

RESOURCE DEVELOPMENT AND ADVANCEMENT

**CCCA National Conference
December 7, 2010 – Tuesday 5 p.m.
Ridgecrest Conference Center ▲ Asheville, N.C.**

MASTERING THE MANAGEMENT BUCKETS

How to Demolish an Exquisite Fund Development Plan by Ignoring the 20 Management Buckets

Learn some best practices for leveraging the Donor Bucket, the Results Bucket, the Customer Bucket, the Program Bucket, the People Bucket and the Delegation Bucket. Soon your entire team (staff, board and key volunteers) will understand the new "Revolution in Generosity."

John Pearson

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Book:

Mastering the Management Buckets:

20 Critical Competencies for Leading Your Business or Nonprofit

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Your Weekly Staff Meeting

"a book review and a bucket every week" – sign up at www.ManagementBuckets.com

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The 3-legged stool:
Cause
Community
Corporation



OUR CAUSE

✓THE RESULTS BUCKET	1
✓THE CUSTOMER BUCKET	2
THE STRATEGY BUCKET	3
THE DRUCKER BUCKET	4
THE BOOK BUCKET	5
✓THE PROGRAM BUCKET	6

OUR COMMUNITY

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THE CULTURE BUCKET	8
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THE <i>HOOPLA!</i> BUCKET	10
✓THE DONOR BUCKET	11
THE VOLUNTEER BUCKET	12
THE CRISIS BUCKET	13

OUR CORPORATION

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✓THE DELEGATION BUCKET	16
THE OPERATIONS BUCKET	17
THE SYSTEMS BUCKET	18
THE PRINTING BUCKET	19
THE MEETINGS BUCKET	20

POP QUIZ!

ONE EXTRAORDINARY DONOR LETTER OR SUCCESSFUL FUNDRAISING EVENT DOES NOT A FUND DEVELOPMENT PLAN MAKE!

EVERY CEO, senior leader and manager has unique strengths and competencies in many “management buckets” – but rarely does one person score high in all 20 buckets. The **MASTERING THE MANAGEMENT BUCKETS WORKSHOP EXPERIENCE**, presented by John Pearson, author of *Mastering the Management Buckets*, helps leaders identify their strengths and weaknesses—and create a practical action plan to build the organization around their strengths, but not neglect areas outside their passion. Leaders (and their direct reports) must avoid the Head-in-Sand Syndrome and make a frank self-assessment of what level they’re at in each of the 99 Knowledge Management Core Competencies of the 20 Management Buckets.

MOVING FROM THE “HEAD-IN-SAND SYNDROME” TO THE “GOOD TO GREAT SYSTEM”

Level 1	I don’t know what I don’t know.
Level 2	I know what I don’t know.
Level 3	I have an action plan to address what I know I don’t know.
Level 4	I am knowledgeable and effective in this Core Competency.

THE MANAGEMENT BUCKETS SELF-ASSESSMENT Here are just 20 of the 99 core competencies. Check <input checked="" type="checkbox"/> where you’re at today→	Level 1	Level 2	Level 3	Level 4
1. THE BOARD BUCKET. A nominee to the board of directors asks if 100% of the board members are already “generous givers.”				
2. THE BOOK BUCKET. A team member in the development department has never read anything on the generosity/stewardship movement. What three books would you recommend—and what training would you suggest?				
3. THE BUDGET BUCKET. A new board treasurer wants to change your financial reporting format—and how you allocate fundraising costs. What are the best practices recommended by ECFA and other organizations?				
4. THE CRISIS BUCKET. Yikes! A key team member just had a severe moral failure. What should you do in the first 24 hours—especially related to your major donors?				
5. THE CULTURE BUCKET. A candidate for a VP position wants to interview your management team to better understand your “culture” and “core values.” Will they all say the same thing? Are staff members expected to be annual givers?				
6. THE CUSTOMER BUCKET. There is disagreement between your board and staff regarding your primary customer vs. your supporting customers. According to the father of modern management, Peter Drucker, what are the five key questions every organization must answer?				
7. THE DELEGATION BUCKET. Your supervisor observes that you tend to be weak on delegation regarding fundraising activities. Whether she is correct or not, outline what your next steps will be.				
8. THE DONOR BUCKET. Only half of your board members are generous givers to your organization. What are the best practices other CEOs employ to foster generous giving?				

THE MANAGEMENT BUCKETS SELF-ASSESSMENT Here are just 20 of the 99 core competencies. Check <input checked="" type="checkbox"/> where you're at today →	Level 1	Level 2	Level 3	Level 4
9. THE DRUCKER BUCKET. Give a brief review of at least two books you've read by Peter Drucker, the father of modern management—and discuss one Druckerism that has helped you become a more effective fundraiser.				
10. THE HOOPLA! BUCKET. A valued team member comments that the unrelenting pressure and deadlines have created a tense work environment. How do you fix this?				
11. THE MEETINGS BUCKET. Patrick Lencioni's book, <i>Death By Meeting</i> , suggests every team should have four kinds of meetings. What are they?				
12. THE OPERATIONS BUCKET. A new team member has been chastised every day for five days for "not following procedure." What's wrong—and what are the likely solutions?				
13. THE PEOPLE BUCKET. According to researchers, there are four basic "social styles," yet most leaders operate as if there's only one "right one"—their own! What are the four and what implications do they have for givers, customers, board members, volunteers, staff, family, spouses, etc.?				
14. THE PRINTING BUCKET. Yikes! The donor letter was just mailed to 10,000 people and there is an embarrassing typo. The 800 number goes to a bar, not your camp! What are your short-term and long-term solutions to this systemic problem?				
15. THE PROGRAM BUCKET. Peter Drucker said you must "slough off yesterday." Explain the law of diminishing returns and how it impacts your top five programs, products or services.				
16. THE RESULTS BUCKET. Every CEO, senior leader and virtually every staff member should have 3 to 10 written annual "Standards of Performance." Explain how this works in your organization. Extra credit: Discuss "S.M.A.R.T." goals.				
17. THE STRATEGY BUCKET. A well-liked CEO of another organization just got fired. They were growing, but apparently lacked a strategic plan. What are the key elements in the strategic planning process?				
18. THE SYSTEMS BUCKET. You're good at launching new programs, but weak on bringing them to the finish line. The discipline of project management requires what competencies?				
19. THE TEAM BUCKET. A best-selling book says there are 34 talents that can be leveraged into strengths. What are your Top-5 Strengths, according to this Gallup research? Extra credit: What are the Top-5 Strengths of your top three givers?				
20. THE VOLUNTEER BUCKET. A trusted volunteer (and generous giver) complains to you that volunteers are "second class citizens" in your organization. What are some of the best practices today in 21 st century volunteer management?				
ADD UP YOUR SCORE →				

YOUR SELF-ASSESSMENT:

- Add up your **Level 1 and 2** scores: _____. What are your next steps on each of these?
- **Who is** holding you accountable for your **Level 3** action plans? What are the target dates?
- **Are you** consistently training others with your **Level 4** core competencies?

Ready to grow? Join us at the next *Management Buckets Workshop Experience!*

#1. The Results Bucket

Core Competency:

We focus on results. We are not activity-driven, we are results-driven. We measure what we value, so we celebrate both the writing and the achieving of team-blessed standards of performance for every staff member, board member and volunteer. We also abandon dead horses and sacred cows.

☑ Prioritize Results With S.M.A.R.T. Standards of Performance!

Create clear goals and a rigorous accountability system with celebration mileposts.

EVERY TEAM MEMBER must craft 5 to 10 annual Standards of Performance (SOPs). The SOPs must:

- Meet the S.M.A.R.T. criteria.
- Be reviewed and approved by peers, direct reports and each person's boss or board.
- Be part of a regular accountability/reporting process (usually monthly).

S.M.A.R.T. SOPs are:

Specific

Objectives should specify what you hope to achieve.

Measurable

Objectives must be specific enough to be measured at the finish line.

Achievable

Objectives must be attainable. No pie in the sky stuff here!

Realistic

Objectives must also be realistic—in light of the resources you have allocated to the SOP.

Time-dated

Objectives must have a specific date when the results will be achieved (Dec. 31, 2011).

My #1 S.O.P. for 2011:

By this date, _____, I will accomplish this:

_____.

My Direct Report, _____'s, #1 S.O.P. for 2011:

By this date, _____, he/she will accomplish this:

_____.

#2. The Customer Bucket

Core Competency:

We know our primary and supporting customers. We segment our customers to more effectively meet their unique needs. We listen to our customers. We are zealots for researching and understanding our markets.

Move Your Customers From Ignorance to Purchase

Use the right tools, for the right people, at the right time.

“ONE SIZE FITS ALL” is a very expensive and ineffective customer strategy. Consider your donor program. Your ministry is reaching out to new donors, thanking current donors, and wondering why your list of former donors is growing so rapidly.

Create a strategy for moving a person from “ignorance” to “purchase” (see the chart below). You’ll have a different marketing and communication plan (the marketing mix) for each segment. The secret: use the right tools for the right people at the right time.

MARKETING MIX EXAMPLES:

- ➔ LEVEL 1: IGNORANCE. A neighbor invites a new homeowner over for coffee and mentions their involvement in a wheelchair ministry.
- ➔ LEVEL 2: AWARENESS. The new neighbor reads a newspaper article about the ministry and remembers the neighbor’s enthusiasm.
- ➔ LEVEL 3: INTEREST. The neighbor’s teen daughter has a new friend that sponsors a wheelchair every Christmas. “Dad, check out their website!”
- ➔ LEVEL 4: TRIAL OR CONSIDERATION. The family agrees to have a garage sale to raise money for wheelchairs. They give a one-time gift online.
- ➔ LEVEL 5: PREFERENCE. The ministry calls to thank them for the gift (within seven days) and that gets Dad’s attention. “I like these folks!”
- ➔ LEVEL 6: PURCHASE. After attending a ministry fundraising event, the family makes a three-year major gift commitment and are volunteer zealots!

THE RIGHT TOOLS FOR THE RIGHT PEOPLE! YOUR MARKETING MIX➔	Marketing Mix Tool A Brochure	Marketing Mix Tool B Website	Marketing Mix Tool C Newsletter
1) IGNORANCE			
2) AWARENESS			
3) INTEREST			
4) TRIAL OR CONSIDERATION			
5) PREFERENCE			
6) PURCHASE			

Bonus Insight

**“IF YOU HAVE \$10,000 TO SPEND,
INVEST \$5,000 IN RESEARCHING
AND UNDERSTANDING THE MARKET.”**

--Dr. Bob Hisrich, Thunderbird School of Global Management
& co-author with John Pearson, *Marketing Your Ministry: 10 Critical Principles*

#6. The Program Bucket

Core Competency:

We are zealots for program effectiveness and so we research and understand our customer before launching new programs, products or services. We measure program results. We feed our primary programs and drop the losers—all in the spirit of discerning where God is at work.

Give Program Choices

When the only two answers are yes or no, you're not satisfying customer needs.

**“GIVE PEOPLE THE CHOICE TO SAY
NO
TO A FEW OPTIONS—
YET STILL SAY
YES!”**

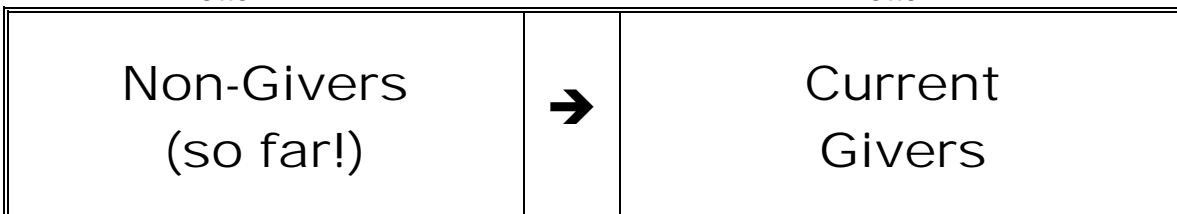
Donor Choice Worksheet:

“Give Givers Options” in appeal letters, events, banquets, scholarship funds, capital gift programs, etc.	Option #1	Option #2
1)		
2)		
3)		

Bonus Insight & Cardinal Rule! (see the Customer Bucket): What’s the goal?

Letter #1:

Letter #2:

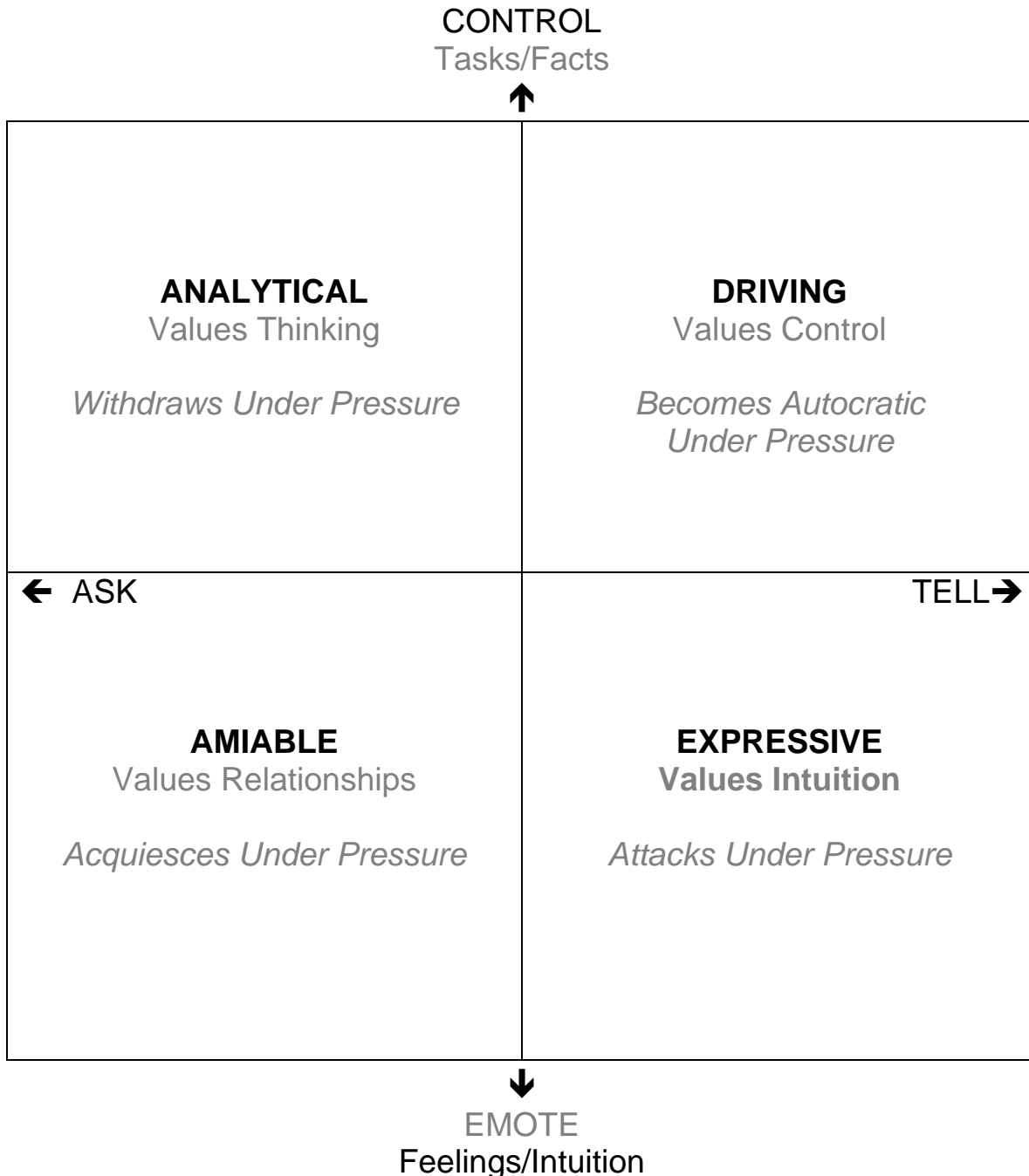


#7. The People Bucket

Core Competency:

We celebrate the God-designed uniqueness of our team members, our customers, our donors, and our volunteers. We are diligent about understanding the four social styles—Analyticals, Drivers, Amiables and Expressives—and helping our people find their comfort zones as they grow in their interpersonal versatility skills.

Givers represent all 4 social styles!



#11. The Donor Bucket

Core Competency:

We believe that extravagant generosity is the biblical norm, not the exception. We challenge donors to give liberally to kingdom causes. We urge prayerful giving to God's work, not for tax benefits nor budget needs. We scrutinize our methodologies not against what works, but against God-honoring principles.

☑ News Flash! The “Revolution in Generosity” is all about the heart—not the head...but don’t think you understand development any more than you understand nuclear physics!

Resources:

- ☐ *The Treasure Principle*, by Randy Alcorn
- ☐ *Revolution in Generosity: Transforming Stewards to Be Rich Toward God*, Wesley K. Willmer, Editor
- ☐ *The Steward Leader: Transforming People, Organizations and Communities*, by R. Scott Rodin
- ☐ www.generousgiving.com
- ☐ *Strengthening the Soul of Your Leadership: Seeking God in the Crucible of Ministry*, by Ruth Haley Barton (Pearson's “2009 Book of the Year”)

Book Review from John Pearson's enews, *Your Weekly Staff Meeting*

- ☐ *The Sower: Redefining the Ministry of Raising Kingdom Resources*, by R. Scott Rodin and Gary G. Hoag
- ☐ http://urgentink.typepad.com/my_weblog/2010/09/the-sower.html

Seed Bag Handoff, September 24, 2010 (John Pearson)

I've reviewed almost 200 books in my weekly enewsletter, but it's rare to review a third book from the same author. You can guess the likely suspects: Drucker, Lencioni, Blanchard, Hybels, and Ram Charan. Today I'm adding Scott Rodin to the list.

In Issue 196, I raved about Rodin's book, *The Steward Leader: Transforming People, Organizations and Communities*. And way back in Issue 35, I encouraged you to read his zinger, *The Seven Deadly Sins of Christian Fundraising*. So here's another Rodin elbow-in-the-ribs, with co-author Gary Hoag, *The Sower: Redefining the Ministry of Raising Kingdom Resources*.

"This book was written," say Rodin and Hoag, "to provide momentum for a movement aimed at the heart of every person involved in the process of raising resources or giving money for the work of God's Kingdom." They add, **"The movement we are supporting is an effort to move away from the commonly used transactional approach to raising money and toward a more biblical approach of transforming hearts. Put a different way, it is realigning priorities to place changed hearts toward God above changed bank balances."**

Does this signal the end of fundraising workshops and development consultants? "It is a new order that seeks to develop faithful stewards whose hearts are rich toward God. It redefines development work as ministry in the Kingdom of God. And it replaces manipulative techniques and closing strategies with a dependence on prayer and relationship-building as the essential tools for success."

Urging Christian leaders, development staff and givers to stop "doing ourselves to death," the authors warn that "God is primarily concerned with our being before our doing."

"You can't lead others on that journey," says Rodin, "if you're not on that journey yourself. Herein lies one of the greatest hypocrisies in the Kingdom of God: people who are poor personal stewards trying to do development work in the name of Jesus. We have spiritually stagnant people in charge of a ministry of seed sowing."

Rodin adds, "This insight was a paradigm shift for me. When I realized that my primary calling as a development person was to be used by God to cultivate hearts to be rich toward Him, everything I did changed."

And...that gritty discernment shows up in just the first 11 pages. Yikes! The entire book is just 76 pages, plus the appendix and the notes. Rodin gets the first 27 pages and Hoag delivers Part II, "The Seasons of Work for the Sower." You'll get the CliffsNotes by reading the four convicting charts: bullet point contrasts between "Secular Fundraising" and "Biblical Steward-raising" in the four seasons of the work of the sower: winter, spring, summer and fall. (Both Rodin and Hoag have farming in their blood--and some pretty good illustrations.)

Hoag urges CEOs and CDOs (chief development officers) to help boards and colleagues understand that God is the Fundraiser. "He is the One Who works in people's hearts to move them to participate in His work through giving. If you don't, they will think you see yourself as a fundraiser."

This is powerful, radical, revolutionary stuff--and I wonder why some pastors and parachurch leaders don't get it. Three cheers for these two gutsy authors!

Hoag: "At this moment, take an inventory of your own life. If you are called to help people grow as a steward, be assured that God will want you to grow more deeply in this area as well. If you are not interested in taking such a spiritual journey, please consider a different role than that of a Christian leader, stewardship officer or pastor. Why? In that role, you are in a position to have an incalculable impact for the Kingdom, **so if you are not interesting in sowing, please hand the bag of seed to someone else.**"

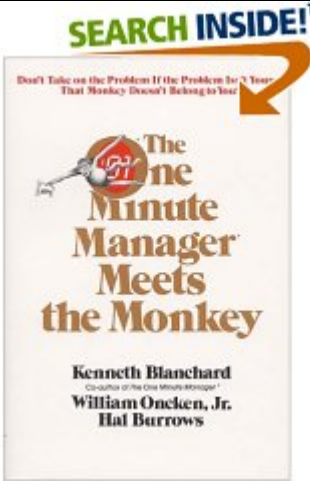
#16. The Delegation Bucket

Core Competency:

We are experts at appropriate delegation. We invite team members to accept assignments based on their strengths. We value organized delegation and believe in the Point Person Principle. We track our to-do lists and we add to our don't-do lists.

☑ Mentor Your Team on the “Monkey” Method of Delegation

Get the monkey off your back!

	<p>#1. Understand the principles from <i>The One Minute Manager Meets the Monkey</i> and mentor your team (and board) with the “monkey” vocabulary.</p> <p>Rule 1. Describe the Monkey.</p> <p>Rule 2. Assign the Monkey.</p> <p>Rule 3. Insure the Monkey Recommend, Then Act Act, Then Advise</p> <p>Rule 4. Check on the Monkey</p>
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What's the downside of delegating?

PEOPLE WHO DON'T TAKE RISKS

GENERALLY MAKE ABOUT **TWO BIG** MISTAKES A YEAR.

PEOPLE WHO DO TAKE RISKS

GENERALLY MAKE ABOUT **TWO BIG** MISTAKES A YEAR.

--Peter Drucker

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20 CRITICAL COMPETENCIES FOR LEADING YOUR BUSINESS OR NONPROFIT**

How to ~~Demolish~~ *ENHANCE*
an Exquisite Fund Development Plan
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