

Strategic Planning for Your Organization and Its Fund Development

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BERTMAN
+ ASSOCIATES

Lori Bertman
ljb@bertmanandassociates.com
(225) 806-9109

Strategic Planning for Your Organization

- It's global.
- It will affect all aspects of your organization's programs.
- Priorities must be selected to implement the mission in the future.
- Some choices made this process may have immediate effect; the impact of other decisions will be felt only over a longer period of time.

Who Is Involved?

- Staff
- Board
- Volunteers
- Appointed study team
- Outside facilitator

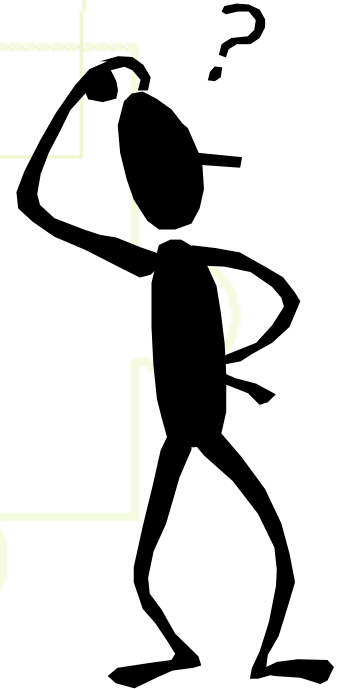


Strategic Planning Should Answer the Following Questions

- What is the organization's (bureau, museum, park, etc.) mission? Why does it exist?
- What vision does the organization have about what it could become in the future?
- What services and programs does it provide now? What could it offer in the future?
- Who benefits from these efforts? How might the clients/customers change in the future? How would the organization respond to these changes?
- Given the surrounding environmental conditions and the current capability of the organization, where should it concentrate efforts and resources to carry out its mission and vision?
- What measures will be used to track the success?
- What efforts will be made to revise the organization's priorities as conditions change?

Essential Questions for Strategic Planning

- What is our mission?
- What is our vision?



Identity Issues



- Who do we think we are?
- What do we do?
- What do we NOT do?
- What long-term plans do we have?
- What short-term priorities must we meet?

What Is Our Service?

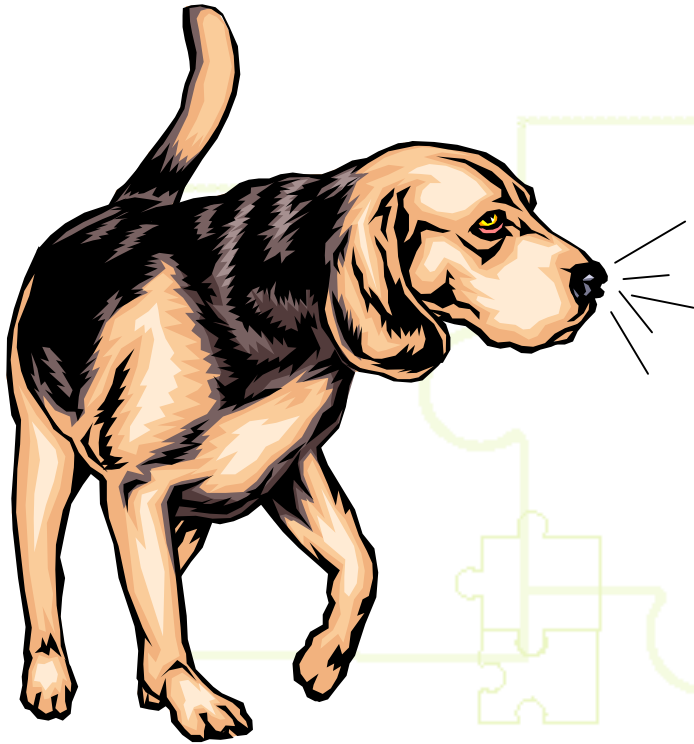
- What do we want to accomplish?
- What results do we want to achieve?
- How is our organization strong?
- How is our organization weak?



Who Do We Serve?

- Who are the people we serve?
- How will those we serve change over time?
- What do the people we serve think is important?
- How well do we meet their needs—and how do we know this?

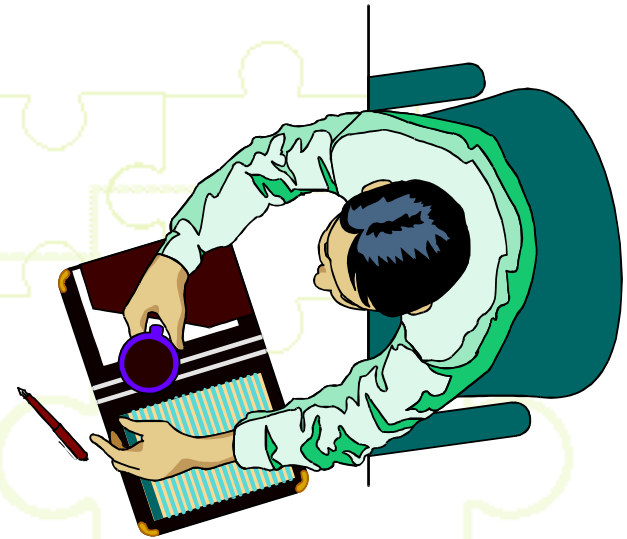
What Are Our Outcomes or Results?



- What outcomes or results do we expect?
- Have we achieved these outcomes or results?
- How can we adapt what we do to achieve the outcomes or results we want?

What Is Our Strategy to Continue?

- What do we know about ourselves now?
- What priorities have we chosen?
- What are our goals (what must be accomplished)?
- What are our objectives (how those accomplishments will be met)?
- What must be set aside or discarded for the good of the organization and those it serves?



What Next Steps Should Be Taken?



- What activities must take place to meet our objectives and achieve our goals?
- Who is going to be responsible for these activities?
- How will we keep staff/board/volunteers updated on our efforts?



Fund Development 101

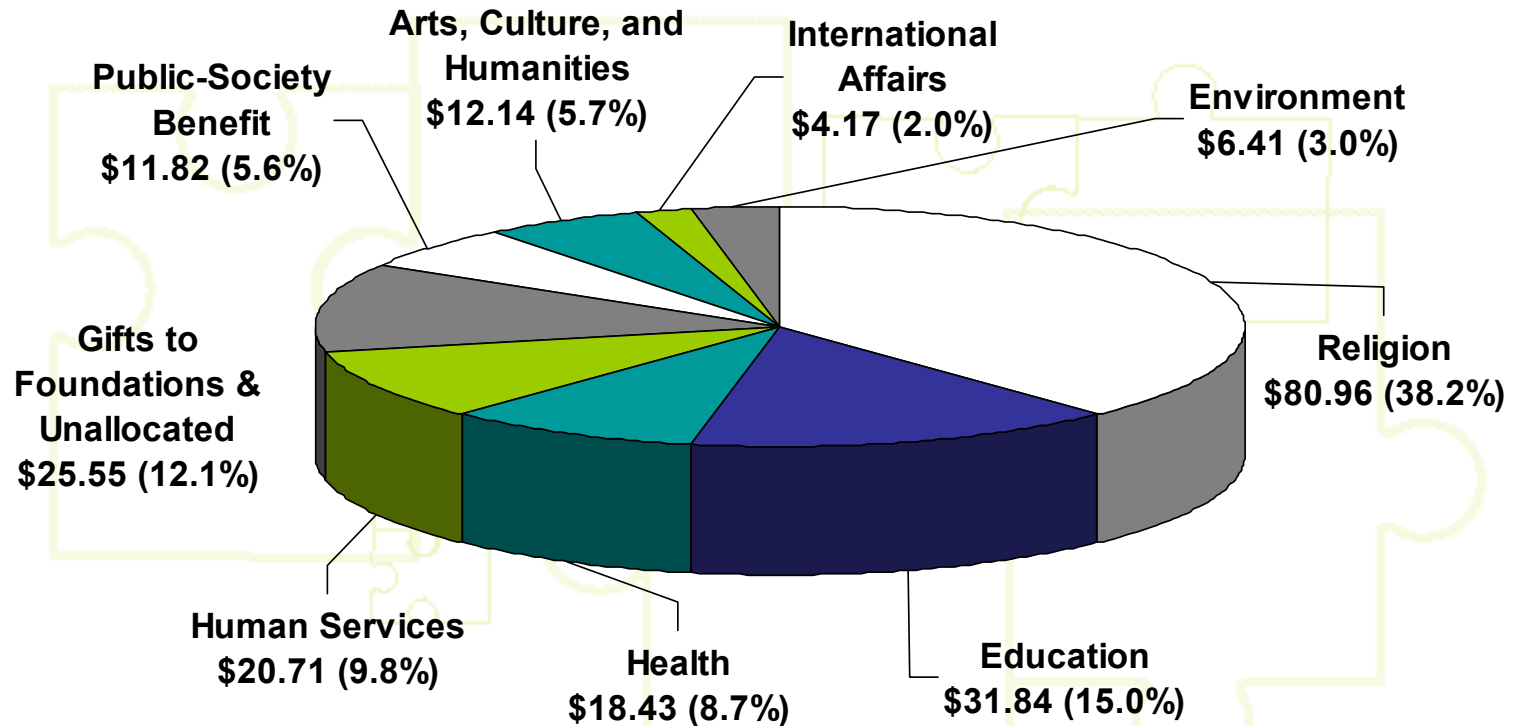
Strategic Plan for Development

- More targeted
- Focus is on the sustainability of the organization
- Asks tough questions to develop a comprehensive development program for the organization
- Must be matched with the overall strategic plan
- Diversifies funding sources
- Establishes an organization's readiness to embark on fund development programs
- Ensures you have the resources to advance the organization's mission

Fundraising vs. Development

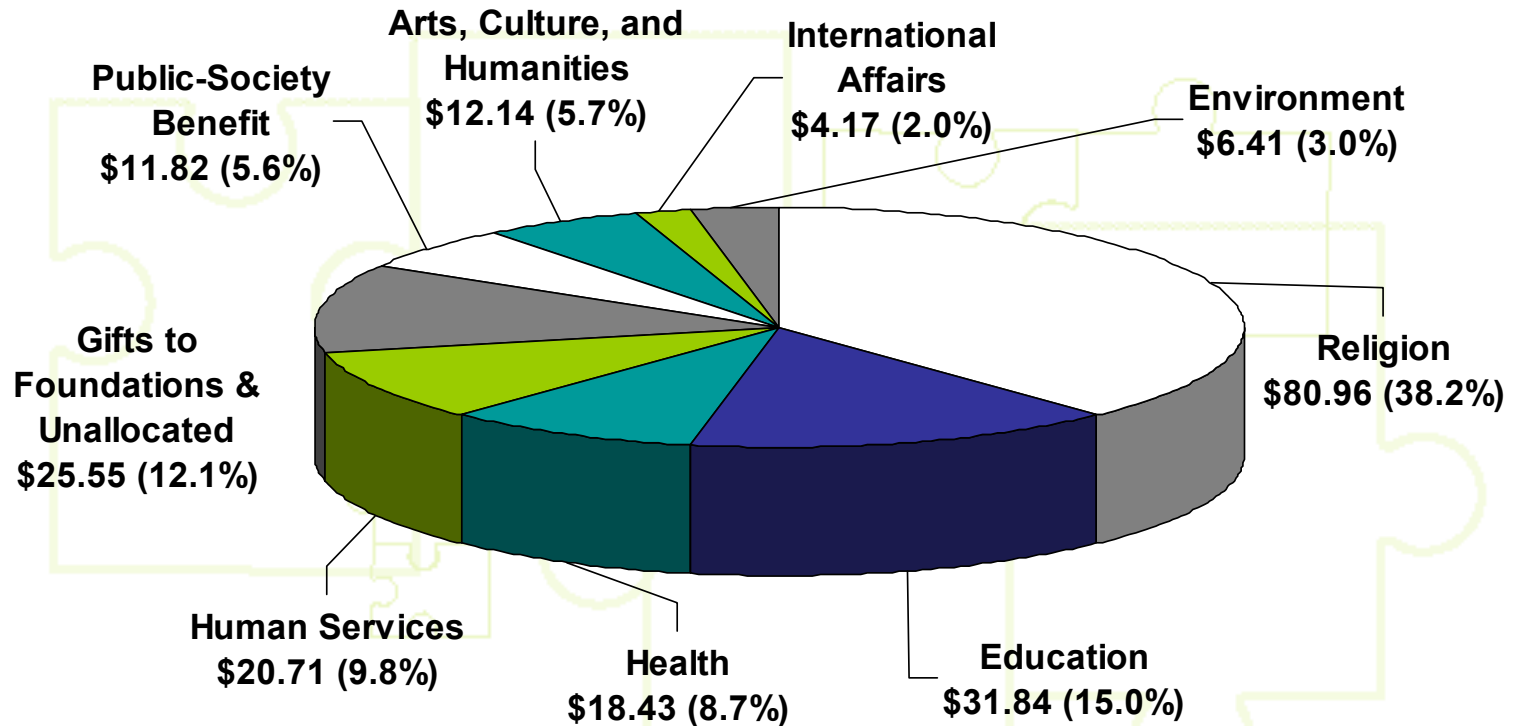
<u>Fundraising</u>	<u>Development</u>
Focus on money	Focus on donor
Quid pro quo	Relationship
One shot	Interest congruent with mission
Instant gratification	Delayed gratification
Where is the money?	Giving culture/environment

2001 Contributions: \$212.00 billion By Sources of Revenue



Source: Giving USA 2002/AAFRC Trust for Philanthropy

2001 Contributions: \$212.00 billion By Type of Recipient Organization



Source: Giving USA 2002/AAFRC Trust for Philanthropy

Components of a Comprehensive Fund Development Program

1. Annual Giving

A year-round effort to raise renewable funds from individuals and groups, for unrestricted and restricted purposes using a variety of solicitation methodologies and techniques.

2. Capital Giving

An intensive, organized fundraising effort to secure philanthropic gifts for specific capital needs or projects, executed within a specific time period, usually over one or more years. It is estimated that 90% of most organization's philanthropic dollars come from the top 10% of the donors.

3. Estate or Planned Giving

The integration of individual donor's plans to make a charitable gift with his or her personal financial and estate plans.

Grantsmanship

- Plan the entire program, design an evaluation, and create a detailed budget first
- Identify funding sources with interest in your work
- Cultivate relationships with foundation staff or trustees
- Have a plan for additional sources of funding and how you will continue the project after funding ends
- Writing a grant is equivalent to writing a business proposal
- A grant award must be used for the purposes outlined in your proposal
- Thank the funder
- Keep in contact with the funder and meet all reporting requirements

The Three Immutable Laws of Development

- People give to _____
- People give to _____
- People must be _____



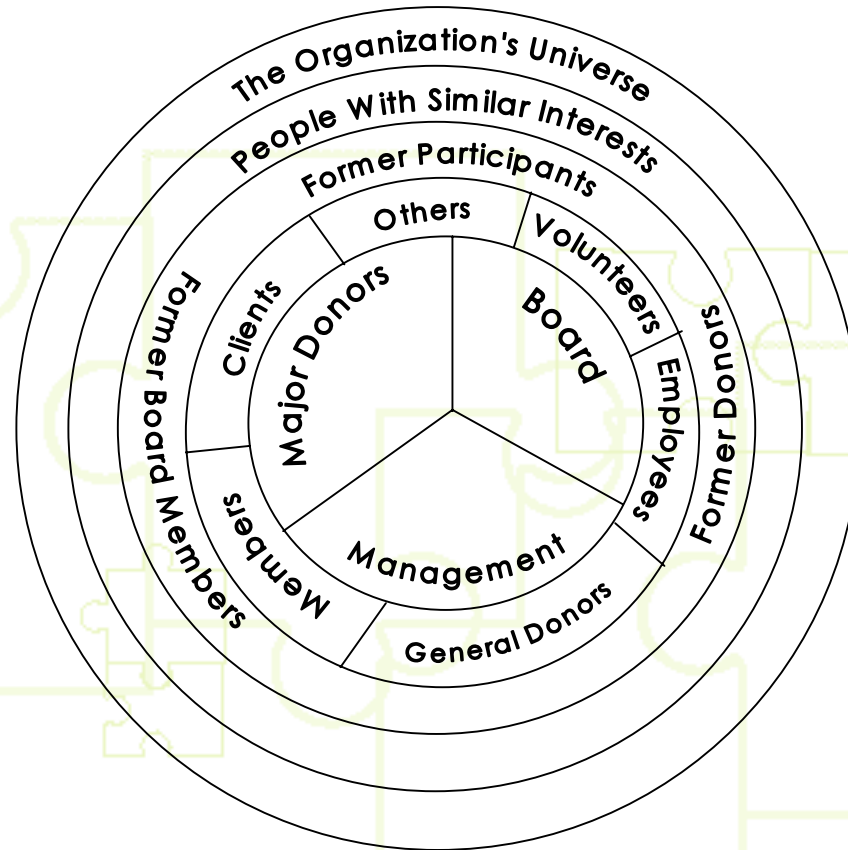
Establishing Your Case

- Case – an expression of the cause, or a clear, compelling statement of all the reasons why anyone should consider making a contribution in support of or to advance the cause. (Seymour, 1966)
- Case Statement – a written document that describes in a summary fashion the reasons a cause is worthy of support, why fundraising and philanthropic gifts are needed, and the benefits specific people will receive when funds are spent.

So What and Who Cares?

- Urgent and compelling reason why someone should give to your organization
- Donor-focused vs. organization focused
- External and Internal Case
- Different case statement for different constituents

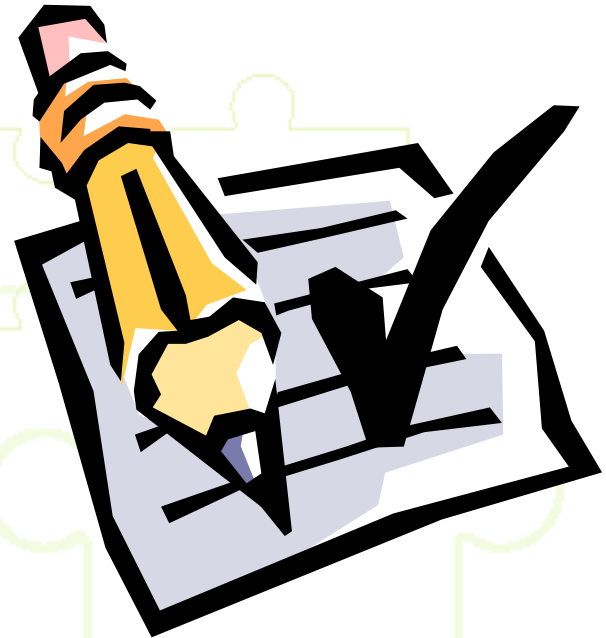
Developing a Constituency



Source: Henry A. Rosso, 1991. *Achieving Excellence in Fund Raising*

Building Your Donor Base

- Interest
- Linkage
- Ability / Capability



Components of a Strategic Planning for Development

- Assess external environment
- Assess internal environment
- Analyze current development activities
- Determine short-term and long-term goals, objectives, and activities
- Implement while planning

Assessment

External factors include—

- Public perception of the organization
- The economy's impact on development
- Public policy issues
- Identifying customers
- Location of the agency
- Identifying competing causes

Internal factors include—

- Board of Directors
- Executive Director
- Staff
- Finances/Budget
- Technical Resources
- Philanthropic culture of the organization
- Programs and Services
- Volunteer Structure

Current development function assessment includes—

- Fundraising personnel
- Assessing current fundraising programs for best practices
- Fundraising technology
- Physical facilities
- Defining the donor pool
- Segmenting the pool of donors

Planning

Action Plans will be developed for each objective.

- Define the key actions required to accomplish the objective
- Identify the person responsible for each action
- Determine timelines for each action
- Establish deadlines and benchmarks
- Establish budgets

Fundraising calendars and campaign templates can be created for this process.

- A solicitation calendar
- A special events calendar
- An annual giving program calendar
- A capital campaign calendar
- A planned gifts calendar
- Grant application and tracking calendar

Templates can be developed for annual and capital giving campaigns.

This includes—

- Case statements
- Pledge forms
- Volunteer solicitation manual
- Solicitation packet
- Recruitment strategies
- Volunteer job descriptions
- Volunteer training components



Any Questions?