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# ***Formalizing Your Development Plan*** **WEDU Be More Effective Workshop**

**Presented by**  
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# Value of Taking Your Development Plan from Your Head to Paper

- Opportunity to involve your board members, CEO, CFO, and program directors in the planning – and building – of an organizational culture where fundraising is everyone's job
- Helps you set goals, responsibilities and time priorities
- Available to share with funders
- Helps you evaluate the success of your fundraising program



# Identify Your Potential Sources of Gift/Grant Revenue

- Board members – 100% participation is essential
- Former board members – don't lose them, use them!
- Other individuals – name those who have major gift potential for your organization
- Volunteers – many want to give but have never been asked
- Staff – every staff member should be asked for a contribution
- Clients and their families – they have benefited from your services and many will gladly give



# Identify Your Potential Sources of Gift/Grant Revenue

- Program attendees – they already know you and have enjoyed your programs
- Events – use net revenue only in your income projections
- Corporations – these \$\$ will be mostly for sponsorships through the corporate marketing department
- Vendors – they benefit from doing business with you; let's ask them too
- Foundations – use the Foundation Center Directory to match your needs with foundation giving interests



## Identify Your Potential Sources of Gift/Grant Revenue

- Government – explore grant programs to see if you fit, e.g. Institute for Museum & Library Services, National Endowment for the Arts, National Endowment for the Humanities, National Science Foundation, Health & Human Services, Dept. of Education, etc. -- but there are also government dollars for transportation
- Federated giving agencies such as United Way
- Service organizations with grant programs such as Rotary, Kiwanis
- Community at large -- if you are a community-based organization, be sure to ask the community for its support



# Inform Your Potential Sources of Gift/Grant Revenue

- Convey the need for your organization, the services it provides, and its impact on the community
- How will you communicate with your potential sources?  
Newsletters, e-newsletters, web site, letters from president, annual appeals, press stories, PSAs, paid advertising, speaking to service organizations and other clubs, invitations to onsite tours and programs, special events



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# Involve Your Potential Sources in the Life of Your Organization

- Invite potential sources for tours and programs
- Invite major gift prospects to small gatherings with board members and current major donors
- Invite potential donors to volunteer



# Ask Your Potential Sources for a Gift

- #1 reason people give is because they are asked
- Set a target ask based on capacity to give and interest you have developed in your organization
- Determine who is the best connector, the best cultivator, the best asker for each major gift prospect
- Ask for a gift that matches the donor's interests and your organization's needs



# Thank Your Donors

- Send thank you letter from president, board member, client served
- Send tax letter within two business days of gift
- Once a year, send a letter of thanks with an update on how donor gifts have been spent, to all donors – without an ask



## Continue to cultivate your donors

- Invite them to programs
- Invite them to host tours and invite their friends
- Invite them to introduce programs or activities
- Make them feel part of the family – and the process of engaging other potential donors

**Ask them again – for successively increasing gift amounts as their level of engagement with your organization increases.**







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## For More Information...

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