

Strategic Fundraising Program Development

Sample Process Description

Introduction

This presents an overview of Conservation Impact's approach to assisting organizations in the development of a strategic and comprehensive fundraising program. All our work is highly customized to meet the unique needs and budget of each organization. This is a sample of a basic process. We can also enhance the process with a strategic business plan, a positioning and branding strategy, a communications plan, or a board development strategy.

Purpose and Goals

The purpose of strategic fundraising program development is to:

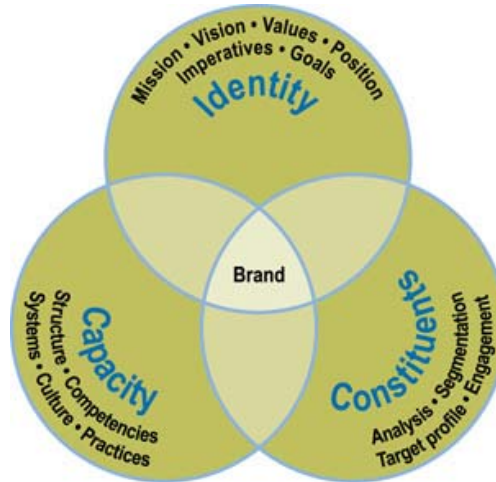
- address immediate fundraising needs and attract new funds
- build viable and sustainable fundraising capacity
- create a strategic and integrated fundraising program to ensure ongoing revenue streams.

Goals to be achieved by the process often include:

- a comprehensive understanding of the organization's fundraising capacity, niche and external opportunities
- a re-designed, more effective, and sustainable fundraising program
- a strategic resource development plan to define and coordinate activities towards specific results
- a fully engaged board and staff, both willing and able to participate in fundraising.

Framework

Conservation Impact uses an *Integrated Strategy* framework that links identity to constituent outreach to capacity. Successful and sustainable fundraising is dependent on the full development and alignment of each component. With a strong identity, an engaged constituency, and adequate capacity, an organization creates a potent operation and a distinct brand. It is this potency and distinction that attracts, engages, and retains donors and supporters.



Integrated Strategy Framework
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Process

At the beginning of each project, we define a very specific sequence of events in order to be explicit about our work and to achieve outcomes. However, we are always flexible to address needs as they arise. We work closely with the executive director, the management team or a development committee to build capacity throughout the organization.

Assessment

We complete a brief but focused fundraising assessment through interviews with staff, board, and donors, and through an analysis of materials, systems, data, and records.

Specifically, we analyze:

- Infrastructure: data management, tracking, research capacity, and needs
- Processes: donor development, coordination, follow up, and moves management capabilities, and ability to leverage all contacts through special events, program participation, and other opportunities

- Human resources: staff, board, and volunteer capacity and needs, and integration throughout the organization
- Strategies: current activities, gaps, needs, opportunities, and areas of focus to best align with strategic plan and financial goals. This includes a review of current and potential donor opportunities.

The assessment identifies untapped potential, opportunities, weaknesses, and gaps. It is the basis for program design and specific recommendations to increase organizational fundraising capacity.

The outcome of this phase is a fundraising capacity assessment, the development audit.

Donor / Positioning Analysis

We complete a donor and positioning analysis through interviews, focus groups, or secondary research to determine external perceptions of the organization and to understand the potential donor audience. We may work with staff, board, or a committee to define positioning or re-positioning alternatives.

The outcome of this phase is donor potential and the organization's position.

The Story

The basis of any successful fundraising effort is not only what the story is, but how it is told. We work with leadership to create a compelling story as the basis for all appeals. We ensure that all staff, board, and volunteers know, feel, and can articulate the story, ensuring consistency of message and a unified "voice."

The outcome of this phase is a compelling story with messages designed to engage donors.

Strategic, Integrated Program Design and Development

Using the assessment, position, and story as a base, we define the most appropriate integrated and comprehensive strategies for fundraising results. We also create the systems, processes, or templates necessary for the efficient and effective implementation of those strategies both internally and externally.

The outcome of this phase is a strategic fundraising program, with the necessary tools, templates, or systems to facilitate implementation.

Implementation

We work with board, staff, and volunteers to build full capacity to implement the fundraising program and to have an organization-wide integrated approach. This may include, but is not limited to, board and staff training and coaching, assisting in asks, outreach to new potential donors, using new tools, or coordinating campaigns.

The outcome of this phase is greatly enhanced capacity (ability, willingness, tools) to achieve and exceed fundraising goals.

Scope of Services and Cost

We outline a very detailed scope of work, with tasks, deliverables, and deadlines. We adhere strictly to our budget and our schedule. We work intensively and can typically complete the process in three months.

Project Deliverables

At the end of this process, the organization has:

- a fundraising capacity assessment
- a donor and positioning analysis
- a compelling story for all constituents
- a strategic and integrated fundraising plan and program
- implementation training, tools, systems, and assistance

See www.conservationimpact.com for more information.