

# Building a Development Plan Designed to Succeed

Presented by:

Kenny Sigler, CFRE

Founder/CEO, Five Tool Fundraising



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## Kenny Sigler, CFRE

- Over ten years working in the nonprofit sector.
- Senior Consultant and VP of Operations for a consulting firm.
- Development Director for a nonprofit in the education sector.
- Executive Director of Advancement Services at UT Tyler Health Science Center.
- Founder/CEO of Five Tool Fundraising.



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Why did you choose this topic?



# Simplicity

“Be mindful of the fact that every time you attempt to communicate more than one thing, you’re splintering the attention of those you’re talking to... If it’s necessary to deliver multiple messages, find a common theme that unites them all and push hard on that idea... The more you can minimize your proposition, the more attractive it will be.”

– Ken Segall, *Insanely Simple: The Obsession That Drives Apple’s Success*

# What we're covering today

- 1) What the COVID pandemic taught us about fundraising strategies.
- 2) How to build an effective fundraising partnership with your board.
- 3) How those lessons plus simplicity drive development planning.

# Takeaways from the pandemic

- Mission-centered vs transactional giving.
- The importance of having meaningful conversations with donors when the ask is not in the room.
- The power of good data and segmentation.

# Tips for Building a Constructive Partnership with the Board.

- 1) Respect and understand their discomfort.
- 2) Lead by teaching and training.
- 3) Play to their strengths.

# Building a Development Plan

- Remember the purpose: to clarify goals, outline **HOW** you will reach goals, and **WHEN** you will execute key activities.
- It's not just for staff. It's for a group of people to execute, monitor, and evaluate.
- Use the planning process as a training opportunity.



# Key Elements of a Development Plan

- Overall fundraising dollar goal.
- Three to five priority areas.
  - What are three areas that need to take priority in order to achieve our goal?
  - What's one area that will give us a long-term benefit if we invested more resources in it?

# Key Elements of a Development Plan

- Metrics – What will we measure? How will we determine success?
- Three to five key strategies/projects that describe in more detail how the organization will achieve its goals.

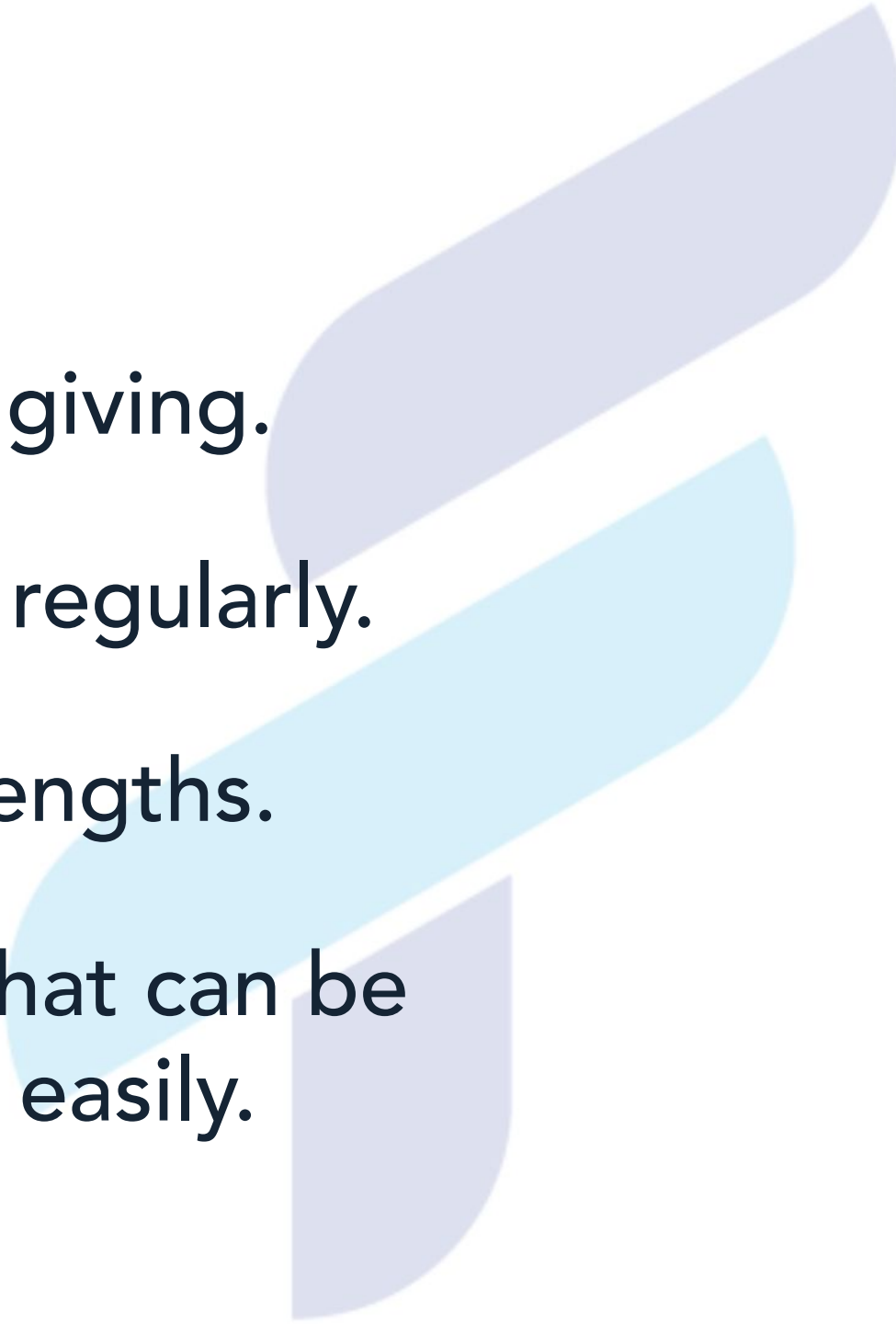
# Examples

- Priority – Improve the state of our data
- Strategy – Clean up existing records.
- Strategy – Review and revise data entry process.
- Strategy – Explore new donor management software options.

# Examples

- Priority – Increase fundraising engagement from the board
- Strategy – Incorporate training at each board meeting.
- Strategy – Board members will attend the annual conference.

# Recap

- 1) Focus on mission-centered giving.
  - 2) Teach and train your board regularly.
  - 3) Play to your volunteer's strengths.
  - 4) Build a development plan that can be understood and monitored easily.
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# Questions or Comments?



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