Essentials of Development

A MURDOCK TRUST PROGRAM

January 2024 • May 2024

M.J. Murdock
CHARITABLE TRUST

Essentials of Development Handbook

Table of Contents

6% Corporations

9% Bequests

21% Foundations

64% Individuals

Report: Giving USA 2023
Data: Giving in 2022

• 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

Biggest

$410

Individuals

People

Know

Trust

Asked

Shown

Involved

Ownership

Life

No

Results

Costs

Case

Team

Segmented

Annual

CHAPTER 2
Embracing the Donor

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

Integration

Keep Informed
A Touch

Entry Point
Introduction

Keep connected
A Touch

Create relationship
& develop trust

Thank
Appropriately

Determine if right fit

Make the
ASK

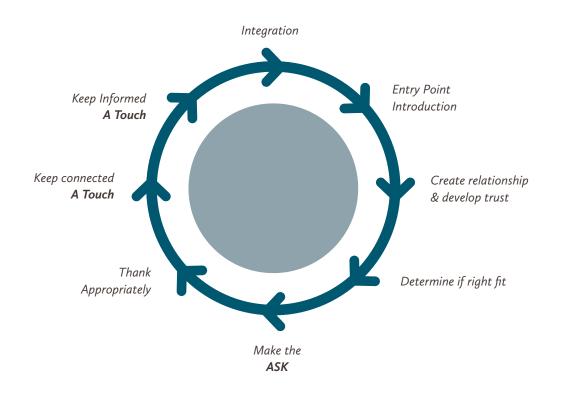## Backdrop for the Embrace

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
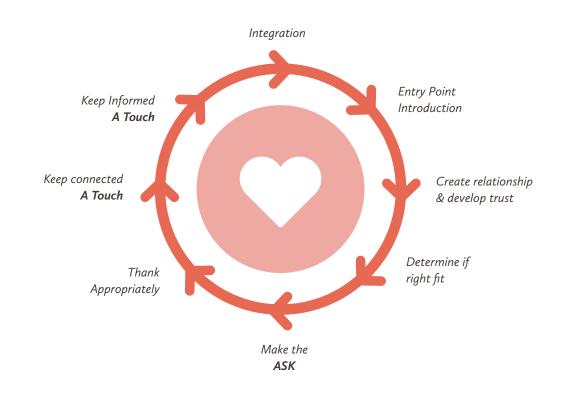
- Do the embrace over and over again
- Treasure the mystery
- Remember the Mars/Venus differences
- Don't do anything that breaks trust

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.

Integration

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right fit

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ASK

CHAPTER 3
The Development Team

• WHAT IS THE DEVELOPMENT TEAM'S JOB?

They thank and ask

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

- Meet monthly

• ANSWER KEY

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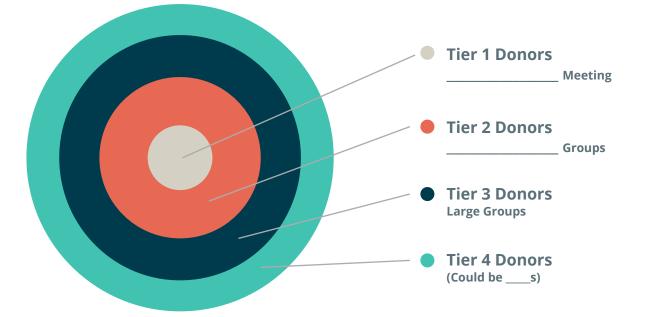
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CHAPTER 4
Segmented Donors

Tier 1 Donors
_____ **Meeting**

Tier 2 Donors
_____ **Groups**

Tier 3 Donors
Large Groups

Tier 4 Donors
(Could be ____s)

• SEGMENTING DONORS: 1'S

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'S

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'S

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'S

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
- _____
- _____
  - Small group
  - Letter/phone
  - Banquet
  - Events

• 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

2024 Annual Fund

Target Date: 12/31/2024	Prospects:	6
Best Case: $635,000	Worst Case:	$246,000
Goal: **$2,000,000**	Committed:	$0

Prospects | Next Steps | Recent Activity

Prospects (6)

Prospects	Primary Caller	Attributes	Strategy	Priority	Target High	Target Low	Asked	Committed	Fulfilled	Next Contact	Actions
Banner, Bruce	Anderson, James	ECC,FSP,BOARD	Individual	1	$500,000	$200,000	$0	$0	$0	11/23/2023	
Bell, Shane	Anderson, James	CSC	Individual	2	$50,000	$10,000	$0	$0	$0	12/15/2023	
Bob, Smith	Anderson, James	CSC,ECC	Business	2	$25,000	$15,000	$0	$0	$0		
Bond, Shane	Mills, Kyle	CSC	Individual	2	$20,000	$5,000	$0	$0	$0	02/09/2024	
Cena, John	Mills, Kyle	BOARD	Business	1	$25,000	$10,000	$0	$0	$0		
Clarke, Michael	Andrew, Flintoff	Alumni	Individual	2	$15,000	$6,000	$0	$0	$0		
Best Case: $635,000					$635,000	$246,000	$0	$0	$0		
Worst Case: $246,000											
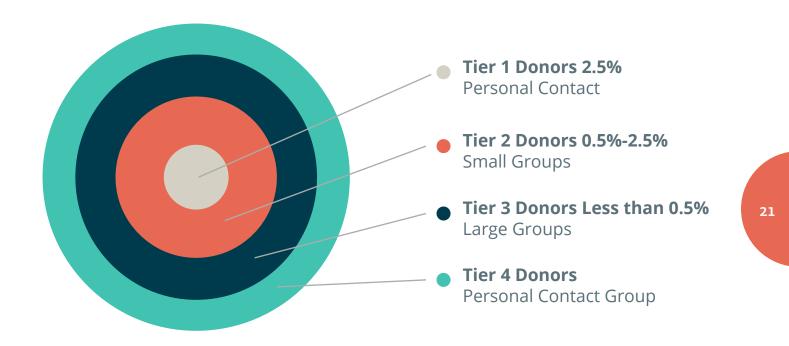
Show All entries

Previous 1 Next

Export | + Add Prospects | Reset | Filter

Summary Production by Caller Report
Under His Wings $5,000,000 12/31/2023

Page 1 of 1
Date 11/14/2023

Caller	# OF PROSPECTS			Target Amount		Asked For Amount	Committed Amount	Total	
	Total	Talked To	Plan To Contact	High	Low			High	Low
Anderson, James	14	0	2	430,000	285,000	82,000	149,000	661,000	516,000
Harrison, Julie	1	1	0	0	0	0	1,000	1,000	1,000
James, Bob	1	0	2	100,000	50,000	75,000	0	175,000	125,000
Sellers, Julie	1	2	1	0	1,000	0	0	0	1,000
Unassigned Caller	2	0	0	500,000	20,000	0	0	500,000	20,000
								BEST CASE	WORST CASE
GRAND TOTAL	19	3	5	1,030,000	356,000	157,000	150,000	1,337,000	663,000

SEGMENTING PROSPECTS

Tier 1 Donors 2.5%
Personal Contact

Tier 2 Donors 0.5%-2.5%
Small Groups

Tier 3 Donors Less than 0.5%
Large Groups

Tier 4 Donors
Personal Contact Group

"Take all donors seriously, but don't treat all donors the same."

TIER 1 DONORS:

Tier 1 Donors have the capacity to give your organization 2.5% 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 1 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:

	Name	Priority #	Primary Caller	Attribute	Target Low	Target High	Asked For	Committed
1								
2								
3								
4								
5								

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 2.5% 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:

	Name	Priority #	Primary Caller	Attribute	Target Low	Target High	Asked For	Committed
1								
2								
3								
4								
5								

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?

1. Casual Conversation

2. The Tour or "Come and See"

4. Ask

3. Presenting the Case for Support

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"
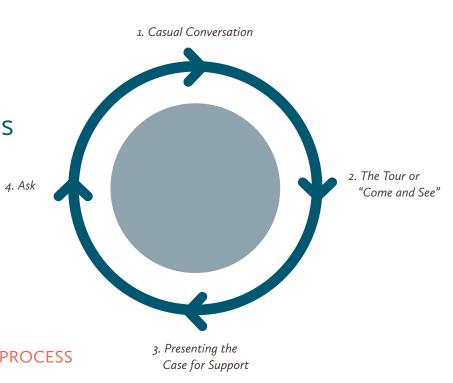
Remember - Every _____ has a question that leads to deeper involvement

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
- The 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?

• 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!

Always "keep the ball in your court"!

Racial/Ethnic Cross Cultural Development _____

1. Diversity in philanthropy will include many _____ _____ outside of our current networks.

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

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.

RACE AND CULTURE 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 of 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

Giving of Asian American

_____

_____

Giving of Latinx People

_____

_____

Giving of African American

_____

_____

Giving of Indigenous People

_____

_____

STEPS TO CULTIVATE DONORS OF COLOR

STEP 1

Learn directly from 1 to 1 conversations

STEP 2

Identify existing networks that connect to POC individuals

STEP 3

Understand crossracial and inter-racial dynamics

STEP 4

Create new linkages to recruit and network diverse donors

STEP 5

Cultivate authentic relationships

STEP 6

ASK!! Time, Talent, Treasure, Testimony

THIS MEANS...

Ensure diversity within board of directors and senior organizational staff

Create case statements and language that reflect diverse cultures

Avoid one-time program or event "targeting" of a particular community

Start developing diverse donor pipelines that focus on authentic relationships

ORGANIZATIONAL BREAKOUT DISCUSSION
Intentionally Cultivating Donors and Staff of Color

Cultivating Donors

What does your organization need to change to better engage donors of color?

_____

_____

What opportunities for greater participation with diverse donors can be developed today?

_____

_____

Cultivating Staff

How are you diversifying your fundraising staff?

_____

_____

How are you supporting their success in building relationships within your networks?

_____

_____

• WORD KEY

Diverse groups	24%
More inclusive	Often overlooked
Recipient-lens	80% to more than 90%
Capacity	Multiple races/ethnicities
Not hired	Revenue sustainability
Lack invitation and access	Often prioritize
Self-perception	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)

ASSIGMENTS FOR MAY

• Complete final draft of Case Statement

• Build your Development Team (including a chair and data manager) and conduct 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.

Point person	Assignment	Deadline date	Done date
	○ 1.		
	○ 2.		
	○ 3.		
	○ 4.		
	○ 5.		
	○ 6.		
	○ 7.		

Faculty Contact Information
Amy Karjala: akarjala@revjengroup.com
Brad Layland: blayland@thefocusgroup.com
Deborah Wilds: Deborah.Wilds@outlook.com
David Thakkar: dthakkar@younglife.ca
Evangeline Pattison: epattison@thefocusgroup.com
Jeremy Simler: jsimler@nwfurniturebank.org
Nancy Nelson: nnelson@warmbeach.com
Ray Keen: ray@thecanbycenter.org

Trust Contact Information
M.J. Murdock Charitable Trust
655 W Columbia Way, Suite 700
Vancouver, WA 98660
Office: 360-694-8415
murdocktrust.org/essentialsofdevelopment
John Franklin, Program Director Murdock
Trust: johnf@murdocktrust.org
Sarah Ruckle, Program Coordinator for Enrichment
sarahr@murdocktrust.org

• 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. Development Team

3. Segmented Donor List

4. Annual Fundraising Plan

• ANSWER KEY

People	Way
People	Life
Asked	Forever
Shown	Maximizes
Involved	Minimizes

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. _____

CHAPTER 8
Engaging Tier 3 Donors

• ABOUT TIER 3 DONORS:

1. Ratio is the same - __ cultivation & care activities: __ ask
2. Most cultivation and care is done _____
3. Most invitations to give are 1 to many (email, events, etc.)
4. _____ often start off as Tier 3 donors
5. Goal is to have Tier 3 donors give _____ of your budget

• WHY WE INVEST IN ENGAGING TIER 3 DONORS:

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

• TIER 3 CULTIVATION AND CARE

- _____ letters and updates
- Newsletters
- Thank you or check-in calls
- Virtual TED talk style events focused on the cause
- Thank you/celebration events
- Small volunteer "_____" work party

• TIER 3 ASKS

- In-Person events (micro, mid or large)
- _____ events
- Social media campaigns and peer-to-peer fundraising
- Direct mail
- _____ giving program/invitation

• FOOD FOR THOUGHT

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

• ANSWER KEY

3	Virtual
1	Monthly
1 to many	
Younger Donors	
40%	
Bring	
Connect	
Provide	
Create	
Thank You	

CHAPTER 9
The Annual Fundraising Plan

• ANNUAL DEVELOPMENT STRATEGY AND PLAN - IN THREE STEPS

1. Identify all of your _____, _____, and _____ activities 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 cultivation, care, and ask activities for _____.

- 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 & other (discovery meetings, invitation for more involvement)

Remember: at least ____ cultivation and care activities per donor

• STEP 2

Identify all of the _____ _____ activities

- When will the development team meet?
- When will we update the case for next year?

Start meeting and never stop.

• STEP 3

Chart those activities on the annual fundraising plan calendar and use it for tracking.

• GET GOING

"Plans are only good _____ unless they immediately _____ into hard work."

Take a breath - Peter Drucker, Management: Tasks, Responsibilities, Practices

• ANSWER KEY

Cultivation

Care

Ask

Development

Tracking

Each donor tier/type

3

Development Team

Intentions

Degenerates

Annual Plan - Planning Worksheet - Tier 1

STEP ONE: IDENTIFY THE CULTIVATION, CARE, AND ASK ACTIVITIES	
CULTIVATION/CARE	ASK/SOLICITATIONS

Annual Plan - Planning Worksheet - Tier 2

STEP ONE: IDENTIFY THE CULTIVATION, CARE, AND ASK ACTIVITIES	
CULTIVATION/CARE	ASK/SOLICITATIONS

Annual Plan - Planning Worksheet - Tier 3

STEP ONE: IDENTIFY THE CULTIVATION, CARE, AND ASK ACTIVITIES	
CULTIVATION/CARE	ASK/SOLICITATIONS

Annual Plan - Planning Worksheet - Tier 4

STEP ONE: IDENTIFY THE CULTIVATION, CARE, AND ASK ACTIVITIES	
CULTIVATION/CARE	ASK/SOLICITATIONS

Essentials of Development
A MURDOCK TRUST PROG

STEP TWO: DEVELOPMENT TEAM ACTIVITIES		
Activity	**Who**	**When**
1. Development team meetings		
2. Update case for support for next year		
3. Other:		

SAMPLE PLAN: VERITAS ANNUAL PLAN (JULY- JUNE F/Y)1			
Month	**Event**	**Category**	**Initiator/ Path**
July	Meet with 1/3 Major Donors (ask)	1	DTC/ PC
August	Back to School Newsletter (c) Meet with 1/3 Major Donors Begin work on Golf Tournament	1,2,3 1 2	HOS/ OM DTC/ PC DTC
September	Meet with 1/3 Major Donors Grandparents Day/ Chapel	1 1,2 4	DTC/ PC HOS/ DTC
October	Fall Festival Secure Pledges 1/2 Tier 2	1,2 2	HOS/ PC DTC/ OM
November	Thanksgiving Cards Secure Pledges 1/2 Tier 2	1,2 2	HOS/ OM DTC/ OM
December	Upper School Christmas Cards Christmas Thanks Letter	1 1,2,3	HOS/ OM HOS/ OM
January	Email note to all donors	1,2,3	HOS/ OM
February	Valentine Day Note Golf Tournament	1 2,4	DTC/ PC DTC/ PC
March	Face to Face TY Meeting Phone Call TY	1 2	DTC/ PC DTC/ PC
April	Cont. Face to Face TY Meeting Phone Call TY Secure Match for Giving Day	1 2 1	DTC/ OM DTC/ PC DTC/ PC
May	Giving Day Invite to end of School Events Begin Work on New Case	3 1,2 1,2	DTC/ HOS/ OM HOS/ PC DTC Chair/ HOS
June	Finalize New Case End of Year Letter	1,2 1,2,3	DTC/ PC HOS

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"

• STEP THREE: Annual Plan (July - June FY)

Month	Event/Activity	Category	Initiator/ Path
July			
August			
September			
October			
November			
December			
January			
February			
March			
April			
May			
June			

Notes

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Types of Foundations

PRIVATE: FUNDED MOSTLY BY ONE DONOR, FAMILY OR ENTITY SOURCE

- _____ Foundations
- _____ Foundations or Charitable Trusts
- _____ Foundations

PUBLIC: FUNDED BY MANY SOURCES

- _____ Foundations in local or state areas
- Funds serving targeted people groups or causes

Determine Organizational Alignment

RESEARCH FIRST
Search for foundation's guidelines, practices and interests

- _____ – Foundation Website, Annual Reports, Funder Directories
- _____ & Networking – Talk to peer nonprofits, board members, grant writers
- _____ – Nonprofit Associations, Nonprofit Funder Events, Grant Writer Workshops
- Understand the proper channel to initiate a _____ or conversation

Key Takeaways From a Funder

- What is their mission and values?
- What have they funded in the past?
- What are their present funding interests?
- What size grants do they usually give?
- What are the project specific guidelines for submission?
- Are there geographic or sector specific limitations?
- What are the deadlines and timing of board decisions?
- What is their origin story and future strategy?

What makes a successful grant proposal?

GOOD GRANT WRITING

- Clear, concise, fluid; Tell _____ story
- Anticipates and answers questions
- Does not gloss over the project's _____
- Solid project planning
- Articulates how success is _____
- Indicates a viable plan to _____ _____ the project once completed
- Thoughtfully recycles content and boilerplate language
- Includes helpful _____ to illustrate how you are learning about your constituency and your organization

COMMON MISTAKES

- Hard to read proposals / _____ information
- Failing to review application instructions carefully
- Requested amount not in line with _____ _____
- Laundry lists of needs. Request should be a _____, focused project.
- Lack of good funding plan (aim for _____)
- Lack of _____ involvement
- Ambiguous project _____
- _____ the truth to fit a grant funder
- Deviating from organization's mission

INDICATORS OF GRANT SUCCESS

Organizational Health

- Experienced, stable, capable _____
- Careful _____ planning and partnerships
- Financially sound and growing
- Proper board _____ and stewardship-centric practices

Project Preparation

- Effective execution and distinctly identifies _____
- Addresses intended or unintended _____
- _____ ability to complete funding and sustain the project
- Reasonable & clear budget

Initiate contact

MAKE IT COUNT!

- Treat them like _____
- Prepare a brief summary of your org, project and any alignment detail about yourself or the foundation before initiating contact
- Invite them to your facility for a _____
- Present several ideas to see what best fits their _____ or funding priorities
- Keep them _____

• ANSWER KEY

Your	Compromising	Conversations
Challenges	Leadership	Local resources
Measured	Financial	Letter of Inquiry
Financially Sustain	Governance	(LOI)
Metrics	Outcomes	Individual Donors
Inconsistent	Consequences	Tour
Foundation's History	Demonstrates	Interest
Cohesive	Family	Informed
150%	Independent	
Board	Corporate	
Expenses	Community	
	Online	

52

53

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

Planned	Shortens	Invitation	Increasing
Estate	Begins	Preparation	Court
35	Relationship	Case	Prospects
10	Difference	Follow up	Policies
Religious	Value	Essential	
Boomers	Asked	Investment	
Fastest	Ask	Without	

CHAPTER 12
Social Media and Development

"Donors don't give to institutions. They invest in ideas and people in whom they believe." -GT Smith

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

- Only 18% 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, 55% of people who engage with nonprofits on social media end up taking some sort of action.
- Be thoughtful and have a plan for HOW you will use your social media

FIND YOUR AUTHENTIC VOICE.

Start your social media plan by defining the VOICE you will use

MAKE A PLAN

What is your goal? Have a purpose behind every channel

FIND YOUR FANS

Identify your audience. What channels are they using? Use hashtags and keywords to find followers

MAKE CONTENT THAT TELLS YOUR STORY

- Basic rules of social media
  - Photos beat text
  - Movement beats photos
  - Live content beats movingcontent

- The type of content you use is also dictated by the type of platforms you use.
- Regular split of content:
  - 50% - Value
  - 30% - Information
  - 20% - Ask

ENGAGE
Don't just post. Post post.
Social media is a conversation

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

• 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.

Point person	Assignment	Deadline date	Done date
	○ 1.		
	○ 2.		
	○ 3.		
	○ 4.		
	○ 5.		
	○ 6.		
	○ 7.		

Faculty Contact Information
Amy Karjala: akarjala@revjengroup.com
Brad Layland: blayland@thefocusgroup.com
Deborah Wilds: Deborah.Wilds@outlook.com
David Thakkar: dthakkar@younglife.ca
Evangeline Pattison: epattison@thefocusgroup.com
Jeremy Simler: jsimler@nwfurniturebank.org
Nancy Nelson: nnelson@warmbeach.com
Ray Keen: ray@thecanbycenter.org

Trust Contact Information
M.J. Murdock Charitable Trust
655 W Columbia Way, Suite 700
Vancouver, WA 98660
Office: 360-694-8415
murdocktrust.org/essentialsofdevelopment
John Franklin, Program Director Murdock
Trust: johnf@murdocktrust.org
Sarah Ruckle, Program Coordinator for Enrichment
sarahr@murdocktrust.org

1 Development Team Meets Monthly except June

• CLOSING COMMENTS

• CLOSING COMMENTS

• CLOSING COMMENTS

APPENDIX

ELEVATOR PITCH

An **elevator pith**, 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 <u>mission statement</u> 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 <u>unique selling proposition (USP)</u> 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.

Review Current Financial Report for organization.

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 WS2020 Summary Production Report and Individual Caller Lists.
- 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.

ESSENTIALS TERMS

ATTRIBUTES
Key characteristics of a donor - for example, Board, Alumni, Parent, Grandparent, etc.

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

TIER 2
Partners and prospects who can give between 0.5% and 2.5% of your fundraising goal.

TIER 3
Partners and prospects who can give less than 0.5% of your goal.

TIER 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]

Jake Shimabukuro
2018-2019 Season

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2. Tebes, J., Matlin, S., Hunter, B., Thompson, A., Prince, D., & Mohatt, N. (2016). Porch Light Program: Final Evaluation Report [Electronic version]. New Haven, CT: Yale University School of Medicine. Retrieved 28 February 2018 from https://www.muralarts.org/program/porch-light/
3. Catterall, J., Demais, S., Hampden-Thompson, G. (2012). The Arts and Achievement in At-Risk Youth: Findings from Four Longitudinal Studies (Research Report #55) [Electronic version]. National Endowment for the Arts. Retrieved 16 February 2018 from https://www.arts.gov/file/2684
4. Arts Education Navigator: Facts & Figures. Americans for the Arts. Retrieved on 13 May 2018 from https://www.americansforthearts.org/by-program/networks-and-councils/arts-education-network /tools-resources/arts-ed-navigator/facts-figures.

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

A Midsummer Night's Dream
Friday Harbor High School, 2019

Vision:
San Juan Community Theatre engages community through performing arts, inspiring island residents and visitors of all ages.

2019-2020 Season Innovations
Extend the Holiday Play to include Performances on Neighboring Islands
Increase Engagement with Schools; Sponsor Students in National Thespian Competitions.
Offer Training in Performance, Directing, and Production Design.
Increased Outreach Activities with Neighboring Islands
Increased Number and Variety of Touring Groups
Improve Safety and Reliability of Facilities
Address Landscaping Irrigation and Lighting

Operating Budget, October 2019 – September 2020

Income		FY 2019
	Earned Income	$294,400
	Corporate, Government, Foundation Support	$91,000
	Restricted Funds	$50,000
	Total Income	$435,400
Expenses		FY 2019
	Production Expenses	$185,100
	Outreach and Development	$109,500
	Facilities and Operation	$127,500
	Personnel	$373,100
	Total Expenses	$795,200
	Fundraising Need	**$352,500**

Gift Plan

Number of Gifts	Average Value	Total
1	$20,000 - $30,000	$30,000
8	$10,001 - $15,000	$100,000
10	$5,001 - $10,000	$60,000
20	$2,001 - $5,000	$60,000
40	$1,001 - $2,000	$60,000
30	$501 - $1,000	$18,000
68	$101 - $500	$17,000
100	$25 - $101	$7,500
Total Need		$352,500

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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
Visit: www.sjctheatre.org/support
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Friday Harbor, WA 98250

Additional Board Members		
Brandon Cadwell	Ted Carlsson	Libby Concord
Frank Cregor	Chuck Dalldorf	Jennifer Herda
Kathy Schwartz	Vickie Shilton	Helen Wiecking King
Anita Welch		

Performing Arts Access for All

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