

Managing a Small Development Office

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Welcome & Introductions



**Lutheran
Social Service**
of Minnesota



Today we will cover...

- What is Resource Development?
- Five Steps to Create a Development Plan
- Building Individual Support
- Ideas and Solutions

What is Resource Development?

Imagine that everyone in your organization is a fundraiser.

What does that take?

- Everyone has a 'Why' Statement
- Everyone building relationships on behalf of the organization through their unique perspective of the work and mission, their skills and connections.

Why do you serve?

In a few sentences, write your 'Why' statement: Why do you do what you do every day?

Emotion:

Why do you personally resonate with the mission or work of your organization? When did you become interested or involved with the organization? What aspects of the organization inspire you? Why do you care?

Responsibility:

What difference does your work make in the community? Why is the work important?

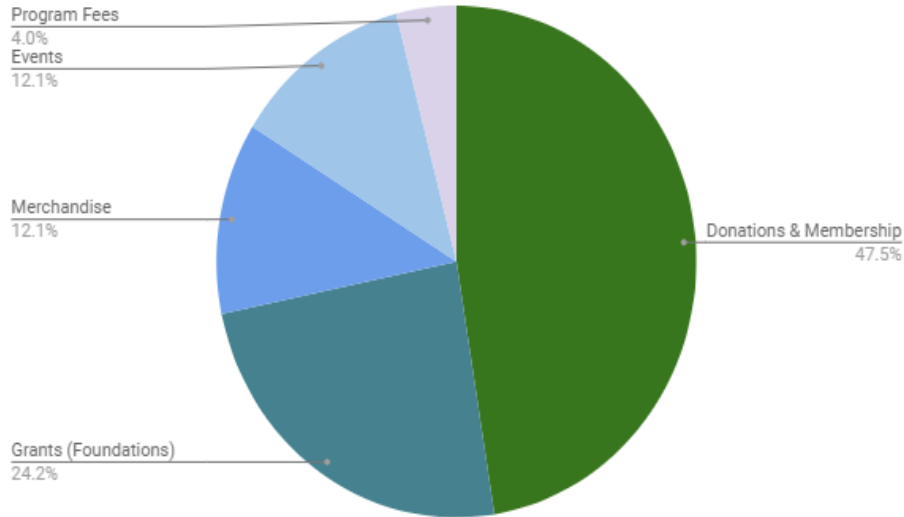
Action:

What are the needs of the organization, and how can others help?

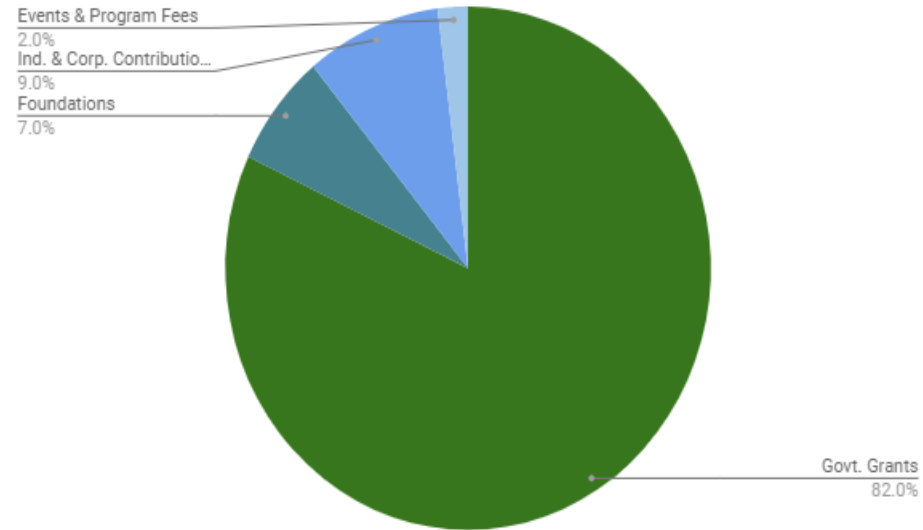
Resource Development is your 'Why' statement, relationships and Financial well-being of the organization

What are the income streams of the organization/program?

Organizational Budget: \$147,000



Organizational Budget: \$985,200



What is a Development Plan?

“A written summary of fundraising goals and objectives and the means by which an organization will achieve them within a given period of time.”

-Association of Fundraising Professionals

Purpose of a Development Plan

Define a successful development program, and develop a plan to support that effort.

1. Clarify giving priorities: gen op, capital, program.
2. Outline the role and use of fundraising vehicles and funds - grants, individuals, events, etc.
3. Development goals
4. Solicitation strategies
5. Staff/board roles and responsibilities



Five Steps to Create a Development Plan

Step 1: Getting Started

Step 2: Strategic plan/Work plan

Step 3: Basic organization information

Step 4: Goals, objectives, strategies, activities

Step 5: Implementation and timeline

Step 1: Getting Started

1. Development procedures
2. Gift acceptance policy/practices/think about what your organization can and can't accept
3. Knowledge of organizational budget



Step 1 (cont.):

1. Development procedures

- Day-to-day operations for the development area.
- How do you acknowledge gifts?
- How do you use your donor database? (or Excel spreadsheet)

Step 1 (cont.):

2. Gift acceptance

- Know what gifts are possible for your organization to accept.
- If you create a policy, questions/issues that arise should be addressed in it.
- Public perception issues.

Step 1 (cont.):

3. Organization Budget

- Know how much you need to raise.
- You will not get 100% of what you request - be realistic.
- Example budget revenue template.

Step 2: Getting started on your plan!

Strategic plan/work plan

- Your strategic plan or work plan is the basis of what you're trying to achieve through fundraising.
- If you don't have a strategic plan, don't let it stop you.
- You have day-to-day work that your programs are trying to accomplish, and that is what your development plan aims to fund.

Step 3: Basic organization info

- Mission and vision
- General organization information (boilerplate) - history, org description, positioning, case for support

Step 3 (cont.): Case for support

- This is the foundation upon which the organization's fundraising is built.
- It is greater than the organization's current needs and greater than the organization.
- Example:

A space like the Damiano Center humanizes people who are often stripped of their dignity by a society that does not value those who are in poverty. Our free and participatory programs offer those who are struggling with a space where they are safe and accepted while they utilize very needed services. Poverty is a serious problem in Duluth. According to the most recent US Census, 22% of individuals in Duluth are living below the poverty line...

Step 4: Goals, objectives, strategies, activities



Step 5: Implementation and Timeline

- Tracking activity is key to success.
- How often is the plan reviewed and with whom?
- You must work closely with finance/accounting.

Step 5 (cont.): Implementation and Timeline

- Grants calendar
- Campaign plans
- Event plans
- Other?



Building Relationships: How are you engaging donors?

Donor base building through...

- Volunteerism
- Special Events
- Membership Drive (Annual Fund)

Categorizing and Managing Donors

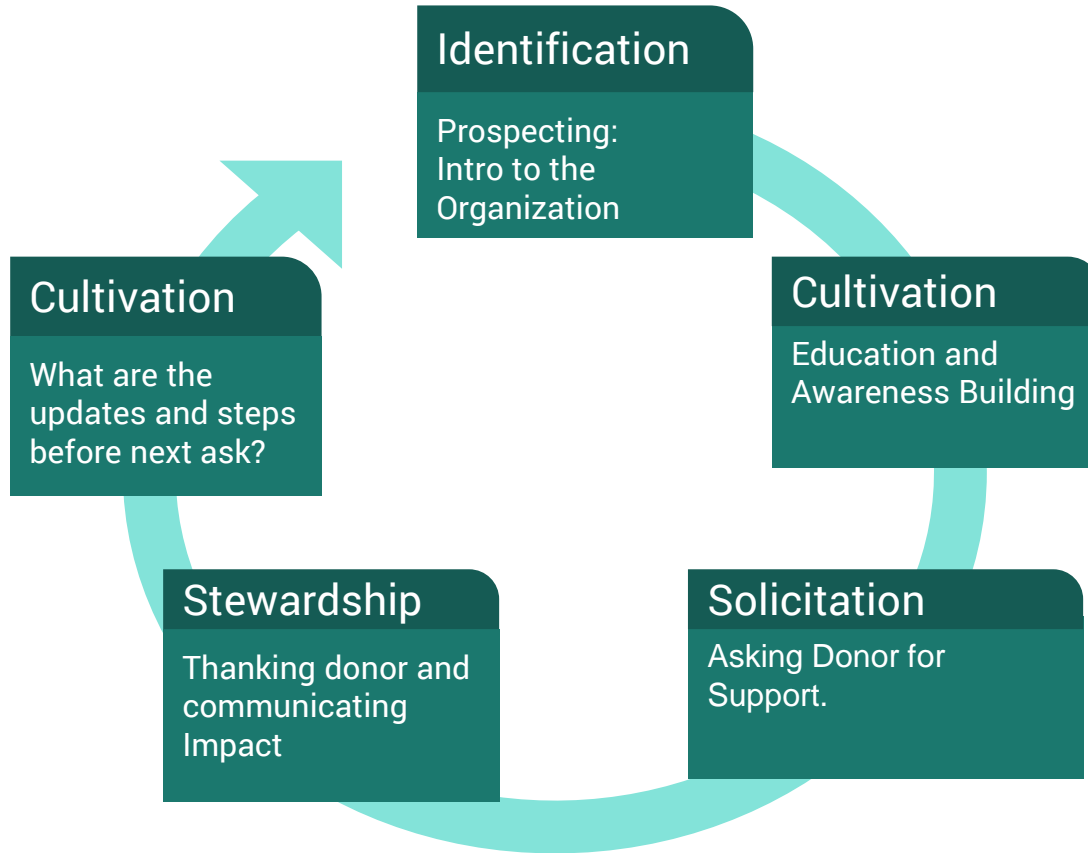
- Individual Giving Program (\$500+)
- Foundations - Grants
- Corporations (sponsorships)
- Planned Giving (estate gifts)

Building Relationships and Screening Prospects: Who are you engaging?

The 4 R's

1. Right Person
1. Right Project
1. Right Amount
1. Right Time

Building and Managing Donor Base through Relationships





Mission

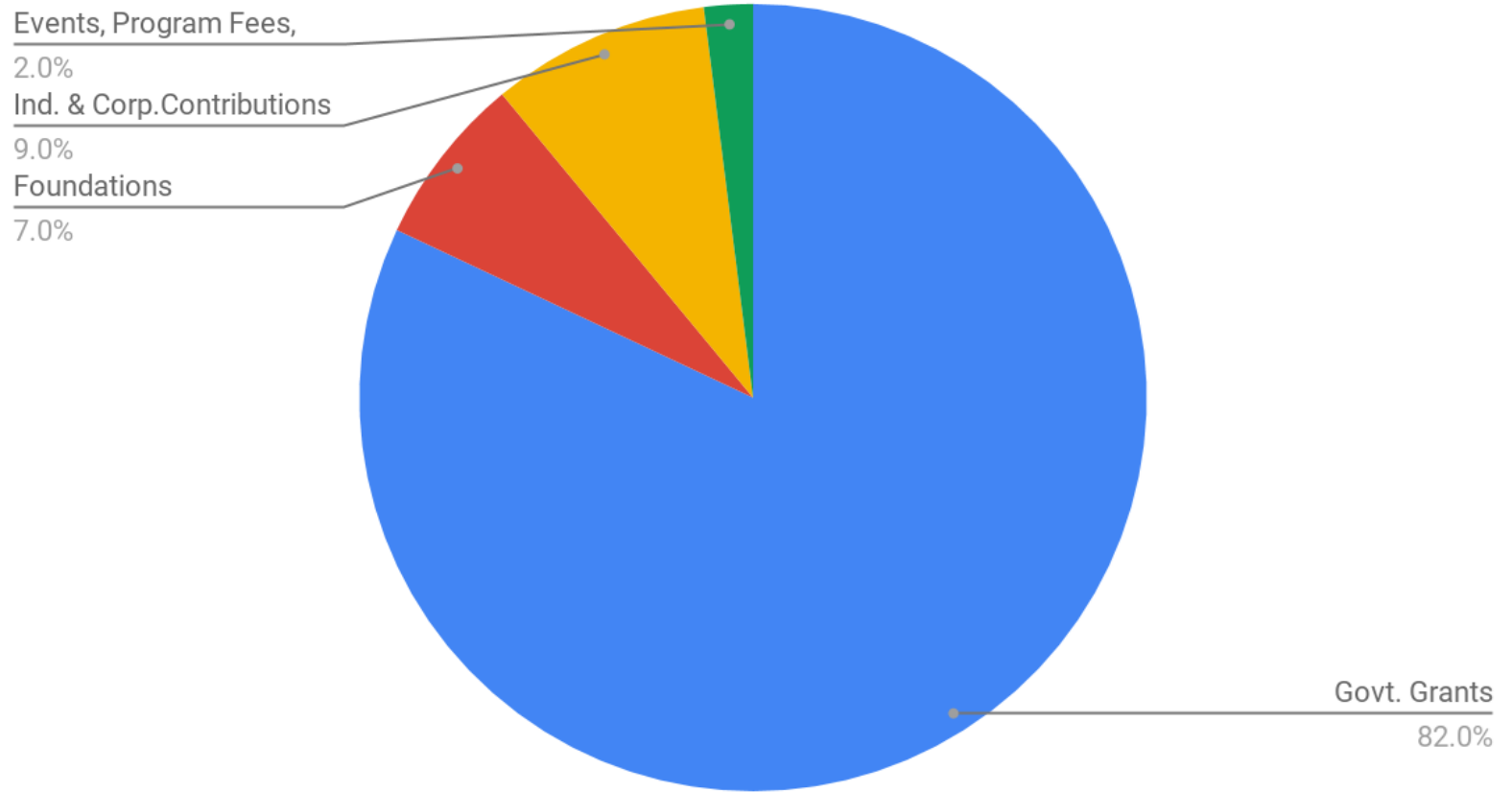
To inspire personal transformation through career development

Together, Let's Get to Work.

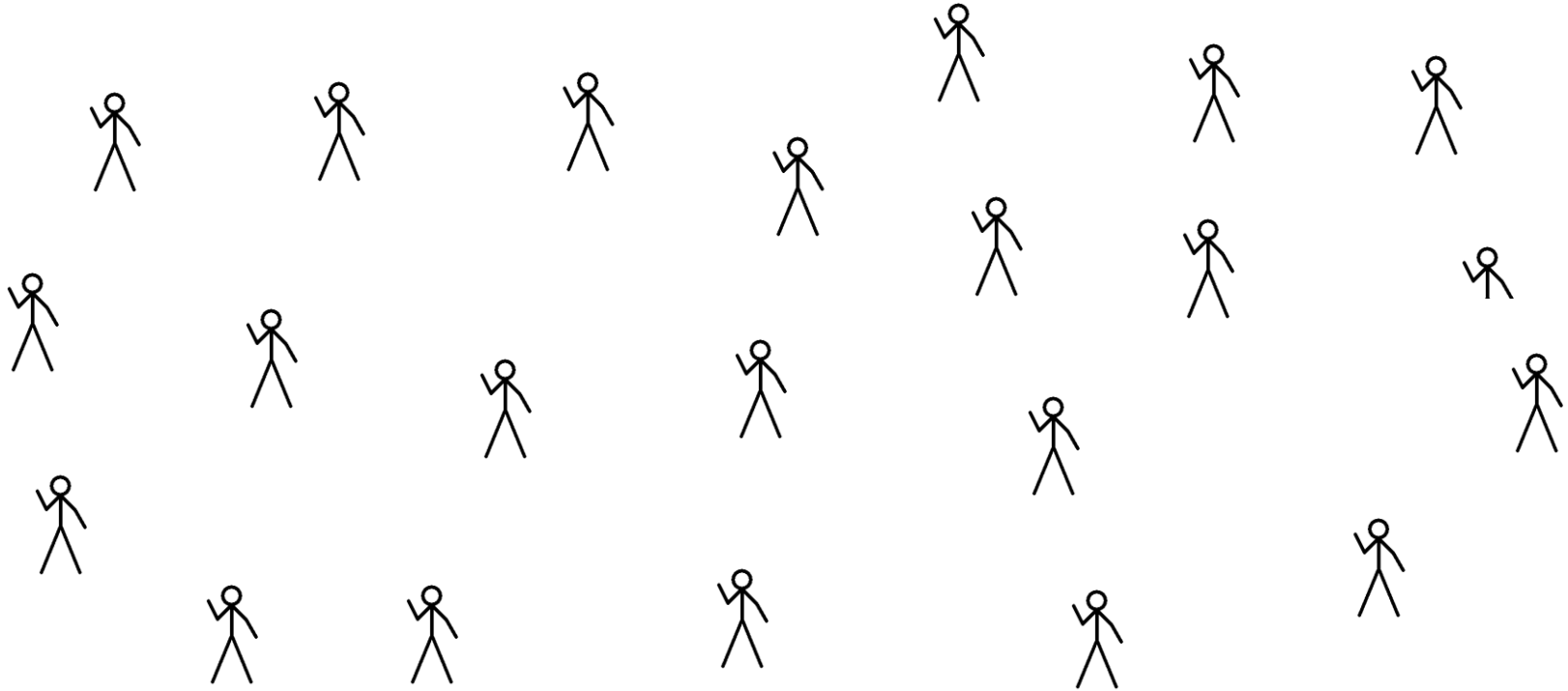
Employment Services

Re-entry Services

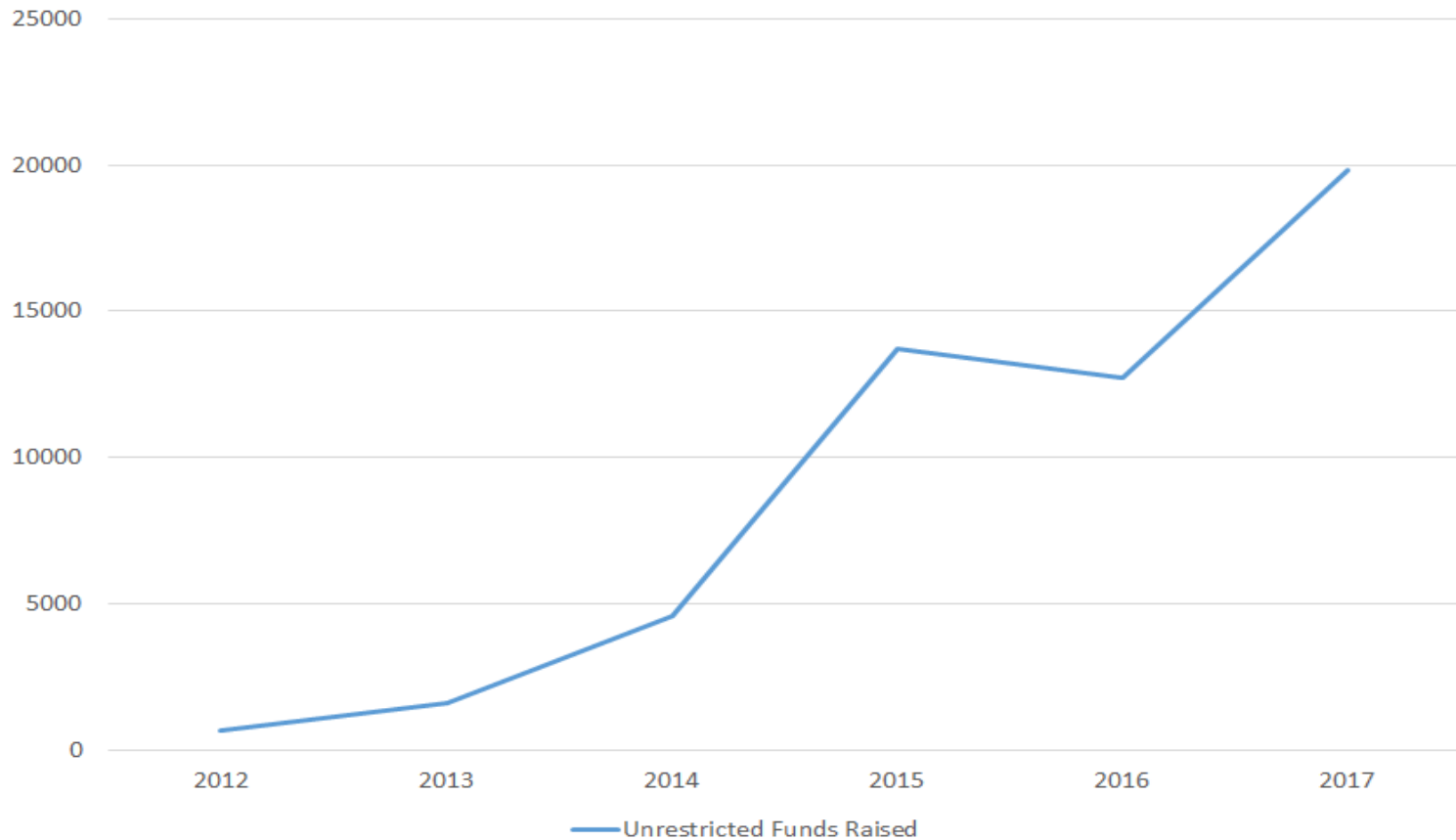
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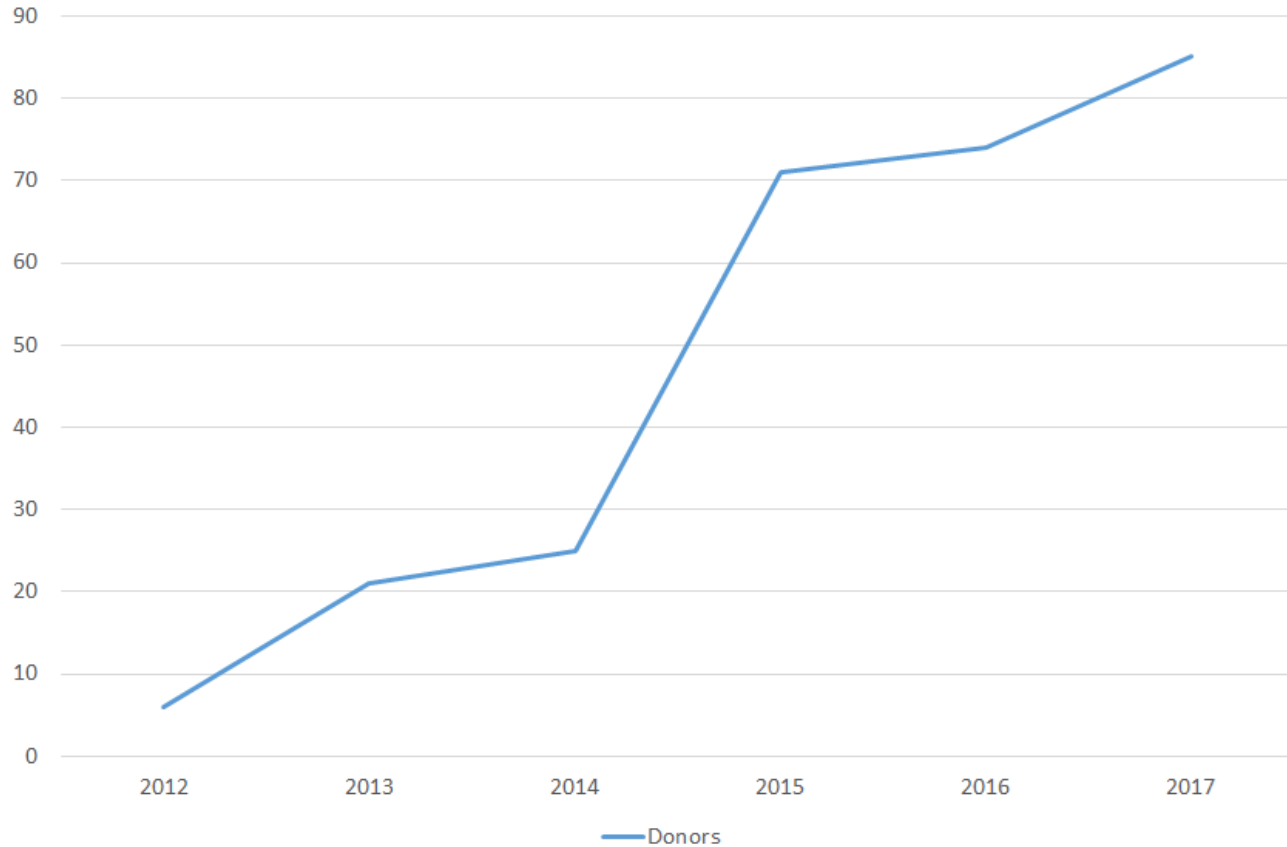
9.5 Employees/12 Board Members



Funding Increase



Donor Increase



How did we do it?

1. Organizational Structure and Job Roles/Responsibilities
2. Reengaged Past Donors/Cleaned up Database
3. Increased Visibility in the Community
4. Implemented “Fundraisers”
5. Invested in New Database
6. Revenue goal is part of the Strategic Plan

Getting Creative: Ideas and Solutions

What is your next step?

What action steps can you bring back to your organization?

Questions?

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