical perspective, competitive intelligence and growth projections.

The resulting document is a Fundraising Strategic Plan by fundraising area: <NAME OF FUNDRAISING AREAS AND HYPERLINK TO EACH>

## Business Driver

The business driver for the Fundraising Strategic Plan FY15/16-FY18/19 is to grow sustainable cost-effective and regular revenue streams enabling <NAME OF ORGANISATION> to establish and grow <to be completed>.

The Plan requires <NAME OF ORGANISATION> staff and management working with the Board to enhance fundraising capacity.

## Strategic Approach

The overarching strategic approach underpinning the FSP is to implement fundraising programs and initiatives focused on:

* Acquiring new donors
* Engaging donors
* Maintaining/retaining donors
* Upgrading donors to higher levels of giving

## Ownership

The methodology employed to develop the FSP was highly collaborative and consultative to ensure that all involved have a strong sense of ownership of the plan. Strong fundraising programs are best developed through the collaborative creation of goals setting from the programmatic level upward. The process involved staff of all levels and staff from a variety of <NAME OF ORGANISATION> departments. This is important if <NAME OF ORGANISATION> is to be successful in realising the fundraising goals.

## Structure of Fundraising Program

The structure of the fundraising program is aligned with the pyramid of giving:

* Direct Marketing program  – <NAME OF ORGANISATION> community involvement; direct mail; staff and volunteer engagement; special events; third party events; regular giving
* Major Giving program – major gifts; corporate and community partnerships; trusts and foundations
* Bequests

The pyramid of giving is designed to demonstrate the donor lifecycle. Donors will first become engaged with <NAME OF ORGANISATION> at the base or foundation of the pyramid through direct marketing programs. At this stage, donors are identified. <NAME OF ORGANISATION> Institute staff engagement, payroll giving, direct marketing, special events, community fundraising, and regular giving are vital programs to the success of <NAME OF ORGANISATION>. At the second stage of the pyramid, donor’s become more informed, their interest grows, and they become more involved in the organisation, its mission and their commitment to the mission. This position of the pyramid includes major gifts, corporate and community partnerships, and trusts and foundations. At the top of the pyramid, an individual donor’s ultimate commitment to <NAME OF ORGANISATION> will emerge as donor’s leave a legacy to the organisation through a bequest. This is the ultimate investment any donor will make. The philosophy is that all major giving prospects may also bequests prospects.

## Fundraising Revenue History

Before <NAME OF ORGANISATION> can plan and is able to project revenue goals for the future, it is critical that historical fundraising achievements be documented as part of this Fundraising Strategic Plan.

<CHARTS AND GRAPHS>

## Cost of Fundraising

One important metric for the Board and staff to examine is the cost of fundraising. Certain avenues for fundraising are more expensive than others and, thus, have lower return on investment (ROI).

<CHARTS AND GRAPHS>

## Number of Donors

Fundraising is measured by many metrics, including revenue, number of donors, average gift, cost of fundraising, and others.

<NARRATIVE>

<CHARTS AND GRAPHS>

## Projected Revenue

<NARRATIVE>

## Expenses

Fiscal year expenditure forecasts were developed and this will ultimately become part of <NAME OF ORGANISATION>’s annual budget planning cycle.

Based on the proposed programs and activities outlined in the FOP, it is anticipated that the most significant increases in expenditure will be in the following areas:

* <AREA>
* <AREA>
* <AREA>

## Goals

<NARRATIVE>

<LINKS TO EACH FUNDRAISING AREA>

## Reporting and Analysis

Throughout the three year time period, it will be critical to establish proper metrics to measure the success of the FSP. Staff and suppliers will be required to report on key performance indicators such as total dollars raised, numbers of acquired/new donors, cost to raise a dollar, donor retention rates, donors upgraded, and other important measures. These metrics may not be available nor in place as of the development of the FSP. The staff will ensure they are available from this point moving forward.

The ongoing focus on results delivery and results analysis creates a new climate in fundraising at <NAME OF ORGANISATION>.

## Dynamic Document

The FSP is a dynamic document and a roadmap for <NAME OF ORGANISATION> for the next three years. Like anyone utilising a roadmap, <NAME OF ORGANISATION> may decide to adjust its route based on road conditions, climate, or other factors. As staff monitor, analyse, and report, staff will keep the Board fully informed of any changes to the FSP over time.

## Timeline

<Graphic to represent implementation timeline>

# <NAME OF ORGANISATION> STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS (SWOT)

<NAME OF ORGANISATION> went through an exercise to identify Strengths, Weaknesses, Opportunities, and Threats (SWOT) as they relate to fundraising. This SWOT analysis, allowed <NAME OF ORGANISATION> to determine ways in which the organisation stands out, ways in which <NAME OF ORGANISATION> have challenges in gaining support, opportunities for improvement, and difficulties faced in raising support.

The chart, which, follows, will highlight the SWOT analysis outcomes.

|  |  |  |  |
| --- | --- | --- | --- |
| **Strengths** | **Weaknesses** | **Opportunities** | **Threats** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Key issues from SWOT

* <ISSUE>
* <ISSUE>
* <ISSUE>
* <ISSUE>
* <ISSUE>
* <ISSUE>

## STRATEGIES TO OVERCOME KEY ISSUES IDENTIFIED FROM SWOT

|  |  |  |
| --- | --- | --- |
| **SWOT ISSUE** | **STRATEGY** | **RESOURCE REQUIRED** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# COMPETITIVE LANDSCAPE

Some key findings include:

* <KEY FINDING>
* <KEY FINDING>
* <KEY FINDING>
* <KEY FINDING>
* <KEY FINDING>

# COMPARITIVE ANALYSIS

<NARRATIVE>

# DIRECT MARKETING

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

# PAYROLL GIVING

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

# <NAME OF ORGANISATION> WORKPLACE GIVING

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

# COMMUNITY FUNDRAISING

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

# EVENTS

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

# REGULAR GIVING

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

# DONOR CLUBS/SOCIEITES

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

# MAJOR GIFTS

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

# BEQUESTS

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

# CORPORATE PARTNERSHIPS

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

# TRUSTS AND FOUNDATIONS

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

# DONOR CARE AND STEWARDSHIP

<NARRATIVE>

## Goal One

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

# BOARD AND LEADERSHIP DEVELOPMENT

Narrative

## Goal One

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Two

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Goal Three

## Objective One

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)

## Objective Two

## Action Steps

* **FY15/16**
	+ Step One (Assigned to)
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY16/17**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)
* **FY17/18**
	+ Step Two (Assigned to)
	+ Step Three (Assigned to)