

# THE BIGGER PICTURE

## REGROUP, ASSESS, PLAN, GROW

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The economic saga continues and each day I am faced with clients and colleagues asking advice about how to proceed during these challenging times. Some are facing significant decreases in public or foundation funds and are laying off staff – including development staff; some have depended on their endowments to significantly subsidize their operating budgets and now find that the needed endowment dollars just aren't there any more; others see that they need to diversify their funding mix and aren't sure how to proceed; still others are faring well despite the economic conditions but aren't sure how long their good luck will last. What do all of these organizations have in common? The need to regroup, assess, plan and – eventually – grow. Below are some tips to help you on your way:

### REGROUP

- Quickly take stock of your current situation
- Eliminate costs that are clearly unnecessary
- Focus your energies on the areas that most need your attention now
- Delete, delegate or defer any extraneous projects that may take you away from what's most important

### ASSESS

- Take some time to evaluate your organization's strengths and those of your development operation
- Look at your staff and its strengths. How can you best support your development staff? How can their skills be enhanced?
- What can you learn from your colleagues at other organizations regarding how their development programs are faring?
- If you must make cuts, what job functions can best be outsourced? • What job functions can be absorbed by others, or eliminated?
- How are you doing in best utilizing your volunteers – board members and others? Ask them their opinions and get their ideas about how they may be able to help.
- How is the organization faring in terms of donor stewardship? This is the time to spend more time talking with your donors, not less. Don't assume that most of your base of supporters is unable to give or must give less. Talk with them individually and spend time continuing to cultivate your loyal givers.

### PLAN

- This is the perfect time to begin planning for the future.
- Enlist the help of your board, staff, other volunteers and/or counsel to create a development plan for the future.
- Examine your case for support and how it can be strengthened. It's all about impact!
- Look at ways that you can increase your public visibility in the community.
- Examine your donors' giving trends and look at ways to give incentives for new donors to come on, for existing donors to continue their giving (and upgrade, if possible), and for lapsed donors to come back into the fold.
- Review your current board and development volunteer makeup. How can their fundraising skills be enhanced? How can the group be expanded to increase your fundraising capacity?
- Look at your infrastructure. How's your donor database working for you? Does everyone know how to use it? How can your current (or restructured) staff work more effectively to carry out the development department's work?

### GROW

- Despite the severity of the economic climate, our current situation isn't going to last forever. Set the wheels in motion now that will lead you to financial growth.
- Once you've completed the other steps, set financial – and other – goals for the future.
- Celebrate successes, at whatever size and level, every day.

My best wishes to you as you forge ahead!