

Checklist

Summertime Reset Strategies

Ah, summer...it's a time for watermelon, long days and swimming pools. With many donors traveling during the warmer months, it's also a perfect time to evaluate, regroup and map out your organization's next strategies. Regardless of your fiscal year end, summertime provides an excellent opportunity to gather your team and plan ahead for the best year yet. Here's where can you start:

EVALUATE CURRENT AND LAST YEAR'S EFFORTS

- Do a deep dive into your outreach efforts in relation to events, cultivation and stewardship tactics—even mailings. Were your efforts complementary to each other? Did they pull the donors closer to your mission? Did they inspire more than inform? Which efforts led to increased giving and which ones acquired the most new donors?
- Aggressively evaluate the timelines of your efforts. Were some seasons of the year heavier than others to the point of exhausting your team? Did you leave enough time to properly prepare for implementation or were you rushing at the last minute? Were your donors given enough lead time to add your events to their calendars? Did you rush a donor "ask" to meet a year-end goal?
- Consider which communication methods and messages were most effective and aligned to your mission. Which emails had the highest open rates? Which videos were viewed the longest? Do you know which social media posts were shared the most? Have you reviewed donor comments from your online giving site to uncover which funds encouraged the highest number of personal remarks? Did any of your board members mention they saw a particular commercial aired, noticed a certain billboard or social media post?

BRAINSTORM NEW IDEAS

- Share ideas for new programs, events or outreach tactics you've seen used by other foundations or learned about from a professional development conference or webinar. Is there something you always wanted to try but never brought it to the team? Did the last few years show new ways of achieving your mission? Now is your chance to throw out your wildest ideas to the team members who know your donor base the best.
- Discuss new and improved ways to plan and organize your collaborative efforts, such as project management tools or software. Increasing your asynchronous communication game by utilizing a shared platform will let everyone better understand each other's roles, responsibilities and timelines. This will free up "reporting out" meetings and encourage more interactive and engaging meetings in the future.

- Does your dashboard need a facelift? Are you dissatisfied with your current metrics and standardized reports? Has the new working environment made you consider different ways to evaluate your team's performance and success? Brainstorm with your team what constitutes a meaningful move and what moves the needle for donors. Then figure out how to measure it.

PLAN FOR THE BEST YEAR EVER

- Decide what to keep, drop and add. You know your donors and programs best. What events were well attended? What stewardship tactics did individual donors repeatedly rave about? What new funding opportunities do you think will match the passions of certain constituencies? Which efforts had the lowest ROI? What could you implement to better demonstrate donors' continued impact?
- Develop a master calendar which includes as many donor touchpoints across as many teams as possible. Ideally, create a matrix with months along one axis and touchpoints down the other. Make sure each block of space includes the specific donors or constituencies targeted, outreach method to be used, team or DOD responsible and detailed timing. Even consider color coding various items to easily see overlapping efforts as well as gaps.
- Refresh your metrics and dashboards based on the new plan. Reverse-engineer your goals by beginning with the end in mind. Allocate the resources needed to measure the performance of your new plan and then demonstrate your strategic prowess to the C-Suite and board. Using a data-driven approach to planning encourages a vote of confidence, as well as increased likelihood to give and participate from both levels of leadership. Then, ensure you effectively integrate them into your plans.
- Revise, distribute and revise again. Allow team members to participate in the editing process to encourage further ownership and responsibility for implementing the plan. Shared buy-in and ongoing accountability will better carry along your plan successfully.

After the past two years, everyone knows even the best plans can fall apart very quickly when the unexpected hits. Plans are not meant to be written in stone but rather provide a shared road map to the destination. Remember to approach planning with an inquisitive mind and curious stance. Your team works best when they bring their strengths to the process and carry each other through the uncertainty.

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