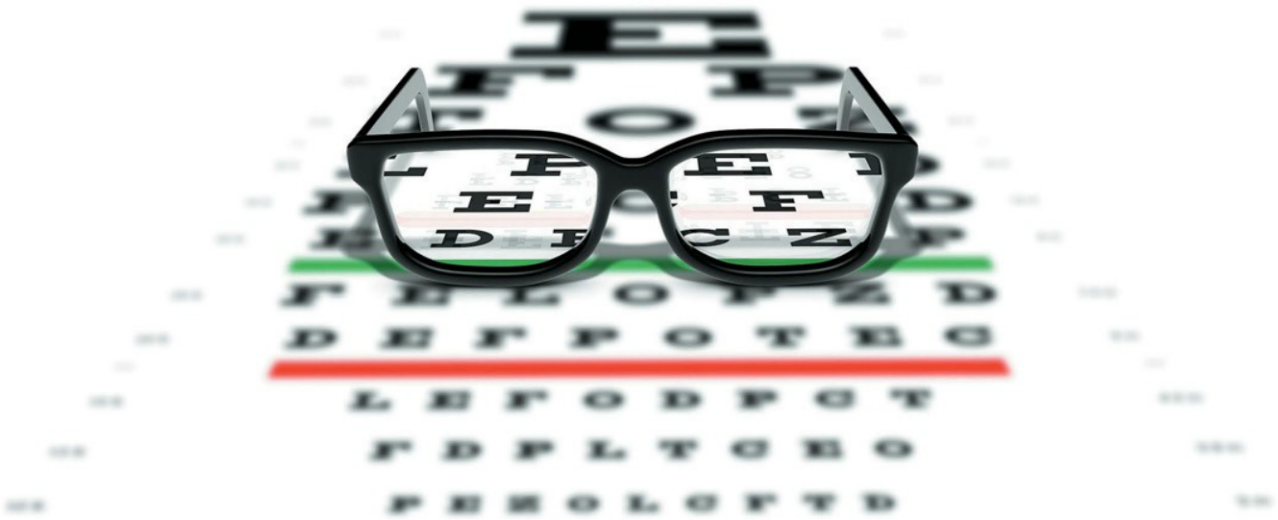


# Staying Focused on Your Plan

BY STEPHANIE CORY, CAP®, CFRE



Planning the next newsletter. Generating a report for your next development committee meeting. Pinning down program staff for data for that grant due next month. Playing phone tag with your top prospect. Just another day for the small-shop development director.

Having a realistic development plan that challenges you (and your department, if you are lucky enough to have staff) and that you can effectively implement, despite distractions and roadblocks—and without burning you out—is critical to success in the small shop. It is all about staying focused on your doable development plan and not being sidetracked by the “helpful” suggestions you receive along the way. Perhaps you already have heard some of them.

## “Can’t you just raise more money?”

Realistic budgeted fundraising revenue is not “raise as much as you can” or whatever it takes to make your organization’s revenue match expenses. Consider what your track record is, and create realistic goals. Maybe last year your organization raised \$200,000 through grant writing, and perhaps \$220,000 is not unrealistic for this year. What if \$50,000 of that funding is from a foundation that makes you wait two years between applications? Can you honestly expect to replace that funding, or would \$175,000 be a more attainable goal?

## “But you can’t stop doing the annual gala!”

Don’t be afraid to retire fundraising tactics that no longer earn their keep. Just because something worked 20 years ago doesn’t mean it works now and belongs in your development plan. Many organizations have a “signature” event or other effort that has its fans—fans you’re often worried about upsetting by discontinuing an event. You can’t argue with numbers. Do your research and assess the efficacy of your various fundraising strategies and tactics.

To illustrate, consider the 49-year-old Arc Art program of The Arc of Chester County, Pa. In its heyday, this program of holiday cards, note cards and limited-edition prints all created from a commissioned original work netted nearly \$39,000 a year. With a decline in large corporate orders and the proliferation of custom online holiday cards, sales went

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below \$18,000 a year. To make matters worse, once printing, postage, advertising and labor were factored in, the program actually lost money.

Once the development committee compared the return on investment for Arc Art with the much more effective and efficient direct-mail and foundation-relations programs, the decision about where to focus organizational efforts was clear. Don't save this type of analysis for when you need to prove a point about the best fundraising methods for your organization. Look at the effectiveness of your tactics every year.

Track where your time goes. How long does each grant proposal really take? How much time do you spend preparing sponsorship packages, going back and forth with your gala chair and getting your direct-mail solicitations delivered?

### “Why aren't you focusing on year-end giving?”

While it is true that many individual gifts are made in the last quarter of each calendar year, fundraising is a year-round effort. Your development plan focuses on the entire year, and it is critical to communicate with prospects and donors on a regular basis. You wouldn't want your quarterly newsletter, an event invitation and a direct-mail solicitation all to arrive within the same week and then have no contact for months after.

Invest in an old-fashioned paper wall calendar so you can see your whole year at once, including lesser-known holidays that may sneak up on you. Begin each year by marking off the days you and your staff will not be in the office—holidays, vacation and professional development opportunities. Next, mark down those nonnegotiable grant deadlines, special events and publication dates (when you actually want those newsletters to reach your audience). Get your direct-mail drop dates up next. Can you find times for them that do not conflict with grant deadlines and extensive preparation for special events?

### “I have the best new fundraising idea!”

Bake sales, 50/50 raffles, jewelry parties, dine-out-for-a-cause events—think about all the high-effort, comparatively low-return “fundraisers” that helpful co-workers and volunteers are always suggesting. Some of these fundraising ideas may make you cringe, but others might actually be decent if they didn't steal your time away from more critical tasks. Will the wannabe fundraisers who suggest the ideas own and implement them? Ask. It is as simple as asking—in writing—how much they expect to raise from the initiative, how much it will cost, who will do what and what the time commitment is for everyone involved.

When someone is asked to put his or her great fundraising idea in writing, it is amazing how suddenly it may not seem so great anymore. Invest a few minutes in developing a formal process for vetting fundraising suggestions. The decent ones with a strong champion will survive the process and add to the bottom line—provided they fit with your development plan.

### “Just get a volunteer to do it.”

How many times have you heard this? Volunteers are an essential part of successful fundraising but not the answer to every small-shop challenge. Identify what tasks make sense to delegate to volunteers, assign them within your plan and delegate only those. Is it addressing thank-you letters, soliciting silent-auction donations or perhaps managing mini-fundraising opportunities?

Do you remember how long it took you to learn to use your donor database well or write a strong grant proposal? Make sure you are willing to invest the time needed to help volunteers be successful and to check their work if you are going to delegate tasks traditionally reserved for paid staff.

Speaking of paid staff, why not delegate some responsibilities to them? Ideally, all your co-workers would be generous contributors to your annual fund. If you are not there yet, meet staff where they are and have them help in small ways. Can your program staff help you with the public relations side of your shop by writing newsletter articles or sharing your organization's story with community groups? If you don't have dedicated administrative support, can other staff help during your busiest gift-processing times?

In particular, if your organization's service recipients are also your donors and prospects, engage other staff in your research. Program and reception staff can be a wealth of information. Can they help you identify and rate prospects? Can they accompany you on visits or make introductions for you? Can they help with thank-you notes and calls?

It takes tact to respond to helpful, and sometimes not-so-helpful, suggestions from co-workers and volunteers. This is where your doable development plan comes in. Don't be afraid to share it and explain why you are employing the tactics you are and where your revenue goals came from.

In a small shop, you are typically without fundraising peers to call on for support. Even if you are a veteran fundraiser, isn't it nice to have someone reassure you that you are on the right track? Don't be afraid to reach out to your colleagues in other organizations for support. It will help you and your organization. After all, a tired, burned-out fundraiser isn't good for anyone. 🙄

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