

Development in a Small Shop or a  
Team of One:

Working Smarter, Not Harder

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Development Director Ketcha

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# About Me

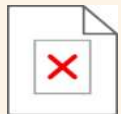
Ian Tovell | Development Director, Ketcha Outdoors

• 5+ years in Development/Nonprofit • I teach Business and Economics at a Community College • President, Maine Planned Giving Council • Board Member, AFP-NNE •  
Lives in Maine with wife, two boys, and 2 dogs • Loves running, skiing, and the outdoors



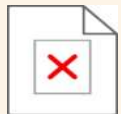
# Poll #1: Who's in the Room?

"How big is your development team?"



Just me

Entire development department, manages all aspects



4+ but stretched thin

Larger team but still overwhelmed



2–3 people

Small team dynamic, shared responsibilities, stretched thin



I wear some fundraising hats

Part-time development responsibilities

# The Reality Check

You're writing grants, planning events, managing databases, and doing stewardship... sometimes before lunch.

This isn't failure — it's the sector.



Grant Writing



Donor Research



Database Management



Event Planning



Board Reporting



Stewardship Calls



Social Media Engagement



Gift Processing



Major Gift Cultivation



Annual Fund Management

The goal today: systems, sanity, and sustainable results.





# The Small-Shop Superpower

Being small is not a disadvantage — being disorganized is.

Your size gives you unique advantages:



## Agility

Fast decision-making, no bureaucracy, quick pivots



## Authenticity

Personal donor connections, genuine relationships



## Donor Connections

Know your supporters personally



## Creative Solutions

Innovation through necessity

# The Small-Shop Mindset

Think Like a Department, Act Like a Team of One

## Old Way

- Doing it all yourself
- Chasing every opportunity
- Reporting what you did
- Treating tech as a luxury
- Working harder
- Asking for help last

## New Way

- Building repeatable systems
- Focusing on high-ROI activities
- Demonstrating outcomes and capacity
- Using tech as leverage
- Working smarter (and protecting energy)
- Advocating for capacity first

📌 Small shops don't need more people — they need clearer systems, stronger priorities, and better leverage.



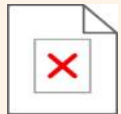
# Poll #2: What's Your Biggest Challenge?

"What's keeping you up at night?"



## Time management

Constant firefighting, lacking strategic focus



## Event overload

Too many events, not enough ROI



## Leadership expectations

Unrealistic goals, lack of understanding



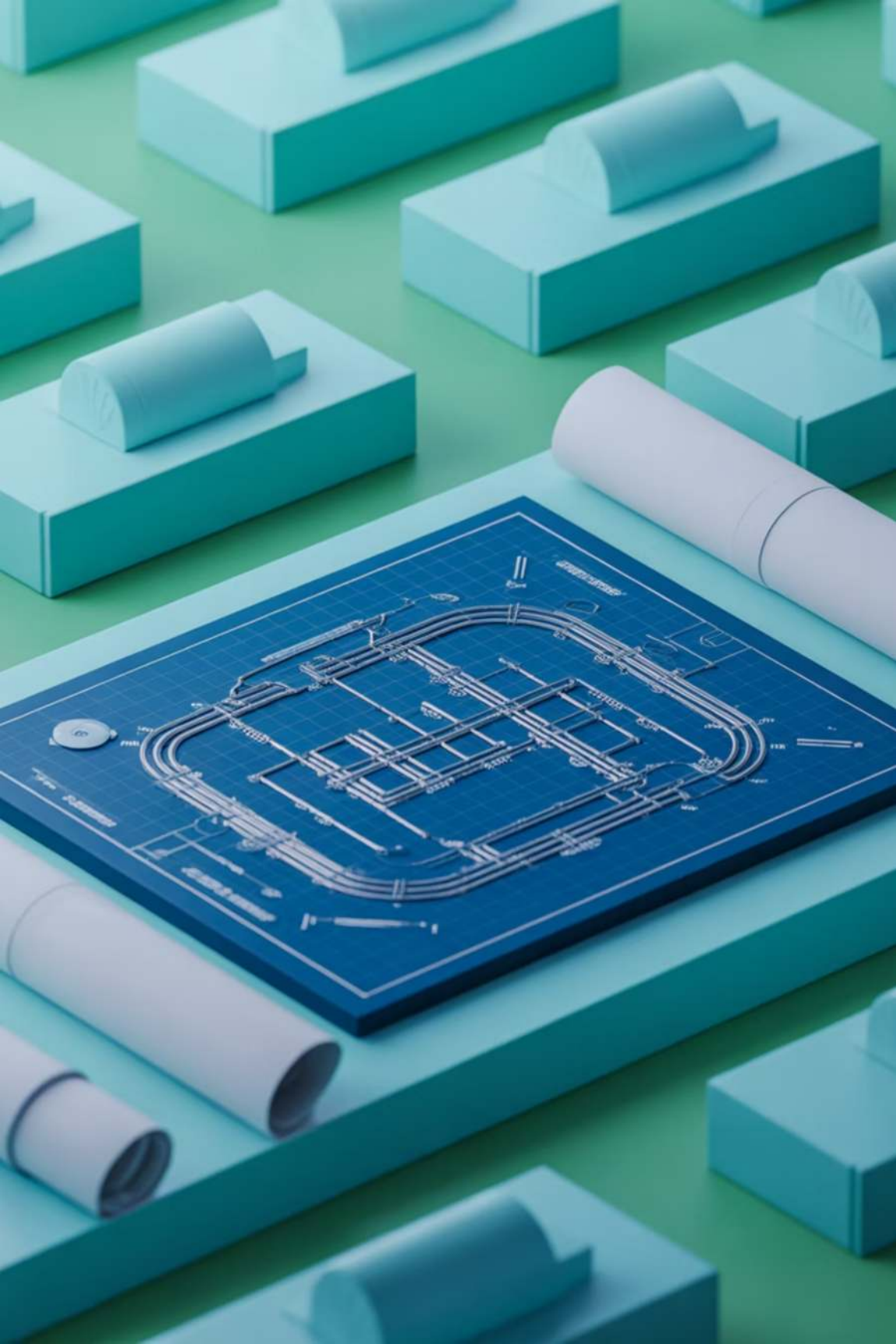
## Donor relationships

Building and maintaining meaningful connections



## Grants/reporting

Complex applications and compliance

A background image showing a collection of light blue architectural models and a rolled-up blueprint on a green surface. The blueprint is open, showing a detailed site plan with roads and buildings.

# Practical Systems That Actually Save Time

Build once, use 100 times.

## Key systems to implement:

Build templates (acknowledgments, appeals, grant narratives)

Automate admin: Google Forms → Sheets → CRM or BCC your CRM

Use PM tools (Asana, Airtable, ClickUp)


Batch work for efficiency



# Prioritization Framework

Urgent vs. Important for development work.

DO NOW (Important & Urgent)	SCHEDULE (Important & Not Urgent)	DELEGATE (Urgent & Not Important)	ELIMINATE (Not Urgent & Not Important)
<ul style="list-style-type: none"><li>Major donor crisis or complaint</li><li>Grant deadline this week</li><li>Board meeting prep (tomorrow)</li></ul>	<ul style="list-style-type: none"><li>Building donor pipeline</li><li>Strategic planning</li><li>Creating templates and systems</li><li>Relationship cultivation</li></ul>	<ul style="list-style-type: none"><li>Last-minute event requests</li><li>Non-critical emails</li><li>Minor administrative tasks</li></ul>	<ul style="list-style-type: none"><li>Excessive social media scrolling</li><li>Low-priority meetings</li><li>Perfectionism on minor details</li></ul>

 Focus on high-ROI tasks:

- Retention (keeping current donors)
- Monthly giving (sustainable revenue)
- Stewardship (building loyalty)

Script for leadership: "If this is a priority, what drops?"

# How Systems Drive Growth in Small Development Teams


Small nonprofits often rely on a single development professional juggling grants, events, and donor relations. Research shows that when these "teams of one" invest in systems and stewardship over new initiatives, performance improves dramatically.


## What the Research Shows:

- Automating thank-you notes and acknowledgments saves 5–10 hours per week (Bloomerang, 2023)
- Shifting focus from new donor acquisition to retention produces higher ROI and sustainable growth (AFP Fundraising Effectiveness Project, 2023)
- Adding a structured monthly giving program increases annual revenue stability by 2× (Classy, 2024 State of Modern Philanthropy)

## The Results:

 **Donor Retention:** 42% → 67%

 **Monthly Donors:** Minimal → 2× Growth

 **Admin Time:** 15 hrs/wk → 8-10 hrs/wk

 **Event ROI:** 1.4× → 2×+

"Sustainable growth doesn't come from working more hours — it comes from building repeatable systems and focusing on donor loyalty."

Sources: Fundraising Effectiveness Project (AFP, 2023); Bloomerang Small Shop Report (2023); Classy State of Modern Philanthropy (2024).

# Managing Donor Relationships as a Team of One

Retention first → stewardship always wins.

Key strategies:



Create a Donor Touchpoint Calendar  
(plan your year)



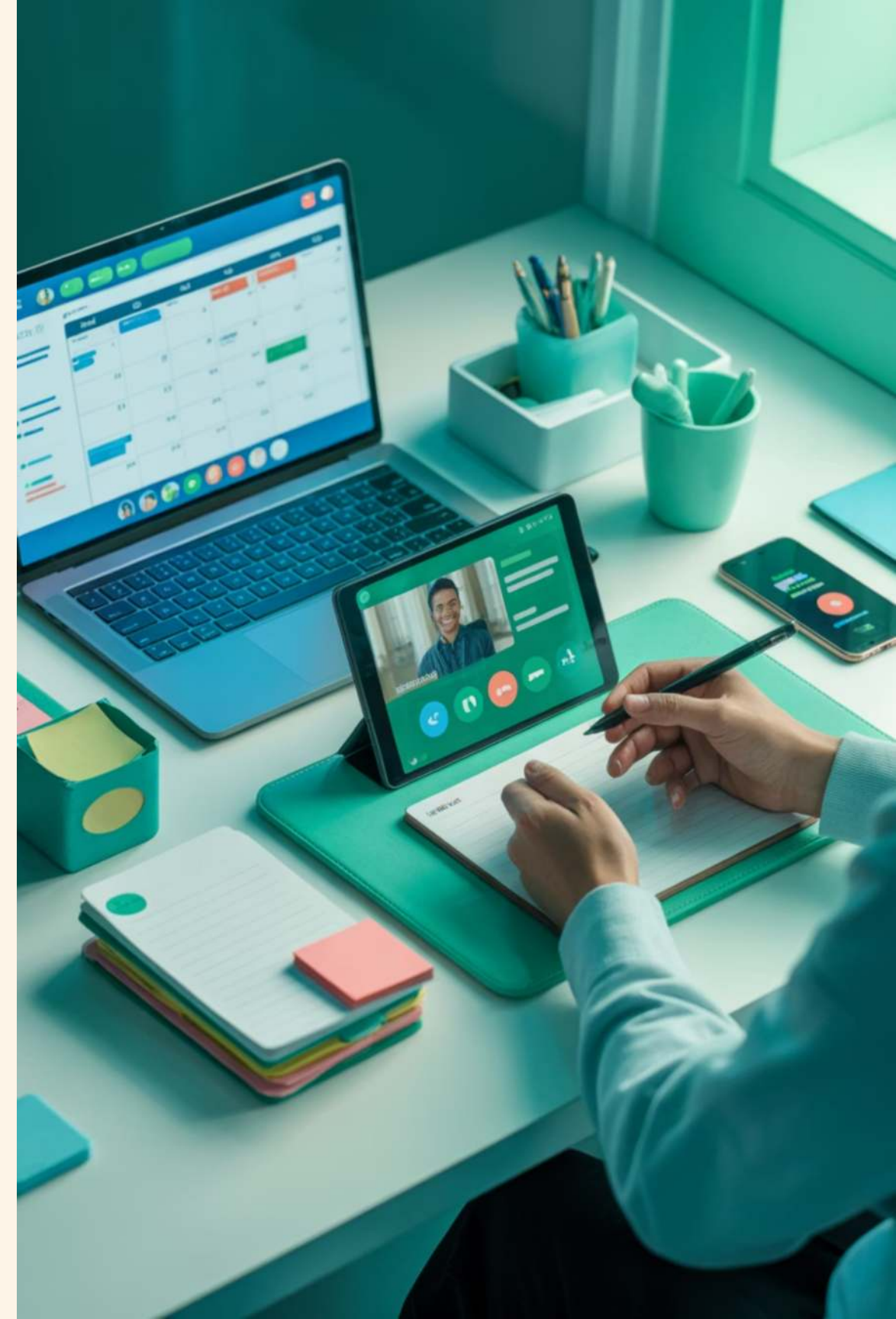
Personal Touches  
quick videos, handwritten notes, fast updates



Engage Board Members for Thank-You Calls



Focus on Mid-Level Donors  
(your sweet spot)





# Stewardship Habits That Build Momentum

Simple systems that create lasting impact:

## **3x3 Rule**

Thank 3 donors before 9 AM. Builds daily gratitude habits. Quick emails, texts, or calls count.

## **Repurpose Stories**

One impact story → 5 formats. Use everywhere: newsletter, social media, donor updates, grants, and board reports.

## **Monthly "Gratitude Friday"**

Block one Friday per month for thank-you calls, handwritten notes, and personal check-ins. Protect this time.

## **12-Month Stewardship Calendar**

Plan all donor touchpoints in advance. Include thank-yous, updates, invitations, and impact reports throughout the year.



# Simple Marketing Systems

Efficiency through smart content strategy:



## Content batching

Write multiple pieces at once



## Canva templates

Consistent branding, fast creation

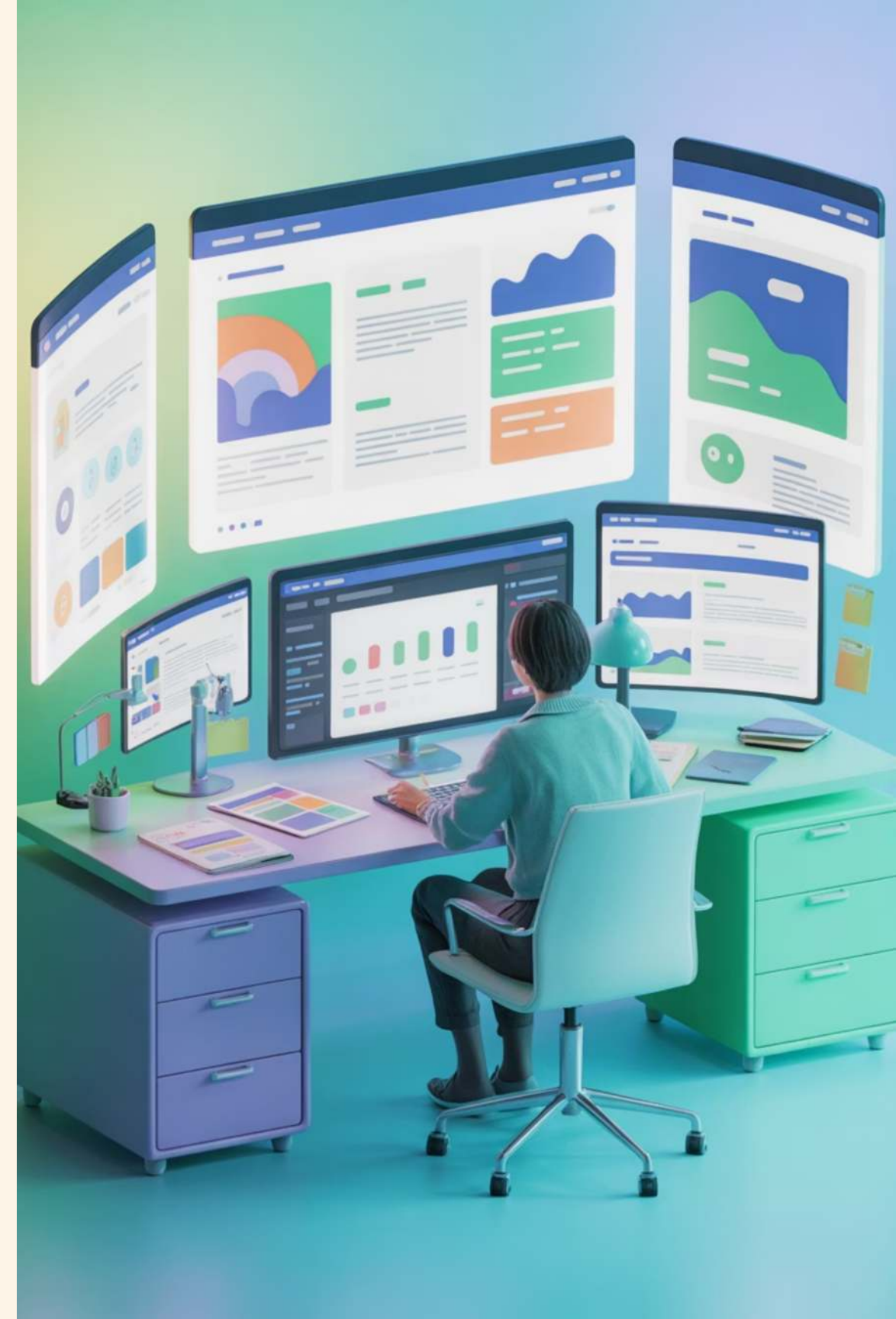


## Reuse everything

One story becomes 6 touchpoints:

- Newsletter feature
- Social media posts
- Website update
- Donor thank-you example
- Grant narrative
- Board report highlight

This segues into how AI accelerates all of this...



# AI Tools: Boost Small Team Efficiency

Small shops don't need more staff — they need leverage.

## Strategy + Writing



- ChatGPT – Grant drafts, donor comms, appeals, event messaging
- NotebookLM – Upload past grants/reports; generates summaries and insights in your org's context

## Visuals & Presentations



- Gamma.app – Auto-designs decks, one-pagers, reports

## Meetings & Notes



- Otter.ai – Records/transcribes donor meetings, board meetings, interviews; extracts action items

## Workflow & Personal Organization



- Seif.ai – Helps to organize your emails, and even writes responses for you



# Poll #3: What Tool Will You Try This Month?

Reinforces implementation and commitment to action.



ChatGPT for grant writing



Gamma.app for presentations



Otter.ai for meeting notes



Canva templates for graphics



Calendar blocking system



Donor touchpoint calendar





# Working With Leadership & Boards

Managing expectations and building engagement:



## Data-Driven Expectations

Use data to set expectations, showing capacity vs. outcomes with visual charts.



## Micro-Asks for Board Engagement

Implement micro-asks for board involvement: 1 call, 1 intro, 1 share.



## Advocacy Script

Use this script example: "Here's what I can do now vs. with additional support."





# Creating a Sustainable Development Culture

Building systems that outlast any individual:

Document processes, donor info, stewardship, and common scenarios

Train volunteers for stewardship tasks

Make development part of everyone's job

Create knowledge transfer systems

Build institutional memory

Essential for future hires and operational continuity.

# Avoiding Burnout (for Real)

Protecting your most valuable resource: yourself.



## Protect creative time

(block 2-3 hours weekly for strategy)



## Themed workdays

(Monday = grants, Tuesday = donor calls, etc.)



## Peer communities

(AFP, Slack groups, LinkedIn circles)



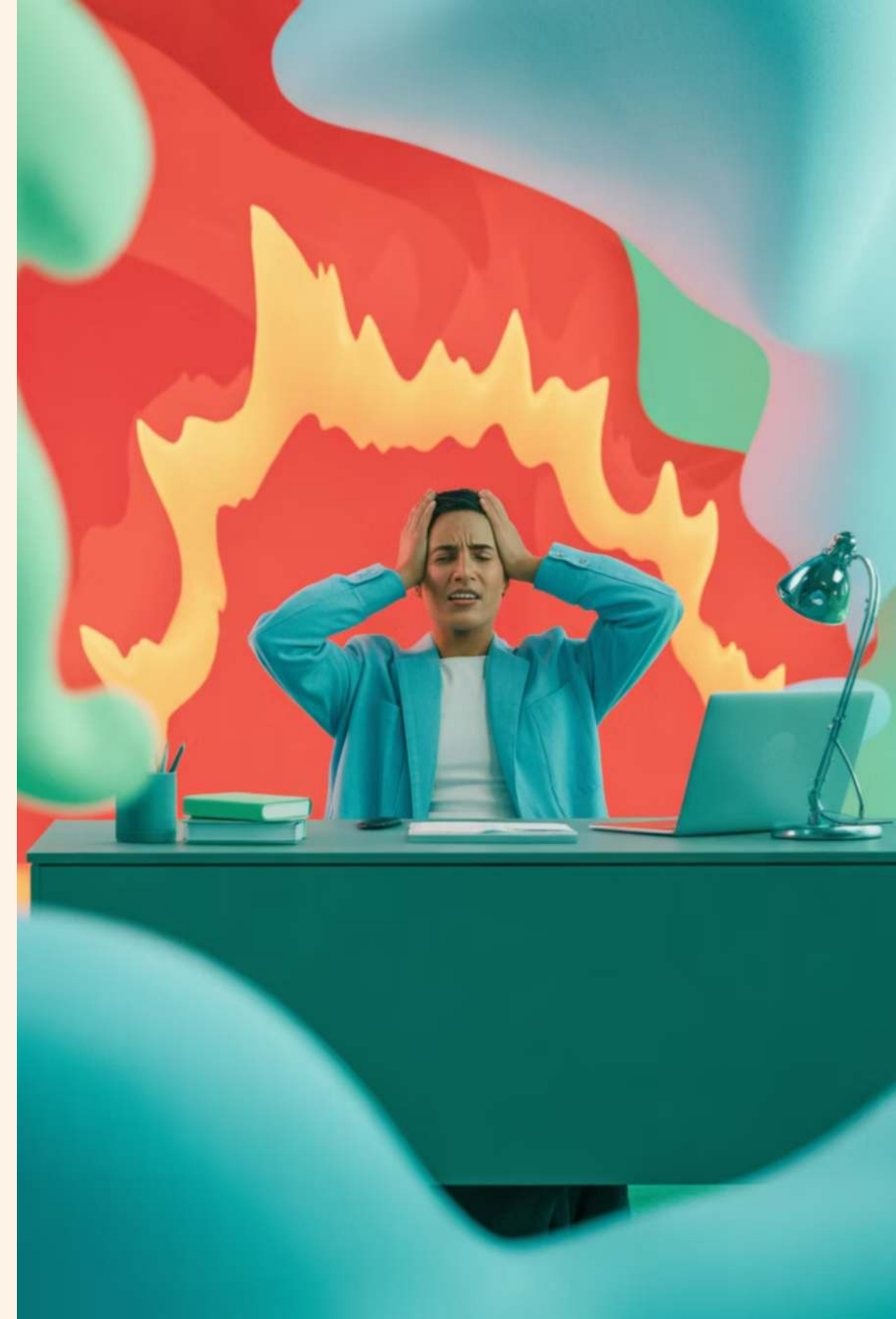
## Personal boundaries

(email hours, weekend limits)



## Regular breaks and vacation time

You cannot pour from an empty cup.



# Key Takeaways

Your system for success:



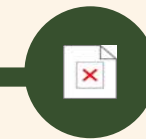
Systemize everything

(Build templates, automate processes,  
document workflows)



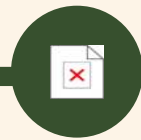
Focus on retention

(Stewardship always wins over  
acquisition)



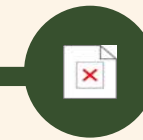
Use AI to multiply time

(Leverage technology for efficiency)



Advocate with data

(Show capacity vs. outcomes to leadership)



Protect your energy

(Boundaries prevent burnout)

# Your Challenge for Next Week



Identify one system you can automate or template.



Block two hours of protected deep work time.



Choose one donor to personally steward.



Say no once — with confidence and clarity.















# Poll #4: One Thing You'll Start (or Stop) Doing Next Week

Commit to action:

What will you START doing?

-  Calendar blocking for deep work
-  Using AI tools for writing
-  Creating donor touchpoint calendar
-  Building email templates
-  Setting boundaries with leadership




What will you STOP doing?

-  Over-customizing every communication
-  Saying yes to every board request
-  Working weekends regularly
-  Skipping strategic planning time
-  Neglecting donor stewardship




# Resource Slide

## Your Small Shop Survival Kit




### Systems & Efficiency

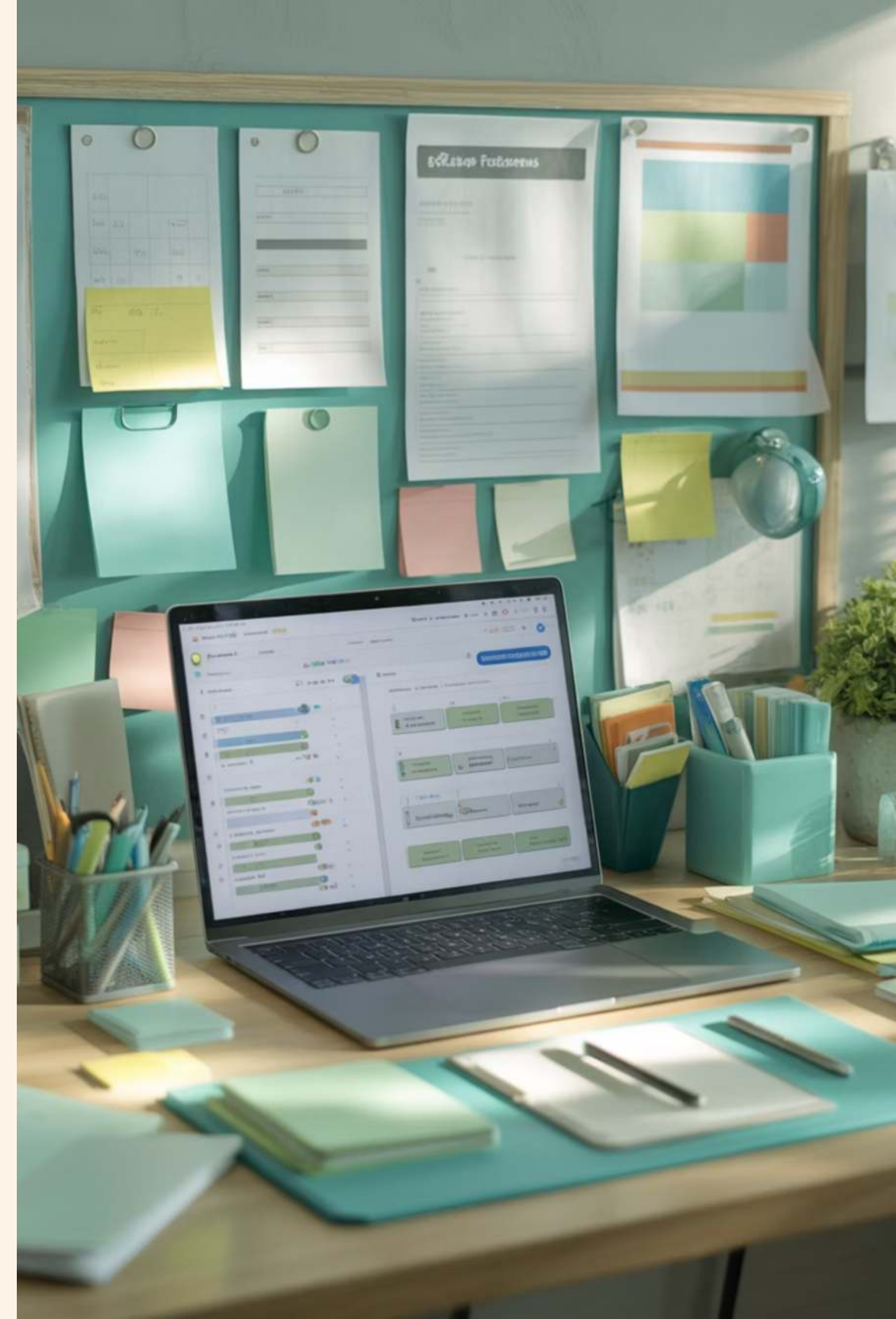
-  Calendar Blocking Template — Plan deep-work blocks and stewardship time
-  Donor Touchpoint Tracker — Log outreach frequency and next steps
-  Task Automation Checklist — Connect forms, CRMs, and spreadsheets

### Stewardship & Communication

-  Thank-You Email Templates — Scripts for first-time, repeat, and recurring donors
-  12-Month Stewardship Calendar — Pre-planned gratitude, updates, and stories
-  Impact Story Framework — Turn one story into six donor touchpoints

### Fundraising & Grants

-  Grant Boilerplate Template — Plug-and-play org background and outcomes
-  ROI Snapshot Worksheet — Evaluate events and appeals by time vs. dollars
-  Campaign Mini-Brief — Align goals, messages, and audience



# Questions & Let's Connect

Let's discuss your challenges and solutions

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