



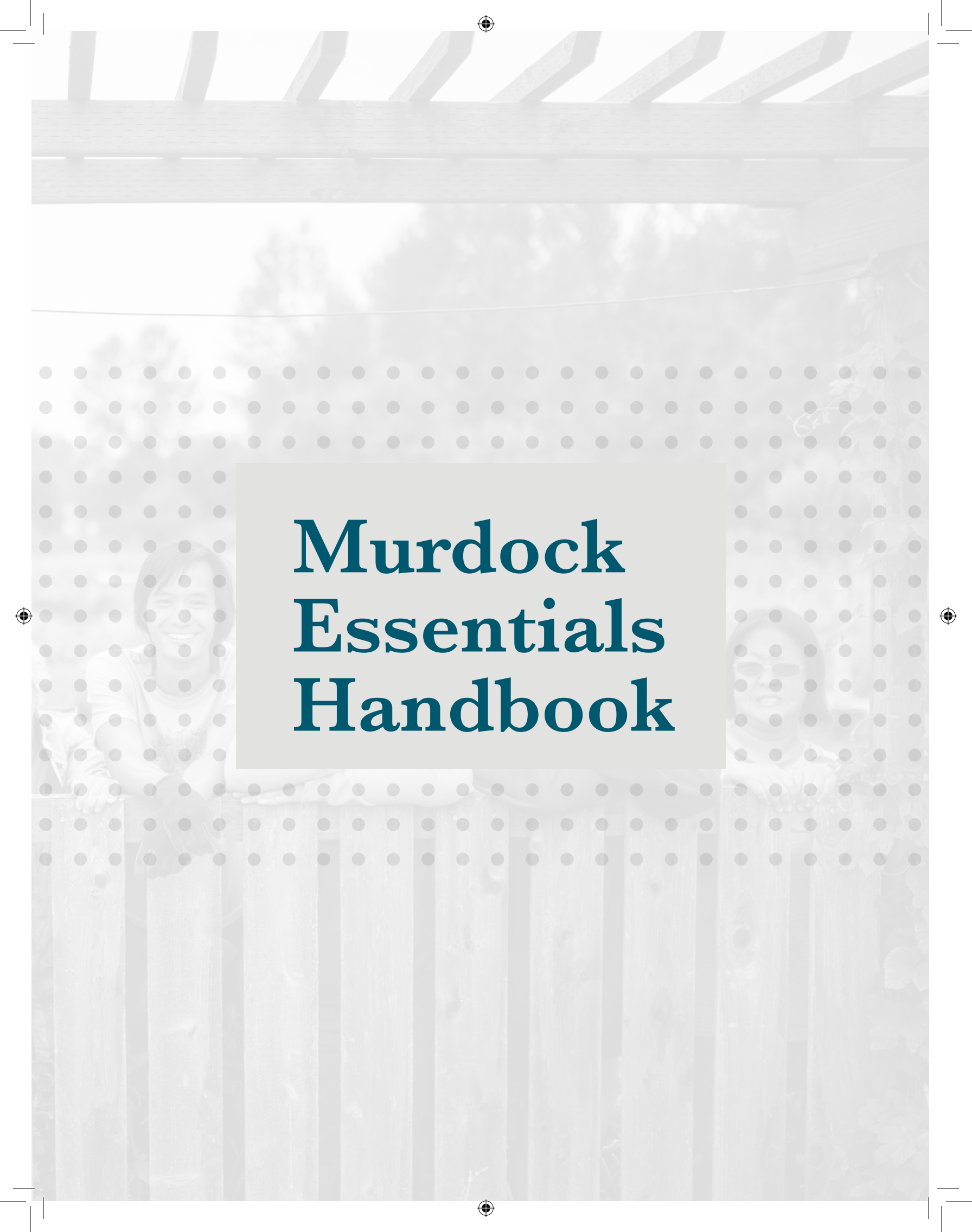
# Essentials of Development

A MURDOCK TRUST PROGRAM



M.J. Murdock  
CHARITABLE TRUST





# Murdock Essentials Handbook

Copyright © 1992, 2019, 2020. No part of this manual may be reproduced in any form without written permission in advance from The Murdock Charitable Trust and The FOCUS Group, Inc.

**The Murdock Charitable Trust**  
655 W Columbia Way, Suite 700  
Vancouver, WA 98660  
[Murdocktrust.org](http://Murdocktrust.org)

**The FOCUS Group Inc.**  
521 A1A Beach Blvd  
St. Augustine, FL 32080  
[theFOCUSgroup.com](http://theFOCUSgroup.com)

# Table of Contents

## December Chapters:

CHAPTER 1 // Introduction . . . . .	06
CHAPTER 2 // Embracing the Donor . . . . .	09
CHAPTER 3 // Racial/Ethnic Cross Cultural Development . . . . .	14
CHAPTER 4 // Asking Process . . . . .	23
CHAPTER 5 // The Board and the Development Team . . . . .	27
CHAPTER 6 // Segmented Donors . . . . .	29
CHAPTER 7 // May Assignments . . . . .	38

## May Chapters:

CHAPTER 8 // Reviewing the Essentials . . . . .	38
CHAPTER 9 // The Annual Fundraising Plan . . . . .	41
CHAPTER 10 // Strategies for Seeking Grant Support . . . . .	47
CHAPTER 11 // Social Media And Development . . . . .	52
CHAPTER 12 // Planned and Estate Giving . . . . .	54
CHAPTER 13 // Maximizing Events for Tier 3 . . . . .	57
CHAPTER 14 // Closing . . . . .	59

## Appendix

45 Ways to Say Thank You . . . . .	62
Sample Development Team Agenda . . . . .	64
Development Team Job Description . . . . .	65
Development Team Chairperson Description . . . . .	66
Lunch Questions . . . . .	67
Role Play Scenario . . . . .	68
Role Play Questions . . . . .	69



# CHAPTER 1

## Introduction

---

### • OVERVIEW OF GIVING

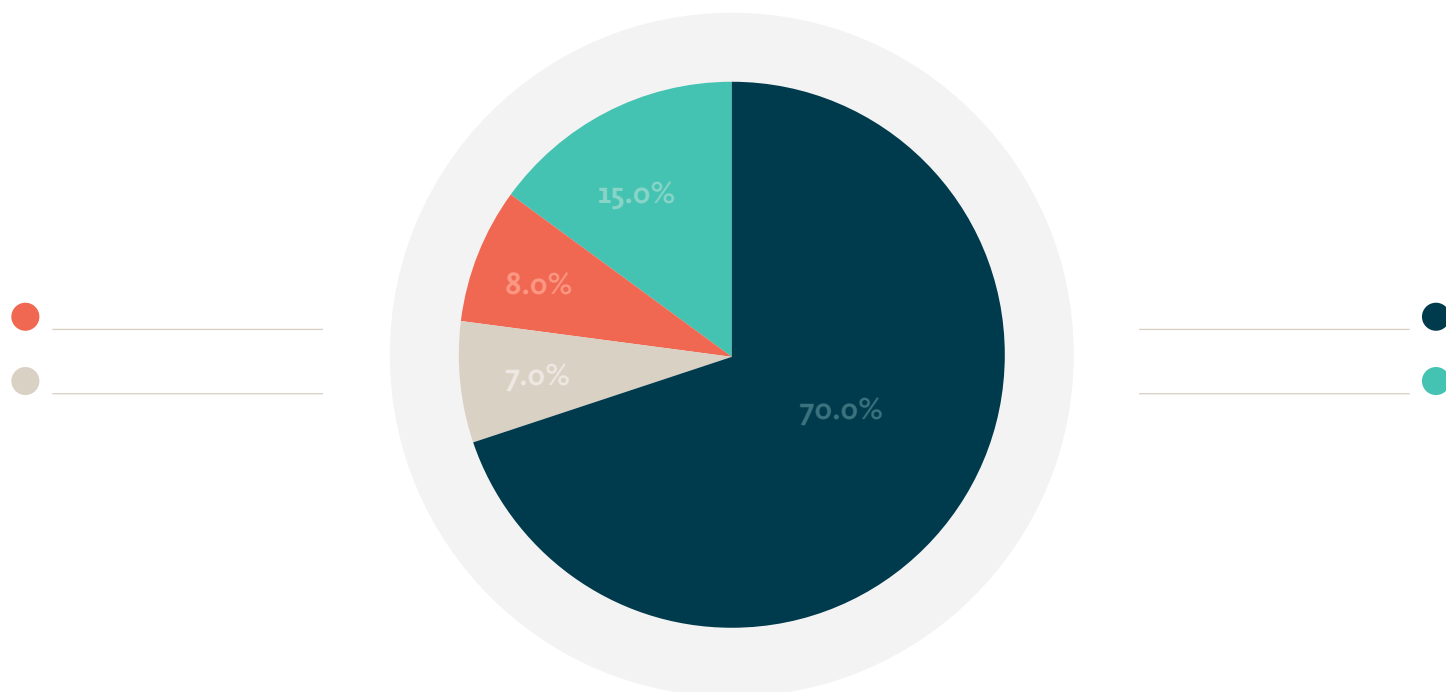
People are the \_\_\_\_\_ givers.

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



### Characteristics of Givers

- Very \_\_\_\_\_ - one of the most valuable things they will give is personal financial information
- About \_\_\_\_\_ of the population
- Demonstrated generosity with time, possessions and \_\_\_\_\_

### Non-Givers

- Ask a lot of questions and can make you feel \_\_\_\_\_
- Generally, the more questions, the \_\_\_\_\_ the gift
- Are closed with information about themselves and their finances

### • 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 \_\_\_\_\_.



• ANSWER KEY

Biggest                      Shown  
\$335                         Involved  
Individuals                Ownership  
Corporations             Life  
Bequests                 No  
Foundations              Results  
People                      Costs  
Trusting  
20%  
Finances  
Defensive  
Lower  
People  
Know  
Trust  
Asked







## CHAPTER 2

# Embracing the Donor

---

### • INTRODUCTION

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 a future

### • ESSENTIALS

\_\_\_\_\_ Statement

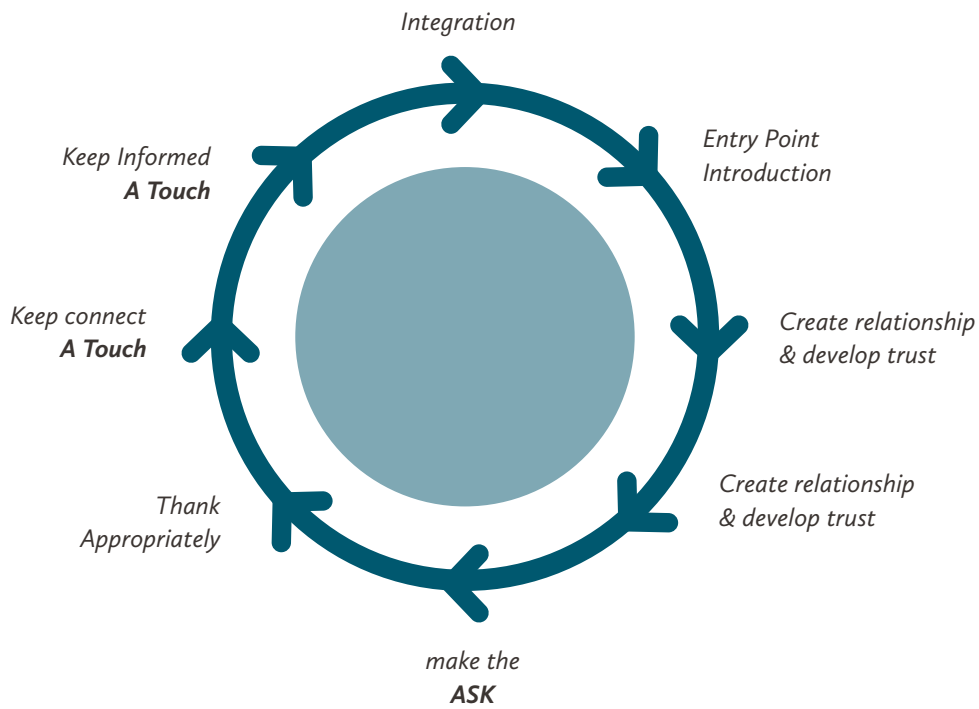
Development \_\_\_\_\_

\_\_\_\_\_ Donor List

\_\_\_\_\_ Team



• EMBRACE OF THE DONOR



10

**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 us 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

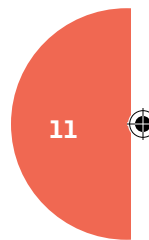
- Six most important words in development are....
- Thank them \_\_\_\_\_
- Know your donor, thank them how they want to be thanked
- See separate Handout, "30 Ways to Do Thank Yous or Do Donor Touches"

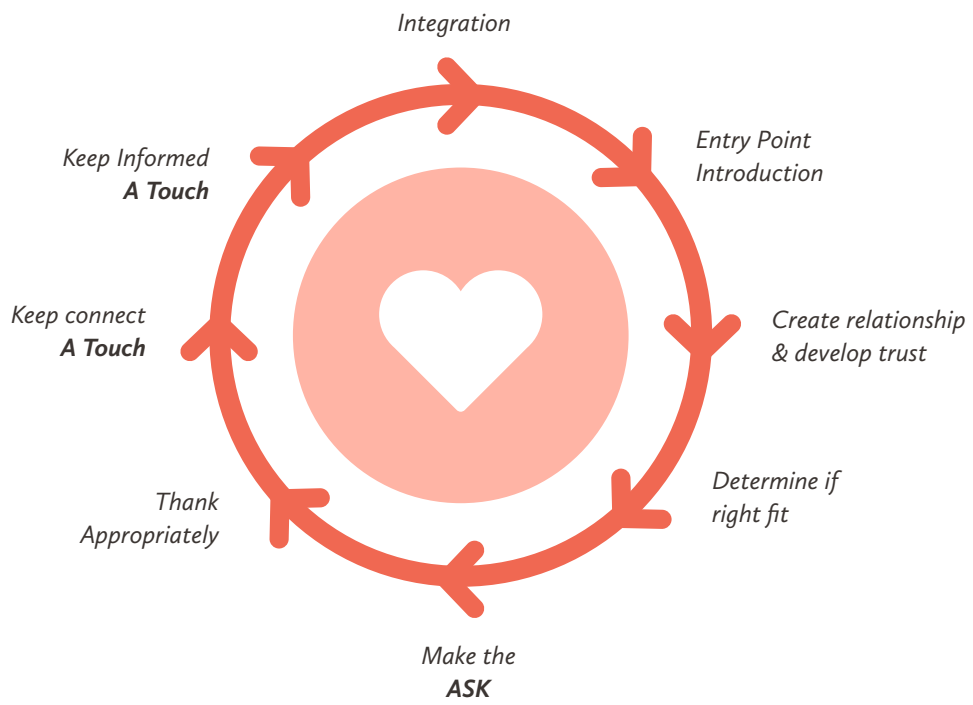
### Keep connected and informed

- 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

### 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 even, 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

Case

Plan

Segmented

Development

Relationships

Ourselves

Time

Kind

Money

Estate plans

Always

Listen

Yes

Asap

Stories

We





## CHAPTER 3

# Racial/Ethnic Cross Cultural Development

“Giving By Minority Populations: A Report from National Research” by Lilya Wagner

“There are many aspects of each culture that we need to pay attention to when we are considering issues related to Fund Development:

national character, basic personality, perception, time concept, space concept, thinking, language, nonverbal communication, values, behavior, norms/rules, manners, social groupings/ relationships.”

\_\_\_\_\_ (cultural nuances) Matters

\_\_\_\_\_ Matters

### • BE AWARE THAT MINORITY CULTURES AND COMMUNITIES GIVE GENEROUSLY

Long history of \_\_\_\_\_ (having someone’s back): pooling resources (Chinese tongs); a place to stay; connecting networks; referrals and references

Minority communities often give a \_\_\_\_\_ percentage of their income than majority culture folks.

However, giving often happens in different ways than in majority culture.

- Support of \_\_\_\_\_ is expected. (Community/kinship/connectedness – “aunts and uncles”, ‘ohana’, ‘la familia’)
- \_\_\_\_\_ gifts are common. (e.g.Tamales, capri-suns, cookies, use of homes, meals, sleeping bags, outreach snacks)
- Reciprocity is \_\_\_\_\_. (How is the nonprofit’s/staff’s work giving back to that community?)





• **CULTURALLY APPROPRIATE ASKS AND ABILITY TO CROSS CULTURES**

Culture(s) of the nonprofit staff who do the fundraising, asking for support

The \_\_\_\_\_ being a person of color

Culture(s) of the Donors who (are being asked to) partner with the resources needed by the work

Talking to an audience of a \_\_\_\_\_ race/ethnicity than \_\_\_\_\_.

• **EXPLORE CULTURAL VALUES AS THEY RELATE TO GIVING AND FUNDRAISING**

What is the role of family and/or other important social grouping in the \_\_\_\_\_? (e.g. church for some communities). Where is decision making done?

How is \_\_\_\_\_ viewed/used in this culture? How is giving done?

How are requests made in this culture? What implications do requests have for those \_\_\_\_\_?

What is the view of nonprofit work in this culture?

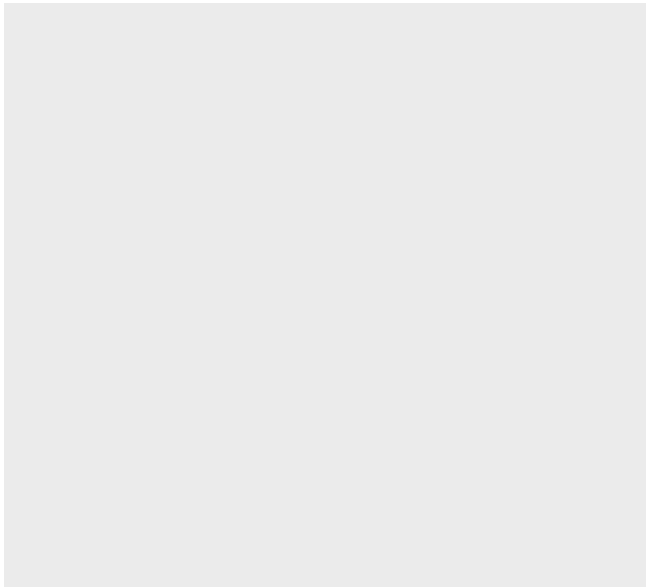
- Are nonprofit workers paid or expected to work multiple jobs? (bi-vocational)
- Is nonprofit work 'understandable' culturally?

What is the view of the type of work your nonprofit does?

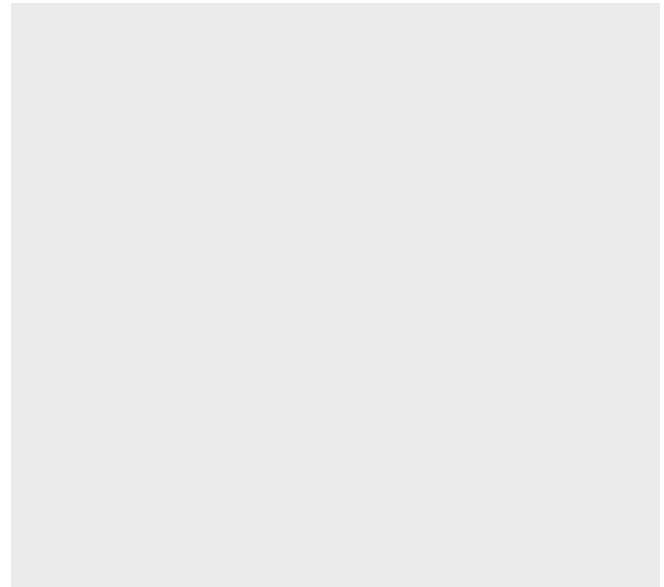


## Listen/Look for Similarities and Differences

### *Similarities*



### *Differences*



16

### • BROAD STROKES

- 45 minutes – introductory overview
- Significant differences within broader ethnic/racial groupings
  - e.g. Cuban-Americans and immigrant Mexican Americans
  - e.g. Immigrant African Americans and African Americans who have been here for generations
  - e.g. Japanese Americans; Filipino Americans; first generation Korean American immigrant
- Generational and assimilation/acclulturation impact
- Some research; Most from decades of fundraising done by myself and dozens of other colleagues from the nonprofit – collaboration for on-the-ground; hands on training.
- How to utilize/understand this information – baseline to inform your questions and relating.





## • CULTURALLY APPROPRIATE AND CULTURALLY RELEVANT ASKS

---

- Indirect communication styles anchored in a “shame-based” culture (esp. with first generation and older prospects) normally requires an indirect ask - A spectrum of asking – and communal need.
- Hierarchical values require honoring elders and those in authority. Use of advocates is important.
- Cultural value of reciprocity requires careful attention to thank you’s and giving of small gifts.
- Value on education.
- Little understanding of nonprofit work that requires fundraising – many nonprofit staff are bi-vocational. Fundraising requires education.
- Often interest and preference in funding nonprofit work that has impact on Asians/Asian Americans - giving back.

- 
- Giving tends to be spontaneous and in response to need, so asking must happen more frequently. (Some giving are more periodic and tied to timing of disposable income, tax, holidays...etc.)
  - Giving of honor/recognition important, think creative ways of thanking and honoring gifts.
  - A strong interest in "giving back" means that giving to the development of young Black leaders is especially motivating. Giving towards education is common, through scholarships and afterschool programs.
  - Service is a high value, so in-kind gifts and volunteering are important elements of partnership.
  - Many nonprofit staff are bi-vocational/multi-vocational.
  - For faith-based: a significant part of giving in the community is to the Black Church, therefore church is very important to support of Black staff (for both funding and credibility/affirmation).





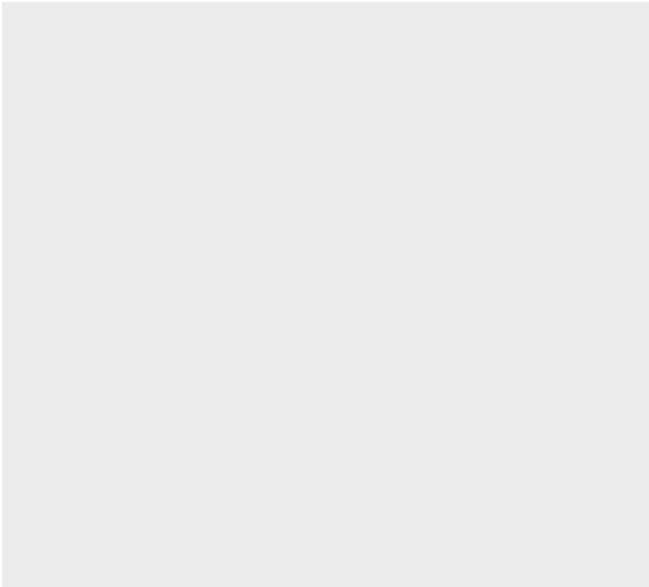
- 
- Cultural values of dignity and honor require that possibilities for rejection be minimalized. Asking needs to be done more indirectly – communal need.
  - The significance of family and collective relationships requires an approach that is less individualistic. Connections/”La Familia” – invite and meet family members.
  - Relationships are extremely important, thus maintaining and cultivating them requires significant attention.
  - Hierarchical values require honoring those in authority and the use of advocates.
  - Service is a high value so in-kind gifts and volunteering are important elements of partnership.
  - Networking and relationship building are cultural strengths.
  - Prefer to give to things they can actually see—tangible needs.
  - Many nonprofit staff are bi-vocational.

- 
- Giving is driven by relationships. Relationships are circular – from individual, family, clan, tribe, and beyond.
  - Giving is sharing and mutual exchange, not charity. “I honor you by giving, you honor me by receiving.” Hawaiian ‘ohana’ – exchange and sharing of food, goods, services, and labor – voluntary giving, rather than barter. Reciprocity and obligation is a part of the culture of giving (redistribution by those who have more resources and higher ranking so that all could share in more equal fashion).
  - Exchange of goods and services ingrained in indigenous norms as key to social relationships (small gifts and thank you’s very important).
  - Giving not driven by desire for recognition – e.g. wall plaque.
  - Asking is impacted by indirect and non-verbal communication – no direct asks, but express communal need.
  - Relationships demand a respect for elders – who are the conveyers of wisdom, role models, and spiritual guides.
  - Networking and relationship building are cultural strengths. Support people they know – vouched for by an advocate.

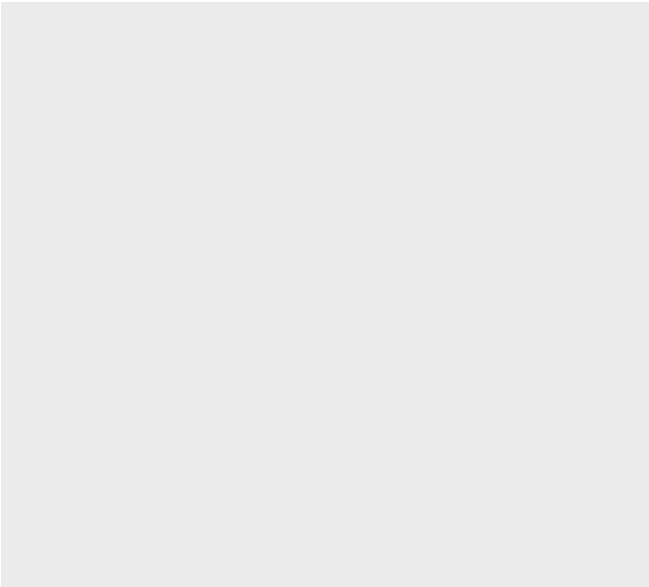


Listen/Look for Similarities and Differences

*Similarities*



*Differences*





• OTHER FACTORS: CULTURALLY APPROPRIATE AND CULTURALLY RELEVANT ASKS

Age/generation, gender, single/married matters in many of these cultures:

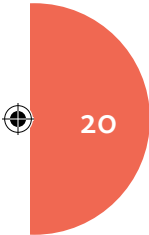
How big is your ask? (One time? Ongoing? Amount? Type?)

- Add in as first bullet: Giving mechanisms via technology (access of lack of)
- \_\_\_\_\_for relationships (more age gap – more indirect)
- Restrictions
- \_\_\_\_\_
- Role expectations
- Sexual overtones

Acculturation and cultural adaptability:

- How \_\_\_\_\_ is the person to majority American culture?
- How experienced is the person in \_\_\_\_\_?
- How familiar are you with this person? (less familiar – less direct. When in doubt, ask less directly)
- \_\_\_\_\_: by being cross-culturally relevant and appropriate

Many POC's (both staff and donors) have already had to learn how to be \_\_\_\_\_



## • THE ESSENTIALS

### Segmented Donor List

- May be \_\_\_\_\_ to cultural/worldviews

### Use of the Case Statement

- Language(s)
- \_\_\_\_\_

### Building a Development Team

- \_\_\_\_\_
- Different cultural strengths, networks, and resources

### Making Direct Asks

- Donor-focused
- \_\_\_\_\_ and appropriate
- Understand the \_\_\_\_\_ and extra work for POC staff



## • ANSWER KEY

Culture  
Philanthropy  
Higher  
Family' members  
In-kind  
Important  
Asker  
Different  
Yourself  
Community  
Money  
Asking and those being asked  
Asian American  
African American  
LatinX  
Native American and Pacific Islanders  
Expectations  
Access  
Assimilated  
Crossing cultures  
Donor-focused  
Cross-cultural  
Counter  
Pictures  
Communal  
Culturally relevant  
Cultural nuances



# CHAPTER 4

## Asking Process

---

### • THE FOUR I'S

1. \_\_\_\_\_
2. Inform
3. \_\_\_\_\_
4. Invest

### • 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
- Question is “Come and See”

Remember - Every \_\_\_\_\_ has a question that leads to deeper involvement

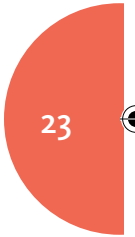
#### Stage 2: The \_\_\_\_\_

- 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?





## • 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

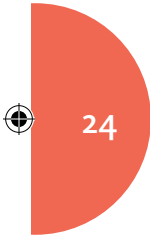
When you get to the gift plan:

- 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**

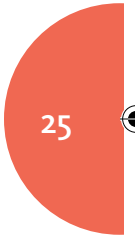
## • EACH STAGE HAS FOUR STEPS

### 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: \_\_\_\_\_

- 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!

### Purpose: Asking for a commitment

- Role Play 1– phone conversation to set up the meeting to make an ask.
- Role Play 2 – reviewing the budget and gift plan pages.
  - The Ask – ask them for a gift using a range

#### • ANSWER KEY

Identify	Follow up
Invest	Ahead of time
Casual	Invitation
Meeting	\$\$
Tour	Science
Presentation	Art





## CHAPTER 5

# The Board and 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?

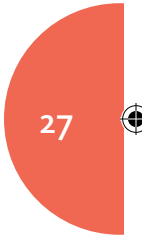
- Who has been \_\_\_\_\_ in your organization for a long Time?
- Who has given \_\_\_\_\_ in the past?
- Who is consistently offering to \_\_\_\_\_ you in any way possible?

### • 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

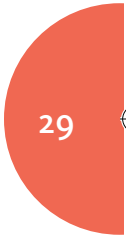
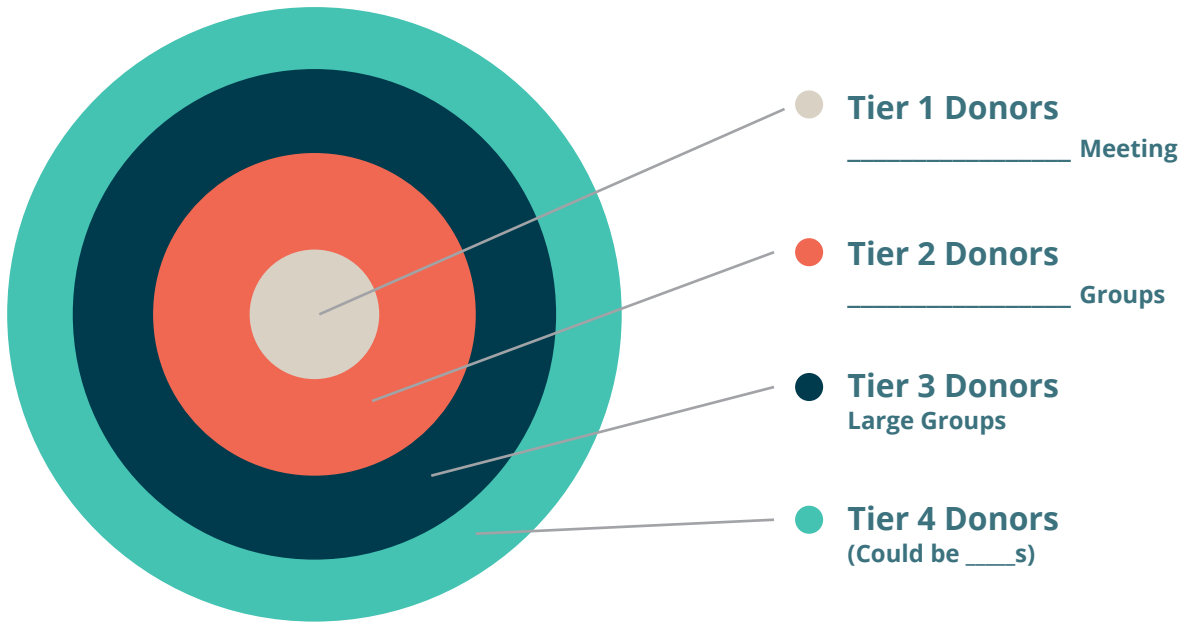
Major donors	Accountable
Staff	Strategy manager
Volunteers	Sacrificially
Case	3-5
Callers	Now
Strategy	Cancel
Data	Data
Involved	
Significantly	
Help	





# CHAPTER 6

## 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 by \_\_\_\_\_ and \_\_\_\_\_

• **SEGMENTING DONORS: #4**

We think they are a \_\_\_\_\_ or \_\_\_\_\_

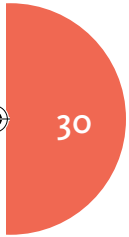
In some cases:

- 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

- \_\_\_\_\_
- \_\_\_\_\_
- 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

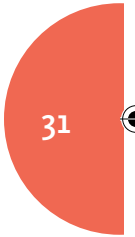
### Key background information

## • 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

## CAMPAIGN LEDGER

Target Date: 12/31/2017	Prospects: 138
Best Case: 1,052,588	Worst Case: 788,561
Goal: 750,000	Committed: 280,396

VIEW A DIFFERENT CAMPAIGN:  
2016 Annual Fund

### Prospect List

- ADD A PROSPECT
- GROUPING
- CREATE REPORT
- EXPORT

Drag a column header here to group by that column

Prospect	Primary Caller	Attributes	Strategy	Priority	Target High (\$)	Target Low (\$)	Asked (\$)	Committed (\$)	Fulfilled (\$)	Next Contact
<a href="#">Edit Delete</a> Abrams, Harold and Carol	Adams, John	Parent, SBO Board	Letter/Phone	2	10,000	900	1,000	5,000	12/31/2018	
<a href="#">Edit Delete</a> Alexander, Chris & Anne	Peacock, George		Church	3	1,200		25,000		10/11/2018	
<a href="#">Edit Delete</a> Ascension Episcopal Church, Rev. Mary McCoud	Parker, Peter		Individual	4					9/30/2015	
<a href="#">Edit Delete</a> Avelt, Avery and Anna	O'Hara, Scarlett	SBO, Mr. Bro	Individual	1	75,000	60,000	10,000		3/29/2018	
<a href="#">Edit Delete</a> Banquet 2013		Core 1	Banquet	3						
<a href="#">Edit Delete</a> Bell, Clarence and Gina	Parker, Peter	Alumni	Letter/Phone	7	1,200	900				
<a href="#">Edit Delete</a> Bennett, Will and Liz	Adams, John	SBO	Individual	1	0	0	0	12,000		
<a href="#">Edit Delete</a> Better Widget, Inc., G. Janson	Valle, Victoria		Business	2	8,000	6,000				
<a href="#">Edit Delete</a> Biggs Charitable Trust, Sue Short	Kennedy, Jackie	Research	Foundation	2	7,500	5,000				
<a href="#">Edit Delete</a> Billings, Cooper and Molly	Parker, Peter	Research/Alumni	Individual	1	15,000	10,000				
<a href="#">Edit Delete</a> Birchall, Bud and Lola	Doc, Jane	Parent	Letter/Phone	3			750			
<a href="#">Edit Delete</a> Bishop, Walter	Parker, Peter	SBO/Alumni	Individual	4	2,500	1,500			2/5/2013	
<a href="#">Edit Delete</a> Bliss Transportation, Inc., Bruce Bliss	Parker, Peter		Business	3	5,000	3,500				
<a href="#">Edit Delete</a> Bowers, Collette	Doc, Jane	Alumni	Individual	2	685,446	421,419	86,746	280,396	58,446	

Page 1 of 10 (139 items) 1 2 3 4 5 6 7 8 9 10

Page size: 15

Create Filter

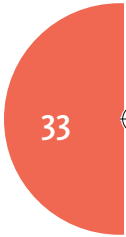


• SUMMARY PRODUCTION REPORT

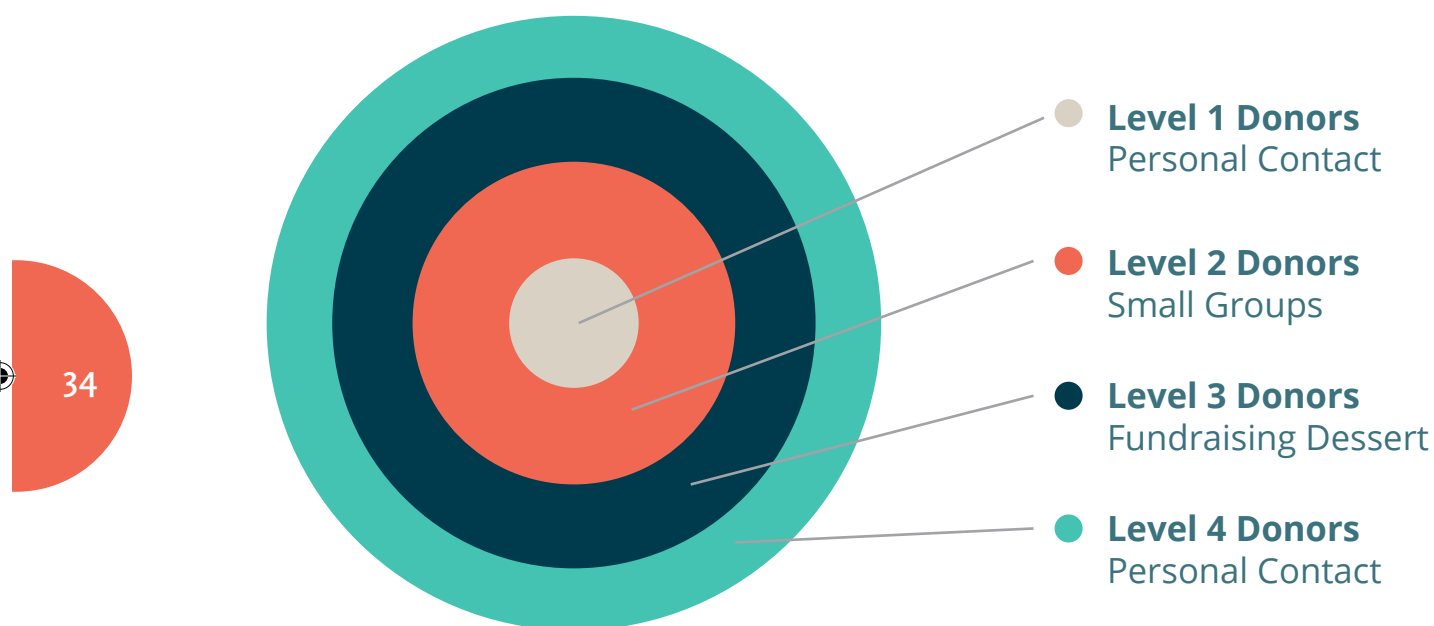
**Summary Production by Caller Report**  
**2016 Annual Fund \$750,000 12/31/2017**

Page 1 of 1  
 Date 10/27/2020

Caller	# OF PROSPECTS			Target Amount		Asked For Amount	Committed Amount	Total	
	Total	Talked To	Plan To Contact	High	Low			High	Low
Adams, John	1	0	1	0	0	0	10,000	10,000	10,000
Bird, Larry	1	0	1	0	0	0	0	0	0
Franklin, John	1	0	0	5,000	2,000	0	0	5,000	2,000
jones, bob	1	0	0	100,000	75,000	0	75,000	175,000	150,000
Kennedy, Jackie	11	0	1	23,600	16,200	0	5,800	29,400	22,000
Mantle, Mickey	6	0	0	18,700	13,400	5,000	3,000	26,700	21,400
O'Hara, Scarlett	20	1	2	46,700	32,150	15,000	28,100	89,800	75,250
Parker, Peter	35	1	8	172,012	122,512	59,512	75,912	307,436	257,936
Peacock, George	14	0	4	9,800	6,800	1,200	40,900	51,900	48,900
Unassigned Caller	11	0	0	215,134	90,057	34	34	215,202	90,125
<b>GRAND TOTAL</b>	101	2	17	590,946	358,119	80,746	238,746	<b>BEST CASE</b> 910,438	<b>WORST CASE</b> 677,611



## SEGMENTING PROSPECTS



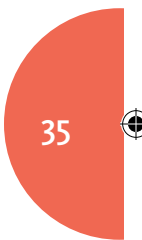
"Take all donors seriously, but don't treat all donors the same."



## TIER ONE DONORS:

Tier One Donors are 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 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 one donors have in common?

How do you currently ask each the people on the list above for a gift?





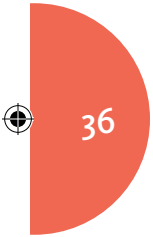
## TIER TWO DONORS:

Tier two donors are have the capacity to give your organization between .05 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:

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

What are some things your tier two donors have in common?

How do you currently ask each the people on the list above for a gift?



• ANSWER KEY

Individual	Events
Small	Mailings
1	#1
Accessible	#2
3%	Individual
0.05%	Group
3%	Ask
0.05%	90%





## CHAPTER 7

### May Assignments

---

#### • ASSIGNMENTS FOR MAY

- Complete final draft of Case Statement
- Build your Development Team (including a chair and data manager) and schedule 4 meetings
- Complete your Segmented Donors List (enter 1's, 2's, and 4's on Windshield)
- Case Statement
- Do each of the 4 steps of the asking process at least twice
- Have a member of your Development Team trained in utilizing Windshield prior to the May meeting



• ACTION STEPS

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
	<input type="radio"/> 1.		
	<input type="radio"/> 2.		
	<input type="radio"/> 3.		
	<input type="radio"/> 4.		
	<input type="radio"/> 5.		
	<input type="radio"/> 6.		
	<input type="radio"/> 7.		

**Coaches Contact Information**  
Jay Barber: jayb@murdocktrust.org  
John Chang: writejohnchang@gmail.com  
Jim Eney: jeney@thefocusgroup.com  
Amy Karjala: akarjala@revjengroup.com  
Brad Layland: BLayland@tfgrp.net  
Nancy Nelson: nnelson@warmbeach.com  
Deborah Wilds: Deborah.Wilds@outlook.com

**Trust Contact Information**  
**M.J. Murdock Charitable Trust**  
655 W Columbia Way, Suite 700 Vancouver, WA 98660  
Office: 360-694-8415  
murdocktrust.org/essentialsofdevelopment





## CHAPTER 8

# 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

People	Way Life
People	Forever
Asked	Maximizes
Shown	Minimizes
Involved	





# 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: and 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?

Tip: It's ok if you don't yet know exactly when your development team will meet. But, start with something (try monthly meeting at first)



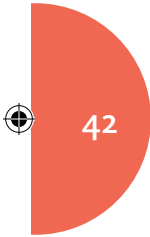
### Annual Fundraising Plan - Calendar

Activities Calendar												
ACTIVITIES	Case Statement and Fundraising Materials	Development Team Meetings	Tier 1 Donor Cultivation/Care	Tier 1 Solicitation Strategies	Tier 2 Donor Cultivation/Care	Tier 2 Solicitation Strategies	Tier 3 Donor Cultivation/Care	Tier 3 Solicitation Strategies	Tier 4 Discovery and Cultivation	Donor Communications	Fundraising Events	Other (grants, planned giving, etc.)
January												
February												
March												
April												
May												
June												
July												
August												
September												
October												
November												
December												

## • GET GOING

“Plans are only good \_\_\_\_\_ unless they immediately \_\_\_\_\_ into hard work.”

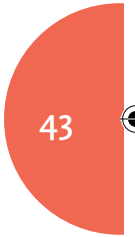
- Peter Drucker, Management: Tasks, Responsibilities, Practices





## Annual Plan – Planning Worksheet

STEP ONE: CULTIVATION AND CARE (THREE PER TIER/TYPE)	
Tier 1	
Tier 2	
Tier 3	
Tier 4	
Other	





# Essentials of Development

A MURDOCK TRUST PROGRAM

STEP TWO: INVITATIONS TO GIVE	
Invitations to give (solicitation type)	Estimated total
Tier 1	
Tier 2	
Tier 3	
Tier 4	
Other	
<b>TOTAL</b>	





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



• ANSWER KEY

Calendar	Cultivation
Tracking	3
Comprehensive	Invitations
Cultivation	Development team
Care	Chart
Solicitations	Intentions
Development	Degenerate
Tracking	





## CHAPTER 10

# Strategies for Seeking Grant Support

---

### • FOUR TYPES OF FOUNDATIONS

- 1- \_\_\_\_\_-run Foundations
- 2- \_\_\_\_\_ Area/Community Foundations
- 3- \_\_\_\_\_ Foundations
- 4- Larger Foundations

### • HISTORY OF THE MURDOCK CHARITABLE TRUST

- Created in 1975 through Melvin Jack Murdock's testamentary trust
- Originally funded with \_\_\_\_\_ million
- Awarded nearly \_\_\_\_\_ grants totaling nearly \_\_\_\_\_
- Current assets of about \_\_\_\_\_ billion

### • WHAT YOU WANT TO KNOW ABOUT A FOUNDATION

- What have they \_\_\_\_\_ in the past?
- What are their present funding interests?
- What \_\_\_\_\_ grants do they usually give?
- What are the specific guidelines for submission?
- What are the \_\_\_\_\_ guidelines?

### • FOCUS OF MURDOCK TRUST

- Focus of grant making
  - Education, Scientific Research, Arts & Culture, Health, and Human Services
- Geographic area of influence
  - Alaska, Idaho, Montana, Oregon, Washington, and British Columbia
- Helping \_\_\_\_\_ organizations in \_\_\_\_\_ and \_\_\_\_\_ ways





## • ORGANIZATIONAL ALIGNMENT

Match between \_\_\_\_\_ and foundation

- Information about foundation's guidelines, practices and interest comes from:
  - Conversations
  - Experience
  - Notes you keep
  - Website
  - Annual Reports
  - Talking to nonprofits in a similar space
  - Nonprofit Associations

48

## • CONTACTING THE FOUNDATION

- Visit the website, call, go visit, or email for \_\_\_\_\_ or application
- Send a \_\_\_\_\_ summarizing project before submitting the proposal

## • MURDOCK TRUST PROCESS - A SEVEN STEP PROCESS

- 1- Letter of Inquiry
- 2- Invited to submit a \_\_\_\_\_ Grant Application
- 3- Assigned to Program Director
- 4- Site \_\_\_\_\_ conducted
- 5- Review by Staff
- 6- Decision by Trustees
- 7- Grants Administration





## • TYPES OF MURDOCK FUNDED PROJECTS

### Capital

- Purchase of property/buildings, new construction, renovations, and more

### Program

- New staff (strategic positions)
  - Decline over three-year period (100/66/33)
  - May include related expenses, similar decline
- Expansion\* (new or existing activities)

### Equipment\*

\*Note: Activity/purchase should not begin/be made until after award is made

## • TRUST EVALUATION OF PROJECT

- Consistent with mission
- Organization's top priority
- \_\_\_\_\_ & \_\_\_\_\_ budget
- Adequate funding plan
- Grass root support
- Potential to complete project
- If new personnel – Who will supervise? Who will train? Funding built in for training?
- \_\_\_\_\_ – Proforma budget?
- If new building – Additional personnel, maintenance, utilities included in operating budget?
- Board on board and \_\_\_\_\_ supporting?
- Is timing right?





## • ORGANIZATIONAL HEALTH OF NONPROFIT

- History – Why founded? True to mission?
- Track Record – Experience? Growth? Trends? Other campaigns?
- Experienced \_\_\_\_\_ – Length of service? Skills? Training?
- Board – Focus? Adequate? Skills? Responsibilities? Involved \_\_\_\_\_ – Annually & this project?
- Financial situation/record – Positive financials? Trends?
- Business model – \_\_\_\_\_ vs. donations?
- Reserves? Debt? Maintaining capital assets?
- Staff Stability – Length of service? Turnover rate?

## • TIPS FROM A GRANT-MAKER

- Do your \_\_\_\_\_: study website, talk with like organizations who have received Trust funding
- Identify your highest priority project
- Get leadership (including board) buy-in
- Have your financial \_\_\_\_\_ in order
- Plan well – know what you want to do and how you will do it
- Detailed funding plan: what sources do you have to ensure the project's success?

## • COMMON MISTAKES

- Hard to read proposals / \_\_\_\_\_ information
- Requested amount not in line with foundation's history
- Lack of good funding plan (150%)
- Lack of \_\_\_\_\_ involvement
- Lack of support from your constituents
- Lack of plan to \_\_\_\_\_ once completed



## • GOOD PROPOSAL WRITING

- Clear, crisp, concise, fluid
- Orderly progression of thoughts
- \_\_\_\_\_ & answers questions
- \_\_\_\_\_ the assumptions
- Do not gloss over project challenges
- Doesn't confuse readers
- Don't compromise the truth to fit a grant funder

## • DEVELOPING THE RELATIONSHIP

- Treat them like \_\_\_\_\_ donors
- \_\_\_\_\_ them, if they will let you
- Invite them to your facility for a tour
- Keep them informed
- Present several ideas and see what best fits their interest or funding priorities
- Stay true to who you are – don't \_\_\_\_\_ to fit a funder

## • ANSWER KEY

Family	Formal	Anticipates
Local	Visit	Justifies
Corporate	Reasonable	Individual
\$91	Sensible	Visit
\$1.2	Sustainable	Change
Funded	Financially	
Size	Leadership	
Geographic	Financially	
Strengthen	Earned income	
Creative	Homework	
Sustainable	House	
Applicant	Inconsistent	
Guidelines	Board	
Letter of inquiry	Sustain	



# CHAPTER 11

## Social Media and Development

### • TURNING TWEETS AND LIKES INTO DOLLARS AND CENTS

“Donors don’t give to \_\_\_\_\_. They invest in \_\_\_\_\_ and \_\_\_\_\_ in whom they believe” - G.T. Smith

Social media is not a \_\_\_\_\_ site. It is a \_\_\_\_\_ site.

### • FOUR STEPS TO BUILD YOUR SOCIAL MEDIA PLAN

- 1- Find your \_\_\_\_\_ voice
- 2- Make a \_\_\_\_\_
- 3- Find your \_\_\_\_\_
- 4- Make content that tells \_\_\_\_\_ story

### • CONTENT BY TYPE

- Twitter - Links, Discussion
- Facebook - Photos, Video, External Links
- Instagram - Photos, Videos, NO LINKS
- LinkedIn - Business Content, Links, Video
- Youtube - Video
- Podcast - Audio

### • CONTENT SPLIT

- \_\_\_\_\_ - Value
- \_\_\_\_\_ - Information
- \_\_\_\_\_ - Ask

### • TWO ONGOING TASKS FOR EFFECTIVE SOCIAL MEDIA

- 1- Engage
- 2- Measure



• ANSWER KEY

Institutions	Plan
Ideas	Fans
People	Your
Donation	50%
Discovery	30%
Authentic	20%



# CHAPTER 12

## Planned and Estate Giving

### • WHAT'S THE DIFFERENCE BETWEEN PLANNED AND ESTATE GIVING?

Planned - Given \_\_\_\_\_ lifetime/event related

- Do you live on much less than you earn?
- Do you plan to sell your business?
- Are you selling an appreciated asset?

Estate - Gifted \_\_\_\_\_ 1 or 2 deaths

### • BASIC FACTS

- Only \_\_\_\_\_ have a current will or estate plan
- Fewer than \_\_\_\_\_ have charitable intent
- Religious organizations receive the largest percentage of estate gifts – 45%
- Urgency with Boomers
- \$80+ \_\_\_\_\_ wealth transfer
- Shorter capacity timeline
- 80% of gifts simple will/trust designations

### • BOOMER URGENCY

- 10,000 turn 65 everyday
- Most make their initial estate gift inclusions between ages \_\_\_\_\_ - \_\_\_\_\_
- Importance of IRA/Retirement fund giving – fastest growing
- Gift list shortens with revisions
- Gift flow begins in 2028

### • WHY LEGACY DONORS GIVE

1. Have a \_\_\_\_\_ with the organization
2. Organization has long-term track record
3. See the organization is “\_\_\_\_\_”
4. See legacy gifts adding value, gift not spent for annual operations
5. They were \_\_\_\_\_ asked



## • WHY LEGACY DONORS DON'T GIVE

- 1- Absence of a \_\_\_\_\_ and vision for the future
- 2- Lack of confidence in the board and/or executive leadership
- 3- Information deficit about the organization's effectiveness
- 4- Absence of gift, grant, and investment policies
- 5- \_\_\_\_\_
- 6- Failure to include spouse in the cultivation and solicitation process
- 7- Lack of on-going engagement after the gift

## • WHAT TO LISTEN FOR WHEN ENGAGING YOUR DONORS

- 1- Important \_\_\_\_\_ in family circumstances, weddings, births, deaths
- 2- \_\_\_\_\_ of a family business
- 3- A corporate buy-out
- 4- Family \_\_\_\_\_
- 5- Reference to forming a type of giving vehicle like a family foundation, family trust, donor advised fund

## • THE ASKING PROCESS

- 1- The Invitation – phone or email
- 2- Preparation – Learn about their relationship
- 3- The “Ask” – in person; share the case
  - Key question: “Have you already or would you \_\_\_\_\_ including a gift in your \_\_\_\_\_?”
- 4- Follow up – always a next step; key to success



## • DOCUMENT DECLARATION

- 1- Copy of instrument (will/trust)
- 2- Initialed charitable beneficiary page
- 3- Letter from legal counsel
- 4- Signed declaration form
- 5- Donor letter or email
- 6- Beneficiary document (IRA, retirement fund, life insurance, etc.)

## • GETTING STARTED

- Confirm top \_\_\_ - \_\_\_\_ prospects
- Review or establish \_\_\_\_\_
- Role play visits

56

## • ANSWER KEY

During	Credible plan
After	Failure to ask
35%	Changes
10%	Sale
Trillion	Inheritance
45-58	Consider
Relationship	Estate
Making a difference	5-10
Personally	Policies





# CHAPTER 13

## Maximizing Events for Tier 3

### • WHAT I USED TO SAY

We talk about fundraising events because they ...

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

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.

57

### • 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 table hosts
- Virtual TED talk style events focused on the cause
- Peer to peer fundraising campaigns
- Online auctions



Food for thought:

- **What can you do now that you couldn't do before?**
- **What can only you do?**

### • HOW MIGHT WE? - SMALLER EVENTS

- Micro-event on site?
- Donor-hosted small house party?
- Small volunteer “work party”
- Activity that might allow appropriate distancing?

58

Food for thought:

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



# CHAPTER 14

## Closing

### • ACTION STEPS: ORGANIZATION \_\_\_\_\_ ED \_\_\_\_\_

Take a photo of this page and email it to your coach and John Franklin: [johnf@murdocktrust.org](mailto: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:

Jay Barber: [jayb@murdocktrust.org](mailto:jayb@murdocktrust.org)  
 John Chang: [writejohnchang@gmail.com](mailto:writejohnchang@gmail.com)  
 Eney: [jeney@thefocusgroup.com](mailto:jeney@thefocusgroup.com)  
 Amy Karjala: [akarjala@revjengroup.com](mailto:akarjala@revjengroup.com)  
 Brad Layland: [blayland@tfgrp.net](mailto:blayland@tfgrp.net)  
 Nancy Nelson: [nnelson@warmbeach.com](mailto:nnelson@warmbeach.com)  
 Deborah Wilds: [Deborah.Wilds@outlook.com](mailto:Deborah.Wilds@outlook.com)

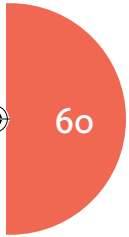
#### Trust Contact Information:

**M.J. Murdock Charitable Trust**  
 Office: 360-694-8415 [murdocktrust.org](http://murdocktrust.org)  
[murdocktrust.org/essentialsofdevelopment](http://murdocktrust.org/essentialsofdevelopment)



• CLOSING COMMENTS

15 horizontal grey bars for writing closing comments.



# APPENDIX



# 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 by 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 Organic.

## **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 W2020 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 quarterbackes 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 Prospects
  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.



# LUNCH QUESTIONS

- 1- Why are you involved with the organization you are here representing?
- 2- What did your parents teach you about money and giving?
- 3- How does your personal narrative and background influence your view of raising money?
- 4- Are you willing to move out of your comfort zone with respect to fundraising on behalf of the people you serve?



# ROLE PLAYS FOR ASKING PROCESS COHORT

*Note: This is one long role play where the people change, the story continues...*

## **Getting the first meeting to have a casual conversation...**

- One person from one group ask a different person from another group if they can get together to talk about the organization... be sure to talk money off the table.

## **Asking at the “casual conversation” meeting to come on a tour...**

- One person from a group asks a person from another group if they would be willing to come on a “virtual tour” of their organization.

## **Asking at the end of the tour if they could sit down with them at a future date to talk them through the case statement via Zoom...**

- One person from a group asks a person from another group if since they have been on a “virtual tour” if they would be willing to allow them to explain the details about the organization by showing them the big picture (case) of their organization.
- The presenter shows them the budget and gift plan and asks if they have any questions.
- The presenter asks if they can follow up with them in a few weeks to ask them if they would be willing to make a gift.

## **Doing the ask and the follow up after the ask...**

- One person from a group does an ask of a person from another group. This is the culmination meeting of all of the 4 steps. The person from the other group asks questions but commits to a gift.
- The person who was asking follows up with an email which they verbally send.



## ROLE PLAY FOR AFTER THE “MAJOR DONOR- ASKING PROCESS WORKSHOP”

**Donor Profile:** Jim and Nancy are long-term donors to the Homeless Shelter and have volunteered to serve food several times over the last 10 years. They typically give \$5000 per year and have given about \$50K total but they have given much larger gifts to others.

**Meeting 1:** Jay and Brad call Nancy and Jim to get an appointment to have a casual conversation that immediately turns into a “casual conversation” which then Jay and Brad invite them to a “virtual tour” via Zoom. At the end of the ‘virtual tour” they ask if they can set up another time to talk about the case statement.”

**Meeting 2:** Jay and Brad get on a zoom call with Nancy and Jim and present the case. They show them the budget and gift plan but remind them that they are not asking for a gift today. At the end of the meeting Brad and Jay ask if they can set up another time to talk about their potential gift.

**Phone Call before Meeting 3:** Brad calls Nancy to confirm the meeting and reminds them that he and Jay are going to talk to them about making a gift.

**Meeting 3:** Jay and Brad pick back up via Zoom and present the gift plan again and asks them for a range. Nancy and Jim do not say yes but says that they will get to them. Jay keeps the ball in their court.

**After Meeting 3:** Jay follows up over the phone and Nancy makes a gift. Jay then sends an email to Nancy and Jim thanking them





M.J. Murdock  
CHARITABLE TRUST