



Topic: From Me to We: Moving from Staff Support to Organizational Fund Development

Guest Speaker: Mike Duggins

October 26, 2021 1:00 pm central



Aaron J. Babyar

Moderator

SRS Training Director

Reminders

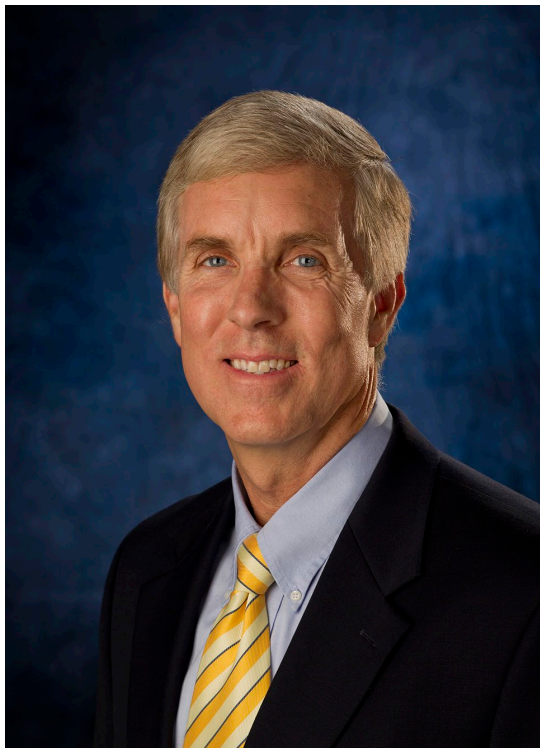
SRS to use this space for 'cleaning house'
with SRS reminders or new information...

Questions

During the presentation, please submit your questions for the upcoming Q&A time.



Prayer



Mike Duggins

Guest Speaker

Chief Development Officer
Cru



From Me to We: Moving from Staff Support to Organizational Fund Development

Compare and Contrast MPD & Org Fund Dev

- A Team Approach
- Power of Relationships
- Reporting Results
- Fund Dev Process
- The "ASK"
- Follow-Up
- Information Tracking



Organizational Fund Dev is a “Team Sport”

- MPD is individual missionary focused, “My Ministry” and “My Relationship” with the donor
- Org Fund Dev is mission or project focused, “Our Ministry” and there are multiple people involved in “Our Relationship” with the donor.



Org Fund Dev is All About Relationships

- MPD is about relationships too but remember, “People give to people justified by the cause.”
- Engage the partner in multiple ways with multiple people to build their vision and commitment to your joint cause.



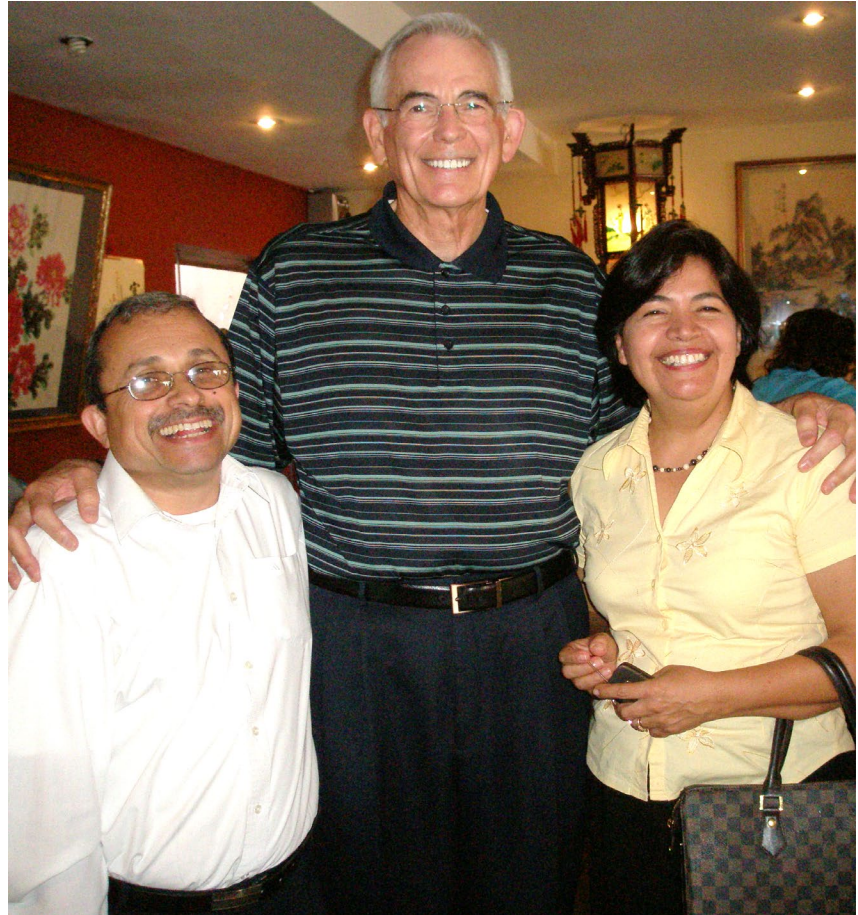
MPD vs. Org Fund Dev Processes

- MPD process is relatively simple
- Org Fund Dev process can be quite complex because of multiple points of engagement.
 - Individual Appointments, calls, correspondence
 - Donor Events
 - Mission Involvement
 - Board Involvement
 - “Moves Management” CRM



MPD vs. Org Ask

- MPD often includes an ask on the first meeting
- Org Fund Dev ask should only be done once you understand the donor's:
 - Interests and passions (what)
 - Potential range of giving (how much)
 - Timing of any giving (when)
 - Key contact with Org (who)



MPD vs. Org Ask

- MPD ask is often verbal for open amount, similar for all.
- Org ask is often written proposal prepared specifically based on research and presented verbally.
- The ASK should be done:
 - By the **Right Person**
 - For the **Right Cause**
 - At the **Right Time**
 - For the **Right Amount**
 - For the **Right Reason**.



MPD vs. Org Donor Follow-Up

- MPD follow-up is simple, write a thank you, add to mailing list, call once a year.
- Org Fund Dev follow-up can include confirmation letter, multiple thank you contacts including from ministry leader, added to caseload in CRM and potentially invite to trip/event.



Org Partners Expect Results be Reported Back

- MPD Partners want to be kept informed of the missionary's activities and impact. Prayer Letter and occasional call.
- Org Partners may have very different expectations. ASK THEM how they would like to be kept informed of the results of their gifts AND DO THAT!



MPD vs. Org Donor Relationship Management

- MPD relationship info tracking is usually adding to simple CRM.
- Org Fund Dev involves multiple people. It is important that every contact with a donor be recorded in the Org CRM. Everything learned should be factored into growing the relationship with the donor.

The screenshot shows a CRM interface for a donor account. The header includes 'CRM Accounts' and a navigation menu with options like 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. Below the header, there are navigation links: 'Account Details', 'Single Account Giving Dashboard', 'CRM Home', 'All Accounts', 'Global Search', and 'Account Details:'. The main content area features a yellow banner for 'Major or Mid-Level Donor' with a link to 'Reps/Caseloads'. The donor's name is 'Duggins, Michael Charles (Mike) and Susan Gail (Susie)' with a USDEV Rank of '#999+' and a household ID '#000011413'. Below this, there are sections for 'Mr Michael Charles Duggins (Mike)' and 'Mrs Susan Gail Duggins (Susie)', each with their titles, contact information, and birthdays. An 'Address' section follows, listing 'Mr. and Mrs. Michael C Duggins' at '11709 Great Commission Way, Orlando, FL 32832-7056'. There are also links for 'USDEV Marketing Preferences' and 'Reference Info'. On the right side, there is a sidebar with sections: 'Additional Contacts', 'My Closed Activities' (which is currently empty, showing 'There are no activities within th...'), 'Other Closed Activities', 'Recent USDEV Donations', 'USDEV Moves Plans', 'Account Resources', 'Account Notes', and 'Account Attachments'.

CRM Accounts **cru** File Edit View Navigate Query Tools Help

Account Details ▾ [Single Account Giving Dashboard](#) | [CRM Home](#) | [All Accounts](#) | [Global Search](#) | Account Details:

Major or Mid-Level Donor
See [Reps/Caseloads](#) section for assigned Reps

Duggins, Michael Charles (Mike) and Susan Gail (Susie) USDEV Rank: #999+
#000011413 (Household)

Mr Michael Charles Duggins (Mike) [Edit](#)
Director (Fund Development)
(407) 233-5554 (Employee Mobile)
mike.duggins@cru.org
Birthday: 8/25
Anniversary: 5/21

Mrs Susan Gail Duggins (Susie) [Edit](#)
Prayer Coordinator
(407) 233-6198 (Employee Mobile)
susie.duggins@cru.org
Birthday: 9/2

Address [Edit](#)
Mr. and Mrs. Michael C Duggins
[11709 Great Commission Way](#)
Orlando, FL 32832-7056

USDEV Marketing Preferences [Show](#)

Reference Info

Additional Contacts

My Closed Activities

There are no activities within th...

Other Closed Activities

Recent USDEV Donations

USDEV Moves Plans

Account Resources

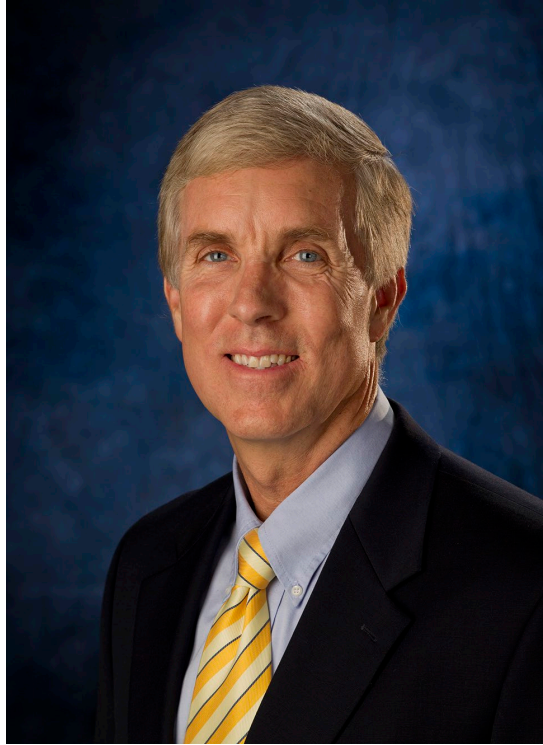
Account Notes

Account Attachments

Both MPD & Org Fund Dev Feel Like a Battle

- A Team Approach
- Power of Relationships
- Reporting Results
- Fund Dev Process
- The “ASK”
- Follow-Up
- Information Tracking





Q & A



SRS Network™