

I, RAT EMERITUS, HAVE WRITTEN OUT THE MATHEMATICS OF DOING GOOD FOR YOUR FELLOW MAN.

WHAT ARE YOU TALKING ABOUT?

I'LL SHOW YOU...SEE, I START WITH THE SIMPLE PRINCIPLE THAT GIVING TO OTHERS PRODUCES GOOD.

BUT THEN I HAVE TO ACCOUNT FOR THE SLOTH COROLLARY.

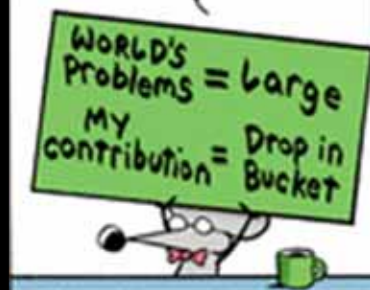
AND THE HAPPINESS PRINCIPLE.



AND THE FUTILITY ALGORITHM.

THEN I ADD IT ALL UP, CARRY THE 3, DIVIDE BY 2, AND ARRIVE AT MY GRAND THEOREM OF HOW ONE SHOULD CONDUCT ONESELF.

WHICH IS WHAT?



NOTHING. HOW OBVIOUS.

WELL... NOT REALLY NOTHING. YOU CAN SIT AROUND AND DRINK BEER.



Creating and Using a Strategic Plan

by David Allen

Developed for

Nuts and Bolts of Lake Associations

10 April 2012



ABC Land Conservancy

Strategic Plan

I. Goals and Objectives

- A. Raise as much money as possible
- B. Save the world
- C. Establish ironclad credibility in the community



Strategic Planning

Mission



Strategy

(Direction, Activities)



Strategy

- Strategies are the set of things you do to accomplish your mission.
 - Buy land
 - Host informational meetings
 - Develop grade school curriculum
 - Sue the bastards



Strategic Planning

Mission



Strategy

(Direction, Activities)



Plans

(Measurable in
Time & Scope)



Plans

- Plans show how far you intend to get within a specific period of time
 - Complete three priority land transactions before Christmas
 - Host an exotic species workshop in July
 - Hire an Executive Director in the next three years



Strategic Planning

Mission



Strategy

(Direction, Activities)



Plans

(Measurable in
Time & Scope)



Budget



Total expenses less \$\$ from other revenue sources.

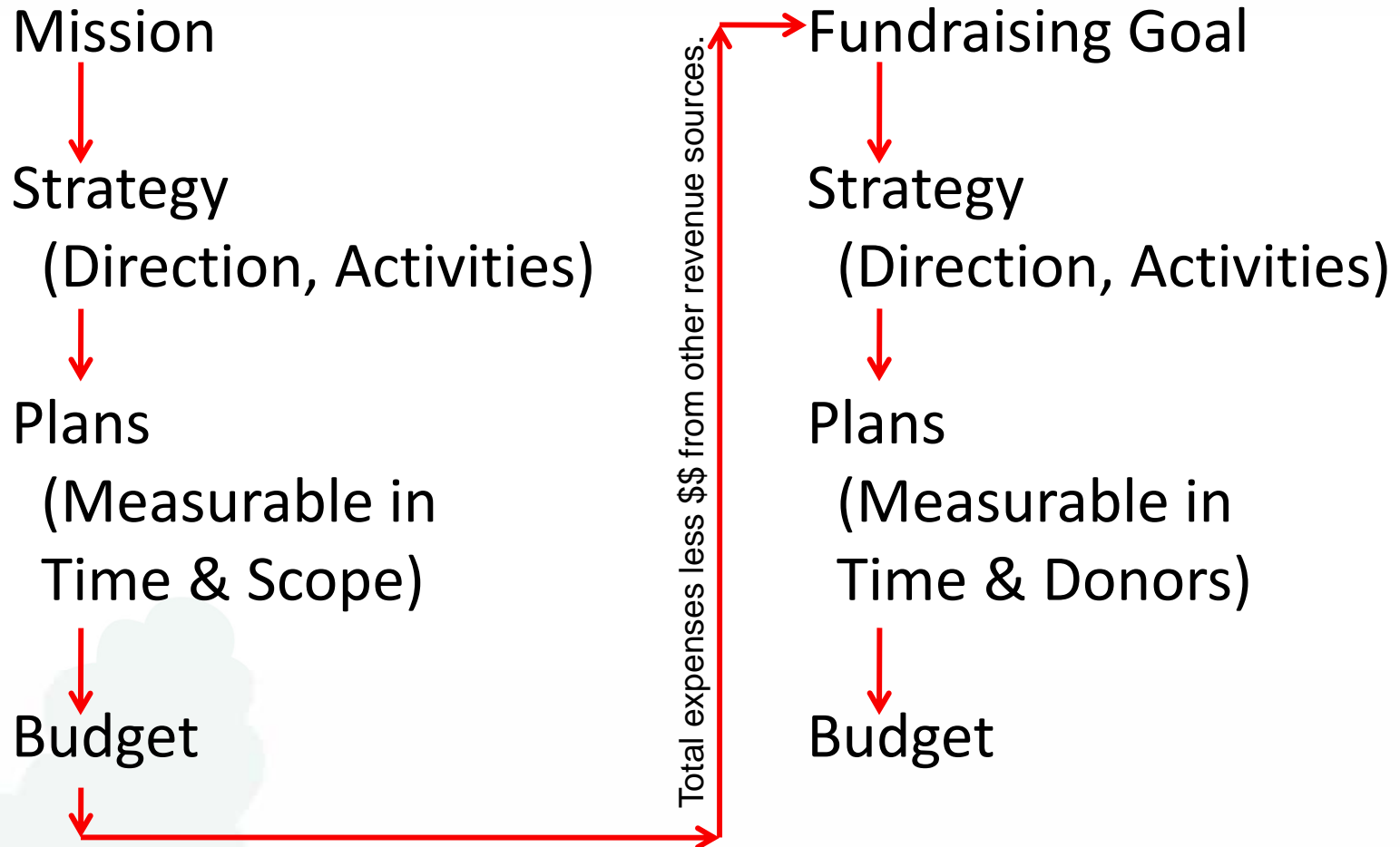


Non-Gift Revenue

- Government Grants
- Interest/Dividend Revenue - Endowment
- Merchandise Sales
- Royalties and Leases
- Registration/Door Fees
- Raffle Revenue



Strategic Planning



Why do a Strategic Plan?

- Thinking and acting strategically is the best way to get the most out of your resources
- Helps a group of people understand how their individual actions fit a larger context – establishes buy-in
- Helps the organization say “NO” to distractions



Planning Process

- Evaluate/Assess what has gone before
- Establish or affirm the mission
- Brainstorm possible strategies/activities/directions
- Choose a set of strategies to work on
- Decide how far you plan to get on each one in the given time period, who will take lead responsibility, and how you will measure
- Budget appropriate resources



Planning Process

- Evaluate/Assess what has gone before
 - Establish or affirm the mission
 - Brainstorm possible strategies/activities/directions
 - Choose a set of strategies to work on
 - Decide how far you plan to get on each one, who will take lead responsibility, and how you will measure
 - Budget appropriate resources
-
- Do this for your 5-Year plan
 - Then do it each year for your annual plans



Good Facilitators

- Are independent - do not have their own agenda
- Help determine a process to accomplish the desired results on time
- Guide the chosen process
- Ensure participation
- Push for specificity
- It is possible for a group member to facilitate, but s/he should not try also to participate.





Funding Your Activities

by David Allen

Developed for

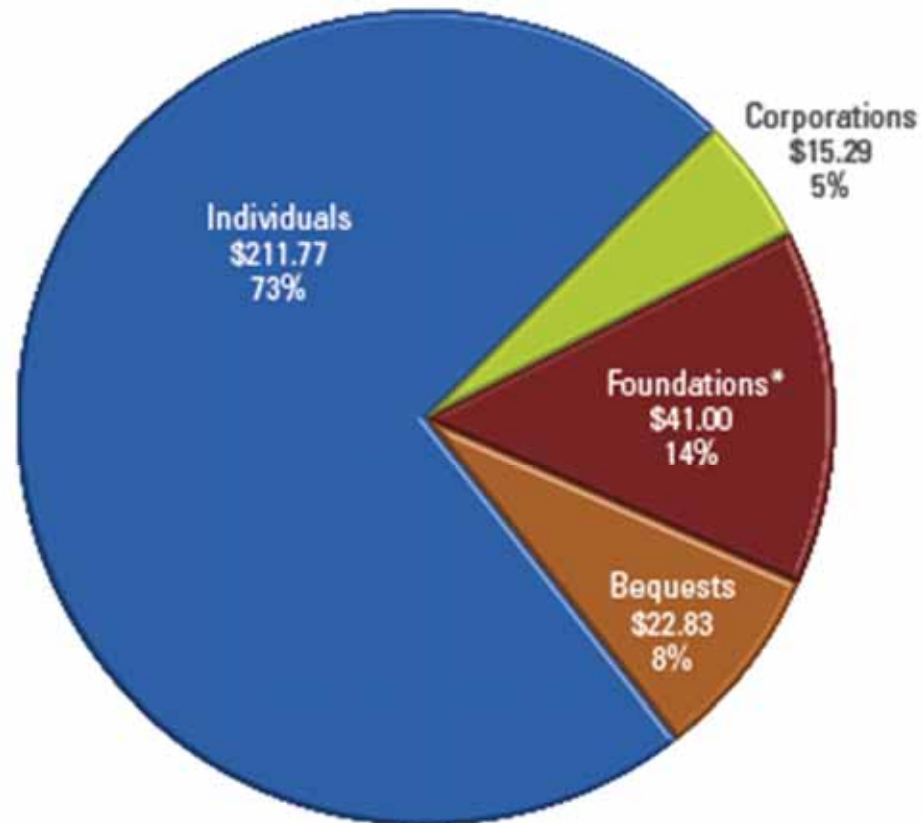
Nuts and Bolts of Lake Associations

10 April 2012



2010 charitable giving Total = \$290.89 billion

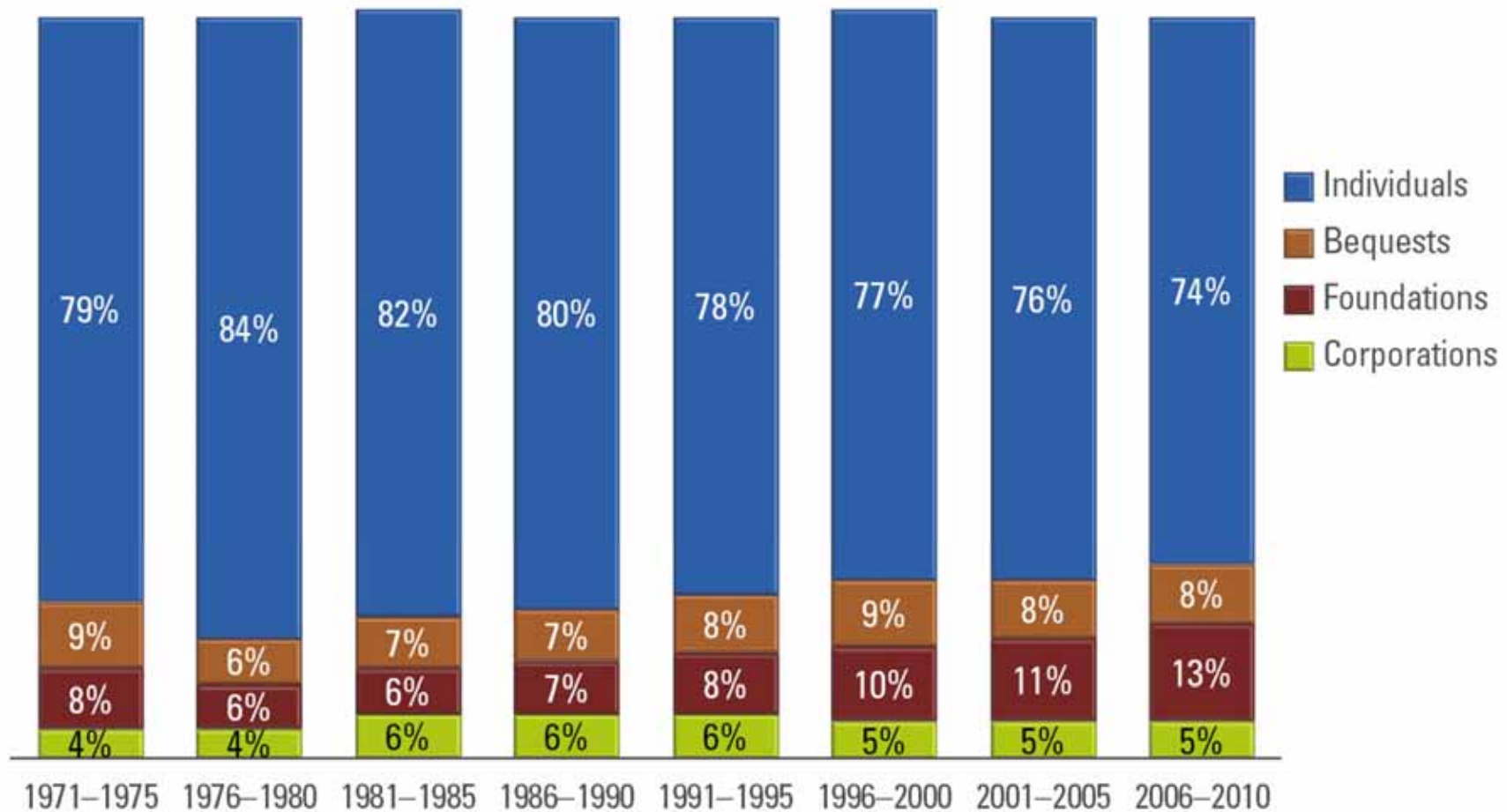
(\$ in billions – All figures are rounded)



*The giving by foundations estimate is provided by the Foundation Center.

Source: *Giving USA Foundation*TM / **GIVING USA 2011**

Giving by source: Percentage of the total by five-year spans, 1971–2010



Source: *Giving USA Foundation*TM / **GIVING USA 2011**

FREE Executive Summary

Download your
FREE executive summary of
Giving USA 2011
at

www.givingusareports.org



Trends in Corporate Giving

- **Corporate Philanthropy is an Oxymoron**
- **Many corporate gifts come from advertising budgets**
- **Exchange relationship is clear**
- **Bang for the buck is important**
- **Visibility to customer base or to employee base is important**

Trends in Foundation Giving

- **Foundation giving is often planned years in advance – It's important to get in the queue**
- **Foundation giving has taken a HUGE hit in recent years, though there are some positive signs for 2012**
- **Foundation giving is becoming increasingly strategic**

Why do People Give?

1. What's being done is worth doing

- Belief in the Mission

2. The organization involved can get it done

- Fiscal stability
- Regard for staff leadership
- Respect for the organization locally
- Regard for volunteer leadership

Definitions: Annual Gifts

Annual and Major (Gifts) describes the decision-making process, not the dollar amount.

Annual (periodic) Gifts require little, if any, deliberation by the donor.



Definitions: Annual Gifts

- Annual expectation (renewal)
- General organizational appeal (operations)
- Mail or phone solicitation
- Quick response
- Small(er) gift size
- Measure of success = YES



Definitions:

Major Gifts

**Major Gifts
(stop and think
gifts) require
consultation,
deliberation,
and time**



Definitions: Major Gifts

- Specific need
- Unique appeal
- Personal ask
- Multiple visits
- Large(r) gift size
- Measure of success = ADVANCE



Building a Development Plan

- Membership (Annual giving) is driven by strategic marketing
- Major Gifts are driven by strategic cultivation of *current* members

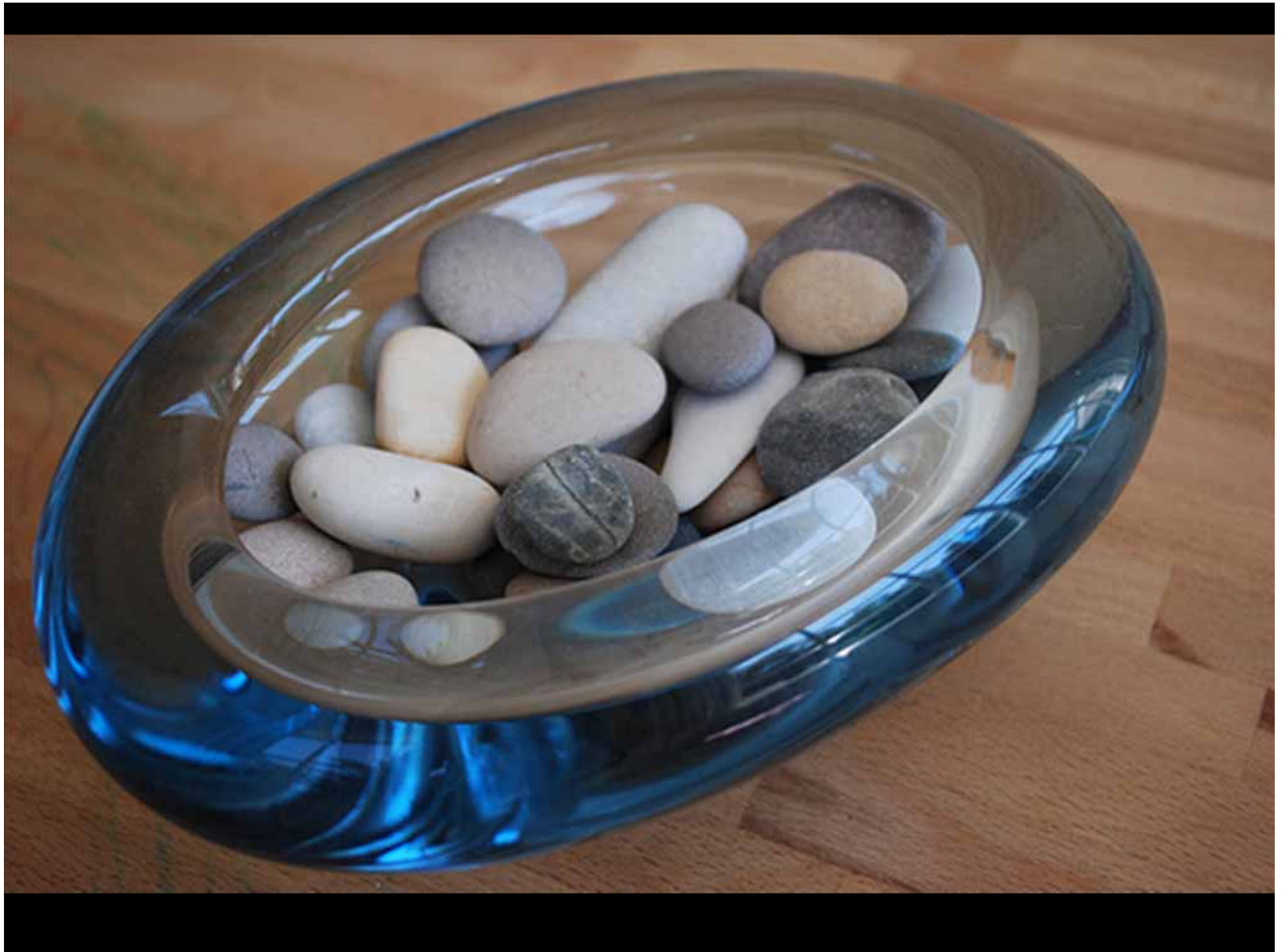


Planned Giving

“If you have left _____ in your will, please let us know so that we may thank you during your lifetime.”

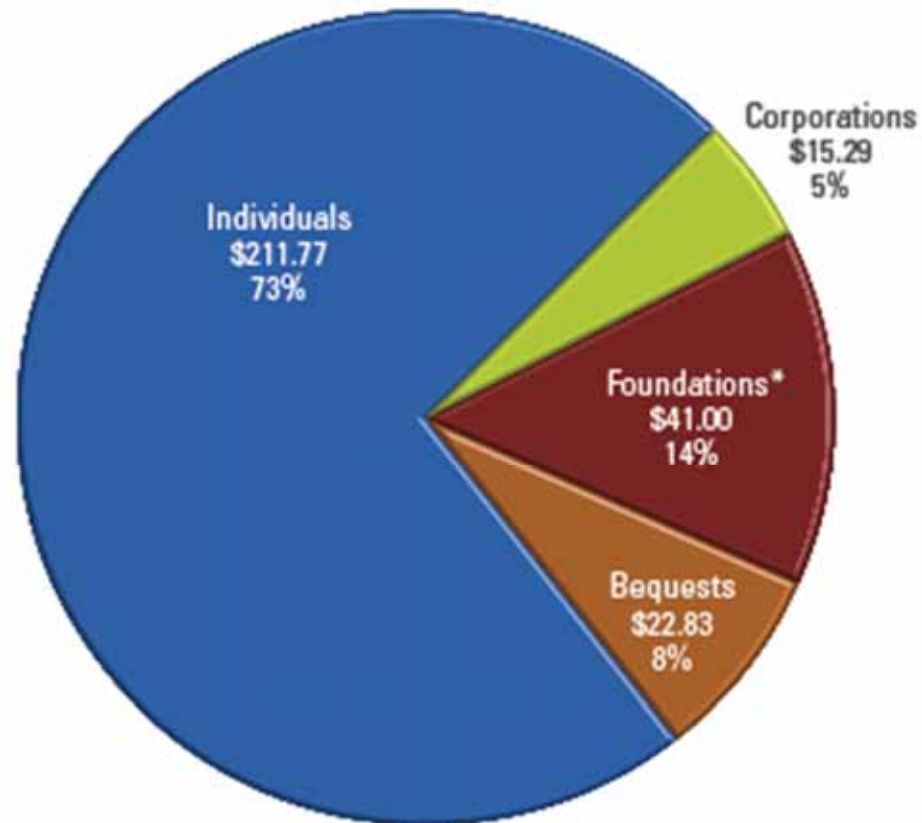
Start a Legacy Club





2010 charitable giving Total = \$290.89 billion

(\$ in billions – All figures are rounded)



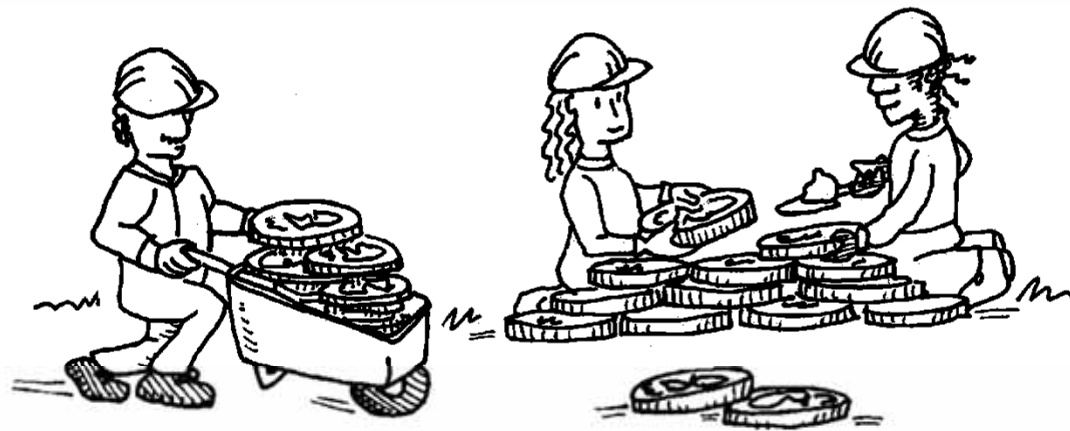
*The giving by foundations estimate is provided by the Foundation Center.

Source: *Giving USA Foundation*TM / **GIVING USA 2011**

Frames of Reference

- Fundraising is about building relationships; only 10% is about “asking”
- All Board Members fundraise
- You have to give yourself to be effective as a fundraiser
- \$1,000 is not as much money as it used to be





Fifty-Three Ways

for Board Members to Raise \$1000

by Kim Klein



A Word About Donor Files

- You need them
- Include essential contact info
- Copies of everything that comes from THEM – including email and checks
- Strategy and cultivation planning



Thank You



David Allen | Development for Conservation LLC

Services

Call me for:

Strategic Planning

Board Development

Development Audit

Capital Campaigns

Board Training

Major Gift Training

fundraisinghelp@sbcglobal.net

608/239-5006 (cell)

