

Crafting Your Most Effective Development Plan

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About Kim

- Kim Jennings, CFRE
- 15 years in Christian education; 11 of them in K-12
- Master's degree in Public Relations
- Consultant with Generis since 2020
 - K-12 specialist
 - Development Programs
 - Capital Campaigns
 - Coaching and Training
- Trainer/Speaker:
 - CESA (Council for Educational Standards & Accountability)
 - Independent School Associations in Tennessee and Virginia
 - Christian School Association, Arizona
 - CASE
 - Partners in Mission

Basic Precepts

- Start simple, add layers over time.
- FOR TODAY (and in all sessions like these):
Take what you need, leave the rest or put it aside until you need it.
- How I define and use “Strategy” vs. “Tactic”

Goals for Today



Goals for Today

- Critical thinking framework



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- Critical thinking framework



- CASE = “Copy and steal everything”

Goals for Today



- **Critical thinking framework**
- **Solid bones for a great development plan that you can customize to your school's DNA**



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Goals for Today

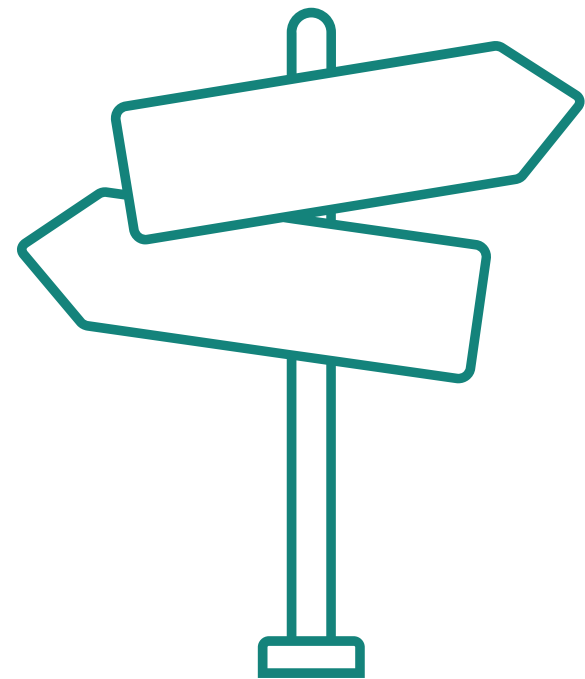


- **Critical thinking framework**
- **Solid bones for a great development plan that you can customize to your school's DNA**

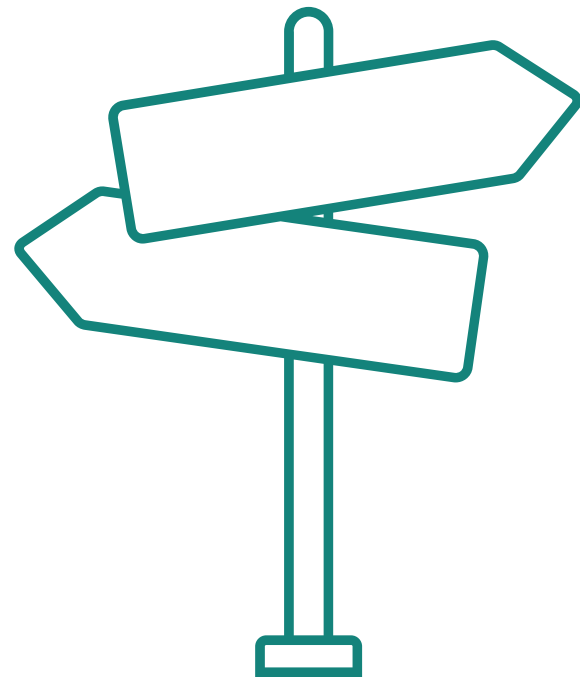


- **CASE = “Copy and steal everything”**
- **Perfect plan that works for everyone**

Agenda



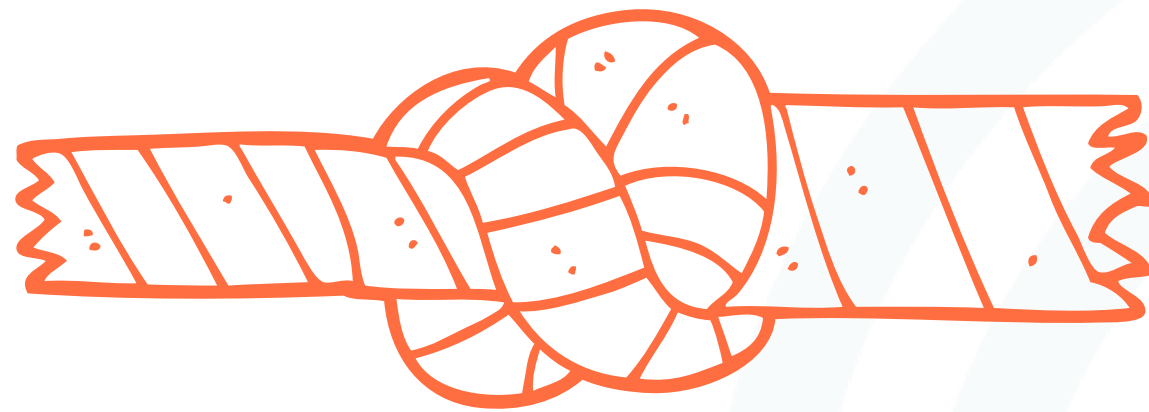
- 30,000 foot view - Overview
- 3,000 foot view - Planning Framework
- 3 foot view - Development Plan Basics
- Examples and Q&A
- Wrap Up



Overview

Living in the Tension

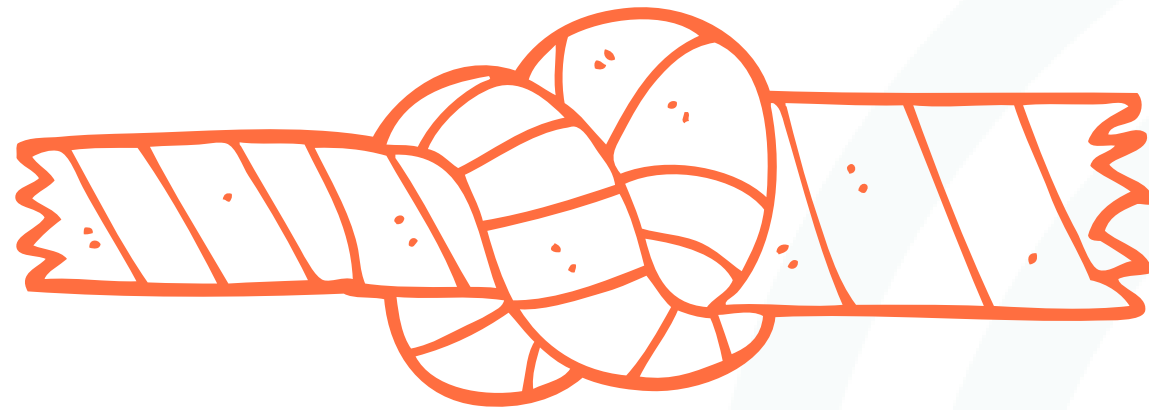
You need
to raise
funds



You're pulled
into every
other part of
school life

Living in the Tension

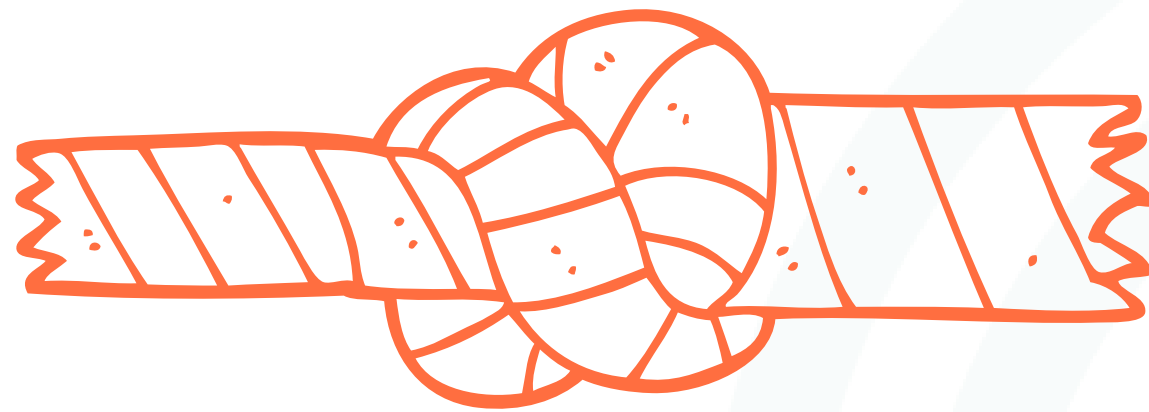
You want
and try to
be relational
in your
strategies



Your time
and
bandwidth is
limited

Living in the Tension

Ideal of a
healthy,
vibrant
Culture of
Generosity



State of your
current
culture & the
fact that
moving
culture is
hard

“If you’re not purposely and intentionally creating the culture you want to have, it’s going to be created anyway, mostly influenced by those with the strongest personalities.”

David J. Friedman, *Culture by Design*

What's the definition of a Culture of Generosity?

A suggestion...

“Culture”

The set of shared attitudes, values, goals, and practices that characterizes an institution or organization

“Generosity”

Liberal in giving

Marked by abundance or ample proportions

Characterized by a noble or kindly spirit

(My) Definition of Culture of Generosity

“An organization with shared attitudes, values, goals and practices marked by abundance and characterized by a noble spirit.”

(My) Definition of Culture of Generosity

“An organization with **shared attitudes, values, goals** and practices marked by abundance and characterized by a noble spirit.”

(culture)

(My) Definition of Culture of Generosity

“An organization with shared attitudes, values, goals and **practices marked by abundance and characterized by a noble spirit.**”

**(measurable,
strategic work)**

What does a healthy Culture of Generosity in a school look like?

Four Distinctives of an Ideal Healthy Culture of Generosity in a School

1. Abundance of people who give generously
2. Battalion of people who volunteer
3. Clear understanding in the school of how gift money is a necessary resource
4. Devotion by the development office to relationship building (not just mass communication)

TRANSACTIONAL

TRANSFORMATIONAL

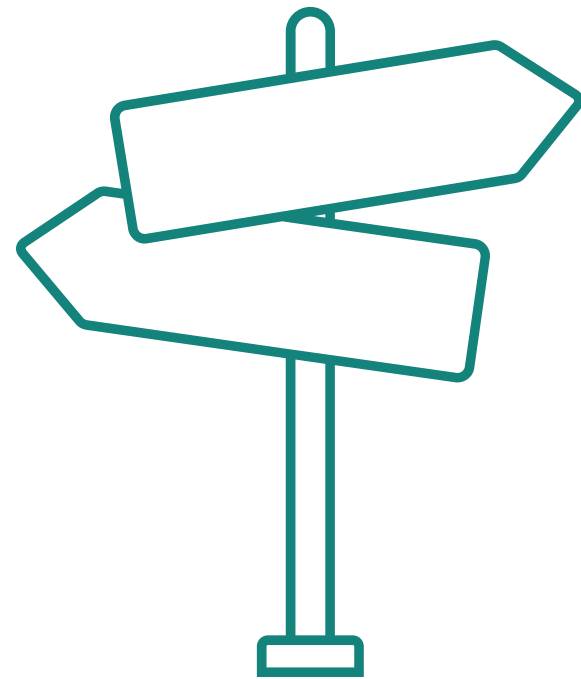


Where is *your*
development
program?

Your Guiding Principle (My Suggested **North Star Statement**)

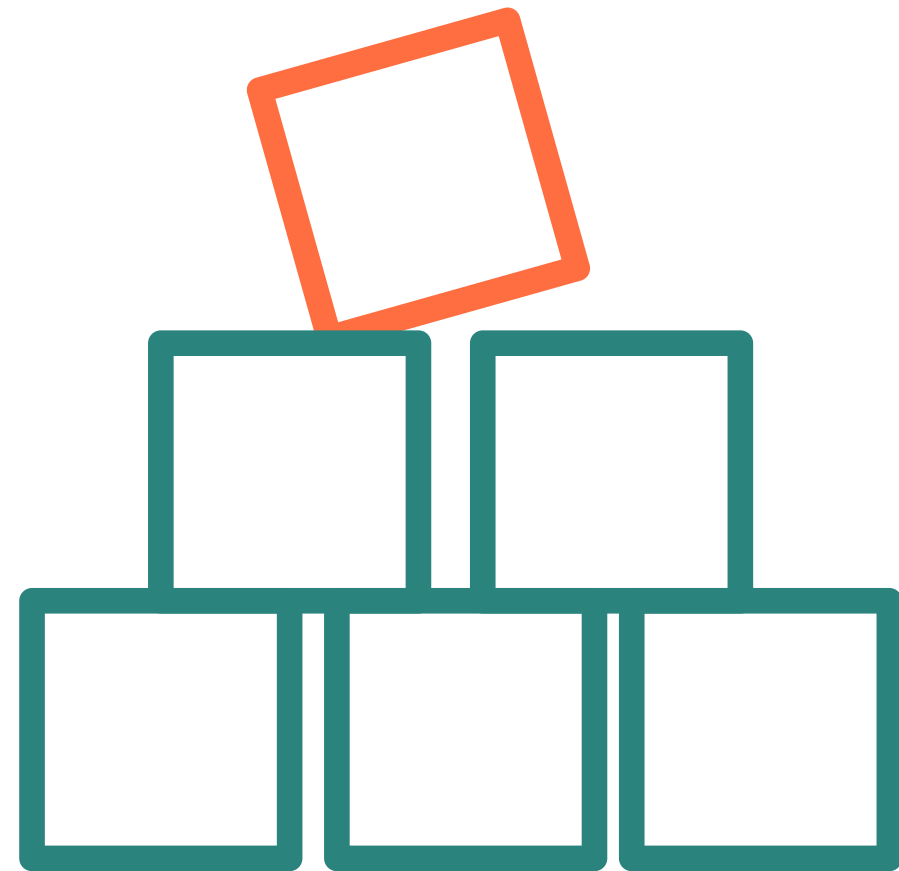


**“We will not sacrifice
tomorrow’s culture for
today’s transaction.”**



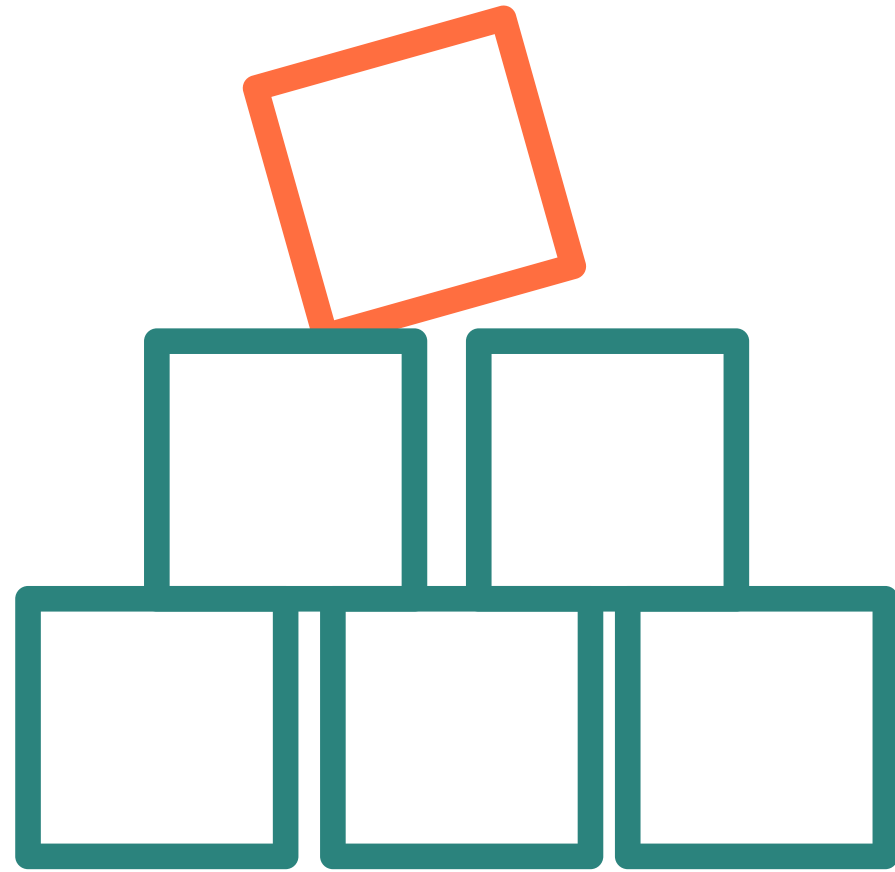
Framework for Building Your Development Plan

Basics of Your Plan



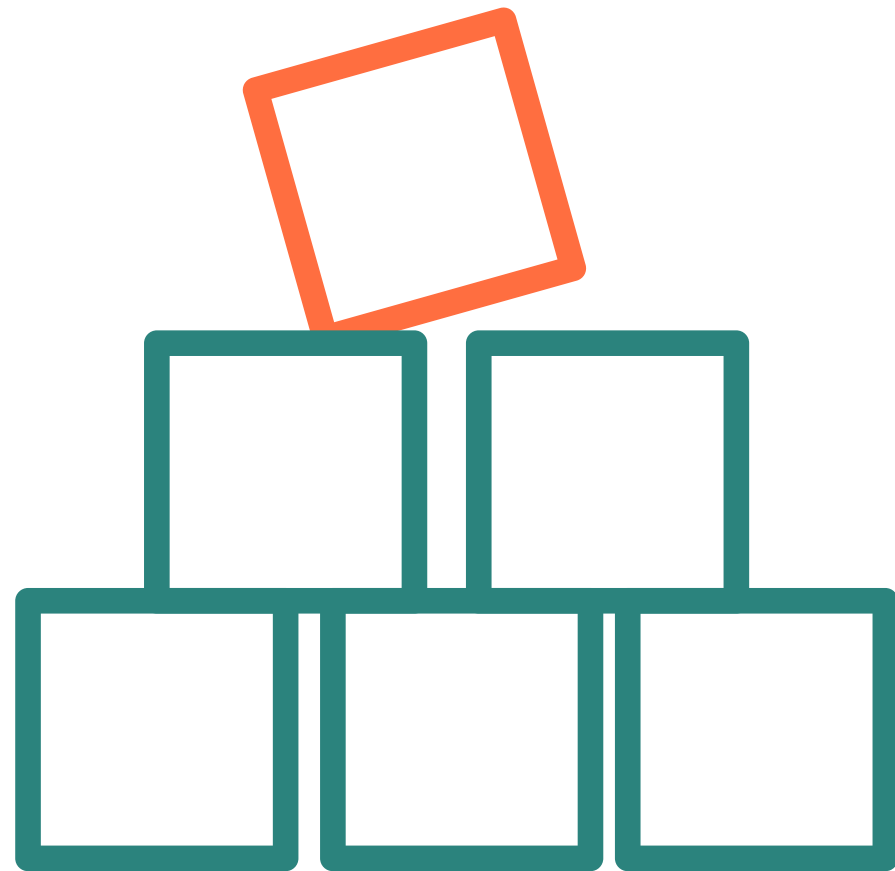
- **WHY**
- **WHEN**
- **WHAT**
- **WHO**
- **HOW**

Basics of Your Plan



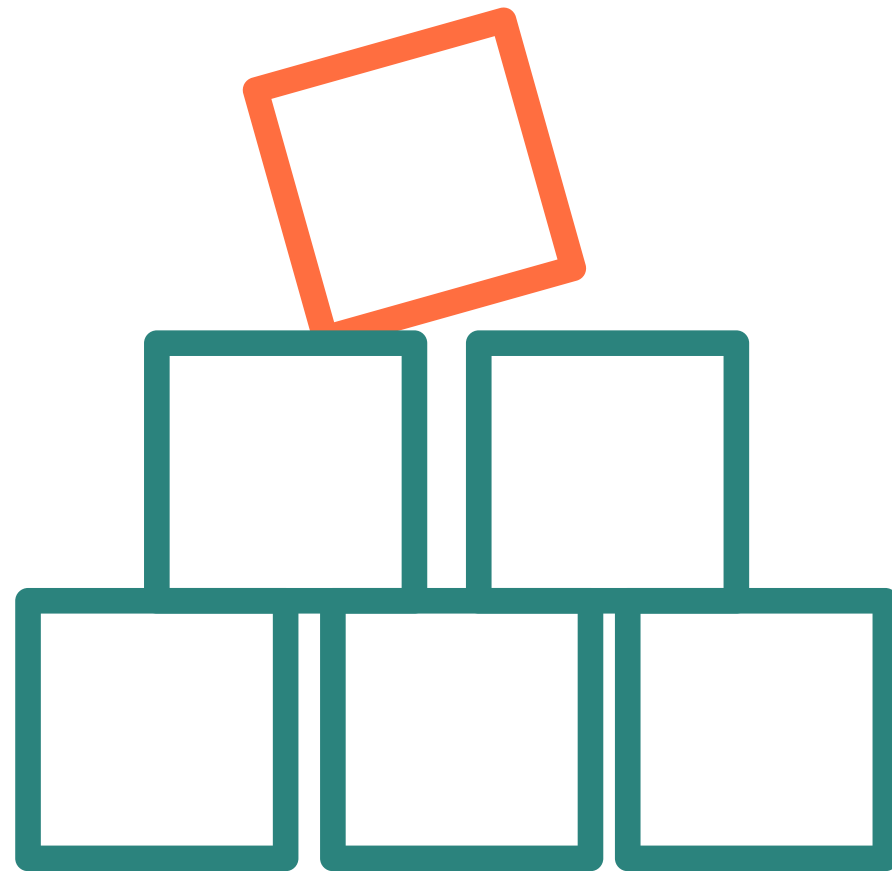
- **WHY: Strategies**
- **WHEN: Timing**
- **WHAT: Tactics**
- **WHO: Segments**
- **HOW: Execution**

WHY



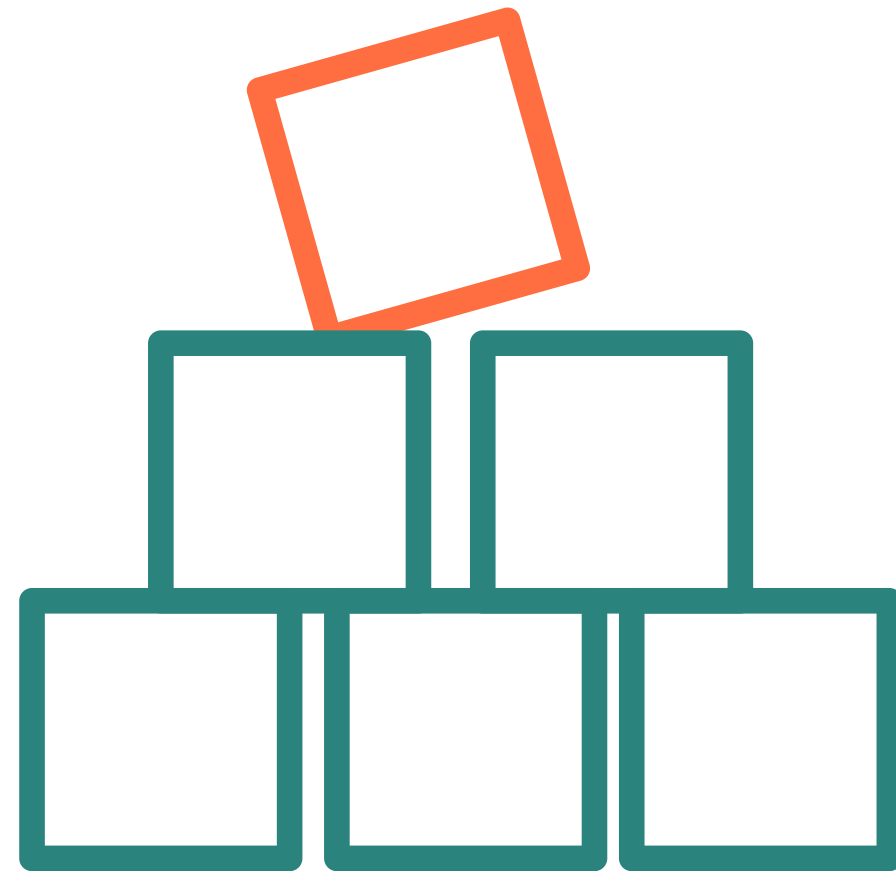
Why are we choosing to do what we're doing?
What are the **STRATEGIES** behind our choices? And, do they align with our **North Star?**

WHEN



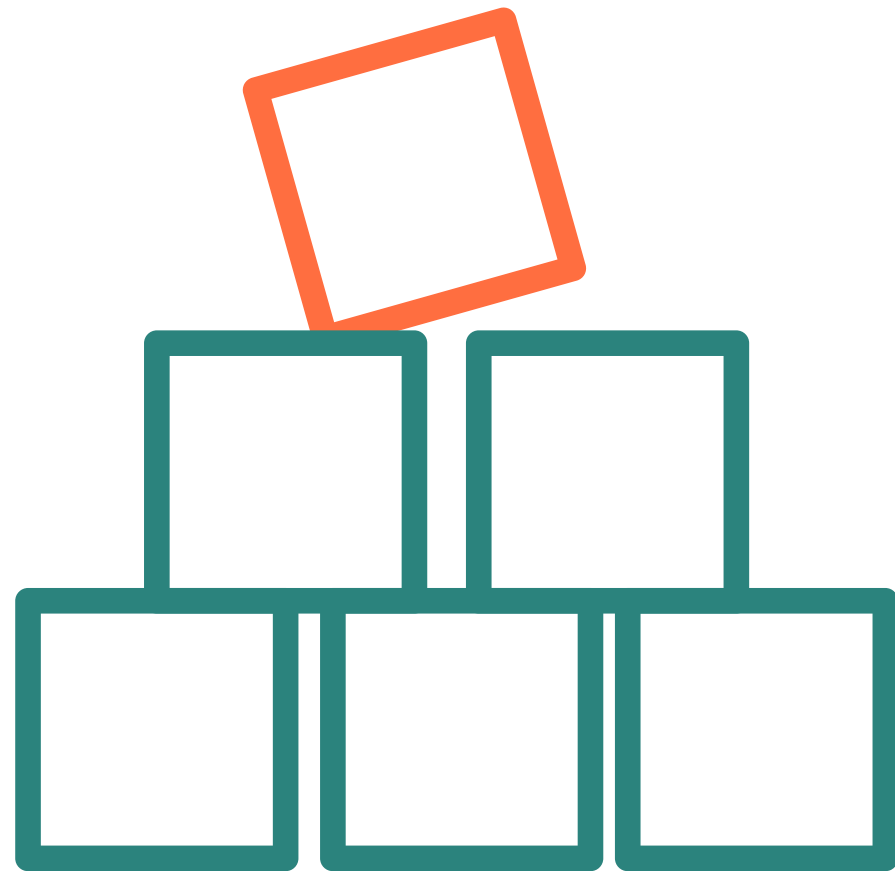
What is the best **TIMING**?
What's in our calendar that we
have to build around?
("Immovable boulders")

WHAT



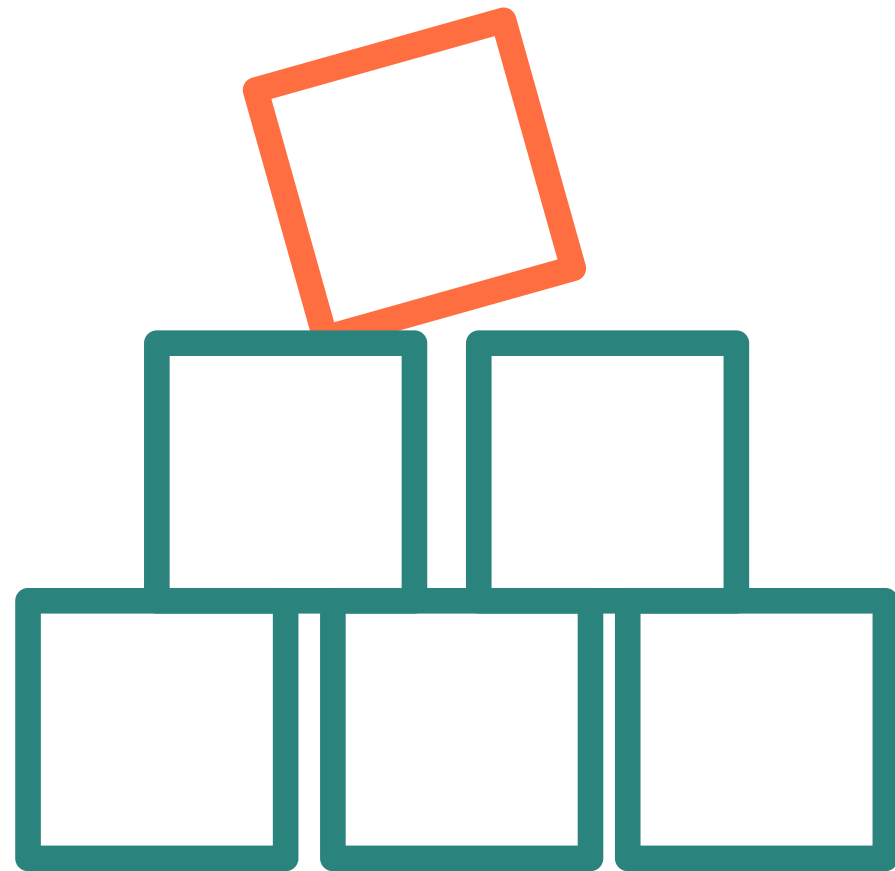
What are the **TACTICS** we're going to choose to spend our energy on, **in support of our strategies and goals?**
("Big rocks")

WHO



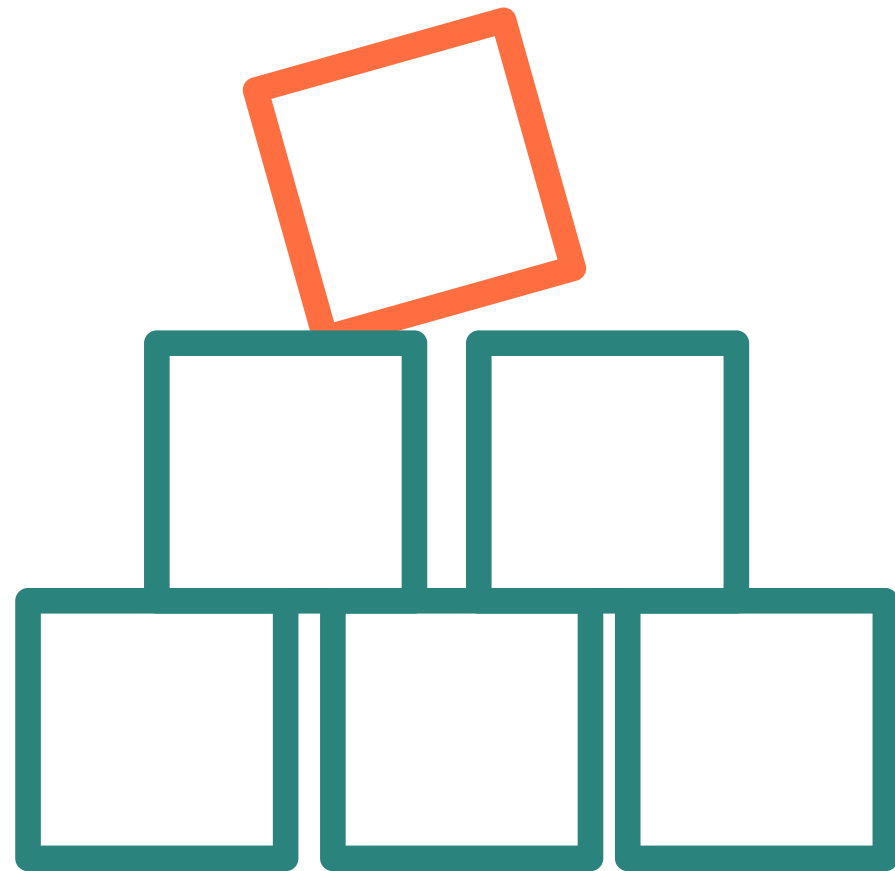
Who do we need to reach? How can we best **SEGMENT** our community to reach them most effectively?

HOW

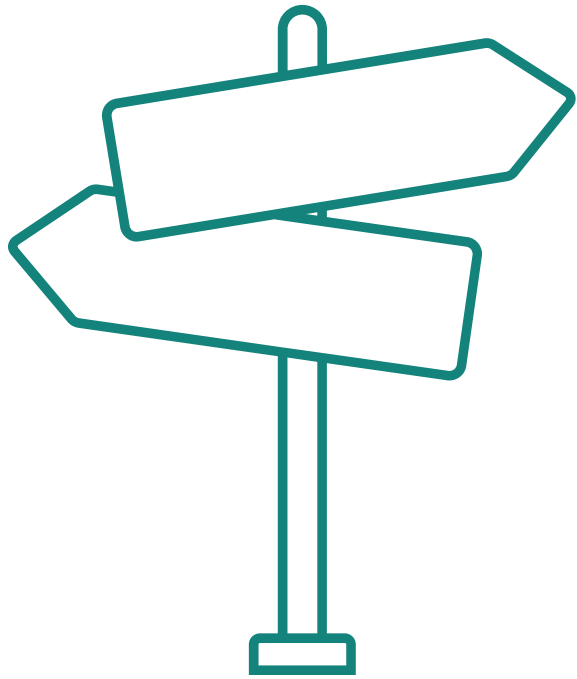


What's your plan for **EXECUTION**? Did you build in time for reflection? Time for following up? **Are you measuring what is important?**

RECAP: Basics of Your Plan



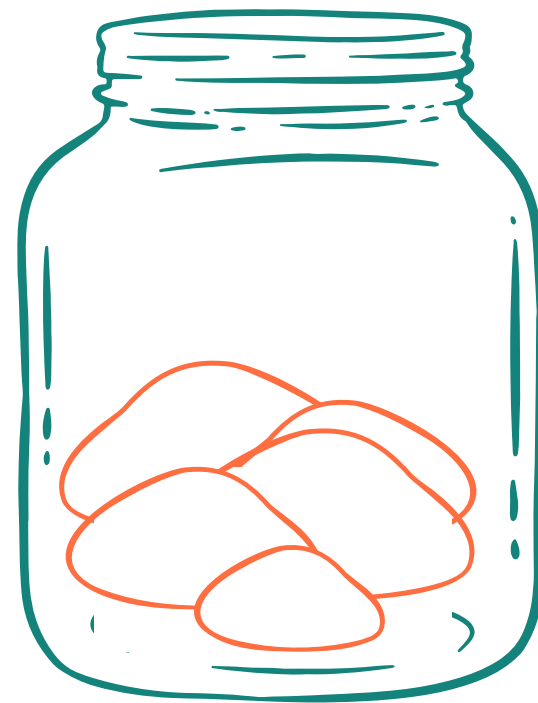
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- **WHAT: Tactics**
- **WHO: Segments**
- **HOW: Execution**



Development Plan Basics: How to Assemble Your Plan

Filling Your “Jar” With “Rocks”

JAR = Your CULTURE, defined as YOU want it to be



- **Immovable Boulders**
- **Big Rocks**
- **Smaller Rocks**
- **Pebbles**
- **Sand**

Your “Jar”

Your jar is the “structure” of your program - your guidelines, philosophical positions, and **STRATEGIES**, which will shape everything you choose next.

- **NORTH STAR STATEMENTS**

- “We will not sacrifice tomorrow’s culture for today’s transaction.”
- “We prioritize strategies that grow our Culture of Generosity.”

- **STRATEGIC POSITIONS**

- We will communicate more often and transparently
- We will develop stronger relationships with our alumni
- We will grow authentic relationships with first-time parents more quickly

What You'll Fill Your “Jar” With

(Examples of each will follow)

- **Immovable Boulders** - calendar items that can't be ignored and must be planned around
- **Big Rocks** - Tactics (Actions to accomplish your strategies)
- **Smaller Rocks** - Supporting tactics to the “Big Rock” tactics
- **Pebbles** - Next layer of supporting tactics
- **Sand** - Intentional Culture Building

Examples of Immovable Boulders

Calendar / cultural items that you'll have to **work around**

- Commencement
- Back to School Night
- Parent Orientation Night
- School breaks
- Annual fundraising event, if you're keeping it (and it's not a requirement that you do...)
- And more...

Examples of Big Rocks

These are the **first layer of TACTICS** in our plan; it's best when we choose ones (or mostly ones) that **support our STRATEGIES**.

- Fall / Spring appeal
- Gala / Golf tournament / Clay Shooting / etc.
- Volunteer management / Peer solicitation
- Mini-drives / Give Days

Examples of Smaller Rocks

This is a **second layer of tactics** that support the larger tactics.

- Timing of Leadership and Major Gift asks
- Additional tactics to support the "big rocks":
 - Direct mail and Email
 - Thinking about timing, segments, etc.
 - What's the personal element? Who do we have involved in that?
 - Do we have a match?
 - How are we educating and then inspiring New Parents?

Examples of Pebbles

These are the **third layer of supporting tactics** to our Big Rocks?

- Regular impact communications to ALL of our constituents (not just donors)
- Some examples of supporting communications in our toolbelt
 - Social media and video
 - Signage on campus inside and outside
 - Calls, notes, peer meetings, etc.
 - Events
 - Landing pages
 - What else??

Examples of Sand

INTENTIONAL CULTURE BUILDING

This is the layer that brings it all together! What are we doing **in and throughout** our entire program that will **create, enhance, nurture a CULTURE OF GENEROSITY?**

- Timing and methods of all aspects of outreach
- Care and attention to onboarding
- Talking points and shared lexicon...
- Champions and allies who advocate...

Examples of Sand

INTENTIONAL CULTURE BUILDING

Places to share the talking points

- In writing (throughout the website, enhancing existing collateral, etc.)
- In speaking (Parent Orientation, Back to School Night, etc.)

Champions and allies who advocate

- Head of School
- Board members
- Administrators
- Formal leadership volunteers
- Influencers throughout the community

Big Rock Example: FALL APPEAL

SMALLER ROCKS EXAMPLES:

- What's your timing? Will it meet your strategy of raising more money earlier?
- Should it be a piece of an going all-year-long messaging strategy or is it a short focused drive? Will it be branded?
- Who are you going to meet with 1:1 with for leadership asks and when will you do it?

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PEBBLES EXAMPLES:

- How will you communicate the WHY about giving and the IMPACT of giving leading into, through, and after the appeal period?
- What channels make the most sense to use? When do those channels need to go live?

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SAND EXAMPLES:

- How will you make sure that new parents understand the need and are inspired?
- How can you use volunteers for personal touches at key points which create that sense of shared purpose?
- What events are happening in the fall that can include the talking points and lead to greater awareness of the Fall Appeal before it even happens?

RECAP: Building Your Plan

Your **JAR** is the “structure” of your program - your guidelines, philosophical positions, and **STRATEGIES**, which will shape everything you choose next.

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Stay in touch!

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Generis serves Christian schools, nonprofits and churches.

- Development Assessments
- Development Plans and Coaching to Implement
- One-Day Strategy Day
- Feasibility Studies
- Capital Campaigns

Free resources and this presentation to download



Schools United

