

Starting a Development Office

Tara Doyon

Petrus Consultant

Director of Development, St. Paul Catholic Center, Indiana University



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A large, stylized green letter 'P' inside a white square, which is set against a dark blue background.

Pathways to Success

- Positive Attitude
- Flexibility
- Resourcefulness
- Good Communication Skills
- Desire to Succeed
- **Systems/Plans/Policies**
- **Tools**
- **Knowledge**
- **A Plan- Execution & Evaluation**



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Success in achieving the mission and goals of your organization depends on the *planning, policies, and documentation* that guides your fundraising efforts. It provides reasoning and rationale for what you do and a roadmap to your journey.

This includes foundational documents, job descriptions, departmental goals, gift acceptance policies and acknowledgment.



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Foundational Documents

Case Statement (s)

Mission Statement

Vision Statement

Operational Plan

SWOT Analysis

Elevator Speeches



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A Case Statement is an internal document whose purpose is to state the cause and all the reasons why prospective donors might want to contribute to said organization.

It is driven by the mission, vision, and strategic plan of the organization. It describes the organization's goals and objectives and covers the programs and services it provides.



The case statement is one of the most important essential knowledge/information pieces in any fundraising program.



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Every case has three key elements:
the purpose, the case content, and the case focus.

I. Purpose: it's not just the fundraising goal. The purpose section should include the organization's aims, purposes, and mission. It presents the case for current programs, and shows how new programs will benefit and enrich people's lives. Finally, the purpose of a case can dramatically show the organization's impact on its community in a variety of ways, now and in the future.



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2. Content: the content of the case centralizes information about a variety of subjects related to the case. These include the following:

Organization's needs	Strategies and task plans
Governance	Cause
Mission	Staff competence for the mission
Budget	Goals
Objectives	Financial history
Facilities	



3. **Focus:** typically, the case will have a particular focus. It might be one, two, or all three of these:

unrestricted operating support

restricted gifts for operations

restricted gifts for special needs – capital, endowment, or other

The case is the organization's road map, and supporting it are a number of elements and processes that make it possible for organizations to plan an integrated development program. By integrating the various types of solicitation and giving options, you can better plan campaigns and take best advantage of all the organization's resources...including staff and volunteers.



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Systems/Plans/Policies

The campus ministry starts its case statement by showing the number of vocations that have come out of the ministry in the last decade, the steady increase in Mass attendance among students each year, and the high participation in Bible studies and other groups outside of Mass.

Next, the campus ministry explains where the opportunities lie for reaching more students on campus and helping to form the involved students at a higher level.

This includes renovation of existing ministry space to accommodate more small group meetings, the addition of a campus minister to the staff, and the institution of a retreat program to better form the students.



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According to the Association Of Fundraising Professionals (AFP) Dictionary, a mission statement is statement or proclamation about a societal need or value that an organization proposes to address. A statement of what is to be accomplished.

Some Examples:

- Build the best product, cause no unnecessary harm, use business to inspire and implement solutions to the environmental crisis.
- Spread ideas.
- To refresh the world in mind, body and spirit. To inspire moments of optimism and happiness through our brands and actions. To create value and make a difference.



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An organizational vision is a statement or set of values that focuses on the organization's goals and inspires action; it is a statement of the future.

A statement of what is to be pursued.

Some Examples:

- One day, all children in this nation will have the opportunity to attain an excellent education.
- A computer on every desk and in every home.
- To create a better every-day life for many people.



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You must have a clearly articulated Mission and Vision.
This must be agreed upon by the entire organization.

Fragmented vision guarantees fundraising mediocrity and missed potential.*

*Staecker & Reid, Non Profit World, Jan 1994



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An organization's Operational Plan presents detailed information specifically to direct people to perform the day-to-day tasks required in the running the organization. Organization management and staff should frequently refer to the operational plan in carrying out their everyday work. The Operational Plan provides the what, who, when and how much.



JULY

Person Assigned:	Due Date:	Week of FY	Start of Week	Current Topic
	7/2/19	1	7/1/19	Develop a 100 Day Plan
				Schedule and plan a Visioning Day for the ministry
			8/9/19	Start taking pictures at all ministry events
		2		Hold a Visioning Day for the ministry
	5/24/19		5/20/19	Plan the time and location of a late summer Advisory Council meeting
	6/28/19	3	6/28/19	Create an agenda for the next Advisory Council meeting
	8/8/19		8/1/19	Create a student registration plan for the start of the school year
	12/1/19	4	9/9/19	Review and optimize the ministry website
	8/30/2019		8/6/19	Plan Family Weekend Mass and Dinner / Flyer Invite
	9/18/2019		9/16/19	Plan an Alumni Tailgate for October
	7/26/19	5	7/22/19	Create a list of five potential donors for the fall Matching Gift Campaign
	7/31/19		7/29/19	Plan Back to School Appeal letter - send to families with Fam Wkd Invite



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The SWOT analysis stands for identification of the Strengths, Weakness, Opportunities, and Threats to your organization.

Discussing these factors will help develop awareness of the internal and external environments that impacts the success of your organization.

Strengths and weaknesses are **internal** factors, Opportunities and threats are **external** factors.



A strength is an internal factor that makes a positive impact on fulfilling your mission:

- Marketing and P/R
- Location / outreach
- Staff
- Any programs or services that add value
- Facilities

A weakness is an internal factor that has a negative impact on fulfilling your mission:

- Lack of marketing and P/R
- Location / outreach
- Poor quality programs / services
- Damaged reputation
- Facilities



An opportunity is an external factor that could help your mission thrive:

- A developing market such as the Internet.
- Alliances with other organizations
- Relationship with the Diocese and the University
- Relationship with donors
- Untapped funding sources

A threat is an external factor that could hinder your ability to be successful:

- Poor relationship with the Diocese or University
- Poor relationship with donors
- Other faith groups that Catholic students may be drawn to
- Funding sources that may be eliminated



Once you have a firm grasp on your Mission, Vision, Case Statement, and an understanding of your SWOT Analysis, you will be able to develop an “elevator speech” that can be given quickly when a prospect asks why the Ministry is important. It will also clarify which three or four elements of the Ministry have the greatest need or potential for growth.



Understanding your Financial Goals

Your leadership should help you develop and understand the monetary needs and financial goals for your position and your organization.

This may be done by setting specific monetary goal, example-
\$25,000.00 in 6 months

Or

Funding for a specific project/purpose

Or

Setting a percentage goal or success, example- 75% response to appeal



A Goal with out a plan is only a wish!

Written goals have a 70% greater chance of being achieved.

Plan these goals annually, review monthly, and revise weekly.



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Define Your Gift Acceptance Policies

What gifts you accept

- Credit cards?
- Stocks?
- Annuities?
- Tangible items such as housing, artwork, vehicles?

Who gets the mail

Input of data

Deposit of gift into bank

Gift acknowledgement and receipt



According to the publication, *Non Profit Source*, in 2017 49% of all church giving transactions are made with a card. Churches that accept online contributions increase overall donations by 32%.



Gift Acceptance Policies

All gifts are not equal in their financial value to your organization. A gift acceptance policy clearly sets forth your organizational position on your ability to accept and utilize all gifts offered to your organization.



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Create and adhere to policies that clearly establish the path a gift (particularly cash & checks) takes:

Who checks, distributes, and opens the mail?

Do you make copies of gifts?

Who inputs the gift information in a database?

Who makes the bank deposit?



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Gift Receipt & Acknowledgement

Gifts should be acknowledged with in 2 weeks of receipt

- Personal acknowledgement through phone call or handwritten note
- Receipt that can be used for tax purposes

- Do you have a policy that establishes what type or at what gift amount the Director or Pastor should personally acknowledge?
 - You may need to nudge your Pastor in this role



Office Needs

Place to record data & information

databases- from Excel & Access to paid services

You must be able to access and evaluate the data you collect, from personal information to gift history.

Each donor database should be customized to the needs of your particular organization.



Communication Tools

Your website

Contact information, make a gift tab

Email signature

Letters

Newsletters

Thank-You cards

Business cards

Propaganda material



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Tools

Physical & Human Needs

- Office space
- Computer with internet, email
- Office supplies
- Calendar
- Telephone

- Vehicle
- Stamina
- Support team



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Challenges in Nonprofit Management

Changes in your environment

Increased demand for accountability

Balance of priorities

Leadership balance

Changes in technology

Relationships

Misunderstanding the role of fundraiser throughout the entire organization

Lack of physical resources

Lack of financial resources

Inadequate record keeping



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Planning grows out of analysis.

Too little planning prevents the creation of a solid foundation.

Too much planning without action can be detrimental to your fundraising efforts.



A Plan- Execution & Evaluation

Year One

Complete within Year One

- Implement the face-to-face solicitation process with Discovery, Cultivation, Solicitation, and Stewardship calls
- Develop Thank you process
- Create Ministry Brochure
- Create Case Statement
- Establish Leadership Council
- Train Staff in solicitation process
- Agenda (for what?)
- Create/purchase database to track information
- Professional Development Education for staff (CCMA Development Institute)
- Communication with Diocese
- Communication with University
- Special Event (Volunteer Driven)
- Proposals
- Request Letters
- Pledge Forms (letter of intent)
- Receipting Policies
- Database template
- Recognition event
- Gaining staff buy in for Philanthropic process



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Execution means to carry out your plan.

You must empower all members of your team to work towards a shared sense of responsibility in your organization's fundraising goals



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Your ability to work with donors at 3 levels

- Making the initial gift
- Donor repeating a gift
- Donors increasing the gift
- Donors making a major gift or planned gift



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Evaluation is essential to your fundraising success.
Effective evaluation should include:

- Ability to gather feedback from donors, leadership team, mentors
- Regular departmental audits
- Review of established metrics to gauge financial success
- Understanding the Rate of Return from various appeals



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1. Establish, know, & embody organization's **Mission & Vision**
2. Establish foundational documents, such as **Case Statement, Operational Plan, & Communication Plan**
3. Establish &/or understand **job description & personnel chain of command**
4. Establish & understand your **financial goal**
5. Define **Gift Acceptance Policies & Gift Acknowledgement Standards**
6. Utilize and thoroughly understand your **database** system
7. Understand & adhere to **ethical practices & standards**
8. **Execute** your plan
9. **Evaluate** your plan
10. Create new **goals** based upon past evaluations



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THANK YOU!

Tara Doyon

Director of Stewardship and Development

St. Paul Catholic Center



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