Essentials of Development Handbook
• OVERVIEW OF GIVING

People are the ________________ givers.

Giving USA’s Charitable Giving Report:

• ____________ billion in charitable gifts
• Grown every year over the last 50 years, except for 2 years
• The vast majority comes from ________________
Where Charitable Giving Comes From

• SIX KEY PRINCIPLES (NOT TACTICS) OF FUNDRAISING

1. People give to ________________; people they ________________ and people they __________.
2. People give because they are ______________ and ______________ how.
3. People give when they are _________________ and have a sense of ________________.
4. Giving is a way of ________________.
5. A “_______” is never forever.
6. Proper planning maximizes _________________ and minimizes ________________.

• ESSENTIALS

_____________ Statement
Development _______________
_______________ Donor List
_______________ Plan
**ANSWER KEY**

Biggest
$335
Individuals
People
Know
Trust
Asked
Shown
Involved
Ownership
Life
"No"
Results
Costs
Case
Team
Segmented
Annual
We are all “hard-wired” for ________________

We are all “hard-wired” to be a part of something much bigger than _________________

Donor = Someone who gives a resource of some kind. It can be:
  • Volunteer __________, expertise
  • Gift in __________
  • __________
  • Writing your organization into their ____________ ____________ for the future
Backdrop for the Embrace

1. Case
2. Development Team
3. Segment Donors
4. Annual Plan

Introduction - ___________ ___________ into the embrace

- A participant in your organization, or relative of a participant
- Introduction from a board member or someone involved with your organization
- Come to a fund-raising event or an awareness-raising event
- In some way they have benefited from your organization
- Mutual common goals/interest

Start developing a relationship and __________

- Be honest, be who you are, ___________
- It’s not only about your organization, it’s also about the prospective donor as well
- Be there, engage in things that interest them
- Do what you say you will do
Determine if it’s a good fit

- Suggest a tour
- Find out about them, ___________ to their story
- Watch for what lights up their eyes with passion.
- If not the right fit, direct them to another organization that is a better fit.

Make the ask

- At the right time, when you are pretty confident of a “_____”
- For the right resource... time, expertise, money, or GIK.
- For the right resource... usually requires starting small to develop more trust and exposure

Thank appropriately

- Six most important words in development are....
- Thank them __________
- Know your donor, thank them how they want to be thanked
- See separate Handout, “45 Ways to Do Thank Yous or Do Donor Touches”

Keep connected and informed

- Give many touches that convey you are interested in them as individuals as well
- Let them know the inside information of what’s happening in your organization
- Tell _____________ that connect them to the purpose of your organization

Keep the relationship alive and hot

- Do the embrace over and over again
- Treasure the mystery
- Remember the Mars/Venus differences
- Don’t do anything that breaks trust
Full integration for the long haul

- ________ for when they begin using the personal pronoun “we” when referring to your organization
- Invite them to be on the inside - staff event, special meetings, etc.
- Listen for when your organization becomes part of their story, when referring to your organization they say “______” and carry your organization close to their heart.
• ANSWER KEY

  Relationships
  Ourselves
  Time
  Kind
  Money
  Estate Plans
  Entry Point
  Trust
  Always
  Listen
  "Yes"
  ASAP
  Stories
  Listen
  We
CHAPTER 3
The Development Team

• WHAT IS THE DEVELOPMENT TEAM’S JOB?
This is a team that focuses on ____________ ____________ and on the few who can do a lot for your organization.

• WHO IS THE DEVELOPMENT TEAM?
Two sources:
1. ____________
2. ______________________

• SIX FUNCTIONS OF THE DEVELOPMENT TEAM
1. Prepare materials: ____________, pledge cards
2. Prepare background of prospects
3. To be ________________
4. Work on events and communication
5. Manage __________________
6. Manage ________________

• WHO IS A CALLER?
• Who has been _________________ in your organization for a long time?
• Who has given ______________________ in the past?
• Who is consistently offering to ___________ you in any way possible?

• THE DEVELOPMENT TEAM CHAIR
• The development team chair is the key person for holding the members of the team __________________
  for making their donor calls
• Also called a ________________ _______________ – they ask, and they give a major gift

• THE TEAM AND GIVING
• Development team members need to be giving ______________________ themselves
• You cannot ask donors to give if you are not giving yourself
• A development team member should be able to handle up to __________ relationships
• SECRETS TO FORMING A DEVELOPMENT TEAM

• Start meeting ____________
• Don’t ___________________ meetings
• Recruit a development team chair (also called strategy manager)
• Recruit a _________ manager
• Have the meetings at lunch and order custom lunches

• ANSWER KEY

| Major donors | Accountable |
| Staff | Strategy manager |
| Volunteers | Sacrificially |
| Case | 3-5 |
| Callers | Now |
| Strategy | Cancel |
| Data | Data |
| Involved | Significantly |
| Help | Help |
CHAPTER 4
Segmented Donors

• SEGMENTING DONORS: #1
They are __________________ either directly or indirectly through a “connector”

Many we will know well, and all should be cultivated to build a closer relationship

They have the ability to give more than ______ of your annual fundraising goal, and you believe that your organization is in the top group of organizations they support

10-15 people maximum on your list

Managed by Development Team
• **SEGMENTING DONORS: #2**

They are accessible either directly or indirectly through a “connector”

They have the ability to give between _______ and _______ of your annual fundraising goal, and you believe that your organization is in the top or middle group of organizations they support

Cultivation and solicitation will occur in person or over the phone

Managed by Development Team

• **SEGMENTING DONORS: #3**

They have limited financial ability falling below _______ annually of what you need to raise

Once you discover that a prospect is a #3, manage primarily in large groups

• **SEGMENTING DONORS: #4**

We think they are a ______ or ______

In some cases:

- We don’t know them well and need help to reach them
- We think they may have special interest in your organization

Determine:

- The depth of interest in your organization
- How you might be able to work with them
- Who is the best primary contact
- Their giving potential and interest

Managed by Development Team, Events and Mailings
• DONOR MANAGEMENT

Donors
- Individuals
- Foundations
- Churches
- Corporations

Attributes
(define constituencies)
- Volunteer
- Current/former board member
- Other?

Strategies

• PROSPECT MANAGEMENT

Financials
- Target High – highest dollar amount you’re willing to ask for
- Target Low – dollar amount you believe you have a 90% chance of receiving (what they gave last year is default)
- Asked For – dollar amount you asked them to give but have not received a response yet
- Committed – dollar amount they have given or pledged to give
- Last Year’s Giving – dollar amount they gave

Key background information

• WINDSHIELD 2020

Introduction to WS2020

Summary production report
- Road map – the macro – for the whole annual budget. It summarizes the entire fiscal year by totaling the assignments of all callers and summarizing the strategies.
## CAMPAIGN LEDGER

**Target Date:** 12/31/2022  
**Prospects:** 144  
**Best Case:** $1,269,788  
**Goal:** $750,000  
**Committed:** $696,596  

### Prospect List

<table>
<thead>
<tr>
<th>Prospect</th>
<th>Attributes</th>
<th>Strategy</th>
<th>Priority</th>
<th>Target High ($)</th>
<th>Target Low ($)</th>
<th>Asked ($)</th>
<th>Committed ($)</th>
<th>Pledged ($)</th>
<th>Next Contact Date</th>
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<tr>
<td>Abrams, Harold and Carol</td>
<td>Adams, John</td>
<td>Parent/Board</td>
<td>2</td>
<td>20,000</td>
<td>0</td>
<td>0</td>
<td>10,000</td>
<td>12/31/2018</td>
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<td>Alexander, Chris &amp; Anne</td>
<td>Adams, John</td>
<td>Letter/Phone</td>
<td>3</td>
<td>1,200</td>
<td>900</td>
<td>0</td>
<td>1,000</td>
<td>10/11/2018</td>
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<td>Astonishing Episcopal Church, Rev. Marty McCloud</td>
<td>Peabody, George</td>
<td>Church</td>
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<td>Avondale, Avery and Anna</td>
<td>Parker, Peter</td>
<td>Individual</td>
<td>4</td>
<td>5,000</td>
<td>0</td>
<td>3/30/2016</td>
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<td>Bank of America 2013</td>
<td>Core</td>
<td>Bank</td>
<td>3</td>
<td>1,200</td>
<td>900</td>
<td>0</td>
<td>1,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bell, Clarence and Gine</td>
<td>Parker, Parker</td>
<td>Alumni</td>
<td>7</td>
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<td>Adams, John</td>
<td>SBO</td>
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<td>0</td>
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<td>Better World, Inc.</td>
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<td>Kennedy, Jacobs</td>
<td>Research</td>
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<td>Parker, Parker</td>
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<td>10,000</td>
<td>0</td>
<td>15,000</td>
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</table>

**Best Case:** $1,269,788  
**Worst Case:** $920,061
### Summary Production by Caller Report

**2022 Annual Fund $750,000 12/31/2022**  
**Date 01/06/2023**

<table>
<thead>
<tr>
<th>Caller</th>
<th>Total</th>
<th>Talked To</th>
<th>Plan To Contact</th>
<th>Target Amount</th>
<th>Asked For Amount</th>
<th>Committed Amount</th>
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<td>Doe, Mildred</td>
<td>1</td>
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<td>0</td>
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<td>Franklin, John</td>
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<td>0</td>
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<td>5,000</td>
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<td>Jones, Bob</td>
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<td>0</td>
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<td>0</td>
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<td>Kennedy, Jackie</td>
<td>11</td>
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<td>1</td>
<td>23,600</td>
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<td>0</td>
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<td>Morley, Bob</td>
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<td>25,000</td>
<td>0</td>
<td>5,000</td>
<td>25,000</td>
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<td>O’Hara, Scarlett</td>
<td>19</td>
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<td>1</td>
<td>46,700</td>
<td>15,000</td>
<td>10,000</td>
<td>75,000</td>
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<td>35</td>
<td>1</td>
<td>8</td>
<td>172,012</td>
<td>59,512</td>
<td>75,912</td>
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<td>51,600</td>
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<td>Sparrir, Steve</td>
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<td>0</td>
<td>100,000</td>
<td>25,000</td>
<td>0</td>
<td>100,000</td>
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<td>Unassigned Caller</td>
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<td>0</td>
<td>155,134</td>
<td>45,057</td>
<td>34</td>
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</table>

**GRAND TOTAL**  
106 18 591,446 272,919 80,746 445,446 1,117,538 799,111
"Take all donors seriously, but don't treat all donors the same."
Tier 1 Donors have the capacity to give your organization 3% or more of your fundraising need. They are connected to you, the people you serve or have been involved with your organization for a long time. They may not be currently giving at a Tier one level, but they have capacity to. The way to cultivate these donors is in a face-to-face meeting. List 5 examples of Tier 1 donors:

<table>
<thead>
<tr>
<th>Name</th>
<th>Priority #</th>
<th>Primary Caller</th>
<th>Attribute</th>
<th>Target Low</th>
<th>Target High</th>
<th>Asked For</th>
<th>Committed</th>
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</table>

What are some things your Tier 1 donors have in common?

How do you currently ask each of the people on the list above for a gift?
**TIER 2 DONORS:**

Tier 2 donors have the capacity to give your organization between 0.5 and 3% or more of your fundraising need. They are connected to you, the people you serve or have been involved with your organization for a long time but they have limited financial capacity. The way to cultivate these donors is either in a face-to-face meeting or a small group. List 5 example of Tier 2 donors:

<table>
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<th>Name</th>
<th>Priority #</th>
<th>Primary Caller</th>
<th>Attribute</th>
<th>Target Low</th>
<th>Target High</th>
<th>Asked For</th>
<th>Committed</th>
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</table>

What are some things your Tier 2 donors have in common?

How do you currently ask each of the people on the list above for a gift?
### ANSWER KEY

<table>
<thead>
<tr>
<th>Indivdual</th>
<th>#1</th>
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<tbody>
<tr>
<td>Small</td>
<td>#2</td>
</tr>
<tr>
<td>1</td>
<td>Individual</td>
</tr>
<tr>
<td>Accessible</td>
<td>Group</td>
</tr>
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</table>

3%
0.5%
3%
0.5%
CHAPTER 5
The Asking Process

• FOUR STAGES OF THE ASKING PROCESS

Stage 1: ____________ Conversation

• No materials
• Money is “off the table”
• Identify your prospects’ interest
• Sharing why you are passionate about the work
• The Question: “Come and See”

Remember - Every ____________ has a question that leads to deeper involvement

Stage 2: The ________

• Designed around the prospects’ interest
• Money is “off the table”
• Informing the donor’s interest
• Can be a live or a virtual (digital) tour
• Sometimes we need to bring people to them
• Question: Can I sit down with you and share with you the details of how our organization works?

Stage 3: The ________________ of the Case

• Meeting held in an appropriate location
• Highlight the “theme” and the other sections that you think would be interesting to them
• Show them the budget and gift plan, but don’t ask because money is “off the table”
• The Question: Can I ____________ ______ with you in a few days to set up a time to talk to you about your gift?

Essentials of Development | A Murdock Trust Program
• **USING THE CASE STATEMENT**

When you prepare for a meeting, ask yourself, “What other ______________ might the person I’m meeting with want to see?” and bring that additional information with you.

In your meeting, as you are sitting next to the donor and walking them through the case, start by bringing them to the ____________

Continue to walk through the case one page at a time, and ______________ in on the things that are most important to that donor.

The case can be used ______________ and ________________

- A horizontal use of the case is the 30,000 foot overview of the organization
- A vertical use is when you drill into the details in a specific area and focus on something that you know the donor wants to talk about

When you get to the financial need or budget page – ____________.

- Ask, “Do you have any questions about what we’ve talked about so far, or possibly about the _______________?”

Don’t proceed to the gift plan until you’ve answered their questions about the budget.

When you get to the gift plan:

- If you’ve indicated to the potential donor that the meeting is not about asking for a gift at that time, then explain that this is how you plan to raise money, and invite them to engage with your organization in some way (visit, volunteer, etc.)
- If you’ve indicated that you’d like to discuss a gift at the meeting, then ask, “Would you be willing to make a gift in this range?” and then point to a middle box

Even if you have read the case many times, be sure to present it with ________________!

Don’t be numb to how awesome your organization is!

After the meeting, ________________ the case with the donor to take home with them.
Stage 4: The Ask

- Remember the two most important rules in Fundraising:
  1. Always let people know _____________ when you are asking for a gift
  2. Ask people for something they can say yes to
- Use the Gift Plan and most often ask for a range as you ask your donor to invest

• ASKING FOR A GIFT

1.) ____% of the time ask for a specific amount.
2.) ____% of the time ask for a range. Which is based on the target high and target low of the donor.
3.) ____% of the time leave it wide open (Get out of the way of the giver).

• EACH STAGE HAS FOUR STEPS

Step 1: The ______________

- Have the person closest to them ask for the appointment and ask that person to join you at the meeting
- Don’t have the meeting over the phone
- Common Objections:
  “Now is not a good time”
  The donor asks if the meeting is about ________
  The donors offers to send a “check”
  The donor says now is not a good time
  They want to meet over the phone
  They say it would be a waste of your time

Step 2: Preparation

- The ______________
  What have they given to you in the past?
  What have they given to others?
  What is going on in their life?

- The _________
  Who has the best relationship?
  What are their passions?
  What is the best context for the meeting?
  Plan the question that will lead to further engagement
Step 3: The Meeting

- Small Talk
- Conversation about your organization
- Question that leads to further engagement
- Remember: Clarify the time allotted for the meeting

Step 4: The ________________

- Do what you said you would do
- Follow up with a note to clarify what you heard
- Document what you heard
- Consider how to involve them in their interest
- Thank!

**ANSWER KEY**

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<th>Casual</th>
<th>Horizontally</th>
<th>Target low</th>
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<td>Tour</td>
<td>Budget</td>
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<td>Enthusiasm</td>
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<td>Follow up</td>
<td>Leave</td>
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<td>Materials</td>
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<tr>
<td>Theme</td>
<td>10</td>
<td></td>
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<tr>
<td>Focus</td>
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</tr>
<tr>
<td>Vertically</td>
<td>Target high</td>
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</tr>
</tbody>
</table>
CHAPTER 6
Racial/Ethnic Cross Cultural Development

RACE AND CULTURE IN PHILANTHROPY

1. We continue to learn how to strengthen our relationships across diverse networks of people and to be __________ in our fundraising.

2. Diversity in philanthropy will include many __________outside of our current networks.

MIS-PERCEPTIONS AND CHALLENGES

3. African American, Latinx and Indigenous People mainly seen through the __________

4. Lack of significant numbers of people of color who have ______ to be major donors.

5. People of color can't be successful in major gifts work and so they are often ______ ______ into these roles.

6. Professionals of color in major donor development often ______ ______ ______ to training and resources.

7. Cultural background and the perception of others sometimes impacts fundraiser's _________________ about being successful.

DIVERSITY IN FUNDRAISING MATTERS

1. ________ of millionaires are people of color.

2. People of color are ______ ______ by fundraisers despite the fact they are generous with their wealth.
3. Over ____ of high-net-worth people of color have a strong propensity to donate to nonprofits.

4. Including _______ ______ in our fundraising channels is essential for long-term.

RACE AND CULTURE IN GIVING

1. Donors color _______ _______ their giving through their affinity for causes that are important to their communities.

2. An important goal in fundraising is to discover those affinities by building _______ ______.

DONOR OF COLOR | MY TAKEAWAYS

African American

________________________________________________________________________

________________________________________________________________________

Asian

________________________________________________________________________

________________________________________________________________________

Latinx

________________________________________________________________________

________________________________________________________________________

Indigenous People

________________________________________________________________________

________________________________________________________________________
ORGANIZATIONAL BREAKOUT DISCUSSION

What are your questions?  

What are the challenges for your organization?  

What are the opportunities for your organization?  

WORD KEY

More inclusive  
Diverse groups  
Recipient-lense  
Capacity  
Not hired  
Lack invitation and access  
Self-perception  
24 %  
Often overlooked  
80 %  
Multiple races/ethnicities  
Often prioritize  
Authentic relationships
ADDITIONAL READING AND RESOURCES

How to Connect with Donors of Color  
*By Emily Haynes and Eden Stiffman, Chronicle of Philanthropy*

How to Create a Culture of Inclusive Fundraising  
*By Lisa Schohi, Chronicle of Philanthropy*

How to Ensure Fundraising Materials Appeal to a Broad Cross-Section of People  
*By Eden Stiffman, Chronicle of Philanthropy*

The Issue of Racism in Fundraising Profession  
*By Birgit Burton, Association of Fundraising Professionals (AFP)*

Money, Power and Race: The Lived Experiencie of Fundraisers of Color (Executive Summary)  
*By PreparingTheNextGeneration.org*

Why People of Color (Still) Need to be Good Fundraisers  
*By Mike Roque Nonprofit Quartely Report (NPR)*

(Articles are also located on the Essentials of Development program page)

- ASSIGNMENTS FOR MAY

- Complete final draft of Case Statement
- Build your Development Team (including a chair and data manager) and consult 4 meetings
- Complete your Segmented Donors List (enter 1’s, 2’s, and 4’s on Windshield)
- Do each of the 4 steps of the asking process at least twice
• CLOSING SESSION - STAND AND DECLARE

Organization: _______________________________________________

Executive Director: ___________________________________________

Please take a photo of or scan this page and email it to your coach and John Franklin: johnf@murdocktrust.org

☐ Check the Top-3 most strategic Action Steps.

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Vancouver, WA 98660
Office: 360-694-8415
murdocktrust.org/essentialsofdevelopment
John Franklin, Program Director Murdock
Trust: johnf@murdocktrust.org
CHAPTER 7
Reviewing the Essentials

• SIX KEY PRINCIPLES (NOT TACTICS) OF FUNDRAISING

1. ____________ give to _______________; people they know and people they trust.
2. People give because they are __________ and __________ how.
3. People give when they are _______________ and have a sense of ownership.
4. Giving is a ______ of ____________.
5. A “no” is never _________________.
6. Proper planning _______________ results and _______________ costs.

• THE ESSENTIALS

1. Case
2. Segmented Donor List
3. Development Team
4. Annual Fundraising Plan

• ANSWER KEY

<table>
<thead>
<tr>
<th>People</th>
<th>Way</th>
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<tbody>
<tr>
<td>People</td>
<td>Life</td>
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<tr>
<td>Asked</td>
<td>Forever</td>
</tr>
<tr>
<td>Shown</td>
<td>Maximizes</td>
</tr>
<tr>
<td>Involved</td>
<td>Minimizes</td>
</tr>
</tbody>
</table>
QUIZ

1. What are the four Essentials of Development?
2. Rank giving in the US from greatest to least:
   - Bequests
   - Foundations
   - Individuals
   - Corporations
3. Complete this phrase: People give to people they know and ________.
4. When it comes to evaluating donors/prospects what are THE BIG THREE?
5. What is the most important component of the case that really defines it as a fundraising tool?
6. What’s the #1 reason people give?
7. What is the #1 failure in fundraising today?
8. When asking for a gift most often you should use a range which represents the __________ and the __________ of that prospect.
9. The Target Low for a donor is the number you are ___% sure they will give.
10. True or False: The Primary Caller is the person who calls every donor to your organization to say thank you.
11. What are the two basic strategies in fundraising?
12. What are the 10 elements of a good case statement?
   1. __________________
   2. __________________
   3. __________________
   4. __________________
   5. __________________
   6. __________________
   7. __________________
   8. __________________
   9. __________________
  10. __________________
• **WHAT I USED TO SAY**

We talk about fundraising events because they ...

1. _____ money and new donors to the cause
2. ______ and care for Tier 3 donors by building community
3. ______ meaningful involvement opportunities for donors and volunteers
4. ______ energy and momentum within the organization and among its supporters

---

Let’s acknowledge ...

• We don’t know when it will feel “safe” to have large events.
• We don’t know how this shift will affect fundraising long-term.

---

• **WE STILL WANT TO FIND A WAY TO ...**

1. **Bring** money and new donors to the cause
2. **Connect** and care for Tier 3 donors by building community
3. **Provide** meaningful involvement opportunities for donors and volunteers
4. **Create** energy and momentum within the organization and among its supporters

---

• **HOW MIGHT WE? - VIRTUAL EVENTS**

• Virtual galas, with virtual ______
• Virtual ______ style events focused on the cause
• ______ fundraising campaigns
• Online _________
Food for thought:

• What can you do now that you couldn’t do before?
• What can only you do?

• HOW MIGHT WE? - SMALLER EVENTS

• _________ on site?
• Donor-hosted small _________?
• Small _________ “work party”

Food for thought:

• What could donors DO in the cause right now beyond giving?
• What can only you do?

• ANSWER KEY

<table>
<thead>
<tr>
<th>Bring</th>
<th>Micro-event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connect</td>
<td>House party</td>
</tr>
<tr>
<td>Provide</td>
<td>Volunteer</td>
</tr>
<tr>
<td>Create</td>
<td></td>
</tr>
<tr>
<td>Table hosts</td>
<td></td>
</tr>
<tr>
<td>TED talk</td>
<td></td>
</tr>
<tr>
<td>Peer-to-peer</td>
<td></td>
</tr>
<tr>
<td>Auctions</td>
<td></td>
</tr>
</tbody>
</table>
CHAPTER 9
The Annual Fundraising Plan

• ANNUAL FUNDRAISING PLAN

... is a _______________ and ______________ tool for all of your organization’s development activities, including:
  • Updating fundraising materials
  • Development team meetings
  • Fundraising events
  • Donor cultivation and care activities
  • Donor communications
  • Print and online communication
  • Grant seeking
  • Planned giving

• HAVING A PLAN MEANS...
  • We have a ___________________ strategy for all of our fundraising activities
  • We can make meaningful projections and stay on track
  • We are guarded against “hijacking”

• ANNUAL DEVELOPMENT STRATEGY AND PLAN - IN FOUR STEPS
  1. Identify all of your _______________ and ________ activities (non-asks) for each donor tier/type
  2. Identify all of your invitations to give (________________) for each donor tier/type
  3. Identify all of the _______________ team activities (meetings, updating case statement)
  4. Chart those activities on the annual fundraising plan calendar and use it for ______________
• **STEP 1**
Identify all of your ________________ and care activities (non-asks) for each donor tier/type
  - Tier 1 (mostly 1 to 1)
  - Tier 2 (mostly 1 to few, some 1 to 1 or 1 to many)
  - Tier 3 (mostly 1 to many)
  - Tier 4 (discovery meetings, invitation for more involvement)
  - Other (organizations, foundations, etc)
Remember: at least ____ cultivation and care activities per donor

• **STEP 2**
Identify all of your ________________ to give (solicitations)
  - Tier 1 (mostly 1 to 1)
  - Tier 2 (mostly 1 to few, some 1 to 1 or 1 to many)
  - Tier 3 (mostly 1 to many)
  - Other (organizations, foundations, etc)

• **STEP 3**
Identify all of the ________________ ________ activities (meetings, updating case statement)
  - When will the development team meet?
  - When will we update the case for next year?
Start meeting and never stop.

• **GET GOING**
“Plans are only good __________ unless they immediately __________ into hard work.”
- Peter Drucker, Management: Tasks, Responsibilities, Practices
## Annual Plan - Planning Worksheet

**STEP ONE: CULTIVATION AND CARE (THREE PER TIER/TYPE)**

<table>
<thead>
<tr>
<th>Tier 1</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 2</td>
<td></td>
</tr>
<tr>
<td>Tier 3</td>
<td></td>
</tr>
<tr>
<td>Tier 4</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>Invitations to give (solicitation type)</td>
<td>Estimated Total</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Tier 1</td>
<td></td>
</tr>
<tr>
<td>Tier 2</td>
<td></td>
</tr>
<tr>
<td>Tier 3</td>
<td></td>
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<tr>
<td>Tier 4</td>
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<tr>
<td>Other</td>
<td></td>
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<tr>
<td><strong>TOTAL</strong></td>
<td></td>
</tr>
</tbody>
</table>
### STEP THREE: DEVELOPMENT TEAM ACTIVITIES

<table>
<thead>
<tr>
<th>Activity</th>
<th>Who</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Development team meetings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Update case for support for next year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Other:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**ANSWER KEY**

<table>
<thead>
<tr>
<th>Calendar</th>
<th>Cultivation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tracking</td>
<td>3</td>
</tr>
<tr>
<td>Comprehensive</td>
<td>Invitations</td>
</tr>
<tr>
<td>Cultivation</td>
<td>Development team</td>
</tr>
<tr>
<td>Care</td>
<td>Intentions</td>
</tr>
<tr>
<td>Solicitations</td>
<td>Degenerates</td>
</tr>
<tr>
<td>Development</td>
<td></td>
</tr>
<tr>
<td>Tracking</td>
<td></td>
</tr>
</tbody>
</table>
• **VERITAS ANNUAL PLAN (JULY- JUNE FY)**

<table>
<thead>
<tr>
<th>Month</th>
<th>Event</th>
<th>Category</th>
<th>Initiator/ Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>Meet with 1/3 Major Donors</td>
<td>1</td>
<td>DTC/ PC</td>
</tr>
<tr>
<td>August</td>
<td>Back to School Newsletter Meet with 1/3 Major Donors Begin work on Golf Tournament</td>
<td>1,2,3</td>
<td>HOS/ OM DTC/ PC DTC</td>
</tr>
<tr>
<td>September</td>
<td>Meet with 1/3 Major Donors Grandparents Day/ Chapel</td>
<td>1,2,4</td>
<td>DTC/ PC HOS/ DTC</td>
</tr>
<tr>
<td>October</td>
<td>Fall Festival Secure Pledges 1/2 Tier 2</td>
<td>1,2</td>
<td>HOS/ PC DTC/ OM</td>
</tr>
<tr>
<td>November</td>
<td>Thanksgiving Cards Secure Pledges 1/2 Tier 2</td>
<td>1,2</td>
<td>HOS/ OM DTC/ OM</td>
</tr>
<tr>
<td>December</td>
<td>Upper School Christmas Cards Christmas Thanks Letter</td>
<td>1,2,3</td>
<td>HOS/ OM HOS/ OM</td>
</tr>
<tr>
<td>January</td>
<td>Email note to all donors</td>
<td>1,2,3</td>
<td>HOS/ OM</td>
</tr>
<tr>
<td>February</td>
<td>Valentine Day Note Golf Tournament</td>
<td>1,2,4</td>
<td>DTC/ PC DTC/ PC</td>
</tr>
<tr>
<td>March</td>
<td>Face to Face TY Meeting Phone Call TY</td>
<td>1,2</td>
<td>DTC/ PC DTC/ PC</td>
</tr>
<tr>
<td>April</td>
<td>Cont. Face to Face TY Meeting Phone Call TY Secure Match for Giving Day</td>
<td>1,2</td>
<td>DTC/ OM DTC/ PC DTC</td>
</tr>
<tr>
<td>May</td>
<td>Giving Day Invite to end of School Events Begin Work on New Case</td>
<td>3,1,2</td>
<td>DTC/ HOS/ OM HOS/ PC DTC Chair/ HOS</td>
</tr>
<tr>
<td>June</td>
<td>Finalize New Case End of Year Letter</td>
<td>1,2,3</td>
<td>DTC/ PC HOS</td>
</tr>
</tbody>
</table>

**Other Explanations:**
Tier 1= $5K+
Tier 2= $1-5K
Tier 3= >1K
Tier 4= Possible 1 or 2"

**The DTC Committee Has the Following Positions:**
“DEV” = DEV Chair
“HOS”= Head of School
“PC” = Primary Caller
“OM” = Office Manager"
There are two types of foundations

1. ____________ : Funded mostly by one donor, family or entity source
2. ____________ : Funded by many sources

DETERMINE ORGANIZATIONAL ALIGNMENT

• Always do your ____________ first. Search for the foundation’s guidelines, practices, and interests
• According to CANDID, about ____% of U.S. Foundations do not have websites
• Understand the proper channel to __________ a letter of inquiry (LOI) or conversation

DEVELOPING THE RELATIONSHIP

• Initiate ____________. Make it count!
• Treat them like _____________ donors
• Prepare a brief summary of your org, project and any alignment detail about yourself or the foundation
  _____________ initiating contact
• Invite them to your facility for a _________
• Present several ideas to see what best fits their _________ or funding _________
• Keep them __________

GOOD GRANT WRITING

• Clear, concise, fluid; Tell ____________ story
• _____________ and answers questions
• Articulates how success is ______________
• Indicates a viable plan to financially sustain the project once completed
• Thoughtfully recycles ______________ and boilerplate language
• Includes helpful _____________- to illustrate how you are learning about your constituency and your organization
COMMON MISTAKES MAY INCLUDE:

- Lack of good funding plan (aim for ____%)
- Compromising the _____ to fit a grant funder
- Hard to read proposals / ___________ information

• ANSWER KEY

Private  
Public  
Research  
90  
Initiate  
Contact  
Individual  
Before  
Tour  
Interest  
Priorities  
Informed  

Your  
Anticipates  
Measured  
Content  
Metrics  
150  
Truth  
Inconsistent
• CLOSING SESSION - STAND AND DECLARE

• ACTION STEPS: ORGANIZATION__________________________ ED________________

Take a photo of this page and email it to your coach and John Franklin: johnf@murdocktrust.org
Review the principles and best practices from this viewing guide (and The Facilitator Guide)—and then list your proposed Action Steps for the board. Be discerning about board and CEO roles—so the board is not doing staff work and the CEO (or staff) is not doing board work.

○ Check the Top-3 most strategic Action Steps.

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murdocktrust.org/essentialsofdevelopment
• CLOSING COMMENTS
• CLOSING COMMENTS
APPENDIX
ELEVATOR PITCH

An elevator pitch, elevator speech or elevator statement is a short summary used to quickly and simply define a process, product, service, organization, or event and its value proposition.

Step 1:
Define who you are. Write one sentence about who you are.

Step 2:
Describe what do you do. Use your mission statement and product/service listing as a guide, and write 1-2 sentences about what you do every day in your business.

Step 3:
Identify your ideal clients/customers. Use your target audience description as a guide, and write 1-2 sentences about who your ideal clients or customers are.

Step 4:
Explain what’s unique and different about you and your business. Use your unique selling proposition (USP) as a guide, and write 1-2 sentences about what sets you apart from every other business owner who does what do you do.

Step 5:
State what you want to happen next. Write 1-2 sentences that identifies what you want your audience to do next.

Step 6:
Create an attention-getting hook. Write 1-2 sentences that pulls in your audience and gets them engaged in what you’re about to say.
45 WAYS TO SAY THANK YOU OR DO DONOR TOUCHES

By Nancy Nelson

INTRODUCTION:

• Six most important words in Development are: THANK YOU, THANK YOU, THANK YOU.
• Importance of saying thanks – gratitude connects the giver with the receiver.
• Make gratitude a way of life, say thank you in a way most meaningful to the donor.

45 WAYS TO SAY “THANK YOU”…..

1. Receipt Letter with special personal note
2. Send a significant newspaper clipping of interest to the donor with the receipt
3. Send a special thank you note card, handwritten and addressed
4. Phone call or TEXT message to say thank you
5. Hand-deliver the receipt, say thanks face-to-face
6. The “Email Cup of Coffee”….a long email, grab a cup of coffee
7. Say thanks on FACEBOOK if appropriate on their page or private FB message.
8. Deliver Hot Cinnamon Rolls, home-made bread, or a plate of cookies to them
9. Take them on a tour of your organization, if possible, introduce them to other staff, the Director, &/or Board Chair
10. Bring the tour to them via a DVD in person or zoom call
11. Share a favorite book with them
12. Read one of their favorite books or a family history that they’ve written
13. Partners’ Appreciation Event – with a meal or fancy dessert
14. Invite to special staff events, meetings or retreat
15. Thank you lunches or dinners at a staff member’s home
16. Deliver a Thank You picture with them in it
17. Have a special recognition plaque hung in their honor
18. Deliver a little gift at Christmas in person
19. Deliver a little chocolate heart on Valentine’s Day with a message, “Thanks for saving a place in your heart for (name your organization).”
20. Invite to a dedication service all who have helped make something possible.
21. Present a surprise "thank you" to a volunteer in public.
22. Recognize with an extra-special meaningful gift that is perfectly chosen for them. (Do research with their friends or family.)
23. Help another nonprofit on a donor’s behalf—many major donors serve on other organization’s boards.
24. Accompany them to an important event that they want to go to but don't want to go alone.
25. Connect them to others (connecting the dots!) that will help their business, etc.
26. Feature them in an article for your organization’s newsletter or email blast.
27. Feature them at a fund-raising event to help tell your organization’s story.
28. Spend time with someone else who is important to them as a way of thanks.
29. Accept speaking engagements that donors ask for.
30. Attend significant family events in a donor’s life (weddings, memorial service, retirement party, etc.)
31. Telephone “Thank-a-thon” to donors by staff and Board of Directors.
32. Spend quality TIME with them (especially meaningful to older donors who live alone.)
33. Bring them as your guest to Rotary, Kiwanis, or Lion’s Club and introduce them.
34. Weave donor “thank yous” into other events going on at your organization.
35. Special “thank yous” for the Board of Directors, celebrate them during board meetings when they have helped in the development work.
36. Accept invitations to stuff that matters to them (example: if they are filling a table for another organization’s fund-raising event.)
37. Cater a meal to them and/or their company’s staff.
38. Listen to them from your heart. Deep listening is a rare gift.
39. Give them direct access to your cell phone.
40. Send them a birthday card with special hand-written message of why they are so special.
41. Invite them out for a meal at a restaurant and pick up the tab.
42. Send a bouquet of flowers for a special day (anniversary, hospital stay, birthday).
43. Rent a plane and have the pilot write in the sky: THANK YOU!
44. Hug them.
45. If you are a person of faith, pray for them.
SAMPLE DEVELOPMENT TEAM
MEETING AGENDA

Organization Update by Executive Director.
Review Minute/Goals from last meeting.

Case
• Review current Case and determine if you need to make any updates, order anymore, or start working on next years case.

Leadership
• Review current Development Team and determine if additional members are needed.

Prospects
• Review current assumptions for cash flow.
• Develop next steps and goals by prospect/caller.

Strategy/Plan
• Review Annual Plan and upcoming activities.

Set next meeting.
DEVELOPMENT TEAM JOB DESCRIPTION

The Development Team is the driving force of the organization’s ability to implement a major donor fundraising strategy. The team’s main purpose is to identify and develop the organization’s prospects. These prospects should represent the 20% who will fund 80% of the organization’s budget. In addition, the team creates and implements the entire development strategy for fundraising. This requires the President to be a part of the fundraising team. The following are the specific responsibilities of a Development Team:

Individual members must:

• Make sacrificial and significant sized gift to the mission and be willing to invite a minimum of two-to-three others to make a similar gift.

• Work to implement the 4 Essentials of Development:
  1. Case Statement
  2. Development Team
  3. Segmented Prospect Lists
  4. Fundraising Plan

• Help to identify other Team members.

• Participate in the asking and thanking of donors.

• Communicate on a regular basis with the Development Team Chairperson to ensure the successful solicitation and thank you of the donors assigned to them.

• Attend monthly meetings.

• Participate in fundraising activities targeted at other donors.

• Replace him or herself should they step down from the Development Team.
DEVELOPMENT TEAM CHAIRPERSON
JOB DESCRIPTION

Without a doubt the key to a successful Development Team is an effective Chairperson. They are the driving force of the team’s ability to identify and develop the top prospects. These prospects hopefully represent the 20% who will fund 80% of the budget. In addition, the Chairperson creates and quarterbacks the entire development strategy for fundraising. This requires a close working relationship with the Executive Director.

The following are the specific responsibilities of a Development Team Chairperson:

• Make a significant gift and be willing to invite two-to-three others to make a similar gift.

• Together with the Director, be responsible for implementing the Essentials of Development:
  1. Case Statement
  2. Development Team
  3. Segmented Prospect
  4. Annual Plan

• Help to recruit a Development Team which includes a:
  • Data Manager
  • Individual Callers

• Arrange for ongoing training of new Development Team Members.

• Organize and hold the Development Team accountable to complete all asks and thank-you's.

• Manage, update and review the organizations data using Windshield2020 (or other donor management system, unless a data manager has been identified) on an ongoing basis providing reports to the Director on a monthly basis.

• Manage and update the Annual Plan.

• Communicate on a regular basis with the Director to ensure the successful solicitation and thank you of other donors.

• Schedule monthly meetings for the Development Team.

• Replace him or herself should they step down from the position of Development Team Chair.
CRITERIA FOR HIRING A DEVELOPMENT DIRECTOR

“SHOULD I HIRE A DEVELOPMENT DIRECTOR?”

I hear this question a lot from leaders of small to mid-size nonprofits, especially from those leading organizations that have operated without paid professional development staff. This is certainly an important decision, and not an easy one to make.

Many nonprofit leaders and boards operate with the false assumption that adding a paid development director (DD) is a silver bullet solution to all of their financial problems. Unfortunately, this type of thinking leads many organizations through a disappointing chain of failed DD hires. Often the reason things don’t work out has nothing to do with the ability of the DD. It’s often because the organization has failed to build a development culture to lay the groundwork for this important new hire.

Below I’ve listed some actions key players in an organization need to be taking in order to foster a development culture. Organizations that work to put these in place will help ensure the success of their first professional development hire.

THE EXECUTIVE DIRECTOR IS ...

Actively leading the development effort. In the absence of a paid DD, the executive director (ED) should be operating as the de facto DD. If development efforts are put on hold until the addition of a DD that’s often a sign an organization is not committed to creating a development culture.

Engaged with individual donors. It is not enough for an ED to fill their development time planning fundraisers or writing fundraising letters. An ED should be building a development culture by actively cultivating and soliciting individual donors, particularly major donors.

Prepared to partner with a DD. Partnering with and leading a paid DD is an art and a science. It is not a good sign if the executive director is eager to hang up his or her development hat once the new DD is hired. The two should work closely together to spearhead the organization’s development efforts.
THE BOARD IS ...

**Generously giving of its own funds.** An organization with board members that are not giving generously or considering its mission to be one of their top three financial commitments is not building a DD-ready board culture. If this is the case, the ED and Board Chair should take the time to address and change the financial commitment of the members.

**Connected to the major donor community.** The DD-readiness of a board is as much related to who they know as what they know about development. Cracking the major donor community is often as simple as recruiting several new members with relationships in the major donor community.

**Already involved in the development effort.** While it is helpful if board members are assisting with donor events, a DD-ready board is also actively bringing their contacts to the table. If they are connecting their contacts to the executive director or hosting small group gatherings those are good signs of a growing board development culture.

THE INFRASTRUCTURE INCLUDES...

**A growing donor base.** A flat donor base signals that the organization may not be DD-ready. The donor base should be growing to the point that the nonprofit cannot sustain the growth without the addition of a paid development professional.

**Key tools of effective development.** To make a significant step toward building a development culture, an organization must begin to imbed the key elements of effective development in their organization. Find an explanation of the Case Statement, Segmented Donor List, Annual Plan, and Development Team as well as a short video outlining the Murdock Trust’s Essentials of Development Training.

**Back-office support.** An organization with a development-ready culture is making provisions for (paid or volunteer) back-office administrative support. This frees up the DD to build donor relationships rather than being buried in creating spreadsheets or updating donor databases.

**A working strategic plan.** If an organization lacks a vision and a working strategic plan, it suggests that it merely aspires to meet its budgetary needs rather than truly making a difference. Remember, people don’t want to give to budgets. They’re inspired to give by a vision that will change the world.
A SUCCESSFUL HIRING STRATEGY WILL ENABLE THE ORGANIZATION TO ...

**Identify the right candidate.** An organization can do all the prep work to become DD-ready and still make a bad hire. This is where a paid or volunteer consultant can help. A consultant can help develop a realistic job description, lead a search for qualified candidates, and help guide an effective interview and reference-check process. (For many smaller nonprofits, the limited financial package for the new DD position can limit the organization’s ability to hire an experienced DD or one will not be tempted to jump ship when a more lucrative development opportunity comes along. Therefore some nonprofits have sought to hire a mission faithful candidate who may have little or no development experience but is already involved as a staff member, donor, or volunteer with the organization.)

**Successfully onboard the new DD.** The most effective use of a development consultant may be to train or coach the new DD once hired. This is particularly true if the new DD has little to no development background. In addition, if the executive director lacks the experience to effectively partner with or supervise the DD, a consultant can help prepare the leader for this significant task.

This is not intended to be an exhaustive checklist of all the things an organization must accomplish before hiring a DD. Yet I believe it is a fair description of the organizational culture most conducive to a successful hire. Attention to these important elements can lower the risk of making a failed development hire and increase the odds of landing a DD that will thrive and grow with your mission.

*John Franklin is a Program Director at the M.J. Murdock Charitable Trust.*
KEY CRITERIA FOR SELECTING A DEVELOPMENT COORDINATOR

• PASSION FOR THE MISSION:
The Development Coordinator should have had some involvement and demonstrated interest in the organization and its mission. He or she should not simply be an individual seeking a position in fund development.

• LEADERSHIP ABILITY (ENTREPRENEURIAL STYLE):
The Development Coordinator should understand that managing an annual fund is like running a small business. He/she must realize they have the responsibility to make sure the business is well run and not depend on a supervisor to motivate them or tell them what to do. Initiative is the key characteristic here. This is someone who knows he/she must lead senior staff and strong-minded business people. The Development Coordinator must not be intimidated by position or high-powered people.

The Development Coordinator should demonstrate an entrepreneurial style and have experience in business development, realizing that business owners do everything, e.g., take out the trash, clean the coffee mugs, while they also are making sure the business is on track. They also will need to be aware there are peaks and valleys with money being raised at one point and then everything goes dry. The entrepreneurial person will be creative in addressing challenges (problems) and will exude optimism.

• TECHNOLOGICAL ABILITY:
The Development Coordinator should be well acquainted with Word, Excel, Outlook or another contact manager, use of the web, etc. Ideally, the selected candidate will create appropriate forms with graphics and use technology to manage and communicate creatively and effectively.

• ATTENTION TO DETAIL:
This is hard to describe and discern in someone. The basic idea is that the Development Coordinator would not be bored with or underestimate the importance of detail in working with volunteers and donor prospects. It seems that fund development is 80 percent detail and 20 percent actual engagement of volunteers and donors. If quality support and follow up is not provided by the Development Coordinator, volunteers get discouraged and drift away. Volunteers and senior staff need a friendly, but not irritating, person to keep them on task.
“Donors don’t give to institutions. They invest in _________ and _________ in whom they believe.” -GT Smith

SOCIAL MEDIA IS NOT A DONATION SITE. IT IS A ______________ SITE

• Only ____% of donors worldwide have given through Facebook fundraising tools. And those numbers are dramatically lower for other social platforms like Twitter and LinkedIn
• In contrast, ____% of people who engage with nonprofits on social media end up taking some sort of action.
• Be ______________ and have a plan for HOW you will use your social media

FIND YOUR AUTHENTIC VOICE.
Start your social media plan by __________ the VOICE you will use

MAKE A PLAN
What is your goal? Have a ________ behind every channel

FIND YOUR FANS
__________ your audience. What channels are they using? Use _________ and keywords to find followers

MAKE CONTENT THAT TELLS YOUR STORY

• Basic rules of social media
  • _________ beat text
  • movement _______ photos
  • live content beats ________ content

• The type of content you use is also dictated by the type of _________ you use.
• Regular split of content:
  • ____% - Value
  • ____% - Information
  • ____% - Ask
ENGAGE
Don’t just post. Post post.
Social media is a ____________

MEASURE
Monitor your social results in the moment and on a monthly, quarterly and ________ basis
__________ change so your metrics may change

• ANSWER KEY
  Ideas  Moving
  People Platforms
  Discovery 50
  18 30
  55 20
  Thoughtful Conversation
  Defining Yearly
  Purpose Algorithms
  Identify
  Hashtags
  Photos
  Beats
PLANNED GIVING

What is the difference between Planned and Estate Gifts?

1. _______________: Given during lifetime
2. _______________: Gifted after 1 or 2 deaths

BASIC FACTS

- Only ___% have a current will or estate plan
- Fewer than ___% have charitable intent
- ___________ organizations receive the largest percentage of estate gifts – 45%
- There is an urgency for ___________
- 10,000 turn 65 everyday
- Most make their initial estate gift inclusions between ages 45-58
- Importance of IRA/Retirement fund giving – ________ growing
- Gift list ________ with revisions
- Gift flow ________ in 2028

WHY LEGACY DONORS GIVE

- Have a ___________ with the organization
- Organization has long-term track record
- See the organization is “making a ______________”
- See legacy gifts adding ________, gift not spent for annual operations
- They were personally ________

WHAT IS THE NUMBER ONE REASON LEGACY DONORS DON’T GIVE?

Failure to ________.

THE ASKING PROCESS

1. The ___________ – phone or email
2. ___________ – Learn about their relationship
3. The “Ask” – in person; share the ________

The next step: Always_________ ________
DISPELLING 5 MYTHS OF ESTATE PLANNING

• Myth #1: Estate planning is really only an important issue for those that are older.
  Truth: Estate planning is _________ at all age levels and life stages.

• Myth #2: If donors make an estate gift their current support will go down.
  Truth: A deeper _________ with an estate gift strengthens the long-term relationship.

• Myth #3: Donors shouldn’t include any charitable interests if they’ve decided everything is going to family.
  Truth: Charitable designations can be included _________ shortchanging spouse or other family.

• Myth #4: It is complicated for donors to make a specific designation for their gift.
  Truth: An _________ number of gifts are designated. In many cases this can be done outside of their documents.

• Myth #5: If someone passes without completing any documents, their family still gets to decide how things are distributed.
  Truth: In most states the ______ will decide who is in charge of the estate and will want to sign off on all distributions, adding months/years to settling an estate.

Getting Started
• Confirm top 5-10 _________
• Review and establish _________
• Role play visits

• ANSWER KEY

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<td>Fastest</td>
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ATTRIBUTES
Key characteristics of a donor - for example, Board, Alumni, Parent, Grandparent, etc.

PRIORITY 1
Partners and prospects with the capacity to give 2.5% or more of your fundraising goal.

PRIORITY 2
Partners and prospects who can give between .5% and 2.5% of your fundraising goal.

PRIORITY 3
Partners and prospects who can give less than .5% of your goal.

PRIORITY 4
Partners and prospects that could become Priority 1 or Priority 2. However, you don't know them well enough yet.

INDIVIDUAL STRATEGY
Cultivating individual relationships with top partners and prospects. This is more effective but less efficient. Use it with a smaller group of partners who give a large percentage of your goal.

GROUP STRATEGIES
Engaging with people through group events, letters, email campaigns, etc. This is more efficient but less effective. Use it with the larger group of partners who give a smaller percentage of your goal.
PRIMARY CALLER
The person who invites the partner to engage with your organization, asks for the gift, and thanks them.

NEXT STEP
What is the next step for cultivating your relationship with each partner? Who is responsible? When should it take place?

TARGET LOW
The amount that you are 90% or more sure that someone will give this year.

TARGET HIGH
The most you’re willing to ask someone for, based on everything you know about them.

ASKED FOR
The amount that a partner was asked for, awaiting a response.

COMMITTED
The amount that the partner said they would give.
Performing Arts Access for All
San Juan Community Theatre
March 13, 2020
The Need for the Performing Arts Building Community

A. Arts lead to a **50% increase in community activities**.¹

B. Arts participants are more than **twice as likely to volunteer in their communities**.²

C. Low income students who are engaged in the arts are **twice as likely to graduate from college**.³

D. **Nine of ten arts participants report meeting new people and making new friends**, helping to reduce social isolation.⁴

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Mission:
Enriching Community Through Performing Arts
A Lifetime of Performing Arts Impact: Jenny’s Story

I grew up on the stage at SJCT, learning to follow through with commitments, overcome fear, grow, solve problems, and dream.

I now teach theatre at the same high school I grew up in. I watch my students learn empathy and courage. I have seen kids battling the loss of parents, failing grades, extreme shyness, and substance abuse issues. I have witnessed these same students grow and support each other, finding strength that leaves me speechless and in awe.

San Juan might be a small island, but our Theatre gives us access to an endless world of possibilities.

~ Jenni Merritt
San Juan Community Theatre Programs & Opportunities

COMMUNITY PERFORMANCES
- Volunteers get opportunities onstage, backstage, in the lobby, box office, and admin office.
- Community organizations like choral groups, chamber music, and the Friday Harbor Film Festival partner with us for space.

EDUCATIONAL CLASSES AND PRODUCTIONS FOR ALL
- Camps, classes, and production opportunities are available for toddlers through seniors.
- Students perform at SJCT in plays, concerts, and even spelling bees!
- Our Middle and High School drama programs partner with SJCT for production.

PROFESSIONAL CULTURAL OFFERINGS
- We present touring artists such as George Winston, Jake Shimabukuro, and Al Stewart.
- Our HD Streaming series includes performances from the National Theatre, Metropolitan Opera, and Bolshoi Ballet.
- Every summer we host a 10-week film series.

FREE OR REDUCED TICKETS AVAILABLE TO ALL

The Drowsy Chaperone, 2019
SJCT Accomplishments: 2019 By the Numbers

53 Full Theatrical Production Performances

108 Other Programs offered including:
   14 On book readings
   9 Touring performances
   21 HD operas, theatrical shows.
   24 Student produced productions

224 Adults and Youth Performed in On-Stage Roles

285 Volunteers, worked over 28,000 hours

Over 14,000 patrons attended performances
Vision:
San Juan Community Theatre engages community through performing arts, inspiring island residents and visitors of all ages.

<table>
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<th>2019-2020 Season Innovations</th>
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<tr>
<td>Extend the Holiday Play to include Performances on Neighboring Islands</td>
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<tr>
<td>Increase Engagement with Schools; Sponsor Students in National Thespian Competitions.</td>
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<tr>
<td>Offer Training in Performance, Directing, and Production Design.</td>
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<tr>
<td>Increased Outreach Activities with Neighboring Islands</td>
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<tr>
<td>Increased Number and Variety of Touring Groups</td>
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<tr>
<td>Improve Safety and Reliability of Facilities</td>
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<td>Address Landscaping Irrigation and Lighting</td>
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### Operating Budget, October 2019 – September 2020

<table>
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<tr>
<th>Income</th>
<th>FY 2019</th>
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<tr>
<td>Earned Income</td>
<td>$294,400</td>
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<td>Corporate, Government, Foundation Support</td>
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<td>Restricted Funds</td>
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<td><strong>Total Income</strong></td>
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<table>
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<td>Production Expenses</td>
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<td>Outreach and Development</td>
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<td>Facilities and Operation</td>
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<tr>
<td>Personnel</td>
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<td><strong>Total Expenses</strong></td>
<td><strong>$795,200</strong></td>
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| Fundraising Need                      | **$352,500** |
## Gift Plan

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<tr>
<th>Number of Gifts</th>
<th>Average Value</th>
<th>Total</th>
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<td><strong>Total Need</strong></td>
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**SJCT Leadership Team**
Executive Artistic Director: Nathan Kessler-Jeffrey  
Board President: Clare Kelm  
Past President: Sandy Johnson  
Board Secretary and Development Chair: Madelyn Busse  
Board Treasurer: Craig Nett

**4 Ways to Give**
Call: 360-378-3211 x028  
Email: [donors@sjctheatre.org](mailto:donors@sjctheatre.org)  
Visit: [www.sjctheatre.org/support](http://www.sjctheatre.org/support)  
Mail: PO Box 1063  
Friday Harbor, WA 98250

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<th>Additional Board Members</th>
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<tr>
<td>Brandon Cadwell</td>
<td>Ted Carlsson</td>
<td>Libby Concord</td>
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<tr>
<td>Frank Gregor</td>
<td>Chuck Dalldorf</td>
<td>Jennifer Herda</td>
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<tr>
<td>Kathy Schwartz</td>
<td>Vickie Shilton</td>
<td>Helen Wiecking King</td>
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<td>Anita Welch</td>
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