

Simple, Actionable, Achievable:

Developing a roadmap for 2015 and beyond

The start of a new calendar year — regardless of your organization's fiscal year — provides a good moment to take stock of past successes and plan for the year ahead. How can you make the most of this process?

At Thurlow/Associates, we believe that going beyond dollars raised, to consider additional metrics, provides for stronger benchmarking and planning. Other indicators of success might include:

- Donor retention
- Number of new donors
- Number or percentage of increased gifts/grants

When each of these indicators moves in the right direction, dollars raised increases!

Use your findings about past performance to develop goals and strategies that are **simple**, **actionable** and **achievable**. They will form the roadmap for your department's efforts. And by engaging your team in establishing the goals and strategies for their fund-development specialty area (individual giving, annual fund, online giving, etc.), you'll promote buy-in — and success.

For example:

If you're seeking to increase the size of your institutional grants, a simple, actionable strategy could be to update your master proposal/s with compelling case stories and strong, fresh indicators of program impact.

If you want to increase donor-retention rates, an achievable strategy might be to call three mid-tier individual donors each week to thank them for their gifts.

Consider using team meetings as an opportunity to report on progress and brainstorm about additional strategies needed to achieve your goals.

If you're not already gathering the data you need to review performance in the areas listed above, what metrics are *you* tracking? What will you start to measure in 2015? Start where you are and build from there!