ABHE
ANNUAL MEETING
February 12–14, 2020
Planning the Annual Calendar & Assigning Responsibilities

DEVELOPMENT FOUNDATION
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- Mission
- Vision
- Core Values
- Donors do the good deeds
- Focus on personal attention

CONCEPTS OF PLANNING

- Synergy
- Tomato plants
- Staff
- Budget
- Time
- Cooperation
• What position do you own?
• What position do you want to own?
• Who has the position you want?
POSITIONING

• Do you have enough resources/potential resources?
• Can you “stick it out” – not flash and dash
• Constant review

GETTING ORGANIZED
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• Job descriptions
• Training
• Evaluation
• Lines of Authority
• Budgeting – what is process to draft and approve development budget

GETTING ORGANIZED

• Income and Expenses – not the same each month
• Immediate Goals and Long-Term Goals for the year
• Activity Goals, essential, but not equal to funding
ENVIRONMENT

• Match your percentages to national averages

• What are your “numbers”

ROAD BLOCKS
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• Not willing to do things differently
• Process of building a development team
• Use of technology – or over use of technology
• Use of volunteers
SOURCES OF FUNDING

- Churches
- Individuals – various group numbers
- Corporations/Businesses
- Foundations
- Bequests

What is the best area for the quickest growth?

PUBLIC RELATIONS/COMMUNICATION

THINK GENERATIONAL

- Newsletter – hard copy/electronic
- Website
- Letters
- Personal notes
- Phone calls
- Facebook
- Cultivation on personal level
DATA MANAGEMENT

• Division of donors; non-donors; lapsed donors
• Profiles of top 100 donors
• Purge
• Receipt turnaround

DO WHAT IS IMPORTANT

NOT WHAT IS EASY
DO WHAT IS IMPORTANT, NOT WHAT IS EASY

- Build support/prayer group
- Face-to-face solicitations
- Build “foundation funding” support

WHERE TO SPEND REST OF TIME

- Churches
- Direct Mail
- Telemarketing
- Social Media
- Special Events
RECORD KEEPING

- Reminds you of God’s blessing
- Interpret results
- Aids in projections
- Comparisons – month to month; quarter to quarter; year to year; project to project
ANNUAL CALENDAR

- Calendar or Fiscal Year
- Have calendar for each month – mark holidays, vacations, campus events
ANNUAL CALENDAR

- Start with top donor plan
  - Individuals/Families Visitations – Key Donor Management Plan
  - Churches
- Special events – dinners, tournaments, telemarketing, Giving Tuesday
- Fund-raising letters and various newsletters