

Development Companion

A PRACTICAL GUIDE FOR CEO'S & DEVELOPMENT PROFESSIONALS FROM DEWITT & ASSOCIATES

SUMMER... TIME for Assessment and Planning

By Brydon M. DeWitt, President

The Path of Least Resistance

There is an old story about a man discovering another man searching the ground around a street light on a starless night. The first man asked what the second was looking for and if he could help. The second man replied that he lost a valuable ring and was grateful for the offer of help.

After some time had gone by without finding the ring, the first man wondered why they were having such trouble and asked the second where he was walking or standing when the ring was lost.

The second man pointed to a hedge 10 feet away. Why, the first man exclaimed, are we looking for it here?

The light is better, explained the second man.

Before we are too critical of the man who lost the ring, we must admit that all of us tend to do the comfortable thing, if we can, rather than tackle what appears to be difficult. We, too, can be guilty of "searching in the light" instead of planning as carefully as possible to find and obtain the friends and funds our organizations require. When we do not have a plan, we will tend to spend time and energy in comfortable pursuits, whether or not they are the most productive. Writing a plan about how we should be spending our time and our organizations' resources often seems

more difficult than just doing the job. In fact, a common excuse is: "I'm too busy. I don't have time to plan."

Time is a precious commodity to any development officer. So, the most time should be spent in those activities that will produce the best possible results. The only way we can be certain that this will happen is to have a well thought out plan of action – and implement it.

This issue of the Development Companion will provide tips on how to create an effective annual action plan.



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Basic Components of Planning

All planning processes have similar components, whether you are preparing a strategic plan or an annual plan to accomplish the longer term objectives.

- **Mission** - Everything that you do or plan to do on behalf of your institution must flow from an understanding of who you are and whom you serve. In addition, you and other members of your staff should write a departmental mission statement. Both should appear at the beginning of the plan.
- **The Current Status** - In order to determine what must be accomplished in the coming year, you need to know where you stand at the present. Gather as much current data from reports and development staff discussions as you can. Also, interview other key staff, trustee leadership, and select volunteers to get their views on what was done well and how things might be done better.
- **Charting the Course** - Following the honest analysis, the objectives to be accomplished within the coming year can be set. Some of the objectives will be arbitrary because of institutional planning that has already been approved by the Board. Other objectives will have been determined by the demands of the operating budget or the plant emergencies that cannot be covered by current resources. Last, there should be objectives that will relate directly to strengthening your department's ability to serve the institution, including challenging staff

Members to become increasingly more knowledgeable and effective.

- **Assessing Progress and Making Corrections** - Following the creation of any plan, there will be information and impediments that could not have been anticipated when the plan was created. Constant monitoring of the implementation of the plan and willingness to make course corrections are essential to success.

Common Questions to Gain Perspective

1. Are the case statements for longer term goals and for the annual fund adequate and up to date?
2. What annual financial goals were attempted and were they achieved?
3. How were the financial goals set and was the process effective?
4. If you are in a capital effort, what specific goals must be accomplished in the upcoming fiscal year?
5. What pieces of printed material are being used and for what purposes?
6. Who is currently involved in telling the institution's story and how successful have they been?



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7. How has the CEO been involved and has this been a productive use of his/her time and energy?
8. Is the current system of record keeping and response to donors up to expectations? Can you get the reports you need to do your work efficiently?
9. How are volunteers being utilized in both program and fundraising activities?
10. What is the status of the internal operation of the development office?
11. Are there relationship issues within the department/institution that have an impact on your ability to function effectively?

Step by Step - Creating and Implementing the Annual Development Action Plan

For any plan to be accepted and effective, those who are stakeholders must have had an opportunity for input and, whenever possible, a major role in creating that portion which they must implement. This concept includes support staff members who are responsible for preparing mailings, providing lists, arranging meetings, and the like. It is wise to listen to those who perform the work. Because they are daily involved, they can, and do, offer good advice on how to accomplish the many nitty gritty necessary unglamorous tasks that are at the heart of every development program.

STEP 1 – Schedule a planning session for your staff members at a secluded location (a retreat center is ideal). Consider collecting cell phones to be returned at the end of the day.

STEP 2 – Make a presentation, lead a discussion, and answer questions on the overall institutional objectives that the department must help accomplish. Invite the resident and the Board Development Chair to participate in this part of the meeting.

STEP 3 – Ask each staff member to make a presentation to the group on his/her area of responsibility, including what was accomplished the previous year and the plan for the coming year.

STEP 4 – Show the interrelationships that exist between the individual areas of responsibilities; lead a through discussion of each presentation.

STEP 5 – Be aware of how any new program or expansion of a present program affects the department's budget. Determine if a request for additional funds or a readjustment of budgeted funds will be necessary.

STEP 6 – with support staff present, transfer the elements of the plan that make an impact on the department's work schedule to a master calendar. Make adjustments as may be required.

STEP 7 – Present the plan to the President for review and comments. It is important that his/her priorities are reflected in the plan for it to be accepted and successful.

STEP 8 – Present the completed plan to the Development Committee of the Board for its review and acceptance.

STEP 9 – In conjunction with the Board Development Vice Chair, distribute the plan to the full Board, make a presentation on it, and ask for the Board's acceptance and support.

STEP 10 – Board understands and accepts development action plan. The plan is implemented.



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more information

Whether or not you choose to use this format for planning, it is important that your plan include specific action steps to meet each objective and that each action step have a deadline.

Some Quotes about Planning

- *"Plan your work and work your plan."* ~ Founder of the Fuller Brush Company
- *"If you don't have a plan, any road will get you there."* ~ Henry Kissinger (It is believed)

Several by the famous author Anonymous

- *"The distance a person goes is not as important as the direction."*

- *"Luck is preparation meeting opportunity."*
- *"Failures are divided into two classes: those who thought and never did, and those who did and never thought."*
- *"If you fly by the seat of your pants, you'll spend a lot of time in the air."*
- *"Not to decide is to decide not to."* ~ Harvey Cox
- *"Our conduct is influenced not by our experience but by our expectations."* ~ George Bernard Shaw
- *"You want to do what?!!!"* ~ Anonymous
President of Anonymous Nonprofit Institution

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