



MULTIPLY 417

Passion: The Bridge between People and Purpose

Weekly Tip July 24, 2023

Some pointers for developing a strategic development (fundraising) plan. Part 1



Greetings!

So perhaps mistakenly, I'm going to bypass spending much time on suggesting why you MUST have a strategic development plan. I'm just going to very hopefully assume that's a given for anyone running a non-profit ministry.

If that really is where you are at, i.e. you don't think you need one, I would gladly spend an hour on the phone with you to discuss why you need to strongly reconsider that position. Please call me at (209) 541-5720.

For the rest of you here are the first 3 of 7 components you must have as a part of your overall plan.

1.- Donor Stewardship/engagement. How are you going to care for your donors both in terms of your system and your procedures? Do you have a solid and capable CRM (donor database)? Do you utilize it to track all the critical information necessary both as far as relational data (address, birthdays, emails, anniversaries, etc.) and certainly financially (giving history, giving interests, capacity considerations, lift consideration, etc.)? What are your expectations for your team that have donor responsibilities? Personally, I love the whole Circle of Influence (COI) combined with Faithful Activities (FA) approach, especially when combined or layered into a moves management plan. It doesn't have to be complicated, but it MUST be consistent.

2.- Major Gifts. Did you know that the current 80-20 rule has shifted to 88-12 as it relates to donors and dollars given? 12% of the folks in the average CRM for all non-profits give 88% of total donations for that non-profit. You must use solid segmentation procedures and create one or more unique communication modes to specifically reach out to and minister to this substantial sector of your partners or donors. You may even want to have a special thank you event (think one-hour dessert) on an annual basis as a part of how you nurture these critical relationships.

3.- Name Acquisition. I know it sounds so incredibly impersonal. But you must consistently inform and "sign up" new people to your communications and hopefully over time to your giving team. Youth for Christ chapters, how is your See the Story strategy going? Need some new juice? Other faith-based ministries you must have an actual

plan attempting to conquer the beast of "we need more names". Let me help and a starting point would be to explain how you can adapt the "See the Story Tour" model for your organization.

So that's 3 down and 4 to go for next week. Then we will look at 10 potential steps you should take to build (or renew) your plan in the following week.s

Passionately,

Rick

P.S. There are a lot of great CRMs (Constituent Relationship Managers) out there. Finding the right one can be exhausting. If you are in that mode, please give the folks at Bloomerang an opportunity to provide you with a demo. I use them myself and have several clients also using them and I swore after 15 years of Salesforce I would never change.

Want help designing your Strategic Development Plan?
Just click that big colored button below.

Email Me!



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Check out my website for
more helpful ideas!