

## Moving Your Mission Forward

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It is time for year-end gift acknowledgements and tax receipts to go in the mail. For many development professionals, January is often the time of year for shifting gears, perhaps from a winter appeal to an upcoming signature event or from fundraising for operations to planning for a special purpose campaign. And while you know that major gifts fundraising is an ongoing, season-less process, this time on the calendar often challenges staff and volunteers to stay motivated and inspired.

Whether you just finished your fiscal year or in the middle of one, here are six steps your organization can take to move your values-based relationships forward to further your mission in coming months:

1. **Acknowledge hard work.** After summer planning, the fall frequently is the busiest time for staff and volunteers engaged in your development efforts. Now that it's winter, take time to thank those stakeholders who have been cultivating, soliciting and stewarding relationships with donors and prospects. Recognize these efforts at your board and staff meetings, and with a personal call or note this spring, before planning starts again.
2. **Engage all your board members in thanking supporters.** In a "perfect" fundraising world, all board members are involved throughout the cycle of major gifts. Between now and perfection, ask board members to personally sign gift and tax letters during your next board meeting.
3. **Devote time to data in order to evaluate progress and opportunities.** Budgeting for an annual fundraising goal often is based less on strategy and more on "the gap" between fees, membership, tuition, and other sources of hard income. Whether you met, exceeded, or fell short of your year-end target, analyze the donors who you acquired, who upgraded, who renewed, and who lapsed. What do the numbers tell you about where your development team should be spending their time this winter and spring?
4. **Reach out to those donors who made a first-time major gift, and to those regular donors who didn't.** Use year-end results to "tweak" your prospect list. Sit with those prospects who made a new or upgraded major gift, and ask about their motivations. What other information would they like to learn about your organization? Who would they like to hear from, and how frequently? Would they like to get more involved, and if so, where might they fit in? For those supporters who did not give in 2010, invite further conversation about changes in their personal priorities or circumstances.
5. **Refresh your case for support.** The "new normal" means fundamental shifts in revenue sources for nonprofits in every sector. Make sure the story you are sharing reflects current realities, but always leads with the relevance, urgency and community benefit of your mission.



**6. Remember why major gifts are a priority for your development program:**

- According to GivingUSA, almost 85 percent of charitable gifts come from individuals
- Donor-centered, face-to-face relationships will foster a deeper, mutual understanding and investment in your mission and vision than the most exciting event
- Retaining and upgrading current donors, vs. acquiring new ones, is good business. According to best practices, it costs \$1.50 to raise a new \$1.00. Investing in meaningful relationships takes time, but the ROI is well worth it

After you have celebrated, acknowledged, and analyzed your year-end fundraising results, use the coming weeks to validate or shift your development priorities. Understanding your successes, challenges, and opportunities will reengage loyal volunteers and reinvigorate dedicated staff!