

Writing your own development strategy: a template

How to use this resource

- 1) Gather your development stakeholders together
- 2) Scan the 'area for development' column and pick an area to start with
- 3) Use the questions as prompts to help you audit your previous development strategy, and note down your responses to the prompts on the page
- 4) Prioritise and check off the actions to start building your development plan
- 5) Use the timeframe as a guide for setting deadlines stay on track
- 6) Use the notes to add in any helpful insights along the way

Strategic area for development	Strategic Aim	Questions to ask	Actions	Timeframe	Notes
Culture of philanthropy	To develop and grow a culture of philanthropy across the school and its community	What is the philanthropic history? what campaigns have been successful? What was giving like? What is our current culture? Do we inspire giving? Do people know about our causes?	Developing understanding of the school as a charity through assemblies, visiting speakers etc. Donor spotlights Volunteer spotlights University ambassadors High school lectures Aligning school ethos with development aims		
Alumni engagement & relations	To engage our alumni and create a supportive community which provides value to the School and alumni	What is our current engagement? What do we want to achieve? How will this support our fundraising goals?	Look at current rates of engagement: Donations Event attendance Email engagement Social engagement Responses to hard copy mailing		
Community engagement & relations	To engage our wider community to build our network and provide opportunities for those involved with the school	Who is included in our wider community? How do we currently interact with them?	Look at current rates of engagement: Donations Event attendance, Email engagement Social engagement Responses to hard copy mailing		
Fundraising	To support the School by raising money for development plans and bursary funds through parents, alumni and wider community	What previous fundraising activities have worked well? What amount do we need to raise? What are the current fundraising campaigns? How do we steward our donors?	Match your fundraising activity to your overall strategy E.g. if you are targeting legacy donors, match your fundraising comms and activity to this Consider Events Collections - virtual and face-to-face		
Networks	To create strategic partnerships with external organisations within our network to advance the School's opportunities	Who have we partnered with in the past? Who can we partner with in the future? What are other schools doing?	List all possible organisations to work with: Other schools Organisations Professional bodies		
Communications	To inform our alumni of opportunities and updates from the School & alumni community	How do we currently communicate? Is it effective? Which channels can we optimise?	Consider how you are using: Email Social media - which generations are you targeting where? Website Mailing		

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Data management	To ensure our data is clean, usable and provides us with insights to drive our development strategy	What is our current process for handling data? Is our data accurate? When was the last time we cleaned our data?	Review data handling practices Consider which data can be deleted if there is no longer a purpose for it Ensure a single record is held for each person Use pick lists for easy segmentation & filtering		
Legislation	To ensure our development strategy and data management meet the legislative requirements	Do our data management and fundraising practices meet the legislative requirements? Is there any upcoming legislation we need to watch out for?	Map your fundraising activities Consider training your team on any updated/upcoming legislation Allocate an individual to stay up-to-speed on legislation that affects you		
Budget & resources	To plan our budget and resources effectively to meet the aims of our strategy	How much budget will we need? Which resources do we require to achieve our strategy?	Reflect on last year's budget - did it provide the returns you need? Which activities were really effective? Which would you cut? Estimate costs and ROI for planned activity Forecast conservatively; plan for the worst-case outcome		
Governance	To develop an development strategy that matches our leadership and behavioural values	How does our development strategy match our leadership and behaviour?	Consider the wider school implications of your strategy Create a roles and responsibilities document Organise an annual steering group meeting Run a risk assessment process		
Team engagement	To achieve internal support and engagement with the strategy	How will we gain internal support for our strategy? Who will take ownership for which tasks?	Decide who will own parts of the project Sell your project within your team Feed in ideas from your team Engage with marketing and admissions departments		
KPIs	To report on key metrics that will indicate whether we will achieve our overall strategy	What do we need to measure to ensure we meet our goals?	Decide on KPI's - use both hard and soft indicators, and split into two categories: financial and engagement Decide how often to report on each KPI - monthly or more regularly is best Divide responsibility for reporting		