



## Program Reorganization = Expanded Fundraising Initiative

By Dawn M.S. Miller, CFRE

***“Don’t fear change, embrace it.”***

Anthony J. D’Angelo,  
*The College Blue Book*

I know a fundraising staff whose mantra is, “*We do everything together.*” They work on the direct mail appeals together, organize special events together, pull database reports together and meet with donors together. That’s nice, at least in theory. However, when a strong group orientation leads to “group-think,” individual creativity can suffer and fundraising initiatives can stagnate. The resulting stagnation can be as profound as a team with no cohesiveness at all.

For many nonprofits, taking a step back from day-to-day operations every few years helps to renew their sense of direction and can lead to a new stage of revitalization and expansion. But the growth process inevitably involves program reorganization.

### **Program Reorganization: The Essential Ingredient**

The term “reorganization” has earned a bad rap through the years—in some cases, for good

reason. “*Will I still have a job? You want me to do what? But we’ve always done it this way!*” (Sound familiar?)

From learning the newest social media tools to understanding the latest donor retention trends, it is the job of fund development professionals to continuously evaluate and grow their fundraising programs. If done properly and with great care, program reorganization can provide clarity and motivation—and enable the fundraising staff to raise more dollars through a variety of new and expanded initiatives.

### **Take an Honest Look at Your Current Fundraising Efforts**

Look at the program reorganization as a marathon not a sprint—it certainly doesn’t happen overnight! Conducting high-level and diversified development efforts require a solid case for funding, a written annual plan and master calendar, experienced and well-trained development staff, and clear goals and objectives that are regularly measured and evaluated.

Since our early days as development professionals, we have discussed and analyzed the *Pyramid of Giving* in a variety of ways. We

can recite the “five I”s by heart:

1) Identification, 2) Information, 3) Interest, 4) Involvement, and 5) Investment. We also know that through greater donor contact, we have greater donor growth, which leads to greater donor commitment.

But do we have a truly well-balanced fundraising program? Are we really concentrating on expanding initiatives at each level of the pyramid? During the program reorganization, dust off the Pyramid of Giving and overlay it onto your current fundraising initiatives. Determine where “fundraising holes” may lie in your program:

- Are most of your efforts focused on low-end gifts?
- Have you skipped over mid-level donors?
- Have you shied away from major donors and planned gifts?

### **Evaluate the Fundraising Initiatives in Each Tier**

As you evaluate your current fundraising initiatives in each tier, consider the following:

- Where is your development office staff *really* spending their time and effort?
- What current programs can be changed or adapted so they

become more effective and efficient?

- What is reasonable considering time and budget constraints?
- Do you have the right staff and skills for expanded efforts?

Creating a visual, such as the chart on the bottom right, will show how the staff's time is spent and can shed light on your team's priorities.

We know that the size of the gifts received by an organization point to the strength of a development effort. The rule of thumb for development income may be summed up through the Pareto Principle: *"Twenty percent of individual donors give eighty percent of the total funds raised."* (Many development professionals now believe that the numbers have shifted to a 10/90 ratio or even a 5/95 ratio.) Imagine the impact you could have if you were giving your top donors a proportional amount of time and attention. It could be time very well spent!

### The Role of the Development Staff

To take the development efforts to the next level, a team should be identified that can lead the charge. The development director should not be solely responsible for expanding the fundraising initiatives. Leadership, the religious members, staff, volunteers, etc., should be involved and understand that results will not be immediate.

When it comes time to reorganize the fundraising programs, decide which current

staff will be realigned and which positions will be filled from the outside. If the development staff is to succeed, access to individuals with fund development expertise is crucial. Consider a regular educational coaching or mentoring program if the staff doesn't have the current expertise. Staff should also be encouraged to expand their development knowledge through professional meetings, webinars and conferences (NCDC is a great place to start).

### Development Staff Changes and Meetings

The development team will need to be open and willing to change to meet, and adapt to, a dynamic work environment. Leading and directing staff entails: holding meaningful staff meetings, being available for direct reports, maintaining equitable wage and salary schedules, setting and monitoring annual goals, and developing future staff leaders.

Staff meetings are an efficient way to share information, resolve important issues, set priorities and delegate assignments. Most of all, these meetings are a place to rally the troops, to renew excitement about the nonprofit's mission, and to expose problems

that may affect the success of ongoing and new programs.

### Make a Plan and Stick to It!

I'm a planner by nature. Then again, I believe all fundraising professionals should be planners and have a written annual plan and master calendar. A few things to consider:

- *What will be done?* Develop annual plans for each donor segment and review regularly. Plan the next few steps with each segment, but be reasonable.
- *How will it be done?* Include your website, social media, online giving, etc. as integrated components of your planning.
- *Where will it be done?* Location, location, location.
- *When will it be done?* Develop timeframes for donor activities. Create a cultivation/stewardship calendar and be accountable.
- *Who will do it?* Create quantitative goals for the total number of weekly/monthly calls per solicitors, staff members, board members, etc.
- *Who will benefit?* Or perhaps will *not* benefit (be excluded) from your fundraising plans?

I know development offices that stop at 10:00 am each Tuesday

Fundraising Strategy	Person(s) Responsible	Percent of Time
First-Tier Gifts		
Mid-Level Gifts		
Major Gifts		
Planned Gifts		

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while staff members place thank you calls to donors of all levels for 30 minutes. A meeting immediately follows and the staff shares their donor stories. It's a wonderful bonding experience for the staff members. It has also grown their donor base and average gifts have dramatically increased. It works because the staff is committed to making it work each week.

### Key Benchmarks

The costs for the reorganization of the development programs are an investment in the future of the nonprofit. Carefully planned performance and evaluation steps should be required—as well as key benchmarks in each fiscal year.

For example, individual development officer performance may be evaluated on the following annual criteria:

1. total dollars/gifts raised and CDR;
2. total number of “Donor Call Reports” submitted;
3. quality of cultivation and stewardship practices, and general progress toward funds raised;
4. quality of annual work plan; and
5. ability to implement annual work plan.

Reorganizing your fundraising programs will educate the participants as the process unfolds so that change is genuine and effective. Small changes in your development office each year can really add up to big revenue increases.

### Open Dialogue

During the program reorganization process, recognize that this is an opportunity for open dialogue among leadership, the religious members, staff, volunteers, etc. This

process will also provide a new level of understanding, cooperation and participation of the fundraising efforts. As your nonprofit evolves, so too should your fundraising efforts.

Consider your own organization and its fundraising efforts. Is it time to change your current paradigm and expand your fundraising initiatives? If so, start your program reorganization today! ■ **NCDC**

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