



Development Strategy Overview

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Three objectives:

- 1) Strategic overview of the pipeline and how it will be used
- 2) What should a development person do each Monday morning
- 3) Announcement of special BETA services for pilot group

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Pipeline Overview



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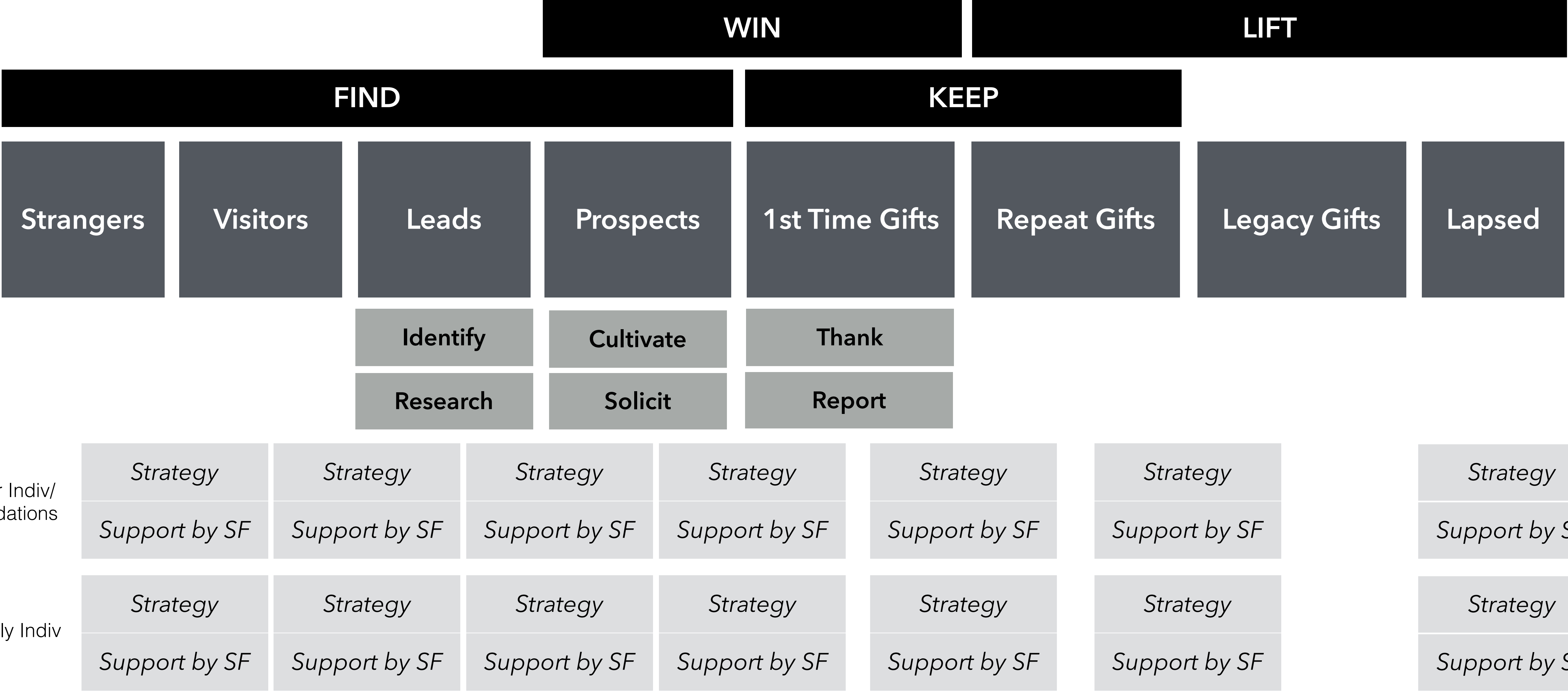
Pipeline Overview



Pipeline Overview



Pipeline Overview



Pipeline Overview

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Repeat Gifts

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Major Indiv/
Foundations

Monthly Indiv

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Pipeline Overview



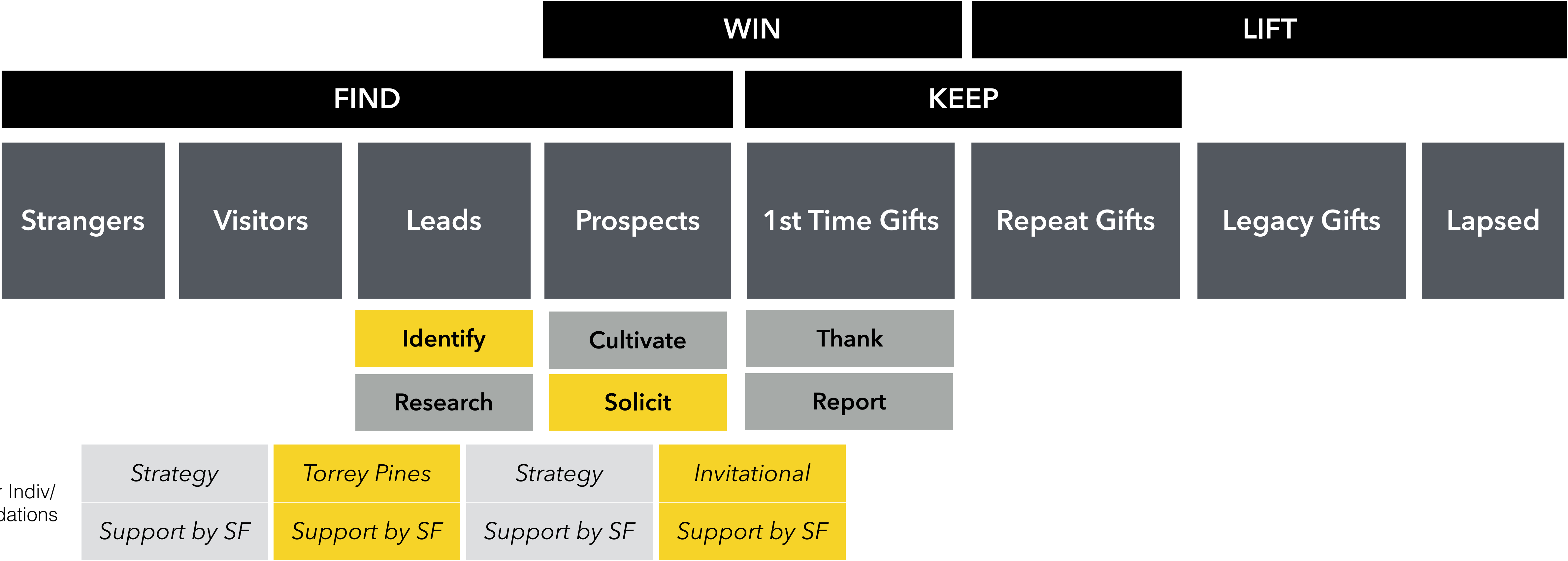
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Strategy	Torrey Pines
Support by SF	Support by SF

Torrey Pines POE Event - 1:6 Ratio (Dev Staff to Visitor - Relationship Assignment)

- 1) Gather development team 3 times throughout event - beginning, middle, & end
- 2) All names/SF on projector
- 3) Enter notes and follow-up tasks as a group - discuss strategy

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Invitational

Private Golf

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Major Indiv/
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sponsorship campaign event fundraiser
challenge match capital campaign
golf tournament
banquet
direct mail "see the story"
email
phone calls cycling event
appointments gala

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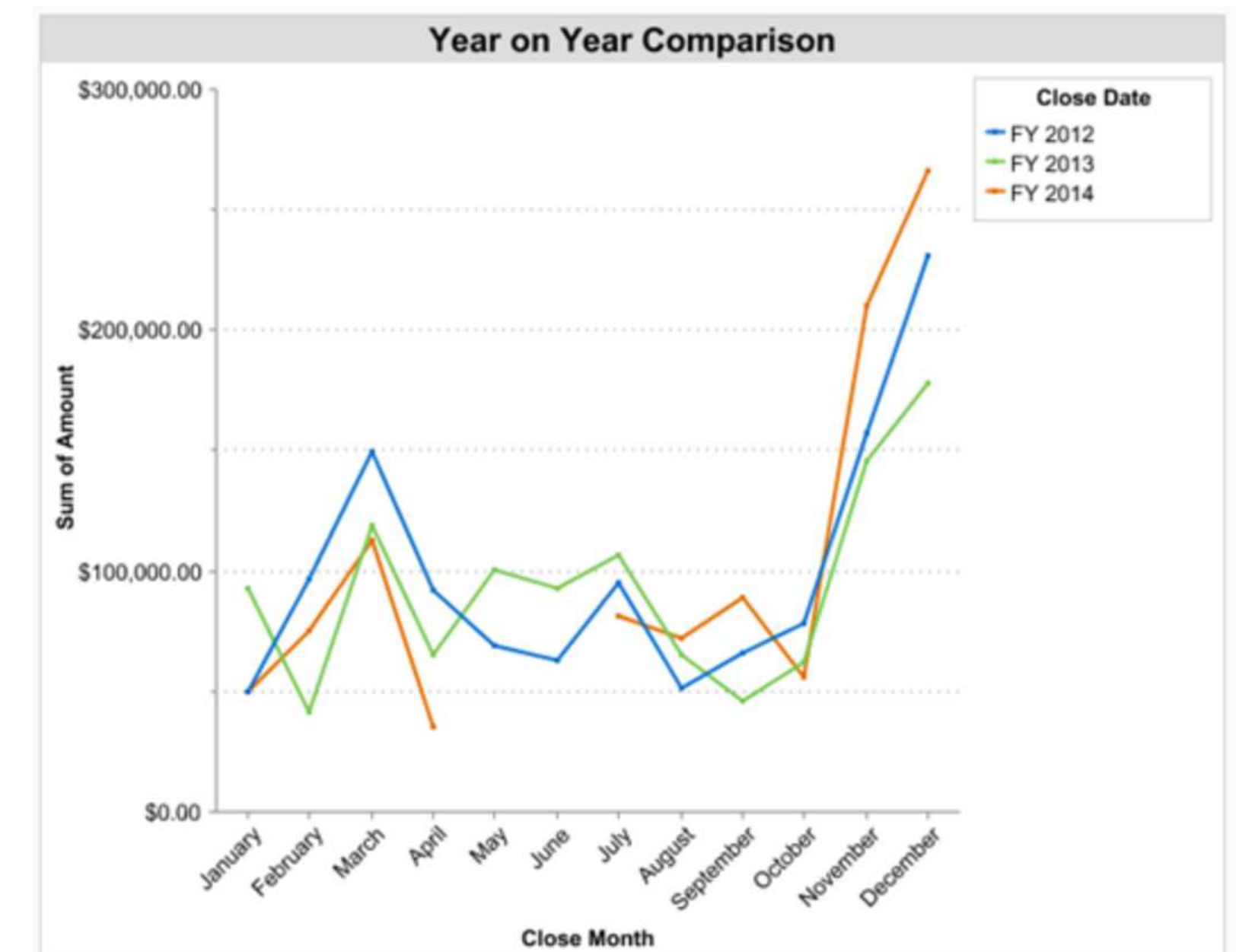
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Basic Weekly:

- “First Time Donations” report of last week – delegate assignment of handwritten thank you note for any amount. Record Thank You in SF.
- “Closed/Won Donations” report of last week, filtered by relevant “major” amount – Add task for phone calls THIS WEEK to those donors
- Reflect on last week’s appointments. Any notes you forgot to enter into a contact, or follow-up tasks that need to be recorded?
- Look ahead at this week’s follow-up tasks for assignments.

Basic Monthly:

- Review “Top 10 Household Donors” report for changes. What is my plan for these 10 this quarter (touch every quarter)? Record notes now and schedule next action.
- Review “Donor Year on Year Comparison” report – How are we doing this month compared to previous years? *Why* are donations higher/lower? What do I need to do about it?



Basic Quarterly:

- Review “Contacts by Best Giving Year” report – why was 20xx the best giving year for the highest % of your donors? How do we repeat that best giving year?
- “Household Giving by Range” (Table) – Who are the donors in the highest bucket? What is our strategy for them as a group? Was their best giving year the same as the best giving year above? What does that say about what our strategy should be?
- “Household Giving by Range” (Pie Chart) – What % of our donors are giving in each range? How does this inform where our development \$ should be invested?
- Review “New Contacts Last Quarter” - What follow-up tasks should be entered for these new relationships?

Advanced:

- SF Pipeline management: see donors that are lapsing in real time.
- NPSP Campaign Metrics: For each strategy, track ROI, CPM, CPD, CP\$
- NPSP Grants Management: Total Goal for the year, # Open in Pipeline, Top Grants Received by \$, Follow-up tasks on Grant Reports (due dates recorded)
- NPSP Donation Forecasting: Recording pledges, follow-up tasks for the “close”

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Special Beta Services for HOA Members

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Special Beta Services for HOA Members



Monthly Indiv

Run A/B Scientifically Optimized Lapsed Donor Campaigns twice a year

- 1) NSC and VSG test for high ROI language, photos, and segments
- 2) You run "SYBUNT" Report - in June and December
- 3) Submit to VSG for optimized lapsed campaign - \$ per piece TBA

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Monthly Indiv

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New Donor Campaign

- 1) Run SF new donor report
- 2) Import new donors into VSG Storefront
- 3) Click run on new donor campaign

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Support by SF

Scrub New Contacts for Major Prospects (Net Worth, Charitable Giving, etc)

- 1) You run "New Contacts" Report - 4,000 contacts FREE for Pilot Chapters
- 2) Submit to NSC for analysis
- 3) WealthEngine (unverified) report provided to chapter with phone consult (requires about 1 month)

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Next Steps:

- 1) Add weekly and monthly reports to SF Instances (next week!)
- 2) HOA is beta testing Quarterly and Advanced Reports for now
- 3) Hire NSC SF Administrator (Dependent on funds from new chapters)
- 4) Executive Director committee working on Development Growth Guide (Released Fall 2015)
- 5) Interactive pipeline (Wikipedia format) published for idea-sharing (Fall 2015)

