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YOUR FIRST 30 DAYS AS THE NEW DIRECTOR OF DEVELOPMENT

Since 2003, I have served as the Director of Development at five different nonprofits, and now, as a fundraising consultant, I enjoy helping organizations develop or find their next great leader.

So, if you are a first-time or newer Director of Development, you are certainly eager to make an immediate impact, impress your team, and identify which strategies will drive your organization forward. With so much to tackle, it is easy to feel overwhelmed. What should take priority? Read on, and I will share a playbook designed to help you navigate the first month in your new role and make meaningful progress right from the start.

WORK BUCKETS

One of my absolute favorite tools for staying organized? A completely blank dry-erase board or, if you are short on space, Excel or a simple Word table works, too.

Here is how I use my board: I outline all my development-related “work buckets.” Everything is interconnected, and everything needs attention, so it is crucial for you and your team to have a clear view of the

whole development program’s landscape, especially in those early days.

The bucket board is not just a personal aid; it makes for a fantastic visual in the office, and it is an evolving resource. As we know, development officers wear so many hats, and this is a great tool for assessing the whole picture. Here’s an example to get you started:

Board	Fundraising	Events	MarComm	Policy & Procedure	Database	Stewardship
Development Committee	Development Plan	Fundraisers	Print Collateral	Gift Acceptance Policy	Training & Support	Gift Acknowledgement
Finance Committee	Annual Appeal	Friendraisers	Digital & Emails	Gift Entry	Active or Solicitable	Naming Opportunities
Governance Committee	Major Gifts	Attendees	Website	Gift Agreements	Actions & Notes	Donor Recognition
Meeting Dates and Agendas	Planned Gifts	Volunteers	Social Media	Pledge, Stock, Matching Gift Forms	Relationships	Appreciation Events
Reports	Capital Campaign	Checklists	Newsletters	Donor Bill of Rights	Reporting	Donor Relations
Fundraising Training	Calendar	Run of Show	Brand Identity & Audience	Privacy Statements	Protocols	Annual Report

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BENCHMARK FOR SUCCESS

Start by pinpointing a mix of benchmark organizations, both those you can realistically emulate and those that make you dream big. Dive into their websites, social media, annual reports, and any available collateral. Take good notes on what sets them apart, such as easy web navigation, beautiful communications design, or compelling stories on social platforms.

Take it a step further and send an email to their Director of Development. Introduce yourself and invite them for a coffee chat in the coming months. You will be amazed at the valuable insights and strategies you can glean from friendly conversations with your new cohort. As you explore, think about how you can adapt the “best of” to fit your nonprofit's unique needs. This process will help you align your vision with proven approaches, setting you up for success.

BOARD DEVELOPMENT

Did you get a chance to meet the Development Committee members during your interview? If not, now is the perfect time to reach out and connect. Building a solid rapport with this group is a must-do in your first 30 days.

I also recommend a quick review of the Board Bylaws to determine if there is a Development Committee charter outlining roles and responsibilities. If you find a blank slate, go ahead and draft a simple charter to guide committee work and formalize their role in the development plan. And remember, involve the committee members in crafting the document—it is a team effort.

Another pro tip: begin to collect pertinent online resources (and white papers) that can help educate your committee on the latest fundraising trends and best practices. An informed and well-resourced Development Committee can be a game-changer for your fundraising efforts.

Finally, do not forget to chat with the Executive Director and the Board Chair

about how you can effectively support the Governance, Finance, and Marketing/ Communications Committees.

DISCOVERY

Now is the time to build your Top 20 prospect list and schedule those first cultivation or “discovery” visits. Coffee chats first thing in the morning or a convenient lunch spot (for the prospect!) are the ways to go.

For your first month, block off your calendar for at least 10 two-hour discovery visits—and try to fill those slots ASAP! Trust me, getting out of the office and away from your desk is essential. Of course, there is a mountain of mundane tasks awaiting you, but nothing takes precedence over cultivating your top donor prospects and building relationships with volunteer leaders. Don't forget to express thanks and appreciation at every turn!

MAKE THE CASE

When not in discovery mode, find a morning or afternoon to gather your colleagues for a lively session focused on evaluating your fundraising communication materials—both print and digital. Make it a fun occasion: bring donuts and coffee or even wine and cheese.

Start by collecting materials from the past couple of years. Spread them out on a large table and dive in together. Overall, the goal is to assess the consistency of your branding and the clarity of your fundraising messages.

Even more important, look for a compelling case for support or the absence thereof. If there are gaps, you will know there's important work ahead.

IN THE CLOUDS

Choosing the right cloud-based platform, whether it's Dropbox or the Google Suite, is a significant step in streamlining collaboration, organizing internal files, and reducing paper waste. Dropbox wins in file sharing and storage, while my favorite, Google, offers collaborative tools like Docs and Sheets. Pick the one that best suits your team's needs and set the stage for more efficient workflows.

Create a digital file structure and shared folders to facilitate easy collaboration amongst your team. Cloud platforms allow multiple users to edit simultaneously and seamlessly. By going digital, you can significantly reduce paper waste, contributing to a more sustainable and productive workplace. You can also use cloud space to set up a shared folder (restricted and secure) for your Board of Directors or Development Committee, giving them easy access to agendas, meeting minutes, and other important governance documents.

SYNC UP

Never underestimate the power of a fundraising calendar. Using digital formats allows your entire team to stay synchronized, viewing the same evolving dates in real-time. By including key events like board and committee meetings, you can prepare agendas and reports in advance. Or make sure your colleagues know when you plan to be out of the office with prospects.

Incorporating holidays into your calendar is crucial for effective outreach planning. Some dates are less than ideal for donation appeals. A clear print production and mailing schedule keeps your outreach relevant and impactful, and marking special events

enables your team to create memorable experiences.

Ultimately, the fundraising calendar is more than just a scheduling tool; it is your roadmap to success. By laying out crucial dates—such as board meetings, events, holidays, appeals, and production schedules—you will navigate the fiscal year with confidence.

GET COMFY WITH YOUR DATA

While not so glamorous, getting comfortable with your database is important for building a data-driven development office. In your first month, run a few key reports, such as year-over-year giving and/or cumulative gift histories for top donors. If the software feels daunting, there are plenty of YouTube video tutorials and helpful support teams ready to assist you.

Make the donor database a priority. Talk to your colleagues about standard operating procedures and “action steps” they follow to maintain data consistency. As a starting point, determine if the Board of Directors roster is accurately coded, then review profiles for your top donors. Practice exporting and setting up a fundraising dashboard.



ABOUT THE AUTHOR

Ben Hoke, *Managing Director at Carter*

With over 20 years of fundraising and strategic communication experience, Ben Hoke brings a deep understanding of nonprofits to his consulting role at Carter. Prior to Carter, Ben held strategic leadership positions responsible for all facets of fund

development, campaign management, marketing and communications, event programming, and alumni relations.

Recently, Ben worked with the Catholic Diocese of Charlotte to enhance fundraising programs in each of their 20 schools. In addition, he led independent school

development offices at Waterford School in Salt Lake City, UT; King School in Stamford, CT; and Palmer Trinity School in Miami, FL.

Ben has also held fundraising positions at Bullis School in Potomac, MD; Darlington School in Rome, GA; and the George Washington University in Washington, DC.

While it is crucial to engage with the database, be careful not to get lost in the details. Your proactive approach will highlight the importance of good information and help cultivate a culture that values data.

TAKE STOCK

Now is the perfect time to look at last year and begin to assess your fundraising and “friendraising” events. Taking early stock of what has worked—and what has not—will help you allocate appropriate resources and plan more effectively. Be prepared to share your insights at the next Development Committee meeting. They’ll be impressed that you are looking at the oft-overlooked business side of event planning.

We should aim for a 70% return on investment (ROI), net of gross income and including staff time. This metric is vital for nonprofits, which often operate with limited resources. Then, consider whether the event achieved its primary goals (fundraising, raising awareness, and/or engaging the community).

Additionally, evaluating ROI helps you stay accountable to donors and board members by demonstrating responsible fundraising and spending practices.

THINK TANKS

One of your best assets in the nonprofit sector is a vibrant network of colleagues from other organizations. This will foster your professional growth and make your work more enjoyable.

Brainstorming opportunities and challenges with peers who understand what you face is like a built-in think tank.

Think of networking as ongoing professional development, as each organization offers unique insights. Want to learn how someone secured an impressive gift or organized a successful event? Your network is the perfect place to find out. In my experience, this type of networking is a fun part of the job. Organize coffee chats, happy hours, etc., with colleagues from other nonprofits. These casual gatherings can spark creativity, strengthen relationships, and enhance your work life.

JUST THE BEGINNING

From leveraging cutting-edge software to getting organized for a successful fiscal year, you now have some new tools to make a real impact. Connect with colleagues in the sector to gather fresh insights.

But don't forget the heart of your work—building relationships! Establish a rapport with your volunteer leaders and take the time to meet loyal donors. Thank them for their support and listen to their stories about why they give. This personal touch will not only help you refine your case for support but also enhance your communications.

Embrace these strategies, and you will set yourself—and your organization—up for a thriving future.

Looking for more advice? The Carter team is here to help. We will always make ourselves available as a resource to you as you advance your mission and philanthropy.

If you don't already have a preferred contact at Carter, you can email info@carter.global, and we'll put you in touch with a senior-level consultant specific to your needs.

ABOUT CARTER

Co-founded by Bob Carter and Steve Higgins in 2011, Carter gathered a select team of the nation's most respected nonprofit professionals working to advance philanthropy worldwide in the areas of fundraising, governance and organizational planning. Each Carter consultant brings decades of executive-level development experience to serve as an extension of your team and help you maximize your organization's potential and better serve your cause. For more information, visit www.carter.global.

