

DEVELOPMENT BOOT CAMP

TAKING CONTROL OF YOUR FUND DEVELOPMENT PLAN

SEPTEMBER 15, 2015



GREATER CEDAR RAPIDS
COMMUNITY
FOUNDATION

BUILDING A SUCCESSFUL PLAN

PLAN EVERYTHING –

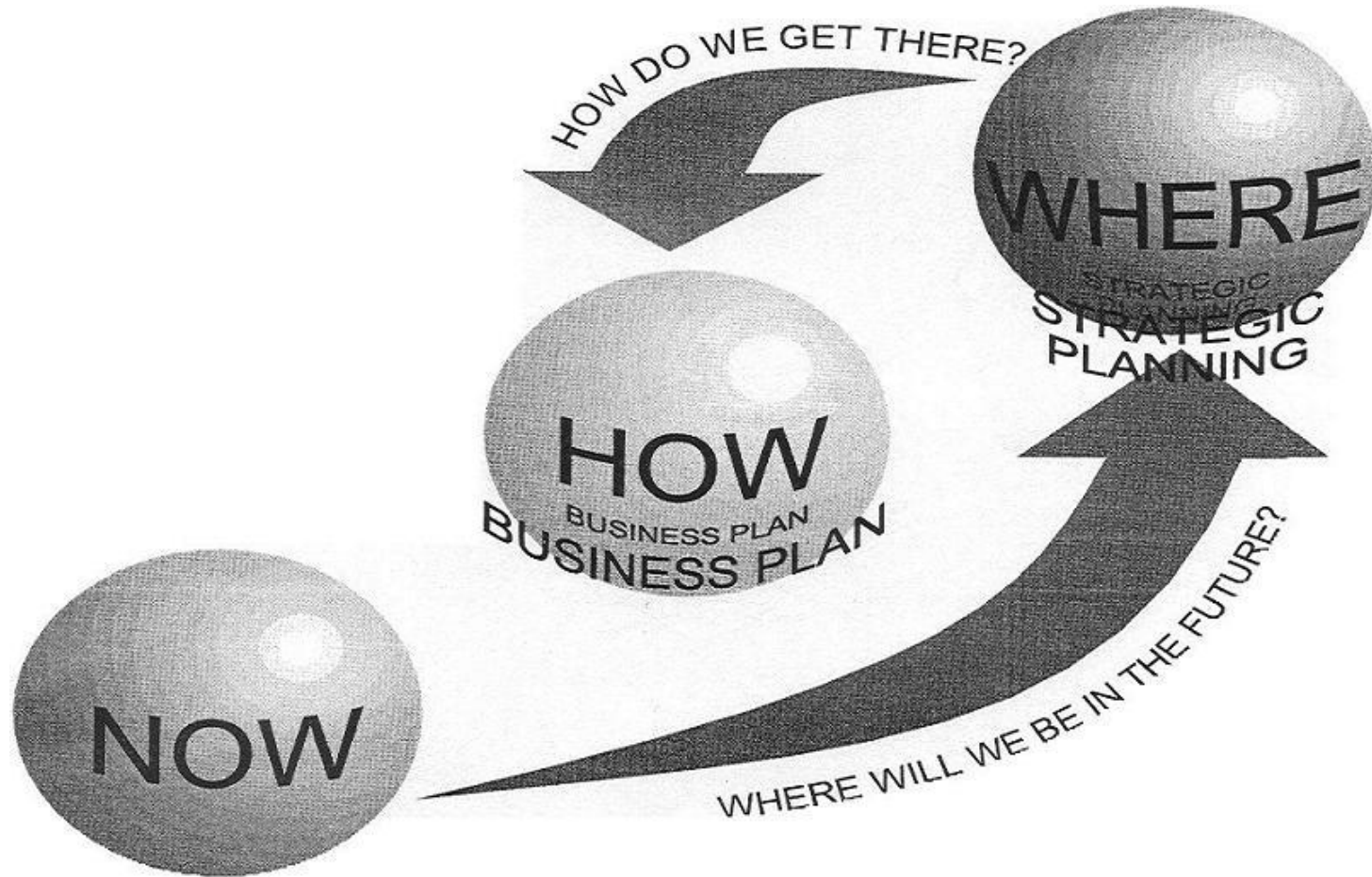
You have to:

- 1) Analyze different scenarios,
- 2) Research and compile data, and
- 3) Make credible conclusions based on your findings.



BECOME THE ARCHITECT

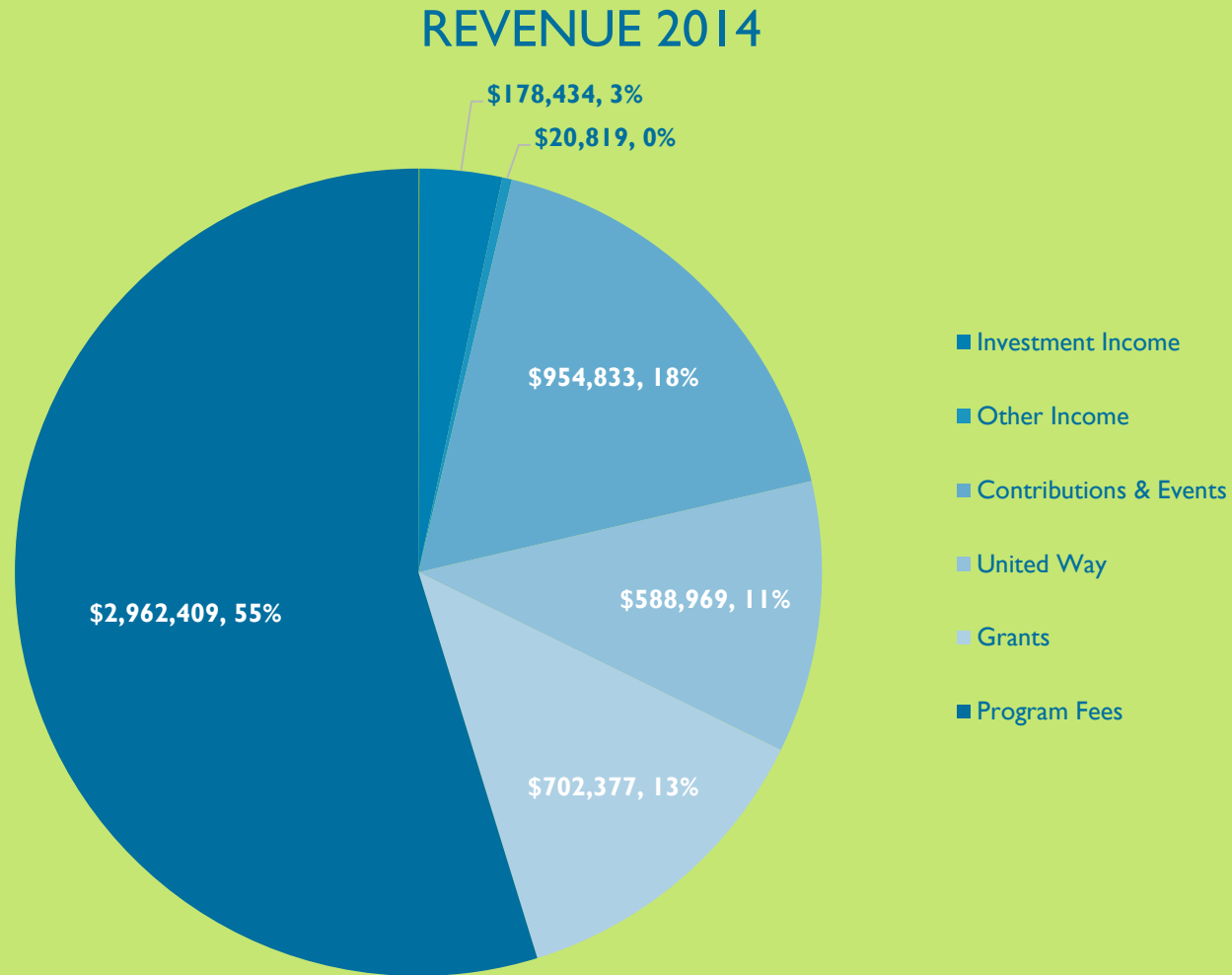
BUILDING A SUCCESSFUL PLAN



BUILDING A SUCCESSFUL PLAN

	STEPS	OUTCOME
STEP 1:	Analyze your revenue	Gain knowledge and identify trends
STEP 2:	Prioritize your revenue	Identify your priorities – “rightsizing”
STEP 3:	Allocate your time	Identify your goals

STEP I: Analyze your total Revenue

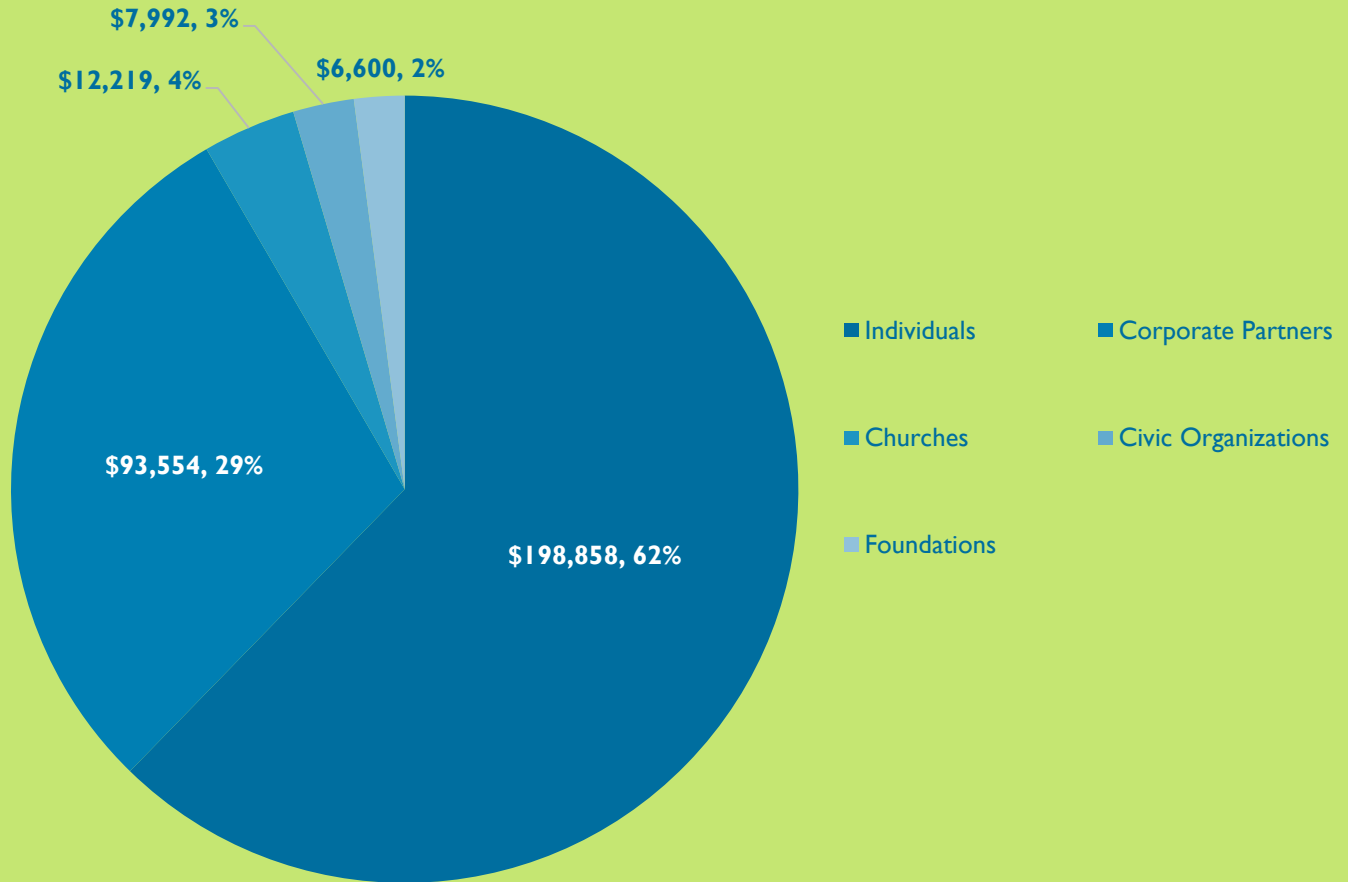


STEP I: Analyze your total Revenue

REVENUE	2013	2014	% CHANGE
Investment Income	\$71,645	\$178,434	149%
Contributions & Events	\$716,948	\$954,833	33%
Program Fees	\$2,228,834	\$2,962,409	33%
Grants	\$567,589	\$702,377	24%
United Way	\$827,455	\$588,969	-29%
Other Income	\$31,584	\$20,819	-4%
Total	\$4,434,055	\$5,407,841	22%

STEP 2: Prioritize your Revenue

CONTRIBUTIONS 2014



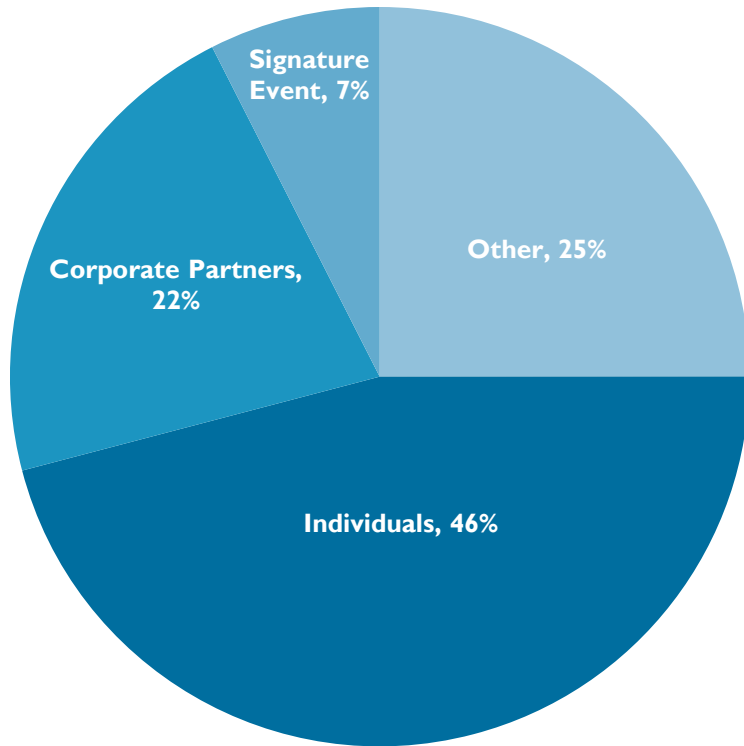
STEP 3: Prioritize your Revenue

CONTRIBUTIONS	2013	2014	% CHANGE
Individuals	\$163,939	\$198,858	21%
Civic Organizations	\$7,108	\$7,992	12%
Corporate Partners	\$96,310	\$93,554	-3%
Churches	\$13,446	\$12,219	-9%
Foundations	\$16,667	\$6,600	-60%
Total	\$297,470	\$319,223	7%

STEP 3: Prioritize your Revenue

EVENTS	2013	2014	% CHANGE
Signature Event	\$32,410	\$48,173	33%
Silent Auction	\$48,512	\$51,843	6%
Golf Event	\$15,423	\$13,674	-13%
Total	\$96,345	\$113,690	15%

STEP 3: Allocate Your Time



STEP 3: Allocate Your Time

Responsive donor services (core)

Meet with 1/3 of Fund Holders (core)

Develop and implement an engagement strategy for professional advisors (enhance)

Develop and implement strategy for Signature Funds –
Establish two Signature Funds (aspirational)

*Core=70%, Enhance=20%, Aspirational=10%

*Adapted from the Google Model

EXECUTING A SUCCESSFUL PLAN

	STEPS	OUTCOME
STEP 4:	Find a mentor	Guide, teach, support & encourage
STEP 5:	Communicate your plan	Build trust with key constituents
STEP 6:	Implement your plan	Get started – “manage the manager”



STEP 4: FIND A MENTOR

STEP 5: Communicate Your Plan

WRITTEN DOCUMENT

Executive summary

Analysis and prioritization of
revenue

State goals and timeline



STEP 5: Communicate Your Plan



KEY CONSTITUENTS

Executive Director

Staff

Leadership

Development Chair

Development Committee

Board Chair with the
Executive Director

STEP 6: Implement Your Plan

Break down into two steps by identifying:

1) Who is doing what and

2) When

“Manage the manager”



STEP 6: Implement Your Plan

Meet with 1/3 of fund holders (core):

- Formalize database

- Finalize donor materials

- Create process for document control

- Prioritize fund holder meetings

- Update fund agreements and routing process

- Conduct meetings

- Create follow-up plan

- Create stewardship plan

STEP 6: Implement Your Plan

Meet with 1/3 of Fund Holders (core)

1) Meet with 1/3 of Donors w/ Fund Balance > \$50k (100 donors)

Next Steps:	Lead	Team	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Formalize database	JV	MB, EB													
Define and assign development officers	MB	JV, LG, SW													
Prioritize fund holder meetings	MB	SW, JV													
Develop strategy for each fund type	MB	As assigned													
Finalize donor materials	MB	SW, MB, JV, LB, CR, KTB													
Create process for document control of donor materials	LB	MB, CR													
Update fund agreements templates and routing process	MB	SW, LB, JV, LB, CR, KTB, JB													
Conduct meetings - Donor-Advised, Endowed (2-3 mtgs/week)	DOs	LG, SW, JV, MB													
Create follow-up plan	MB	LG, SW, JV													
Create stewardship plan	MB	SW, JV, CR, KTB													

Gantt charts illustrate the start and finish dates of the terminal elements and summary elements of a project.

STEP 6: Implement Your Plan

- Cycle 3 => Existing Fund Holder with Fund Balance \geq \$50,000

Step 1

- ANNUAL DISTRIBUTION MAILING

Step 2

- FUND REVIEW MEETING

Step 3

- FOLLOW-UP

CHARTING YOUR PROGRESS OF A SUCCESSFUL PLAN

	STEPS	OUTCOME
STEP 7:	Monitor your progress	Report, refine and celebrate

STEP 7: Monitor Your Progress

Getting Organized!

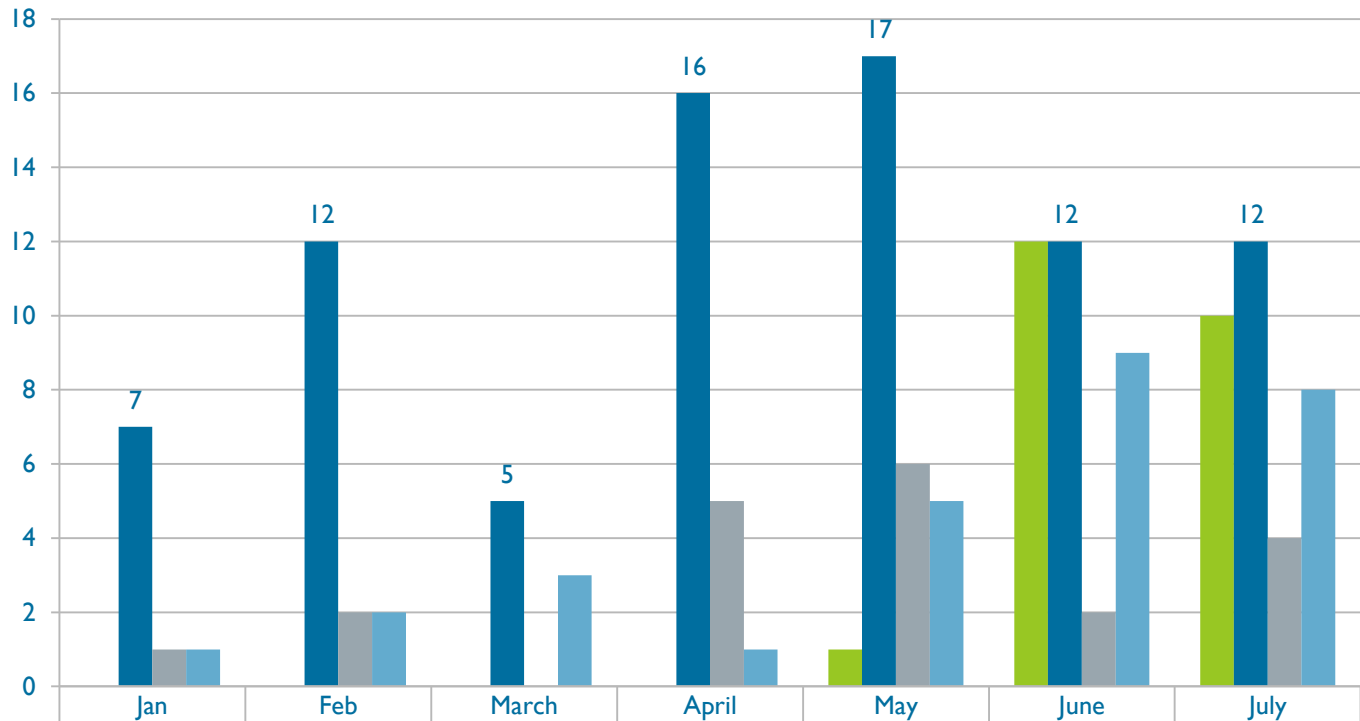
- ▣ Team meetings
- ▣ Staff meetings
- ▣ Semi-annual and annual performance reviews
 - ▣ Accomplishments
 - ▣ Objectives/Priorities
 - ▣ Open Forum
- ▣ Committee Meetings (frequency)

STEP 7: Monitor Your Progress

DEVELOPMENT MEETINGS	JAN	FEB	MARCH	APRIL	MAY	JUNE	JULY	TOTAL
Donor - Meeting	7	12	5	16	17	12	12	81
Professional Advisor-Meeting	1	2	0	5	6	2	4	20
Prospect Meeting	1	2	3	1	5	9	8	29
Total Meetings	9	16	8	22	28	23	24	130

STEP 7: Monitor Your Progress

DEVELOPMENT ACTIVITY REPORT - 2015



■ Donor - DDC Meeting***	0	0	0	0	1	12	10
■ Donor - Meeting	7	12	5	16	17	12	12
■ Professional Advisor-Meeting	1	2	0	5	6	2	4
■ Prospect Meeting	1	2	3	1	5	9	8

STEP 7: Monitor Your Progress

KEY CONSTITUENTS

Executive Director

Staff

Leadership

Development Chair

Development Committee

Board Chair with the Executive

Director

