



Essentials of Development: Program Overview

Presented in partnership with the M.J. Murdock Charitable Trust

Description: Essentials of Development is designed to equip small to mid-sized nonprofits with the knowledge, skills and tools to build a thriving development program by cultivating strong relationships with individual donors.

Program Capacity: 9–12 Idaho-based nonprofit organizations

Why participate in this program?

- Essentials of Development is for small to mid-sized organizations that:
 1. Need help increasing the contributed income base of their revenue stream.
 2. Are willing to exert the concerted effort to implement the four “Essentials of Development” in their fundraising practice.
 3. Desire to focus on increasing their individual donor base, including major donors.
 4. Are committed to including board members and development personnel in *all three training sessions*.
- Essentials of Development is NOT for organizations that:
 1. Do not have at least one paid staff member.
 2. Are looking for help mostly in the area of foundations and grants.
 3. Are seeking to get their foot in the door with the Murdock Trust or Idaho Community Foundation grant processes.
 4. Are hoping for a “quick fix” for their contributed revenue need.

Overview and Objectives

- **Essential #1: The Case Statement**

The case statement is an organization’s presentation piece for one-on-one interactions with prospective and continuing donors. Carefully composed to provide a clear overview of the organization, describe how donors can get involved in

supporting the mission, and the impact donors make when they partner in the mission.

Objectives:

- Understand the importance of effectively articulating the organization's work and the requirements to fulfill the mission
 - With donor input, identify the key components of the case statement
 - Complete a polished case statement to use in donor presentations
- **Essential #2: The Development Team**

An important component of any development strategy is having a core group of leaders (staff and volunteers) actively partnering in donor development.

Objectives:

- Understand the importance and power of having a diverse group of people to advance development work for the organization
 - Identify key people to invite to the development team
 - Establish the development team, including those who attend the class.
- **Essential #3: The Segmented Donor List**

Segmenting your donor list and having thoughtful, unique strategies for the various segments is a key factor in building strong relationships with supporters. Seminar participants will learn how to divide their roster of individual donors for maximum personalization and effectiveness.

Objectives:

- Understand the importance and power of segmenting donors
 - Create a segmented list of individual donors
- **Essential #4: The Annual Plan**
- A strong annual plan allows organizations to ensure they are on track to achieve their funding goals through a variety of activities. The plan identifies the activities and communications that are necessary for each segment of the donor list, and, importantly, informs allocation of time and resources throughout the year.

Objectives:

- Understand the importance and value of mapping out an annual plan
- Identify the many activities that comprise successful development work
- Identify tactics and activities for varying levels of donors
- Create a draft annual plan to take forward into implementation

Expectations

Participants are expected to participate in all three (3) class sessions and all scheduled coaching calls to successfully complete the program. If an absence is anticipated, please give a 72-hour notice to Nonprofit Center staff and your assigned coach.

- **Attendance:** The participating organizations must have their entire development team attend. The development team must include: the Executive Director/CEO, a Development Director or equivalent, two (2) board members, and any additional fundraising staff the organization might have.
- **Virtual Class Sessions:** All three (3) class sessions will be full-day sessions which include lectures, activities, breakout sessions, work time, and group sharing. They will be held on Zoom. There will be breaks, but participants must block out the full time.

Participants should join the Zoom meeting in a quiet and private space and should dedicate their attention to the class session. Cameras are encouraged to be on during discussions, and frequent distractions and divided attention will not be tolerated.
- **Coaching Sessions:** Organizations will be paired with an Essentials coach—who works with the organization from the survey prior to the first seminar through the remainder of the training—to assess and build the organization’s development process.

Organizations are responsible for scheduling five (5) calls with their coaches. If an organization cannot attend a coaching session, a 72-hour notice is required to reschedule.

If the organization would like additional coaching other than the hours included in the program, they must work with their coach on an additional hourly rate.
- **Surveys and Assessment:** Prior to acceptance, organizations will be asked to complete the following: Interest Form, Board Commitment Form (to be completed by each participating board member), and Placement Form.

Real-time evaluation and feedback are provided during the Essentials of Development seminars and coaching sessions. Participants will also be asked to complete a feedback survey after each class session and a final Feedback and Assessment Survey on completion of the program.

Calendar of Learning (Approximate Timeline)

Month	Activity	Estimated Time to Complete
November-December	Surveys and Assessment: <ul style="list-style-type: none"> Interest Form 	15 minutes
January	Surveys and Assessment: <ul style="list-style-type: none"> Placement Survey Board Commitment Form 	1 hour
February	Coaching Session #1	1 hour
	Session 1: <ul style="list-style-type: none"> Course Overview The Context for Focusing on Individual Donors Key Concepts of Philanthropy and Development Embracing the Donor Strategic Planning Overview Essential #1: The Case Statement Essential #2: The Development Team Conducting Effective Donor Meetings 	7 hours
	Homework (coaching provided): <ul style="list-style-type: none"> Draft case statement (prepare to share the draft with class) Hold meetings with 2 major donors to get input and feedback on the draft case statement Determine the strongest people to serve on the Development Team Gather list of your top 50 donors to work on during the next session (donor names will not be shared outside your organization) 	~ 5 hours
March-April	Coaching Sessions #2 and #3	1 hour each
May	Session 2: <ul style="list-style-type: none"> Learnings from Donor Meetings Present Initial Case Statements for Review and Refinement The Ask: An Invitation to Partner in your Mission 	7 hours

	<ul style="list-style-type: none"> • Essential #3: The Segmented Donor List • Essential #4: The Annual Plan 	
	<p>Homework (coaching provided):</p> <ul style="list-style-type: none"> • Finalize segmenting your donor list • Draft annual plan, prepare to share draft with class • Finalize case statement, and prepare to present it to class • Stand and declare prepared for next class 	~ 5 hours
June- August	Coaching Sessions #4 and #5	1 hour each
September	<p>Session 3:</p> <ul style="list-style-type: none"> • Learnings from Donor Meetings • Present Draft Annual Plans • Key Metrics for your Development Program • Final Case Statement Presentations • Creating a Culture of Philanthropy • Course Summary 	7 hours
	<p>Surveys and Assessment:</p> <ul style="list-style-type: none"> • Feedback and Assessment Survey 	45 minutes

Estimated Cost to Participate

**Pricing subject to change*

- **Members: \$700**
- **Non-members: \$850**

The value of this program – over 40 hours of development and coaching – retail for over \$10,000 per participating organization.