**DEVELOPMENT COMMITTEE INSTRUCTION MANUAL (2-18-19, J.D.H)**

In order to fulfill DC responsibilities, there are certain data bases/files that must be maintained. Since they reside on J. D. Helms’ personal home computer, the following is a brief account of where they may be found and then transferred to a disk or other media and uploaded to the PC of whoever is designated to assume these duties:

This person needs to come to my home where my wife, Judy, or I can sign them onto my PC system so they can access and download the needed data.

**Job #1 – DONOR DATA BASE MAINTENANCE & USAGE**:

The donor data base is located in **Excel/Orpheus/Donor Records/Donor Record 2020-21** (or later, if it’s a later year). This data base contains a 12 year record of donations (in donor name order except current year in chronological order) and is updated manually by me every time Bob Meier informs me via fax of checks, or I receive the information directly from the Orpheus’ web site maintained by Chase. When I receive notice I enter the data into this data base and then for donations of $100 or more, produce an acknowledgment letter in Word and mail it to the donor. If the donation comes in by *credit card* via the 10-20-30 fundraising site (Dojiggy.com), then an acknowledgement email is automatically sent to the donor in real time. But if the 10-20-30 donation is a check or cash I enter them manually which produces the acknowledgement letter automatically, provided I also have and enter the donor’s email address. This is important if the check or cash exceeds $100 because we need to have the physical address in order to mail invitations to our annual donor party. Sometimes people hand Bob or me a check or cash without an email address so I have to go to the Orpheus member who the donor wishes to credit and get it from them. If they don’t have it, or can’t get it, then I may have to write a letter and mail it.

**Job #2** – **ACKNOWLEDGEMENT LETTER PREPARATION & MAILING**

The shell letter I use is located in **Word/Development/Donor/Acknowledgment** **Ltr 9-8-15 with New logo.** I transpose the information received from Bob’s faxed check copy and print out and mail it. (Note: a better technical person could do this from Excel in one step instead of opening Word and transposing the name & address.)

**Job #3 – PRODUCING PLAYBILL DONOR LISTS**

This is a list of donors that goes to Marty Jablonski 30 days prior to the first concert of each series (spring and Holiday). It should be a listing of donors who have given the prior 12 months, but I err on the side of caution by going back roughly 13 months, figuring no one objects to being listed when they may not have given, but people can get upset if they are left off the list.

The problem comes up mostly in preparing the Holiday series because at the time the list is prepared we are in the middle of the 10-20-30 fundraising campaign. Say, e.g., someone gave on November 1 to the 10-20-30 and I’m preparing the list on November 15. If that individual intends to give again but later in the cycle (after Nov 15 in this example), they would be left off the list if I only used 12 months. So, I would probably reach back 13 months to ensure they remain on the list.

In compiling the Donor list, two data bases must be merged:

1. The 10-20-30 which can be downloaded from the Dojiggy site into Excel
2. My separate list of donors from the current Excel data base

Here are the steps I follow:

1. Since these data bases are not in the same columnar order, I get rid of unnecessary fields from both sites and starting with the Dojiggy data, rearrange the fields to conform to the order in which my donor list is maintained. I keep the following fields in both data bases: First name, last name, how displayed, amount, and date.
2. After merging them (it’s helpful to make all fields the same length before copying and pasting the Dojiggy data to the end of my separate donor data), I sort by last name and then first name.
3. I go through every entry and try to combine multiple donations from donors who have made more than one (by adding the amounts together and keeping just one entry per donor), while also eliminating ones that might be duplicates because they might have been entered once into Dojiggy and also by me on my separate spread sheet.
4. Then I sort the entire file by Amount, high to low and eliminate those below $50 because these donations don’t get published on our donor listings.
5. Now I have a list where some entries lack a ‘display as’ column and I create an entry of first and last names in that column. That’s what will appear on the final donor list.
6. Then I break up the list into giving amount categories, add the verbiage as it will appear on the donor list, and send it to Marty with a copy to Dave Kelly. To see the final product, look at any Playbill listing for the format.

**Job #4 – PRODUCING INVITATION LIST for the DONOR THANKING EVENT:**

This is similar to the last one, except the cutoff for invitations is $100 so the list will be smaller (approx. 60, plus Orpheus members who have donated that amount AND Orpheus singers who Brook invites in order to assure sectional balance).

The process is very similar to the one described above. This list needs to be created around Jan 15 which is a relatively quiet one for donations, so it is more stable than for the Holiday concert playbill.

After doing the same work as above, the list is cutoff at $100 and then:

1. Paper stock and envelopes must be ordered (Staples has both)
2. Invitations need to be printed from the list using Mail Merge function in Word. I only do these for the 60 or so non-Orpheus singers, and send the others electronically to each Orpheus member who has contributed $100 or more. This saves both postage and printing cost. I also send them to members who did not donate but are welcome to come in order to sing. Coordinate with Brook on this. He always asks for a list of Orpheus donors who gave $100 in order to determine who gets invited to sing, but might add others for balance.

**Job #4 – 10-20-30 FUNDRAISING CAMPAIGN**

1. Go into my PC and download the annual schedule of DC activities from: **word/orpheus/development/2019-2020 Season Plan,** which has when due dates and who is responsible.
2. Contact Dojiggy (Dick Janac can help with this) to get yourself registered as Administrator so you can access the data base from your personal computer (user name = **teamo**, P/W = **devry** and Website Host name = **omc**).
3. Renew license (approx. $500) each year. Dojiggy will contact your to remind you.
4. Get Peter Bennett to take photos of all the new and returning members (Janac may have them if previously a member) and Dick Janac will promote them to the website and get the site updated
5. Two months prior to November 1, prepare an email for each member who received 1 or more donations the prior year. The email should contain his prior year’s list and a list of each donor name and amount contributed prior year. When sending it out, announce the program start to members.
6. Work with Dave Kelly who will send out solicitations on our constant contact site starting November 1 and with 2-3 successive ‘booster’ solicitations.
7. When donations are made on line, both you as the Administrator and the member in whose name the donation has been made will receive messages confirming the donation. For ALL donations of $50 or more, I immediately send a thanking note to the donor….something like….”Not just Jim but all of us Orpheus singers are very grateful for your support. Thank you!” Hopefully, the member will also send a note to his donor friend or family member.
8. Donations that come in by check or cash generally are given to David Schwarz who then either shows it to me at rehearsal or makes a copy of the paperwork and faxes to me. I then enter the data into the Dojiggy site, crediting it to a member or the general organization if no member is specified. IF the data includes email address, then after entering it the system will again generate automatic notification emails to the donor and you follow the same process as above. IF no email address, I try to get one from the appropriate Orpheus member and in some cases this requires me going into the excel data base and locating the donor’s name which will also include an email address.

**Job #5 – AUDIENCE 50-50 (HOLIDAY CONCERTS)**

This job is performed by David Schwarz and the Volunteers who sell tickets at the front of the house and then bring the cage forward so our President or another Board member can have a drawing to select the winner at each Christmas concert performance..

**Job #6 – SPRING SCHOLARSHIP RAFFLE**

This job involves the following steps:

1. Update letters (for current year) located in my personal computer at 1) **Word/Orpheus/raffle/letter to give donors** and 2) **word/Orpheus/raffle/Owen Swenson ltr.** These letters may be sent our members after announcing the campaign kickoff.
2. Announce the kickoff to the guys about 6 weeks prior to 1ST concert, on line using something like found in my personal computer at: W**ord/Orpheus/raffles/announcement of the 2019 spring raffle**. Be sure to give them a cutoff date after consulting with Bob Meier. We prefer having all the items collected 30 days prior to the first concert because we can then include their name in a list of In-Kind donors for the Playbill.
3. As each raffle item is received from members, and given to you or Bob Meier, each one must be entered into an excel spread sheet: **Excel/Orpheus/raffles/2019 spring scholarships raffle items**.
4. The final list must be given to Bob Meier a few days prior to the 1st concert so he can prepare a large flyer to sit on a desk at each concert where volunteers sell raffle tickets. Our members should also be encouraged to buy tickets at one of our rehearsals. Bob Meier prepares the tickets.

**Job #7 –DONOR THANKING EVENT/PARTY**

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| **Development Committee (DC)** | **General:**  • Schedule and run DC business meetings with other committees as required.  • Report Status to the Board  • Arrange venues for committee meetings, and other meetings called by the DC.  • Keep/publish meeting minutes  • Maintain communication with the other relevant committees assigned and sponsored by the Board of Directors.  • Drive setting the goals for the Committee based on the Board’s Strategic Business Plan.  **Fundraising**:  • Drive the development and maintenance of theFundraising Plan for the organization. The plan will support both the long/short range goals, and the Vision/Mission of the organization. Plan, manage and run the following:  -The annual 10-20-30 fundraiser (November-December)  -The annual audience 50-50 at each Holiday concert  -The annual Spring Scholarship Raffle (drawing at final concert)  • Maintain the computerized Donor database.  • Ensure that all donations are acknowledged with the correct  **Grants:**  • Research Grant opportunities and develop a grant writing schedule with due dates; develop personal relationships with targeted grants organizations, and write/submit grant applications.  • Act as the Liaison between the DC and the Grant making organizations (POAC & ACA).  • Establish and maintain communication with the POAC and ACA directors.  • Ensure that the reporting documentation to the Grant making organizations are completed and delivered on time.  documentation and on timely manner.  **Other:**  • Plan and implement annual **‘Thanking’ Event**  • Create **Playbill Donor Lists** |

1. Q: Are the tasks currently being done by an individual or a group?

All tasks are currently done by **individuals**:

Dave Kelly handles all tasks associated with **grants**

J. D. Helms coordinates all the **fundraisers** (with significant help from David Schwarz for the Holiday 50-50 and Spring Raffle, Dick Janac who maintains the Dojiggy website, Cyndee whose volunteers sell 50-50 and raffle tickets, and Dave Kelly who manages our marketing data base and works with Big Marlin to send out 10-20-30 solicitations).

**Thanking Event** is planned and implemented by Drew and Gail Peterson with help from many others, especially on the day of the event

**All other tasks** are the responsibility of the Chair, currently J. D. Helms

1. Q: Are the tasks currently being done by singer or non-singer?
2. All done by singers
3. Q: Are the tasks being performed effectively now?
4. All are being performed very effectively.
5. Q: How likely is it that the people doing these tasks will continue performing them?
6. J.D. is willing to commit to the next 3 years, but willing to step aside anytime if another willing volunteer came forward.

Dave Kelly would like to pass the Grants torch as soon as someone can be found and trained, who has prior success writing and obtaining grants, and understands Orpheus’ history as applies to grants and fund raising.

1. Q: Do you believe the people performing the tasks would like or need help now?
2. Fresh thinking is always helpful to the creative process. J. D. would welcome someone willing to take over his responsibilities but they would need to commit time to learning the processes and then assuming responsibility. It would not appeal to anyone who finds detail work distasteful, and a retired member is recommended because of the time commitment.

Dave Kelly has grown tired of the Grants job and would like someone else to take it over. The ideal person would have some experience with writing grants and getting results, as well as historical perspective. Someone has come forward and expressed interest and will be assessed by David during the next cycle.

1. Q: Do you believe the people performing the tasks would like or need help in the future?
2. Orpheus will need to react quickly if one of the principals should suddenly become incapacitated or die. If that should happen without appropriate successors in place, the transition period could be painful. Not many processes are documented.
3. Q: If the people doing the tasks relinquish responsibility, how do you envision them getting done most effectively? (i.e., you assume responsibility, assign to another committee member, get a new volunteer, stop performing the task.)
4. We have no deep bench, so they would have to be *new* volunteers. Discontinuing the tasks is not an option. The exception is if we decided, e.g. to discontinue one of the lesser fund raisers, and I’m thinking the spring Raffle, which seems to be the least favorite of the singers who are asked to obtain raffle items. Only a few singers participate and as we continue to improve financially, the amount raised for scholarships may not be worth the effort as they conceivably could be funded out of general operating funds or through a separate appeal to a few donors.
5. Q: How easy is it to break the tasks into multiple parts to be completed by multiple people?
6. Breaking up the tasks is theoretically possible, but without a central business office, data bases, which currently reside on different private home PCs, would be an obstacle
7. Q: Could tasks be combined with some other tasks?
8. If you mean other DC tasks, combining makes no sense since each person (Dave K, David Schwarz, JDH) has their hands full with current responsibilities, none of which are overlapping. If you mean combining with non-DC tasks, I don’t perceive any synergies from combining with other committee tasks.
9. Q: Do you believe the tasks should continue to be done by a singing member or a non-singer?
10. Subject to cost constraints, all could be done by non-singing members, but only if the person(s) were willing to make multi-year commitments. Some of the value of doing these tasks through repeat cycles is building relationships with donors and grant making organizations.

Word/Orpheus/Development/Development Manual