



Foundations for Development Success

By Nanette Fridman and Jennifer Weinstock

How many times have you asked your development team or CEO, “What did we do last year?” or “Can anyone remember how it worked in fiscal year 2015?”

Wonder no more! No matter the size of your organization, preparing these important documents will create essential roadmaps to effectively guide the coming year and establish a solid development foundation for years to come.

1. **Annual Campaign Analysis:** What happened last year? If you can answer that question at the end of every campaign closing, after three to four cycles you will have an arsenal of data to help make strategic decisions. This analysis can also help with projecting future fundraising goals. Take some time to assess what worked last year, what didn't and why. Look at numbers, messaging, events, donor categories, solicitors and dig into the data and outcomes with your staff and development committee. You want to take away key learnings that will inform next year's planning.
2. **Case for Giving or Support:** The case for giving or support simply tells a donor why your organization is worthy of their philanthropic support. What societal or community need your organization meets? What do you do with the money raised? What will be the impact? Your case needs to grow and mature as your organization grows and matures. There are also different levels of the case depending on the engagement with each donor. What you can get across in a mail appeal is very different from a complex person to person conversation. Revisit your case yearly and document any changes. Everyone in the organization from leadership to management to staff to board to volunteers should be able to articulate your case for giving so make sure to share it widely.
3. **Projections for Development Funds and Goals:** Despite what too often happens, the development goal is not a number that you back into once the budget is done and you identify your organization's deficit. If you analyze your campaigns with some consistency, you can partner with your finance office during the

budget cycle to make accurate predictions of what a reasonable growth goal will be. Rule of thumb is 2% to 5% annually; however, many organizations report that they struggle to meet these growth percentages. Setting an aggressive goal that you can meet realistically is critical. Development professionals should make projections of what they reasonably feel they can raise based on past giving, donors' relationships to the organization, upcoming opportunities and other competition in the landscape. **This is a line by line analysis.** Be wary of, "We'll do 10% more than last year." Based on what?

4. **Development Plan:** One you have your goals, the development plan at a minimum should show how you will reach those goals by each constituency and using what strategies. At best, the development plan is a holistic integration of all the development activities that will take place in the coming year. This drills down to the tactical level of events, mailings, training, phone-a-thons, social media etc. either in the plan or in an accompanying implementation work plan. The development plan should be approved by your Development Committee and your Board of Directors. A strong development plan that you return to frequently with your leadership can help everyone stay on track and is a great way to disseminate responsibility for development.

5. **Development Calendar:** This interactive calendar should include organizational programmatic events, development and constituency events, and marketing/communications. Make sure this calendar also notes other key community events from your area's collaborative and competitive organizations. You don't want to find out a week before your major donor event that another organization is holding an event the same night. Focus on the rhythms of your organizational year and make sure meetings, events and mailings work with your donor base.

6. **Top Prospect List:** A key question that we often get is what is a top donor? Our answer is not based on dollar amount because for every organization that dollar amount is different. A great rule of thumb is to list your donors in descending giving order. The top 20% are what we mean. That might be a list of 25 names at a small organization or 10,000 names at a large organization. Your top donor prospects are the people who have the capacity and inclination to climb the ladder to the top of the list. Start your focus there. This list should be sortable by tier or priority and coded by the lead solicitor. For each top donor, it is best

practice to have a moves management or individual stewardship plan which may be part of this document or separate.

7. **Cultivation/Stewardship Menu by Donor Category:** The year is so busy and hectic. It's great to brainstorm a standing list of cultivation opportunities so that your leadership and other professionals have a standing list of offerings. This list needs to be more than a cup of coffee or a tour of your organization. What other core cultivation opportunities can you make available for your donors to educate them about your organization and nurture your relationship with them? Keep that list growing and nearby when you make your calls!

8. **Development Committee:** Development is a partnership between donors, volunteers and professional staff. Your core volunteer leadership team needs to feel engaged all year long. Even if your committee doesn't meet in the summer, review your charge, freshen up your job descriptions and orient new members. Meet one on one with every member of the committee over the summer to review the documents above. Give them an inside peak and let them share their input.

To be sure, these core questions and documents take a lot of work to formulate. For development success, they are must haves to keep you on track and clarify roles and responsibilities of the development team. The magic comes from re-visiting these projects at the end of every annual cycle and continuously all year long as you put them to good use!

Authors' Note: Are there other documents you consider foundational and prioritize that aren't on our list? Please let us know. We want to grow this resource for the field so please send them our way.

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