

Topics for Discussion: Preparing to draft an operations plan

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Strategic Planning

- Use School's mission statement and/or Strategic Plan
- Set multi-year goals and priorities in writing

Annual Fund

- Set goals
- Rate top donors
- Printed solicitations
- Phone solicitations
- Personal solicitations

Alumni Relations

- Reunions – goals for participation/planned gifts
- Alumni Board strategic planning

Trustees/Volunteers

- How well do you utilize them?
- Do they know their mission?

Database Management

- Reporting/pledge accounting
- Prospect identification/targeting
- Gift charts for annual fund, major gifts, capital campaign

Donor Cultivation

- Receptions/Thank You/School programs
- Recognition programs

Major Gifts Program

- Set goals
- Research donors
- Rate prospects
- Personal solicitations -- assign solicitors

Capital Campaigns

- From silent phase to wrap-up: how will it affect the office?

Planned Giving

- Set goals
- Recognition society

Communications

- What communication tools do you use to reach constituents? Are they effective?
- Calendar
- Discuss each event handled by the Development office. Are they fundraisers or friendraisers? Are they cost effective?