

EXHIBIT 6.2

Task by Date

Ref. #	Task Detail	Timeline		Status
		Start Date	End Date	
1.1.1	Review current case for support	12/1/2001	12/15/2001	Completed
4.1.1	Develop position description for CDO	12/1/2001	12/31/2001	Completed
3.2.1	Review current board expectations	12/1/2001	12/31/2001	Completed
4.1.2	Develop list of places to advertise for CDO	12/1/2001	12/31/2001	Completed
1.1.2	Prepare draft of case for support	1/2/2002	1/31/2001	Completed
4.1.3	Place ads for CDO position	1/2/2002	1/7/2002	Completed
1.2.1	Appoint Board Appeal Committee	1/8/2002	1/30/2002	Completed
3.2.2	Prepare proposed board expectations	1/10/2002	1/31/2002	Completed
4.1.4	Receive and screen applicants for CDO position	1/10/2002	2/10/2002	Completed
1.5.1	Assess previous events and determine which event(s) to hold in 2002	1/10/2002	2/15/2002	Completed
3.1.1	Endorse development plan	1/28/2002	1/28/2002	Completed
1.4.1	Develop proposed membership levels	2/1/2002	2/6/2002	Completed
1.5.2	Recruit committee to plan event	2/1/2002	2/15/2002	
2.2.1	Plan Web site	2/1/2002	2/28/2002	Completed
2.2.3	Investigate billboard opportunities	2/1/2002	2/28/2002	
1.3.1	Develop a preliminary major-gift prospect list	2/1/2002	3/31/2002	
1.3.2	Develop recognition program for major gifts	2/1/2002	3/31/2002	
1.1.3	Review draft of case for support	2/7/2002	2/7/2002	Completed
1.2.2	Conduct board screening session	2/7/2002	2/7/2002	Completed
1.2.3	Send board appeal letter	2/8/2002	2/10/2002	Completed
1.1.4	Finalize case for support	2/8/2002	3/15/2002	
4.1.5	Conduct initial interviews for CDO applicants	2/10/2002	2/20/2002	Completed
1.2.4	Conduct board solicitations	2/10/2002	3/25/2002	
4.1.6	Make initial recommendations for CDO to Board	2/20/2002	2/28/2002	Completed
4.3.2	Develop a position description for development committee	3/1/2002	3/20/2002	

continued on the next page

Implementing the Plan

Ref. #	Task Detail	Timeline		Status
		Start Date	End Date	
4.1.7	Conduct final interviews for CDO	3/1/2002	3/31/2002	
2.5.1	Prepare a list of potential organizations to join	3/1/2002	3/31/2002	
2.3.1	Determine publicity materials needed	3/1/2002	4/30/2002	
2.1.1	Develop prospect list for business leaders breakfast	3/1/2002	4/30/2002	
4.3.3	Develop a list of potential development committee members	3/1/2002	4/30/2002	
3.1.2	Develop and implement awareness survey	3/1/2002	5/31/2002	
2.2.4	Issue news releases	3/1/2002	12/31/2002	
1.1.6	Prepare appropriate materials from case	3/15/2002	4/30/2002	
3.2.3	Approve board expectations	3/25/2002	3/25/2002	
1.1.5	Endorse case for support	3/25/2002	3/25/2002	
4.1.8	Make offer to top CDO candidate	4/1/2002	4/10/2002	
2.5.2	Investigate cost and benefits of organizations	4/1/2002	4/30/2002	
1.3.3	Recruit volunteers to help with major-gift appeal	4/1/2002	5/1/2002	
1.3.4	Conduct screening meeting	4/1/2002	5/15/2002	
1.3.5	Prepare major-gift appeal materials	4/1/2002	5/30/2002	
2.2.2	Design and install Web site	4/1/2002	5/31/2002	
4.3.4	Invite potential development committee members to an orientation meeting	5/1/2002	5/30/2002	
4.3.1	Appoint a board member to chair the development committee	5/1/2002	5/30/2002	
1.4.3	Investigate rental or purchase of prospect lists	5/1/2002	5/31/2002	
1.4.2	Segment donor/prospect lists to determine approach for various prospects	5/1/2002	5/31/2002	
2.5.3	Join selected organizations	5/1/2002	5/31/2002	
2.1.2	Prepare agenda and materials for business leaders breakfast	5/1/2002	5/31/2002	
2.2.6	Investigate video needs and opportunities	5/1/2002	6/30/2002	
2.3.2	Design publicity materials	5/1/2002	6/30/2002	

Summary

Ref. #	Task Detail	Timeline		Status
		Start Date	End Date	
1.3.6	Conduct board training meeting	6/1/2002	6/15/2002	
1.4.5	Schedule phonathon and secure location	6/1/2002	6/30/2002	
4.3.5	Recruit development committee members	6/1/2002	6/30/2002	
3.1.3	Evaluate awareness survey	6/1/2002	6/30/2002	
1.4.4	Look up phone numbers of phonathon prospects	6/1/2002	6/30/2002	
2.5.4	Participate in organization activities	6/1/2002	12/31/2002	
2.1.3	Invite prospective business leaders to first business leaders breakfast	6/15/2002	7/1/2002	
1.3.7	Solicit major gifts	6/15/2002	9/30/2002	
1.5.3	Hold dance party event	6/22/2002	6/22/2002	
1.4.6	Recruit phonathon volunteers	7/1/2002	7/31/2002	
2.1.4	Hold first business leaders breakfast	7/1/2002	7/31/2002	
4.3.6	Hold first development committee meeting	7/1/2002	7/31/2002	
4.2.1	Do analysis of past years' thrift shop income	7/1/2002	7/31/2002	
2.4.1	Develop a list of organizations for speaking engagements	7/1/2002	7/31/2002	
2.4.2	Develop a list of potential speakers	7/1/2002	7/31/2002	
4.2.2	Investigate other thrift shops to see what their success factors are	7/1/2002	8/31/2002	
2.3.3	Have publicity materials printed	7/1/2002	8/31/2002	
2.2.7	Seek funding for video	7/1/2002	8/31/2002	
4.4.1	Develop a case for support for planned giving	7/1/2002	9/30/2002	
1.4.7	Prepare phonathon materials	8/1/2002	8/15/2002	
2.4.5	Prepare PPT show for speakers	8/1/2002	8/30/2002	
3.1.5	Identify tag line for public awareness	8/1/2002	8/30/2002	
3.1.4	Evaluate success of cultivation events in raising awareness	8/1/2002	8/31/2002	
2.4.3	Recruit speakers for speakers' bureau	8/1/2002	8/31/2002	
2.1.5	Evaluate results of first business leaders breakfast	8/1/2002	8/31/2002	
2.4.4	Prepare a letter and flyer to be mailed to organizations	8/1/2002	8/31/2002	
4.4.2	Develop a list of potential planned giving committee members	8/1/2002	9/30/2002	
1.4.8	Mail pre-phonathon letter	8/10/2002	8/15/2002	

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Implementing the Plan

Ref. #	Task Detail	Timeline		Status
		Start Date	End Date	
1.4.9	Conduct phonathon	8/15/2002	8/31/2002	Ongoing
1.4.10	Mail follow-up letters	8/31/2002	9/5/2002	
2.1.6	Continue to hold business leaders breakfasts monthly or quarterly	9/1/2002		
2.4.6	Hold training meeting for speakers	9/1/2002	9/15/2002	Ongoing
4.2.3	Evaluate location options for thrift shops	9/1/2002	10/31/2002	
4.4.4	Develop planned giving materials	9/1/2002	12/31/2002	
4.4.3	Develop a list of allied planned giving professionals to cultivate and educate	9/1/2002	12/31/2002	
2.2.8	Produce video	9/1/2002	12/31/2002	
2.4.7	Mail letters about speakers' bureau to organizations	9/15/2002	9/30/2002	
2.4.8	Conduct speaking engagements	10/1/2002		
4.2.4	Develop a plan to increase revenue of thrift shop	10/1/2002	11/30/2002	
4.4.5	Launch planned giving program	1/1/2003	12/31/2003	

Source:

Lysakowski, L. *Nonprofit Essentials: The Development Plan*. Wiley & Sons; Hoboken, New Jersey. 2007. Pgs. 167-170.