# **Appendix B: Sample meeting agenda for reviewing current development efforts**

*<School name>*

**Development Program Review**

**Meeting agenda**

*<Date>*

**Prayer**

**Meeting Purpose:** Review current development efforts

**Introductions**

**Review of existing programs**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Annual Fund** | | Development or fundraising? (Circle one.) | | | |
|  | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** |
| Dollars raised |  |  |  |  |  |
| Dollars spent |  |  |  |  |  |
| Net dollars raised |  |  |  |  |  |
| Staff hours |  |  |  |  |  |
| Volunteer hours |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Fundraiser/​Event Name** | | Development or fundraising? (Circle one.) | | | |
|  | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** |
| Dollars raised |  |  |  |  |  |
| Dollars spent |  |  |  |  |  |
| Net dollars raised |  |  |  |  |  |
| Staff hours |  |  |  |  |  |
| Volunteer hours |  |  |  |  |  |
| **Fundraiser/​Event Name** | | Development or fundraising? (Circle one.) | | | |
|  | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** |
| Dollars raised |  |  |  |  |  |
| Dollars spent |  |  |  |  |  |
| Net dollars raised |  |  |  |  |  |
| Staff hours |  |  |  |  |  |
| Volunteer hours |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Fundraiser/​Event Name** | | Development or fundraising? (Circle one.) | | | |
|  | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** |
| Dollars raised |  |  |  |  |  |
| Dollars spent |  |  |  |  |  |
| Net dollars raised |  |  |  |  |  |
| Staff hours |  |  |  |  |  |
| Volunteer hours |  |  |  |  |  |

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| --- | --- | --- | --- | --- | --- |
| **Fundraiser/​Event Name** | | Development or fundraising? (Circle one.) | | | |
|  | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** |
| Dollars raised |  |  |  |  |  |
| Dollars spent |  |  |  |  |  |
| Net dollars raised |  |  |  |  |  |
| Staff hours |  |  |  |  |  |
| Volunteer hours |  |  |  |  |  |

**Responsibility:**

* Who is responsible for development at our school?
* If we add a planned giving society, who would be responsible for the work?
* Can we expand existing development staffing or add a dedicated development staff member?
* How can volunteers be used to support the development program?
* Current planned giving efforts: What planned giving currently exists?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Existing planned giving** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** |
| **Number of planned gifts received** |  |  |  |  |  |
| **Dollar amount of planned gifts received** |  |  |  |  |  |
| **Number of notified planned gifts** |  |  |  |  |  |
| **Approximate dollar value of notified planned gifts** |  |  |  |  |  |
| **Number of endowments** |  |  |  |  |  |
| **Value of endowments** |  |  |  |  |  |
| **Number of endowment gifts** |  |  |  |  |  |
| **Dollar value of endowment gifts** |  |  |  |  |  |

**Key themes**

**Next steps**