

Develop Your Fund-Raising Plan With Consensus

Introduction

Are you working on a fund-raising plan - or planning to?

When seeking to construct a plan for a fund-raising campaign, the persons charged by their non-profit organizations with that responsibility often ask for a plan "boilerplate," or a "template," thinking that such models could be directly and wholly adapted to their situation.

However, it is not that simple. Since each campaign plan should be determined by the objectives, costs, resources, priorities, responsibilities and timelines emanating from the long-range, strategic plan, it is obvious that a "one-size-fits-all" fund-raising campaign plan document can only be used in a broad and general way. Refinement, flexibility, and consensus, are but a few of the components which each plan must accommodate and they are unique from one organization to another.

This document can help you to adapt the guides and outlines provided so that you can develop your own general development plan and specific fund-raising campaign plans.

Planning Is Everything

- A fund-raising campaign must be:
 - a plan,
 - within a plan,
 - within a plan.

Each campaign plan works within the general development plan, which in turn must fit into the organization's strategic plan --- with the Mission Statement being the "centre of it all."

Deviate from this hierarchy of plans and you invite chaos. A campaign plan that is not in accord with the general development plan may make its goal, but it may also "poison the well" for other fund-raising efforts. A general development plan that has not been created within the context of an organization's strategic plan may outline a valid theory for acquiring contributed income, but it will probably lack the content necessary for successful implementation.

The Road Map To Success

A strategic plan is an organization's blueprint for carrying out its mission statement. It is initiated, implemented, and periodically reviewed by an organization's staff and board. The process of strategic planning is a critically important element of successful management. Volumes have been written on the topic and any bookstore with a strong business and management section will have more than a few feet of shelf space devoted to the subject. I urge you to develop an understanding of the process and to make sure your organization has a strategic plan which it revisits annually.

A strategic plan, which should cover at least three years, is a prerequisite for establishing, first, a general development plan effort and, subsequently, specific fund-raising campaigns. It identifies institutional priorities, plots a course for achieving goals and objectives, lays out performance assessment, and provides for midcourse corrections.

It is the first step in establishing an organization's budget. Knowing what is to be done and how it will be accomplished allows cost to be determined. Then, income can be balanced against expenses. The shortfall --- the amount you plan to spend minus anticipated income --- is the operational deficit. It represents the money the organization will have to raise, usually through contributed income, to balance its budget.

A general development plan identifies how and from what sources an organization will acquire and maximize contributed income. It encompasses all potential sources, identifies the tactics which will be used, and communicates that information to the organization's staff, volunteers, and influential supporters. Like the strategic plan, it is a living document subject to periodic review and updating. Usually, the person charged with the responsibility for managing the process of achieving contributed income will write the plan, in collaboration with the organization's director and the board development committee --- if one has been established. If a standing development committee has not yet been named, the board as a whole or a temporary committee will have to exercise oversight responsibility. The general development plan is applicable to any organization, although each of the points would need to be adapted and augmented to fit a specific organization.

Developing Your Own Fund-Raising Plan

You need to develop your fund-raising plan. There are several places you can go to construct your funding plan but here is a good place to start. (1) "*Exhibit & Document Library*" - <http://www.raise-funds.com/exhibitlist.html>

Building Consensus

Well thought-out plans are necessary for successful fund-raising, but the best-laid plans will come to nothing if an organization's leaders have not arrived at a consensus to raise money. The paid head of the organization, the board chairperson, key staff members, trustees, other volunteers, and advisory group members all need to agree with fund-raising goals and the plan for achieving those goals.

This is not the place to explore the techniques of consensus building. It is one of the hotter topics in the management community, and a trip to your local bookstore or library will turn up a plethora of books on the subject. Suffice it to say, consensus building is involvement. Consensus for any program of action is rarely achieved without involving in the program's design those from whom you are seeking the consensus.

Successful fund-raising relies heavily on trustee involvement. Trustees should be a fundraising campaign's donors and solicitors of first resort. They must be an active part of the consensus-building process. Use your trustee development committee to develop overall fund-raising strategy, tactics, and initiatives and to plan specific campaigns. Key staff members should also be involved in formulating general fund-raising strategy and tactics. If the people in charge of delivering the

programs and services of an organization are not in agreement with the process of soliciting contributed income, they will not be effective advocates for fund-raising efforts.

Then there are those, such as volunteer solicitors, who sign on for a fund-raising campaign. They play important roles, but by choice limit their involvement. A solicitor is not as fully engaged in a campaign as the campaign chairperson. It is unlikely that solicitors would take part in the formulation of campaign plans. However, you must win their consensus to carry out the campaign.

Hold Nothing Back

Two words describe what I have found to be the key in achieving consensus among volunteers, staff, and others involved in designing, executing or supporting fund-raising efforts: *full disclosure*.

If you are the person putting a campaign together, inform everyone about its goals, how it will be carried out, and the roles, responsibilities, and relationships of all involved, and do it early in the process as possible. Never, ever think in terms of managing a person's need to know.

If you are a staff member, trustee, or [volunteer](#), demand to know the fund-raising plan in its entirety from the beginning. Never, ever accept the answer, "That's something you won't be working on. You don't need to worry about it." If you are expending the time and effort to work on a fund-raising campaign, you want it to have every opportunity for success. An organization that doles out fund-raising information on a need-to-know basis is an organization that is severely hampering its own efforts. Frequent and detailed reports need to be issued to everyone involved in a fundraising campaign.

Courtesy of: www.raise-funds.com