ENGAGEMENT OVERVIEW

Strategic Fund Development Plan

Two-year strategy and implementation framework

Client profile

An emerging nonprofit preparing to launch a residential human-services program. Client identity, location, financial information and organization-specific recommendations have been withheld.

Engagement objective

Develop a sustainable funding strategy that supports a responsible program launch, establishes a formal development function, diversifies operating revenue and creates a separate path to long-term facility financing.

51 pages

Original client deliverable

24 months

Strategic planning horizon

Scope of work

Organizational assessment, fundraising strategy, board engagement, public funding readiness, facility acquisition options, communications, implementation planning and a ten-part operational toolkit.

About this sample

Selected and adapted material from a completed consulting deliverable. It illustrates the scope and approach of the engagement, not client outcomes or a complete implementation guide.

PART I / SELECTED STRATEGY

Strategic assessment & funding sequence

Assessment framework

The engagement examined organizational readiness, funding diversification, development infrastructure, governance, operating sustainability and the distinction between capital and operating needs.

01 **Establish readiness**

Confirm the service model, approved budgets, governance, fiscal status and partnerships.

02 **Finance capacity**

Prioritize flexible support for planning, compliance, program development and fundraising infrastructure.

03 **Build recurring support**

Develop foundation, corporate, individual and eligible public funding streams tied to documented outcomes.

04 **Separate facility decisions**

Evaluate occupancy and ownership options, financing feasibility and applicable approvals before capital solicitation.

Financial planning discipline

Use approved start-up and operating budgets, cash-flow scenarios and reserve requirements to establish fundraising targets. Track pending requests separately from committed revenue.

PART I / SELECTED STRATEGY

Board fundraising & accountability

Transforming board culture

Most boards are asked to help with fundraising and are never shown how. The plan makes development a shared leadership responsibility, supported by specific actions, training and regular review.

Annual board retreat

Dedicate time to strategy, fundraising responsibilities, donor engagement and individual commitments.

CEO wish list

Bring specific requests for introductions and practical assistance to board meetings, rather than vague requests to fundraise.

Board giving expectations

Establish a written policy for personally meaningful giving and agreed fundraising participation.

Fundraising training

Equip board members to identify prospects, cultivate relationships, make appropriate asks and thank donors.

Standing development agenda

Review fundraising progress regularly, assign ownership of actions and track commitments.

Governance safeguards

The full engagement also addressed independent decision-making, written policies, oversight and appropriate professional review of material transactions.

PART I / SELECTED STRATEGY

Two-year implementation roadmap

Months 1–3

Organize

Assess readiness; confirm budgets and policies; establish donor systems; convene board leadership.

Months 4–6

Build

Begin funder cultivation, priority proposals, individual and corporate outreach, and partner engagement.

Months 7–12

Convert

Steward prospects, build a renewal pipeline, review assumptions and strengthen reporting.

Months 13–18

Expand

Pursue multi-year funding, deepen partnerships and assess capital feasibility when ready.

Months 19–24

Sustain

Renew support, strengthen recurring giving, evaluate progress and prepare the next strategic plan.

Implementation capacity

The plan identifies the need for designated development leadership, consistent oversight and specialized expertise. Implementation services are a separate engagement from strategic planning.

PART II / IMPLEMENTATION TOOLKIT

From strategy to practical execution

The original engagement included ten supporting resources designed to help leadership implement the strategic plan.

A	Government funding guide
B	Industry, program and project codes
C	Fundraising systems and CRM guide
D	Board fundraising and retreat toolkit
E	Corporate and foundation prospect directory
F	Priority grant opportunities
G	Annual fundraising and communications calendar
H	Signature event planning guide
I	Grant proposal analysis
J	Research and sources

Engage S Joye & Associates

Strategic fund development planning | Board governance and fundraising advisory | Fractional development leadership | Government and foundation funding strategy

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