Advancement Principles and Practices That Breed Success

4 Key Moves | Pat McLaughlin
4 Key Moves

1. Examine Your Strategic Plan With Fresh Eyes
2. Bridge The Gap: Plans vs. Progress
3. Saturate Your Market Segment
4. Practice A Multi-Level Donor Approach
Examine your strategic plan with fresh eyes.
WHAT IS A STRATEGIC PLAN?

• A process devoted to developing a shared vision of the organization’s future.

• A determination of the best way to make this vision happen.

• A map that connects the dots between the vision of your organization and your fundraising efforts.
STRATEGIC PLANNING IS NOT

• Annual Planning or developing projects & goals for the next plan year.

• Long Range Planning or developing future projects based on past-history.
QUESTIONS TO ASK

• Where are we now?
• Where are we going?
• How are we going to get there?
• Do we need to revise our mission statement?
• Do we need to renew or revise our vision?
• What goals and action steps should be in place for the next 3-5 years?
Your vision is only as good as the strategic plan on which it is built.
Bridge the gap: plans vs. progress
Plan Basics

- Budget
- People
- Tools
- Goals
- Progress
Plan Basics

Budget

How much do you need to raise?

Annual Funds

Capital Funds

Endowment Funds
Plan Basics

Budget

It costs money to raise money.
Plan Basics

Budget

Annual Fund Income

- Restricted
- Temporarily Restricted
- Unrestricted
Plan Basics

People

Who’s on your team and are the right people in the right seats?

- Systems vs. people-focused
- PDP - profile for success
Plan Basics

Tools

Do you have the right CRM and are you using it efficiently?
Plan Basics

Goals

• How many major donor visits/month?
• How many alumni or ministry partner events?
• How many direct mail appeals?
• How do you envision development services?
Plan Basics

Progress

Our job as advancement professionals is to connect God’s people to God’s work through our organization and invite them to partner with us.
Plan Basics

Progress

There’s no such thing as the perfect strategic plan, however ongoing progress should always inform and update your plan.
Any development plans should always be fluid.
Saturate your market segment
Markets

5 Individual

1. Board
2. Major donors
3. Mid-level donors
4. Recurring donors
5. Prospects & lapsed donors (>36 months)
Markets
Other

- Individuals
- Businesses
- Churches
- Foundations
Markets
5 Methods

- Personal Visit
- Direct Mail
- Digital
- Events
- Call Virtual Text

Donor
## Comprehensive Strategy

<table>
<thead>
<tr>
<th>Donor Communication</th>
<th>Strategy</th>
<th>Tactics</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major Donor</td>
<td>One-To-One</td>
<td>Personal, Individualized, &amp; More Detailed</td>
<td>70%</td>
</tr>
<tr>
<td>Mid-Level Donor</td>
<td>One-To-Few</td>
<td>Moves Management To Tier; Begin Deeper Engagement</td>
<td>20%</td>
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<tr>
<td>General Donor</td>
<td>One-To-Many</td>
<td>Segment, Test, &amp; Analyze For Effective Communications</td>
<td>10%</td>
</tr>
</tbody>
</table>
Determine your markets first; then establish the best methods to fit your markets.
Practice a multi-level donor approach
Multi-Level Approach

Overall Focus

Create focused strategies & approaches for:
- Major Donors
- Mid-Level Donors
- General Donors
- Recurring Donors
Start from the top down. Prioritize your tasks & manage your time.
Multi-Level Approach

Annual Financial Plan

Make personal solicitation your top priority.

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>50%</td>
<td>Major Donor Solicitation</td>
</tr>
<tr>
<td>25%</td>
<td>General Donor (Mail/Events)</td>
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<tr>
<td>15%</td>
<td>Administration</td>
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<tr>
<td>5%</td>
<td>Public Relations</td>
</tr>
<tr>
<td>3%</td>
<td>Church Relations</td>
</tr>
<tr>
<td>2%</td>
<td>Foundation Proposals</td>
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</table>
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QUESTIONS?

Please reach out anytime to chat.

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THANK YOU!