



TRI-VALLEY
NONPROFIT ALLIANCE

Is your house in order? Start 2016 off right!

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Take stock in January

- Review your past organizational year
 - What worked, what did not?
 - What are your
 - Strengths,
 - Weaknesses
 - Opportunities and
 - Threats
- (SWOT Analysis)



The Benefits of SWOT

- Strengths and Weaknesses (internal)
 - Qualities that enable accomplishment of your mission
 - Weaknesses that might prevent it
 - (Tangible and Intangible)
- Opportunities and Threats (external)
 - What is the current environment? Has anything changed?
 - Could something jeopardize your success?
 - A SWOT Analysis reviews your position

Strengths

Advantages
Capabilities
Resources, Assets, People
Marketing - reach, distribution, awareness



Weaknesses

Lack of competitive strength
Financials
Our vulnerabilities
Timescales, deadlines and pressures
Continuity, supply chain robustness



Opportunities

Market developments
Business and product development



Threats

Environmental effects
Market demand
Obstacles





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SWOT allows you to...



Capitalize
on Strengths



Eliminate
Weaknesses



Identify
Threats



Invest
in Opportunities



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Does your SWOT Analysis?

- Change any organizational goals? Create new ones?
- Is your Mission/Vision Statement still applicable?
- Do you have the right people on your board, as volunteers, in your organization to accomplish what you want to do?

Look at your organization as an outsider



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- Look at every aspect of your webpage. Click on all links
- Call your phone number. Check your voice mail message
- Look at all collateral. Is your brochure still accurate? Images?
- Look at where your organization is linked (aka how you're mentioned on the Chamber website, vendors, partners)
- Update GuideStar, Look at the state registries

Review your fundraising for
the past year and decide for this



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80/20 Rule (output vs. input)

- 80 percent of the funding comes from 20 percent of donors
- 80 percent volunteer hours = 20 percent of all volunteers
- 80 percent of corporate sponsorships = 20 percent of business relationships

80 percent of our efforts = 20 percent of our results

So where to spend your time...



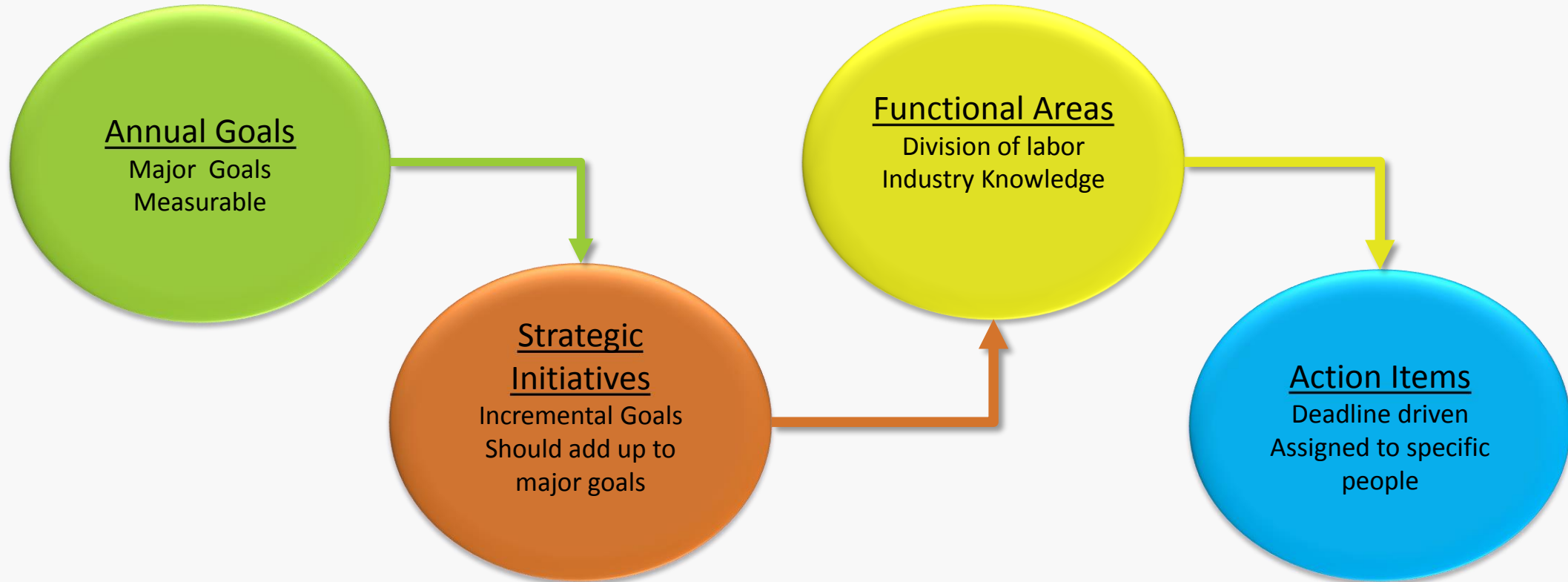
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- Events?
- Major gifts + asks?
- Annual campaign?
- Cultivation?
- Passive partnerships?

People give to people. Be sure to focus on relationships.



Moving Goals into Action





Example

Goal

- Raise \$100,000

Strategic Initiatives

- \$10,000 in annual gifts
- \$20,000 from fund raising events
- \$20,000 from corp/foundation grants
- \$50,000 from major gifts



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Example

Functional Area

Annual Giving and Membership Program

- Define a solicitation base of approximately 10,000 people including current and past donors (3 years) and ticket purchasers.
- Schedule a solicitation campaign for the base with a foundation in direct mail (at least 3 annually) followed up with e-mail and social media solicitations.
- Deliver a giving message prior to every LVPAC performance
- Incorporate social media strategy into program, and actively participate in nationwide and regional giving days
- Mail renewal letters (1 level upgrade) before annual subscription date
- Staff to carryout immediate follow up by telephone or email
- Inform donors of matching gifts opportunities – investigate web-enabled resource to assist donors regarding matching gifts when giving online



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Example

Task	Goal Addressed	Due	Assigned to
Research and purchase predictive modeling tool to help identify prospective donors	New major and annual donors	Jan. 1	Chris



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Mind Mapping





Mind Mapping





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Getting Your House in Order

Thank You!

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