

Creating the Annual Development Action Plan

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Writing a plan about how we should be spending our time and our organization's resources often seems more difficult than just "doing the job." In fact, a common excuse is: "I'm too busy. I don't have time to plan."

Time is a precious commodity to any development officer. Therefore, the majority of our time should be spent wisely in those activities that will produce the best possible results. The only way we can be certain that this will happen is to have a well thought out written plan of action – and implement it.

All planning processes have similar components, whether you are preparing a strategic plan or an annual plan.

- **Mission** – Everything that you do or plan to do on behalf of your organization must flow from an understanding of who you are and who you serve. In addition, you and other members of your staff should write a development program mission statement. Both should appear at the beginning of the plan.
- **The Current Status** – In order to determine what must be accomplished in the coming year, you need to know where you stand at the present. Gather as much current data from reports and development staff discussions as you can. Also, interview other key staff, trustee leadership, and select volunteers to get their views on what was done well and how things might be done better.
- **Charting the Course** – Following the honest analysis, the objectives to be accomplished within the coming year can be set. Some of the objectives will be arbitrary because of organizational planning that has already been approved by the Board. Other objectives will have been determined by the demands of the operating budget or the plant emergencies that cannot be covered by current resources. Last, there should be objectives that will relate directly to strengthening your department's ability to serve the organization, including challenging staff members to become increasingly more knowledgeable and effective.
- **Assessing Progress and Making Corrections** – Following the creation of any plan, there will be information and impediments that could not have been anticipated. Constant monitoring of the implementation of the plan and a willingness to make course corrections are essential to success.

The Analysis – Common Questions to Gain Perspective

Asking and answering the following questions can make your planning activity more targeted and effective:

- Is the organizational case statement adequate and up to date?
- What annual fund-raising goals were attempted last year and were they achieved?
- How were the fundraising goals set and was the process effective?
- If you are in a capital effort, what specific goals must be accomplished in the upcoming fiscal year?
- What pieces of printed material are being used and for what purposes?
- Who is currently involved in telling the story of your organization (CEO, other staff members Board members, alumni, physicians, etc.) and how successful have they been?
- How has the CEO been involved and has this been a productive use of his/her time and energy?
- Is the current system of record keeping and response to donors up to expectations? Can you get the reports you need to do your work efficiently?
- How are volunteers being utilized in both program and fund-raising activities?
- What is the status of the internal operations of the development office?
- Are there relationship issues within the department/ organization that have an impact on your ability to function effectively?

Step by Step – Creating and Implementing an Annual Development Action Plan

For any plan to be accepted and effective, those who are stakeholders must have had an opportunity for input and – whenever possible – to have had a major role in creating that portion which they must implement. This concept includes support staff members who are responsible for preparing mailings, providing lists, arranging meetings, and the like. It is wise to listen to those who perform the work. Because they are daily involved, they can, and do, offer good advice on how to accomplish the many nitty gritty, necessary, unglamorous tasks that are the base of every development program.

Step 1 – Schedule a planning session for your staff members at a location where telephones are hard to find. If you can, take them to a retreat location.

Step 2 – Make a presentation, lead a discussion, and answer questions on the overall organizational objectives that the department must help achieve. It is important that all staff members participate in this part of the meeting.

Step 3 – Ask each staff member to make a presentation to the group on his/her area of responsibility, including what was accomplished the previous year and the proposed plan for the coming year. Each presented objective should have action steps and specific target dates for completion.

Step 4 – Show the interrelationships that exist between the individual areas of responsibility; lead a thorough discussion of each presentation.

Step 5 – Be aware of how any new program or expansion of a present program affects the department's budget. Determine if a request for additional funds or a readjustment of budgeted funds will be necessary.

Step 6 – With support staff present, transfer the elements of the plan that make an impact on the office work schedule (direct mail, magazine, newsletters, etc.) to a master calendar. LISTEN to your support staff and make adjustments as may be required.

Step 7 – Present the plan to the CEO for review and comment. It is important that his/her priorities are reflected in the plan for it to be accepted and successful.

Step 8 – Present the completed plan to the Development Committee of the Board for its review and acceptance.

Step 9 – In conjunction with the Development Chair of the Board, distribute the plan and make a presentation to the full Board. Ask for the Board's acceptance and support.

Step 10 – Following the Board's acceptance and approval, the annual Development action plan is ready to be implemented.

We realize that not every chief development officer has a staff, and many of our readers are responsible for the full program with very little office support personnel. Yet, the process is valid regardless of the number of persons involved. The key is to build a logical, workable plan on paper and get the ownership and participation of those persons you need to be able to accomplish your goals. Chief among these are, of course, the members of your Board.