Getting to Goal: The Annual Development Plan for Small Budget Orchestras

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Challenges and Opportunities

<table>
<thead>
<tr>
<th>Competition for dollars.</th>
<th>You have touch with donors.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competition within the arts community.</td>
<td>You offer a donor-centric experience.</td>
</tr>
<tr>
<td>Arts is generally not a high-priority.</td>
<td>You fill a personal need.</td>
</tr>
</tbody>
</table>
Plan “The Macintosh Way”

<table>
<thead>
<tr>
<th>Right Thing</th>
<th>Wrong Thing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Right Way</td>
<td>X</td>
</tr>
<tr>
<td>Wrong Thing</td>
<td></td>
</tr>
</tbody>
</table>

Source: *The Macintosh Way* by Guy Kawasaki
Assess Your Funding Mix

Two parts to the exercise

• Easy: Where do I have the most reach now?
• Hard: Where can I create opportunities?

Goal: To determine where to make the best possible use of your time, energy and financial resources to get the best possible return.
The easy part: 20 donors can get you to goal. The hard part: figuring out which twenty.
What Donor Markets Make the Most Sense for Us?

Where do we have reach?

Where can we put time and resources for the most “bang for the buck?”
Assess Your Reach

- Patrons
- Audience
- Community
## Sample Goal Chart

<table>
<thead>
<tr>
<th>Constituency</th>
<th>Last Year</th>
<th>This Year’s Goal</th>
<th>Budget</th>
<th>Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board</td>
<td>$32,500</td>
<td>$50,000</td>
<td>$40,000</td>
<td>Added 2 new members; expect 100% giving</td>
</tr>
<tr>
<td>Foundations</td>
<td>$55,000</td>
<td>$75,000</td>
<td>$65,000</td>
<td>Includes upgrade/renewal gifts. Have identified 11 new prospects.</td>
</tr>
<tr>
<td>Corporations</td>
<td>$20,000</td>
<td>$30,000</td>
<td>$25,000</td>
<td>Can renew both corporate partners and add a third</td>
</tr>
<tr>
<td>Event (Net)</td>
<td>$56,300</td>
<td>$70,000</td>
<td>$65,000</td>
<td>Increase in table pricing and assumes renewal of key sponsor</td>
</tr>
<tr>
<td>Major Donors</td>
<td>$50,000</td>
<td>$75,000</td>
<td>$60,000</td>
<td>Will renewal 90% of donors and add two to three new donors via new board members</td>
</tr>
<tr>
<td>Annual Appeal (Net)</td>
<td>$10,100</td>
<td>$15,000</td>
<td>$12,500</td>
<td>Modest increase in program participation</td>
</tr>
</tbody>
</table>

**Total: $223,900**  
**This Year’s Goal: $315,000**  
**Budget: $267,500**
Choose The Right Campaign Activities

Consider
- Touch
- Time
- Cost

Consider your community

Don’t be afraid of letting go of things that do not work
The most dangerous phrase in the language is, ‘We’ve always done it this way.’

REAR ADMIRAL GRACE HOPPER
Touch

Visits

Events

Proposals
Sponsorships

Social Media

Mail
Time

- Visits
- Social Media
- Proposals
- Sponsorships
- Mail
- Events
Cost

- Proposals
- Sponsorships
- Social Media
- Visits
- Mail
- Events
Right Sizing Your Resources

Start with the resources you have
- Assess your talent
- Educate and train
- Focus and streamline

Only add resources if you gain
- Experience
- Expertise
- Efficiency
Maximizing Your Resources

Invest in education and skills development

Find the efficiencies
  ◦ Data management/sharing
  ◦ Streamline time spent on fundraising activities

Consider outsourcing/insourcing to help bridge gaps
Outsourcing to Insourcing

Retention
- Define needs
- Define outcomes
- Focus on
  - Experience, Expertise, Efficiency

Engagement
- Get the work done
- Create systems
- Knowledge transfer

Transition
- Staff hire
- Use systems and knowledge to move process forward
Create An Action Plan

Don’t try to initiate everything at once

Note recurring and periodic activity

Use the calendar to set priorities and assess progress
Set and Monitor Metrics

- Goals by category
- Benchmarks: how much raised, by when
- Donors (Acquired/Renewed/Upgraded)
- Visits/Calls completed
- Database growth
- Staff competencies
The Intangibles

Willingness to take risks and to make change

Related to the above:
- Celebrating successes
- Honestly embracing failures
- Making adjustments when and where necessary
- Seizing opportunities when they arise
The Intangibles

Bold commitment leading to bold action

Viewing asking for money as extending an invitation to be part of something meaningful

Strategic volunteer recruitment: inviting members who can either strengthen your existing networks or create new ones for you
Keep a good head and always carry a light bulb.

BOB DYLAN