



Structuring Your Development Office For Success

Presented by:
Monique Hanson
Sally McMillan

October 04, 2011

1:00 – 2:30 p.m. Eastern
Noon – 1:30 p.m. Central
11:00 a.m. – 12:30 p.m. Mountain
10:00 – 11:30 a.m. Pacific
9:00 – 10:30 a.m. Alaska



Association of Fundraising Professionals
4300 Wilson Boulevard, Suite 300, Arlington, VA 22203-4168
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www.afpnet.org

Monique Hanson and Sally McMillan

Monique Hanson serves as Senior Vice President and Chief Development Officer of YMCA of the USA (Y-USA), headquartered in Chicago, Illinois, where she leads the organization's national fundraising efforts and collaborative model development. The Y is the nation's leading nonprofit committed to strengthening communities through youth development, healthy living and social responsibility. Since 2005, the Y-USA financial development team has raised more than \$100 million dollars and granted more than \$52 million dollars to local YMCAs. Y-USA's grant-making now ranks among the top 7% of all foundations in the United States.

Monique brings more than 20 years of strategic alliance development and fundraising experience in the areas of health, education, arts and culture to her current position. Prior to joining YMCA of the USA, she served as leadership staff at the national headquarters of the Alzheimer's Association, where she was responsible for strategic planning and the implementation of a comprehensive National/Chapter consolidated service and fundraising model, as well as fundraising, both national and international.

Monique serves on the Research Council and the Professional Advancement Division of the International Association of Fundraising Professionals. She holds a B.A. in history from the University of Wisconsin.

Sally McMillan has worked in non-profit fundraising for 12 years. As Director of Development for YMCA of the USA, she is responsible for corporate and foundation solicitation as well as oversight of Financial Development operations, stewardship and re-granting from Y-USA to local YMCAs. Sally honed her institutional fundraising experience at Providence-St. Mel School, Gateway Foundation, the Alzheimer's Association (national office), and Planned Parenthood/Chicago Area before joining Y-USA. She graduated from Princeton University and has completed coursework at the University of Chicago Graduate School of Business.

STRUCTURING YOUR DEVELOPMENT OFFICE FOR SUCCESS

Monique Hanson, Sr. VP & Chief Development Officer
Sally Draper, Director of Development
YMCA of the USA

October 4, 2011



Introductions and Goals

Today, our goals are to:

1. Focus on the foundations of successful development operations of *any* size
2. Identify strategies for maximizing success in a **small- to mid-size** shop
3. Provide concrete tips for doing more with less
4. Frame examples around the Annual Fund



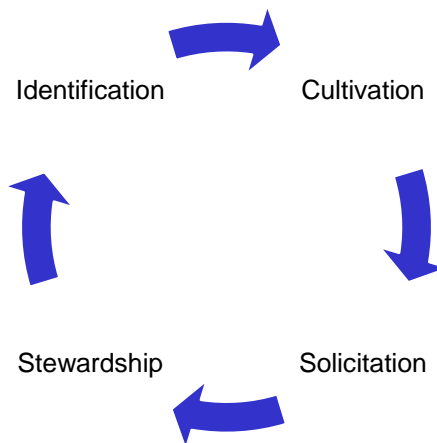
Small- to Mid-size Operations



Funny-potato.com



Foundations of Success

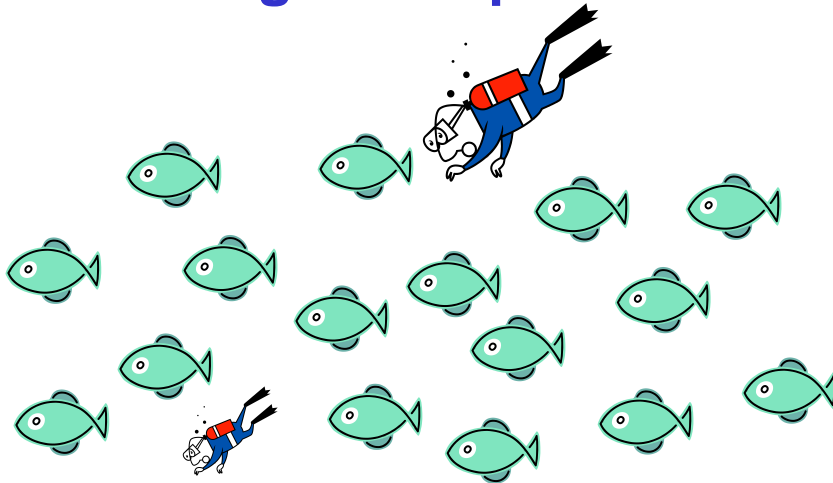


Identification

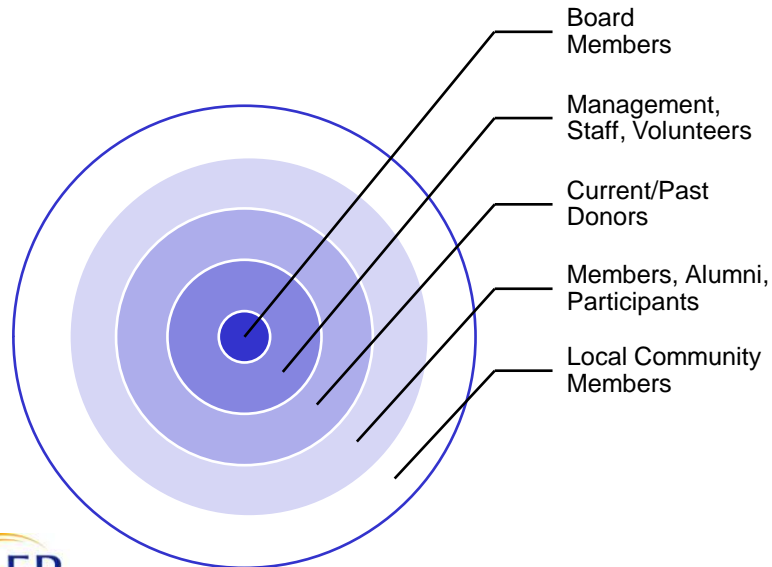
A **deliberate** process by which you isolate a prospect based on certain characteristics for further evaluation



Building a Prospect Pool



Work From Inside Out



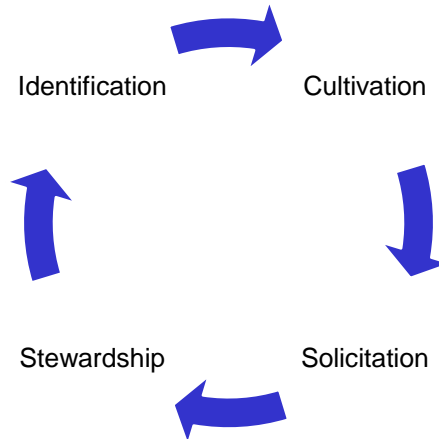
Keys to Success



- Engage your Board and key volunteers
- Make every activity an opportunity to gather prospects, build engagement and know your constituency
- Tell your story and describe your impact
- Plan:
 - Prioritize your prospects
 - Create a moves management strategy
 - Identify realistic expectations



Foundations of Success



Cultivation

The ongoing process of nurturing prospective donors toward first-time giving, and current donors toward higher levels of understanding, commitment and giving.



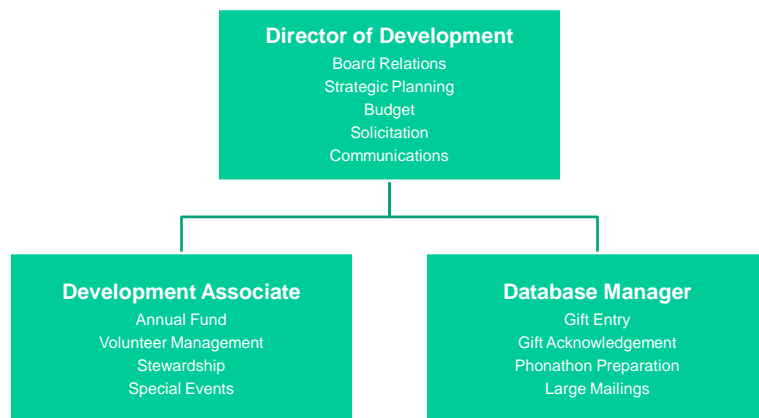
Volunteer Engagement

Engage your board and volunteers in personal cultivation:

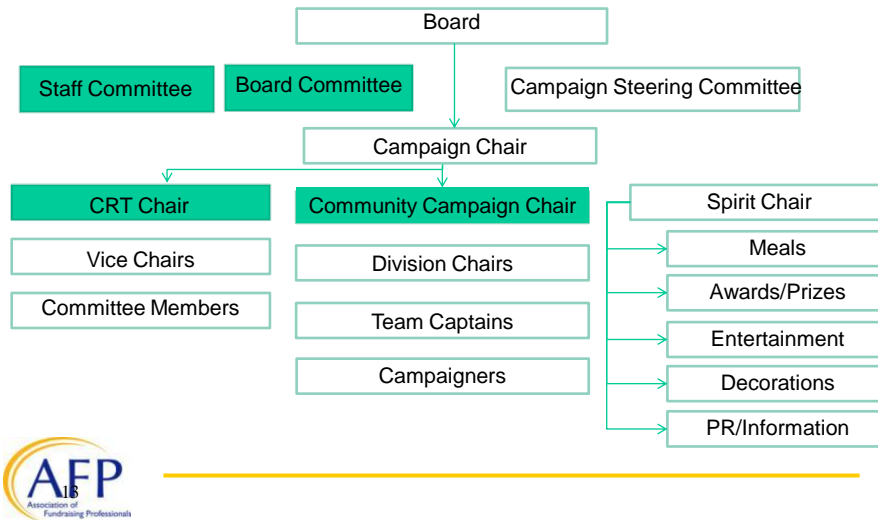
- They may have better/more natural access to the prospect
- They can be your finest ambassadors
- They believe in the cause
- They model behavior by giving themselves
- Volunteers are your best prospects



3-Person Annual Campaign



Volunteer-led Annual Campaign



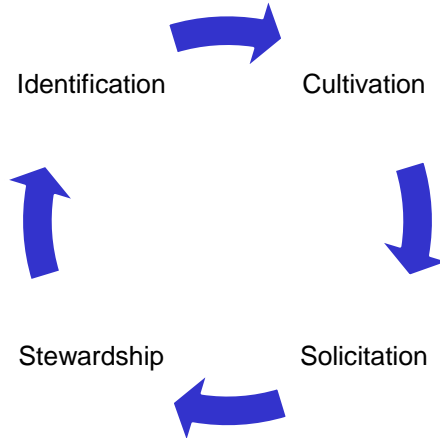
Keys to Success



- Engage your volunteers and other staff
- Document your prospect information
- Train your volunteers to stay “on message”
- Know your next move—moves management



Foundations of Success



Solicitation

“turning your organization’s dreams
into the prospect’s dreams”

Briana H. Roth, 2000

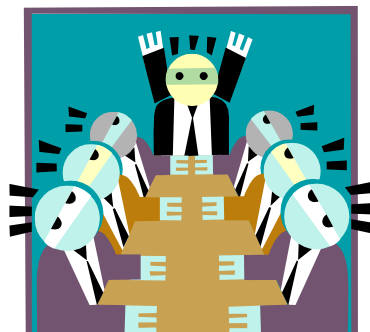


Solicitation

- Ask!
- Engage Volunteers
- Train Volunteers



Family First



Keys to Success



- Planning: organize and prioritize your moves management strategy
- Leverage your volunteers, but staff guides the process
- Ask!

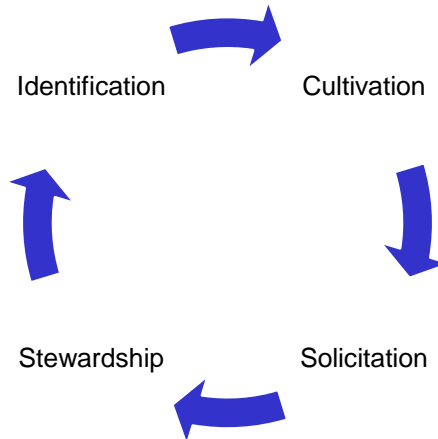


After the Ask

- Follow up with thank-you letter
- Document the interaction for your organization
- Send promised materials promptly
- Demonstrate impact



Foundations of Success



Stewardship

- The philosophy and means by which an institution exercises ethical accountability in the use of contributed resources

and

- The philosophy and means by which a donor exercises responsibility in the voluntary use of resources

*The Fund Raising School,
The Center on Philanthropy at Indiana University*



Keep it Personal

- One size does not fit all. Provide the donor a sense of the impact of his or her particular gift
- Say thank you with the same high-quality attention you use when asking for a gift
- Thank at least one donor every day



Stewardship

The chance that these two girls would be friends during the school year is slim, but at Camp – where everyone eats the same food, wears the same old clothes, and just enjoys being a child – kids come together no matter how varied their home lives may be.

At Camp, relationships are fostered that can last a lifetime. Your gift has made *this* relationship possible.

Thank you!



Stewardship

The Camp Thunderbird Y-Guides/Y-Princesses program serves more than 800 families and helps foster great relationships between fathers and their children, both sons and daughters. Each year, these families camp out, go bowling and do countless other activities.

One of our most popular events is our annual **"Father-Daughter Dance"**. On January 17th, 300 sets of fathers and daughters danced the night away at our "Princess" themed dance. Events like this are possible – because of YOU.



Stewardship

Donor Recognition

- Thank your donors right away—within 48 hours
- Thank throughout the year, not just immediately after the gift
- Demonstrate impact
- Respect privacy...ask permission before publishing a name, putting someone up on a donor wall or making a public announcement
- Donor recognition need not be expensive



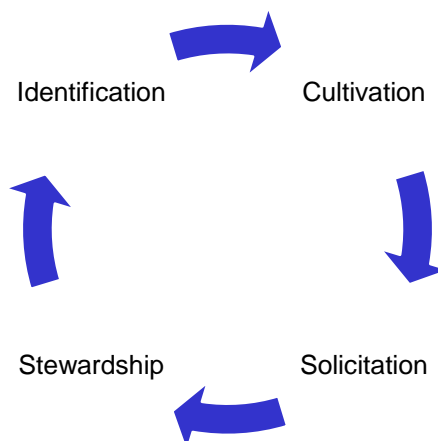
Keys to Success



- Plan your interactions with the donor
- Promptly acknowledge and confirm gifts
- Report impact to donor and/or volunteer...what has changed?
- Engage the donor in meaningful, forward-thinking conversations
- Capture information in a formalized way
- Honor the wishes of the donor and use the gift exactly as the donor intended



Foundations of Success



Operations

- Development Plan
- Budget
- Documented Systems and Policies
- Metrics
- Records Management



Strategic Plan



“If everyone is moving forward together, then success takes care of itself.”

- Henry Ford



Tactical Planning

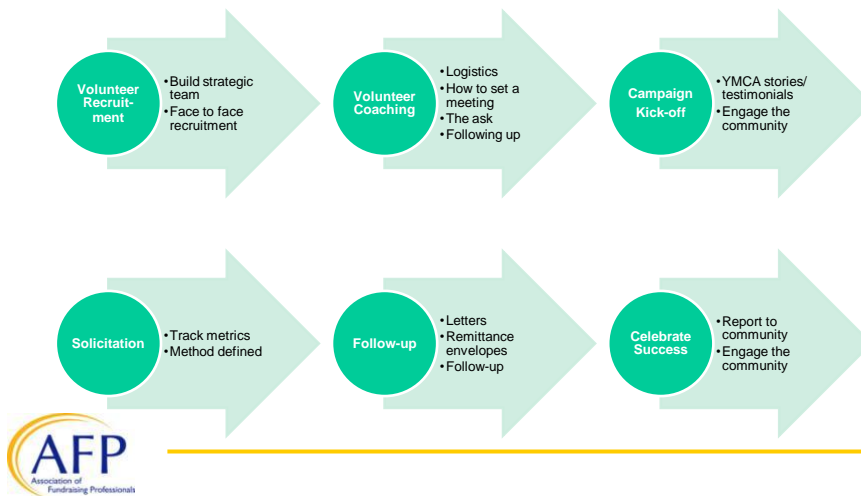
Key Components of a Development Plan

1. Goals
2. Strategies for achieving goals (e.g., Annual Fund)
3. Analysis of potential...by constituency and by strategy
4. Action plan and timetable for each strategy, with income benchmarks
5. Assignment of responsibilities (for strategies, and for individual solicitations to volunteers, staff, others)
6. Marketing needs for each strategy
7. Budget and funding for each strategy



Source: AFP Online Resource Center (Development Plan)

Start with Milestones



Budget

- Fundraising revenues and expenses are co-dependent
- Revenue goal should be determined jointly by development staff and CEO/Board
- Factors to consider when establishing a revenue goal:
 - Available financial resources (budget)
 - Human resources (staff and volunteers)
 - Fundraising climate
 - Cost to raise \$1

2010 Fundraising Expenses = Actual Cost to Raise \$1 in 2010
2010 Charitable Revenue

2011 Fundraising Budget = Estimated Cost to Raise \$1 in 2011
2011 Fundraising Goal



Documented Systems and Policies

- Plan for the unknown
- Established guidelines help you avoid pitfalls
- Documented systems retain their value long after certain personnel leave organization
- For gift acceptance guidelines, see: http://www.afpchicago.org/Creating_Gift_Policies.pdf



Professional Standards

- AFP Code of Ethical Principles and Standards of Professional Practice
- APRA Statement of Ethics
- A Donor Bill of Rights



Metrics

- Tell you whether you are operating efficiently and effectively
- Show progress year-over-year
- Help pin-point problem areas to be addressed
- Allow you to benchmark against similar organizations



Donor Records Management

WANDA EPCOTT

August 17, 2011

Dear Mr. Thompson,

Thank you for the opportunity to tour your YMCA yesterday. I was most impressed by the English as a Second Language class you showed me. I can see what a valuable service this is to our community. Please let me know what I can do to help support this important program.

Sincerely,
Wanda Epcott

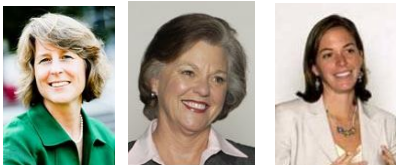


Questions



Coming Next....

**October 27, 2011
1:00 – 2:30 p.m. ET**



***From Boomers to Echo
Boomers: Giving Across the
Generations***

**RACHEL HUTCHISSON,
JUNE BRADHAM CFRE &
TUCKER BRANHAM, CFRE**

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CERTIFICATE OF PARTICIPATION

**I was a participant in the AFP Webconference held
October 04, 2011
1:00 – 2:30 PM Eastern**

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**Presented by:
Monique Hanson &
Sally McMillan**

Full participation in this session is applicable for 1.5 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

Signed _____

This is for your records only.



Association of Fundraising Professionals

2011 WEB/AUDIOCONFERENCES

Educating Fundraisers in the 21st Century



- FEBRUARY 16, 2011, WEDNESDAY

Planning to Keep Your Donors

John Joslin, CFRE

- FEBRUARY 24, 2011, THURSDAY

It's Not About You, It's About Them: the New Imperative in Corporate Fundraising

Jason Saul, Author

- MARCH 2, 2011, WEDNESDAY

The Secrets of Consultants

Penelope Cagney, CFRE

- MARCH 24, 2011, THURSDAY

Seriously Good innovation... in Practice!

Jon Duschinsky

- APRIL 7, 2011, THURSDAY

Strengthening Foundation Relationships

John Greenhoe, CFRE

- APRIL 20, 2011, WEDNESDAY

Social Networking and Online Fundraising Success

Ted Hart, ACFRE

- MAY 4, 2011, WEDNESDAY

Managing Prospect Relationships and Fundraising Activity in a Campaign

Elizabeth Crabtree, Director of Prospect Development at Brown University

Sponsor: *The Association of Prospect Researchers for Advancement (APRA)*

- MAY 19, 2011, THURSDAY

Developing a Planned Giving Marketing Plan

Timothy Logan, ACFRE

- JUNE 1, 2011, WEDNESDAY

Campaign Reporting

Elizabeth Crabtree, Director of Prospect Development at Brown University

Sponsor: *The Association of Prospect Researchers for Advancement (APRA)*

- JUNE 21, 2011, TUESDAY ***3:00 PM EASTERN***

How to Raise More by Selling your Impact

Jason Saul, Author

- JULY 13, 2011, WEDNESDAY

When Raising Money 10 Legal Matters to Avoid

Marty Martin, JD, MPA

- JULY 26, 2011, TUESDAY

Building Relationships that Pay Off

John Hicks, CFRE

- AUGUST 24, 2011, WEDNESDAY

Raising More Money From Your Business Community

Linda Lysakowski, ACFRE

- SEPTEMBER 15, 2011, THURSDAY

Face-to-Face Basics: Integrating Individuals into Your Development Plan

Amy Eisenstein, CFRE

- SEPTEMBER 28, 2011, WEDNESDAY

Nonprofit Internet Management Strategies, Tools and Trade Secrets

Ted Hart, ACFRE

- OCTOBER 4, 2011, TUESDAY

Structuring Your Development Office for Success

Monique Hanson

- OCTOBER 27, 2011, THURSDAY

From Boomers to Echo Boomers: Giving Across the Generations

June Bradham, CFRE, Rachel Hutchisson & Tucker Branham, CFRE

- NOVEMBER 1, 2011, TUESDAY

Donor Centered Planned Gift Marketing

Michael J. Rosen, CFRE

- NOVEMBER 17, 2011, THURSDAY

Digital Mobilization on Giving

Marcelo Iniarra

- DECEMBER 6, 2011, TUESDAY

Secrets of Success in the Small Shop

Sandy Rees, CFRE

- DECEMBER 14, 2011, WEDNESDAY

Building a Major Gifts Program through Integrated Solicitations

Adam Burk, CFRE



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*Please note each Web/Audioconference session offers CFRE points!

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FEES: \$159 (U.S.) per member session; \$295 (U.S.) per nonmember session

Special AFP Member Bundle - \$99 per session when registering for 10 or more programs at one time!



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- February 16, 2011 John Joslin, **Planning to Keep Your Donors**
- March 2, 2011 Penelope Cagney, **The Secrets of Consultants**
- March 24, 2011 Jon Duschinsky, **Seriously Good Innovation... In Practice!**
- April 7, 2011 John Greenhoe, **Strengthening Foundation Relationships**
- April 20, 2011 Ted Hart, **Social Networking and Online Fundraising Success**
- May 4, 2011 Elizabeth Crabtree, **Managing Prospect Relationships and Fundraising Activity in a Campaign**
- May 19, 2011 Timothy Logan, **Developing a Planned Giving Marketing Plan**
- June 1, 2011 Elizabeth Crabtree, **Campaign Reporting**
- June 21, 2011* Jason Saul, **How to Raise More by Selling your Impact**
- July 13, 2011 Marty Martin, **When Raising Money 10 Legal Matters to Avoid**
- July 26, 2011 John Hicks, **Building Relationships that Pay Off**
- August 24, 2011 Linda Lysakowski, **Raising More Money From Your Business Community**
- September 15, 2011 Amy Eisenstein, **Face-to-Face Basics: Integrating Individuals into Your Development Plan**
- September 28, 2011 Ted Hart, **Nonprofit Internet Management Strategies, Tools and Trade Secrets**
- October 4, 2011 Monique Hanson, **Structuring Your Development Office for Success**
- October 27, 2011 June Bradham, Rachel Hutchisson & Tucker Branham, **From boomers to Echo boomers: Giving Across the Generations**
- November 1, 2011 Michael J. Rosen, **Donor Centered Planned Gift Marketing**
- November 17, 2011 Marcelo Iniarra, **Digital Mobilization on Giving**
- December 6, 2011 Sandy Rees, **Secrets of Success in the Small Shop**
- December 14, 2011 Adam Burk, **Building a Major Gifts Program through Integrated Solicitations**

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- Online: <http://afp.peachnewmedia.com>
- Fax: 781-723-0433
- Phone: 770-805-6292
- Mail: Peach New Media, 153 Prospect Street, Suite 330, Marshfield Hills, MA 02051

Please print clearly (especially the email address)

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(Payment must accompany registration and must be paid in U.S. funds)

Method of payment (check one):

- Check enclosed payable to *Peach New Media*
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Card # _____ CVV Code _____ Exp. _____ Signature _____

3-digit code on back of card

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