OUR NON-PROFIT ORGANIZATION
PRELIMINARY DEVELOPMENT STAFF RETREAT OUTLINE

ORGANIZATION ISSUES

A) What are we trying to accomplish as a community service organization?
   1) Mission fulfillment and development
   2) Goals: programmatic and financial
       --- Next six months
       --- Next 12 months
       --- Next 2-3 years

B) What are the Development Department's priorities today in terms of its top 3-5 fund-raising activities?
   1) In the volunteer Chairperson's perception
   2) In the volunteer President's perception
   3) In the Executive Director's perception
   4) In the Senior Staff's perception
   5) In the Development Director's perception
   6) In each Development Staff member's perception

C) Why is our Development Department organized the way it is?
   1) What changes were made in the recent past and why were those changes made?

D) What does not work well now?
   1) Structurally
   2) Functionally

E) What organizational structures and functions do other similar organizations assign to their Development Departments?

F) Are there some activities or opportunities out there that our Development Department has wanted to move forward into that the existing organization or staffing has not allowed?

G) What information would we like to have, but do not now have on a daily, periodic, or sporadic basis, which we know would significantly improve our performance and efficiency?

H) Evaluating our data gathering system:
   1) What does our system do for us now?
   2) What would we like it to do that it does not do now?
   3) What does it do unsatisfactorily?
   4) What reports does it generate automatically?
   5) What kinds of internal audit checks are currently performed
   6) What kinds of manual audit checks are performed which could be done by the computer?

I) What are the points of contact we have with other departments that currently cause friction?

J) Are there some things we currently do that could better be done by others?

K) Are there some things others do for us that could be done better by ourselves?

L) How many levels of management are involved before important and timely decisions are made?

M) Review each development staff position and determine the exact characteristics required to maximize performance:
   1) What skills are missing?
   2) Where should the missing skills be ideally located?
   3) What cross-training currently takes place, formally and informally?
   4) How much overtime takes place?
       --- Where is it used?
       --- How does it compare with the previous year(s)

N) If you could make any changes you wish regarding how development activities for our organization are carried out and/or organized, what would your top five changes be?
   1) __________________________________________
   2) __________________________________________
   3) __________________________________________
   4) __________________________________________
   5) __________________________________________