Kristi Howard-Shultz
Consulting

*Date*_____

GROWTH & OPERATIONS PLAN

Prepared by _____

INSTRUCTIONS:

Use this narrative plan to lead all agency team members/board/staff/committees through successful campaign and event execution. This is an excellent document to use in staff training, as a succession planning tool and even when creating job descriptions & performance evaluations.

These are simply examples. Use them to launch your specific plan on the next page!

OBJECTIVE:

Provide Development Officer with a map to plan a successful year in development, resulting in stronger fundraising committees, third party events, and achieving the Development Officer's portion of the development department goal.

WAYS TO MAKE THIS A MEANINGFUL TOOL TO KEEP ON TRACK:

1. Refer to it to develop agendas for key meetings.
2. Refer to it to keep all team members informed and accountable.
3. Measure progress against these timelines and goals.

OBJECTIVE GOALS:

Through successful work with fundraising committees and staff **_net_** the following amounts in each category by fiscal year end:

Through successful work with fundraising committees and staff net the following amounts in each category/campaign by fiscal year end:

-
-

MEANS TO ACHIEVE OBJECTIVE GOALS:

- *Train fundraising committees accordingly.*
- *Engage them in making the roadmap for their success.*
- *Encourage them to set and achieve their own goals related to this plan.*
- *Evaluate and improve existing events.*
- *Coordinate Development campaigns with Program/Recruitment campaigns to build stronger relationships with donors.*

ADDITIONAL GOALS/IDEAS:

- *Donor survey*
- *Weekly "thank you" calls from daily deposit list*
- *Solicitations written in varied voices—volunteer, program staff, program participant/beneficiary, donor, etc.*

OBJECTIVE:

WAYS TO MAKE THIS A MEANINGFUL TOOL TO KEEP ON TRACK:

1.
2.
3.

OBJECTIVE GOALS:
Through successful work with fundraising committees and staff *__net__* the following amounts in each category by fiscal year end:

1.
2.
3.

MEANS TO ACHIEVE OBJECTIVE GOALS:

1.
2.
3.

ADDITIONAL GOALS/IDEAS:

1.
2.
3.

MONTH

Backdating is crucial here! For example, in the same month, your admin team may be paying invoices for a past event while running the mailing list for an upcoming campaign. The goal is to use this tool not only to keep all team members on track, but to foster a true partnership in resource development by respecting each team's time, work, strengths & contributions. Some months are busier than others. We can acknowledge that, plan and adjust accordingly here. Clear is kind. Unclear is unkind.

ADMINISTRATIVE SUPPORT   STAFF LEAD:

1.
2.
3.

VOLUNTEER MANAGEMENT   STAFF LEAD:

1.
2.
3.

MARKETING/PUBLIC RELATIONS   STAFF LEAD:

1.
2.
3.

PROGRAM SUPPORT   STAFF LEAD:

1.
2.
3.

KEY MEETING DATES   STAFF LEAD:

1. Board:
2. Staff:
3. Committee:
4. Others: