
Index

A

Accountability, 190, 191, 197–199, 201
Action steps
 components of development plan, 91, 92
 fundraising, 113, 116
 goals and objectives, 9, 14, 46, 78, 79, 81–86, 98, 101, 114
Allison, Michael, 17, 45
Annual fund, 39, 99, 111, 112, 116, 190
Annual report, 109–111
Approval of plan, 75, 114, 116
Association of Fundraising Professionals (AFP)
 case and case statement distinguished, 108
 Code of Ethics, 184
 consultants, list of, 31

B

Benchmarks
 benchmarking systems, sample forms, 166–180
 fundraising costs, 181–186
 importance of, 190, 191
 and lack of previous performance data, 22, 23
 monitoring the plan, 160
 need for, 14
 objectives, 79–81
 as part of development plan, 8
 return on investment, 186–188

 steps, 189, 191
 strategies, 181
 timeline as, 113, 114, 160
 use of in keeping plan alive, 163
Benefits of development plan, 9
Big Online Database, 104
Board of directors
 accountability, 190, 191, 198, 199, 201
 annual appeal, 97, 98
 approval of plan, 116
 and development audit, 48, 49
 development committee, 74, 98
 evaluation form, 204
 evaluation of, 199
 fact sheet, sample form, 157
 fundraising, involvement in, 96–99
 fundraising assessment form, 205, 206
 fundraising progress chart, 202, 203
 and goal setting, 74, 75, 79, 85, 97, 114
 members, selection of, 4
 new members and impetus for development planning, 41
 planning process responsibilities, 26, 27, 33
 presentation of plan to, 75
 progress reports to, 194
 recognition, 194, 196, 201
 role of in development planning, 72–74

Budget
 as benchmarking system, sample form, 166
 changes in and revision of development plan, 161
 and development planning, 44, 52
 as part of development plan, 9, 14
 and strategic planning, 11, 12

C

Capital campaigns, 111–113, 116
 board training, 98, 99
 and changes in goals, 200
 and need for development plan, 39, 40
 Case for support, 115
 and importance of development plan, 40
 and public relations, 108, 109
 and role of development officer, 30
 Case statement, 108
 Change
 effect of on development plan, 160–163, 165
 and flexibility of plan, 164, 165, 200, 201
 and need for revising development plan, 12, 13, 160–163, 189
 Checklists. *See also* Forms
 consultants, selecting, 31
 development audit, 69, 70
 Chief development officer (CDO)
 board meetings, attendance at, 73, 74
 CEO as, 25
 hiring of and life cycle of organization, 2, 4, 5
 implementation of plan, 159, 160, 190
 monitoring the plan, responsibility for, 159–161
 and need for development planning, 40, 41
 and organization commitment to development, 42
 planning process, role in, 18, 20, 21, 23, 32
 reporting to CEO, 95
 responsibility for planning, 72
 titles, 18
 turnover, 37, 38
 Chief executive officer (CEO)
 approval of plan, 75, 114, 116
 commitment to development, 42
 as development officer, 25
 and development planning, 41
 hiring of and life cycle of organization, 4
 planning process, responsibility for, 23, 25, 32
 reporting to, 95
 responsibility for development planning, 72
 succession plan, 161

Chief financial officer (CFO)
 hiring of and life cycle of organization, 4
 planning process, role in, 25
 responsibility for development planning, 72
 Combined Federal Campaign, 183
 Commitment
 board of directors, 98, 99
 importance of, 41, 42
 Philanthropic Profile Assessment Tool, use of, 5, 15, 16, 23
 to planning, 52
 volunteers, 199
 Communications, 91, 115
 donors, 105, 106
 public relations, 107–111
 Components of development plan, 91, 92, 114–116
 communications, 91, 105–111, 115, 116
 donor relations, 91, 101–107, 114, 115
 fundraising. *See* Fundraising
 infrastructure, 91–101, 115
 Confidentiality, 105
 Consultants
 and development audit, 47, 48
 locating, 31
 planning process, responsibility for, 30–33
 request for proposal (RFP), 30, 31
 selecting, 30, 31, 34, 35
 Costs of fundraising, 181–186
 Crisis planning, 163, 165
 Cultivation techniques, 106, 107, 115

D

Daft, Richard L., 2
 Development audit
 areas assessed, 48–51
 audit form, sample, 58–60
 board, role of, 48
 checklist, 69, 70
 consultant, need for, 47, 48
 and development planning, 46
 and need for planning meetings, 76
 and preparing for consultant, 31, 32
 purpose and scope of, 47
 report included in development plan, 113
 sample audit and plan, 117–149
 staff, role of, 48
 when needed, 47
 Development committee
 formation of, 98
 members of, 98, 196
 planning process, responsibility for, 27–30, 33, 74

presentation of plan to, 75
 progress reports to, 194
 terminology, 27, 28
 use of consultant in lieu of, 30
 Development materials, 109, 115
 Development office. *See also* Development staff
 organizational charts, 150, 151
 public relations, responsibility for, 107–111
 resources needed and support of CEO, 23, 25
 Web site, responsibility for, 109, 115, 116
 Development officer. *See* Chief development officer (CDO)
 Development staff. *See also* Development office
 chief development officer. *See* Chief development officer (CDO)
 and development audit, 48, 49
 new staff and need for development planning, 40, 41
 organizational charts, 150, 151
 as part of development plan, 94–96
 planning process, responsibility for, 18–21, 32
 stress levels, 38, 39
 Direct mail, 45, 100, 112
 Donor Bill of Rights, 115, f158
 Donors
 board members, role of, 26
 costs of acquiring new donors, 182–184
 cultivation, 106, 107
 Donor Bill of Rights, 105, 115
 guides for, 183, 184
 identifying, 102–105, 152–156
 and importance of development plan, 8, 39, 40
 relations, 101–107, 114, 115
 research, 103–105
 role of board in identifying, 99
 software, 92–94
 stewardship, 105, 106
 thanking, 105, 106

E

Eighty/twenty rule, 185
 Elements of development program, 6, 9–13
 Ethics, 184
 Evaluation of plan. *See also* Benchmarks;
 Monitoring the development plan;
 Performance measurement
 importance of, 201
 need for, 8
 Events. *See* Special events
 Expectations, unrealistic, 37

F

Failure to plan, 6–8
 Flexibility, need for, 164, 165, 200, 201
 Form 990, 183
 Format of development plan, 113, 114, 164
 Forms
 benchmarking systems, 166–180
 board of directors, evaluation of, 204
 board of directors, fundraising assessment, 205–207
 board of directors fact sheet, 157
 consultant selection checklist, 31
 development audit, 58–60
 development audit and plan, 117–149
 development audit checklist, 69, 70
 development plan chart, 87
 development planning worksheet, 61–66
 development program evaluation, 53–57
 Donor Bill of Rights, 158
 fundraising progress, board of directors, 202, 203
 organizational chart, large development office, 150
 organizational chart, small development office, 151
 potential donors, identifying, 152–156
 schedule for development planning, 88, 89
 special events evaluation, 67, 68
 Foundation Center, 104
 Foundations, research on, 104
 Fundraising
 activities, 111, 112, 116
 assessment form for board members, sample, 205–207
 board members, role of, 48, 49, 96–99
 constituencies, 111, 112, 116
 costs of, benchmarking, 181–186
 materials, 109, 115
 methods, 112, 113, 184
 program components, 10
 progress chart for board of directors, sample, 202, 203
 volunteers, 100, 101

G

Gantt charts, 164
 Goals
 action steps. *See* Action steps
 board involvement, 74, 75, 79, 85, 97, 114
 budget, role of in establishing, 44
 failure to meet, 197, 198
 and failure to plan, 6, 7
 long-range, 46, 51, 200
 and meetings, 75

Goals (*continues*)
 nonfinancial, 44
 objectives distinguished, 76
 as part of development plan, 9, 14
 and planning process, 20, 22
 public relations and communications, 108
 realistic, 39, 164, 190, 191
 setting, 76–81, 85, 86
 short-range, 46, 51, 200
 support of CEO, 25
 unrealistic, 43, 189
 Grace, Kay Sprinkel, 28
 Grant Station, 104
 Grants
 and failure to plan, 6, 13
 fundraising methods, 112–113
 and life cycle of organization, 4, 5
 Greenfield, James, 11, 182, 185

H

Hardware, 94

I

Implementation of plan
 changes, planning for, 160–163
 and keeping the plan alive, 163–165
 responsibility for, 159, 160
 Infrastructure, 91–101, 115
 Internet
 research, 103, 104
 Web-based fundraising, 113, 115
 Interviews, development audit, 48

K

Kaye, Jude, 17, 45

L

LAI principle (linkage, ability, and interest), 8
 Legal standards, compliance with, 184
 Levins, Wilson C., 185
 Life cycle of organization, 2–5, 13

M

Marketing director, hiring of and life cycle of organization, 4
 McNamara, Carter, 2, 3
 Media kits and media releases, 111, 115
 Meetings
 board of directors, 73, 74
 development committee, 74

 planning, 75, 76, 85
 planning tips, 77
 Monitoring the development plan, 159, 160
 benchmarks. *See* Benchmarks
 and changes in organization, 160, 161
 and keeping the plan alive, 163
 need for, 190
 responsibility for, 164, 190
 Moves management, 8, 185, 191

N

National Center for Charitable Statistics, 186
 Natural disasters, effect of on plan, 162, 163
 Need for development plan, 6–8, 38–41
 Newsletters, 107, 108
 Ninety/ten rule, 184, 191

O

Objectives
 action steps. *See* Action steps
 board approval, 114
 failure to meet, 197, 198
 goals distinguished, 76
 and meetings, 75
 as part of development plan, 9, 14
 realistic, 190, 191
 setting, 76–81, 85, 86
 SMART, 80, 86
 success, celebrating, 193, 194
 support of CEO, 25
 unrealistic, 189
 Organizational charts, samples, 150, 151

P

Performance measurement, 52
 benchmarks. *See* Benchmarks
 evaluation form, sample, 53–57
 evaluation of board, 199
 past results and development planning, 42
 and revision of plan, 189, 190
 Philanthropic Profile Assessment Tool, 5, 15, 16, 23
 Planned giving, 45, 99–101, 109, 111–113, 116, 196, 197
 Planning process
 development plan chart, 87
 goals and objectives, setting, 76–81, 85, 86
 meetings, 75, 76, 85
 for next plan, 200, 201
 preparation for, 41–45

responsibility for. *See* Planning process, responsibility for
 schedule, sample form, 88, 89
 when to start development plan, 37–41
 worksheet, 61–66
 Planning process, responsibility for, 17, 18, 72–74, 81–85
 board of directors, 26, 27, 33
 chief executive officer, 23, 25, 32
 consultants, 30–33
 development committee, 27–30, 33
 development staff, 18, 19, 32
 non-development staff, 19–23, 32, 33
 Press kits and press releases, 111, 115
 Public relations, 107–111, 115
 Public relations director, 4
 Purpose of development plan, 6–8

R

Readiness for fundraising, 23, 48, 51
 Recognition
 board members, 194, 196, 201
 staff, 193–195, 201
 volunteers, 197, 201
 Reports
 development audit, 51
 need for, 8
 progress, 194
 Request for proposal (RFP), 30, 31
 Research
 methods, 104, 115
 potential donors, 103–105
 Responsibilities
 approval, 114
 implementation of plan, 159, 160, 190
 monitoring the plan, 159, 160
 as part of development plan, 9, 14
 plan implementation, 159, 160
 planning process, 17–23, 25–33, 72–74, 81–85
 tasks as benchmarking system, sample form, 171–180
 Return on investment (ROI), 182, 186–188, 191
 Revision of development plan
 annual, 46
 and changes in organization, 160–163
 need for, 12, 13, 160–163, 189
 and new development officer, 41
 responsibility for, 159, 160
 Rule of Seven, 106

S

Scandals, effect of, 161, 162
 Seiler, Timothy L., 108
 Simon, Judith Sharken, 3
 Smallwood, Stephen, 185
 Software, 15, 30, 43, 44, 47, 49, 92–94, 161, 185
 Solicitation
 annual giving, 112. *See also* Annual fund capital campaigns, 113
 cost guidelines, 182
 development committee, role of, 29, 98
 fundraising methods, 112, 113, 116
 and moves management, 8, 191
 and need for development plan, 6, 10
 role of board members, 26, 27, 73, 99
 role of CEO, 23
 staff, role of, 95, 100
 telephone, 112
 Web site, 113, 115
 Special events, 112
 evaluation form, 67, 68
 “event fever,” 7, 13
 event planning, 38
 and need for development plan, 7, 8
 Staff
 accountability, 190, 191, 197, 198, 201
 assessment of as part of development plan, 94–96
 development staff. *See* Development staff
 hiring of and life cycle of organization, 4
 planning process, responsibility for, 19–23, 25, 32, 33
 program, 19, 20, 25
 recognition, 194, 196, 201
 Stanley, Andy, 10
 Stewardship, 105, 106
 Strategic plan
 action steps, 81
 board approval, 114
 development plan as part of, 11, 12
 and importance of development plan, 40
 need for, 11
 people involved in strategic planning, 17
 Strengths, weaknesses, opportunities, and threats (SWOT). *See* SWOT analysis
 Stress and development staff, 38, 39
 Success, celebrating, 193–197, 201
 SWOT analysis, 42, 43, 52

Index

T

- Technology, 92–94, 115.
 - See also* Software
- Telephone fundraising, 113
- Time frame for development plan, 46, 51
- Timeline
 - action steps, 81–85
 - as benchmark for plan, 113, 114, 160
 - and budgeting, 25
 - development planning, 45, 88, 89
 - importance of, 114
 - as part of development plan, 9, 14
 - and strategic planning, 11
 - tasks as benchmarking system, sample form, 167–170
 - triggers for forming development plan, 37–41
- Training
 - board of directors, 98, 99
 - software, 94
 - volunteers, 100, 199
- Turnover
 - development officers, 37, 38
 - and monitoring the plan, 160, 161

U

- Urban Institute, 183

V

- Values-based philanthropy, development, and fund raising, 28, 29
- Vision, 10, 11
- Volunteers
 - accountability, 199, 201
 - committees, 100–102
 - development committee. *See* Development committee
 - fundraising, 100, 101
 - progress reports to, 194, 196, 197
 - recognition, 197, 201

W

- Wagner, Lilya, 38, 39
- Web sites
 - Association of Fundraising Professionals, 31
 - and public relations, 107–109
 - research on potential donors, 103, 104
 - responsibility for organization's Web site, 115, 116
 - Web-based giving, 113, 115