



# PLAN FOR SUCCESS

## A DISCUSSION ABOUT GROWTH AND ABUNDANCE

---



How Centers Learn and Grow  
How we Rise to Meet the Need

Kathy Alm, Former CEO, PATH Intl

Dana Butler-Moburg, CEO, The Shea Center

# How are we today? DBM

Two hours – what do you need?

The value of everyone in the room focused on helping each other

## FFT #1 – (Food for Thought)

**Make time and space for abundance. Creating abundance is a discipline.**

**Make it a habit to talk more about blessings than burdens. Where your focus goes, energy flows.**



*The SheaCenter*  
*for Therapeutic Riding*



# What did it take to get from before to after?



# What did it take to get from before to after?



Time – talent – treasure – ties

Patience

Courage

Help

Fertilizer

Structure

A plan

Education

Pruning – excavating - replanting

Vision

Collaboration

Structure

Gratitude

Communication

Passion

Discipline

# Number one reason people give?

## #1 Because they were asked.

- 2) Belief in the mission
- 3) Experience with services – trust the organization
- 4) They trust the person asking – relationship
- 5) Want to be part of something good

## 17) Tax benefit



*The Shea Center*  
for Therapeutic Riding



# FFT #2 Growth and philanthropy are part of an ecosystem with interdependent components.



## The mission is your compass.

- Fundraising (storytellers, askers, go-get stuff people)
- Leaders (staff, board, volunteers)
- Business systems (accounting, tech, data management, education, volunteer recruitment)
- Governance (board management, partners, our philanthropy infrastructure)
- Vision, values and planning



Philanthropy is an ecosystem with interdependent components.

The mission is your compass.

FFT #3

- DO
- DROP
- DELEGATE
- DEFER (`cause some stuff has to wait)



The *SheaCenter*  
for Therapeutic Riding



# FFT #4 Pareto's Principle – where do we put our time?

The mission is everything.

80 percent – consequences

20 percent – causes

1700 donors

400 \$10,000+



# FFT #5 – Ask for Help (Delegate)

The mission is everything.

A culture of philanthropy shares leadership and authority.

- Speaker's bureau
- Board help (public hearings)
- Sort strategic priorities and feedback (JG)



# FFT #6– Educate and Steward (Do)



**The mission is your compass.**

A culture of philanthropy educates and empowers. Raise up the story tellers.

- Board leaders
- Volunteers
- Parents
- Staff



# FFT #7 – What's your plan? (K?)



**The mission is your compass.**

- **K – do you want to take the conversation about planning?**

# Philanthropy is an ecosystem with interdependent components. K?

Are we all on the same page?

- Mission
- Vision
- Values
- Core behaviors

## CORE BEHAVIORS

CODIFYING CULTURE – HOW WE WORK

SHEA CENTER STAFF



# CORE BEHAVIORS

CODIFYING CULTURE – HOW WE WORK

SHEA CENTER STAFF



## INTEGRITY

I/we strive to be honest, unbiased, trustworthy people who persevere and value excellence.



## EMPATHY

I/we am candid yet kind, caring and strive to be self-aware and perceptive.



## SERVANT MINDSET

I/we am(are) humble, flexible, willing and inclusive. I/we strive to be a continuous learner.



## JOYFUL

Optimistic, hospitable, caring.



## RESPECTFUL

I/we strive to know my impact on others and give others the benefit of the doubt. I/we am(are) kind to others.



## COMMUNICATION

I/we communicate in a direct, clear, transparent, discrete and professional manner. I/we own the problem I/we seek and find solutions.



## COLLABORATIVE

I/we demonstrate teamwork, being solution-minded, creativity, being results oriented and critical thinking.

# FFT #8– Feared Thing First (Do)

The mission is everything.

Brene Brown

“Do something that scares you every day.”

And ask for help. (The armor of busy the weight of perfectionism.)



# FFT #9– Pruning (Drop)

**The mission is everything.**

Things **MUST** change. Our job is to notice when to call “enough” and listen to the organization.



*The Shea Center*  
*for Therapeutic Riding*



# FFT #10 – Gratitude everywhere

## The mission is everything.



1. Call every donor
2. Know your funding priorities at all times
3. Educate your board about the priorities
4. FUNdraising is for all
5. Personal notes (with real stamps)
6. Have other people make thank you calls and notes
7. Have a fundraising plan: direct mail, events, mid level major gift, annual giving, horse sponsorship, events, major gifts, grants, planned giving program
8. Make everyone feel welcome and included
9. Client thank you video



# What did it take to get from before to after?



Time – talent – treasure – ties

Patience

Courage

Help

Fertilizer

Structure

A plan

Education

Pruning – excavating - replanting

Vision

Collaboration

Structure

Gratitude

Communication

Passion

Discipline

# How does this work? Annual BBQ and Family Faire

Sponsor waiting list

GA waiting list

Every table letters noting every guest

400+ handwritten cards

Special “gifts”

Videos leading to the event

Building a culture of joy and philanthropy

Educating the staff and board about who is coming

Parade of stars (celebrating the first rider)

Client greeters



# How does this work? Annual BBQ and Family Faire



The Shea Center  
for Therapeutic Riding



# When it all comes together...



# When it all comes together...



# What will you do next?

Take this time in Colorado to focus. What IS next?  
What calls to you?

What are you doing to refill YOUR cup? Abundance starts at the top.

Share with each other via the conference app what you got. What you need help with. Talk to each other.

Email me three action steps. I'll email you back in the new year and remind you what you committed to.

[dbutler@sheacenter.org](mailto:dbutler@sheacenter.org)

