



Where Strategic Planning & Fundraising Meet

Funding For Good | Consulting and Coaching for Growth





Funding For Good

Owner, Mandy Pearce *(left)*

Lead Consultant, Marie Palacios *(right)*

Strategic Planning • Development & Business
Coaching • Board Development & Education •
Fundraising Planning & Strategy



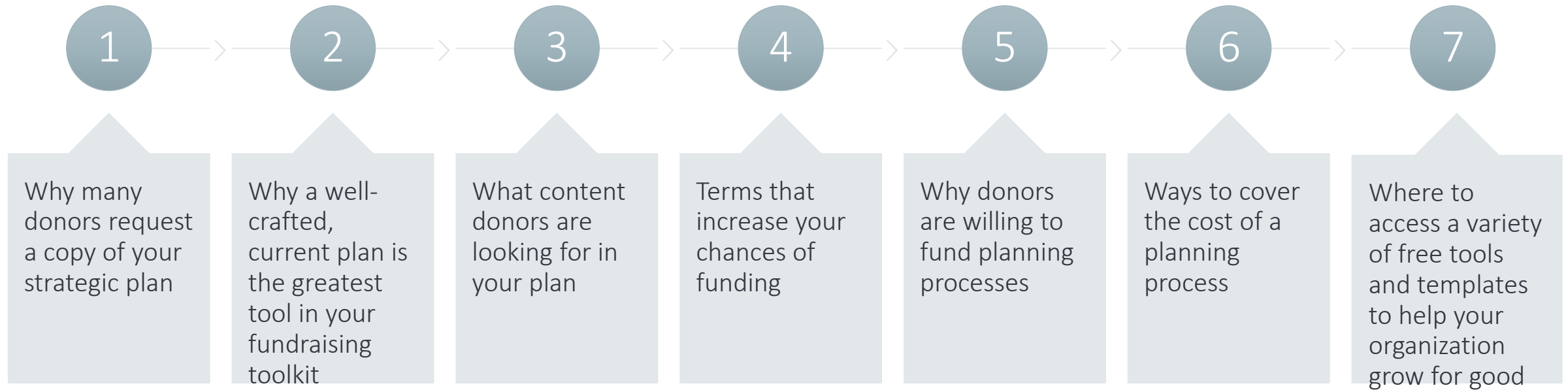
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Getting to Know You

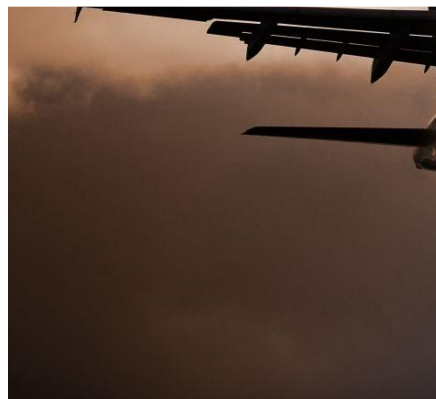
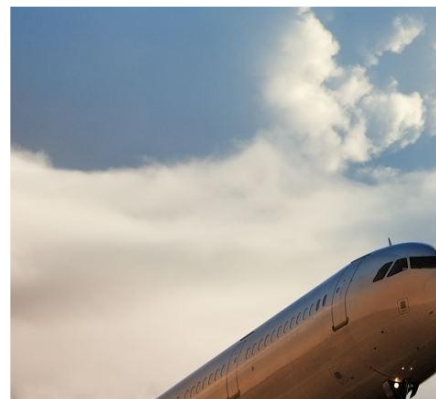
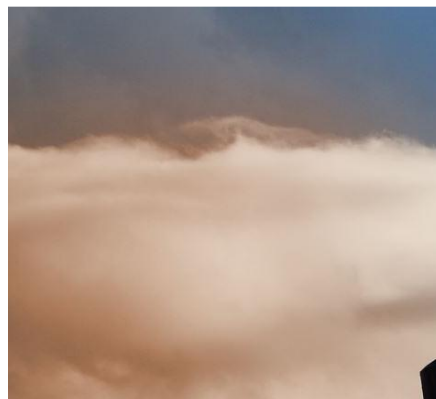
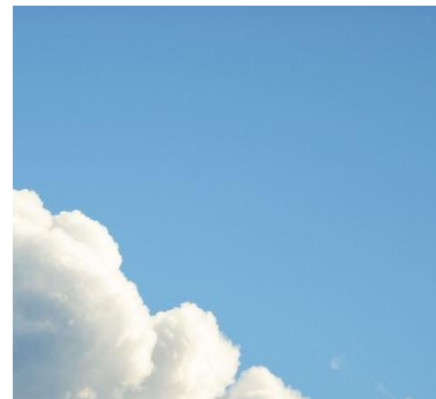
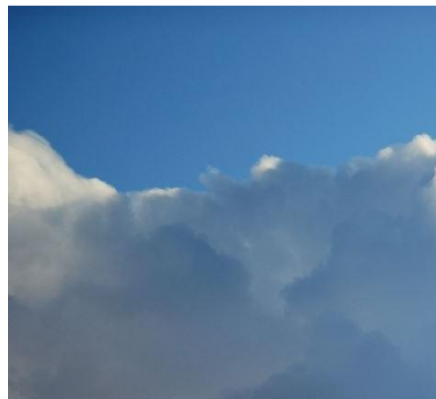
Using only one word: Describe your strategic planning experience.

What We'll Cover





Strategic Planning Overview





What Is A Strategic Plan?

Funding For Good's definition:

“A process and product that:

- ✓ Defines where your organization is going
- ✓ Confirms what success looks like in measurable terms
- ✓ Offers a roadmap on how you plan to get there

It is NOT:

- Business as usual
- A stand-alone development plan
- A multi-year implementation plan

4 Core Questions Every Strategic Plan Should Answer



Where are we now?

What might block us?



Where do we want to be at specific points in the future?

How do we get there?



Why is a strategic plan important?

- Confirms a shared vision (Aka: “destination)
- Provides direction by outlining strategies and steps for accomplishing goals
- Allows organizations to evaluate, measure, and share successes
- Promotes development plans (programs, resources, personnel)that are mission/vision focused)
- Creates “ownership” and builds consensus
- Helps teams “problem-solve
- Ensures leadership and staff are on the same page
- Increases chances for success and sustainability
- Assures donors and stakeholders the organization is a worthy, safe, and timely investment



Top things to Know about Strategic Planning

1. Intentional planning processes could double an organization's chances for success.
2. Nearly 70% of plans fail.
3. There isn't one industry standard model
4. Evidence-based models are designed to increase the quality of the experience and product.
5. One size doesn't fit all. [process or product]
6. The facilitator you select could "make or break" your return on investment (ROI)
7. A viable strategic plan should be "a living, breathing document" that provides direction while remaining adaptable.
8. A strategic plan is only as strong as the people who develop and implement it.



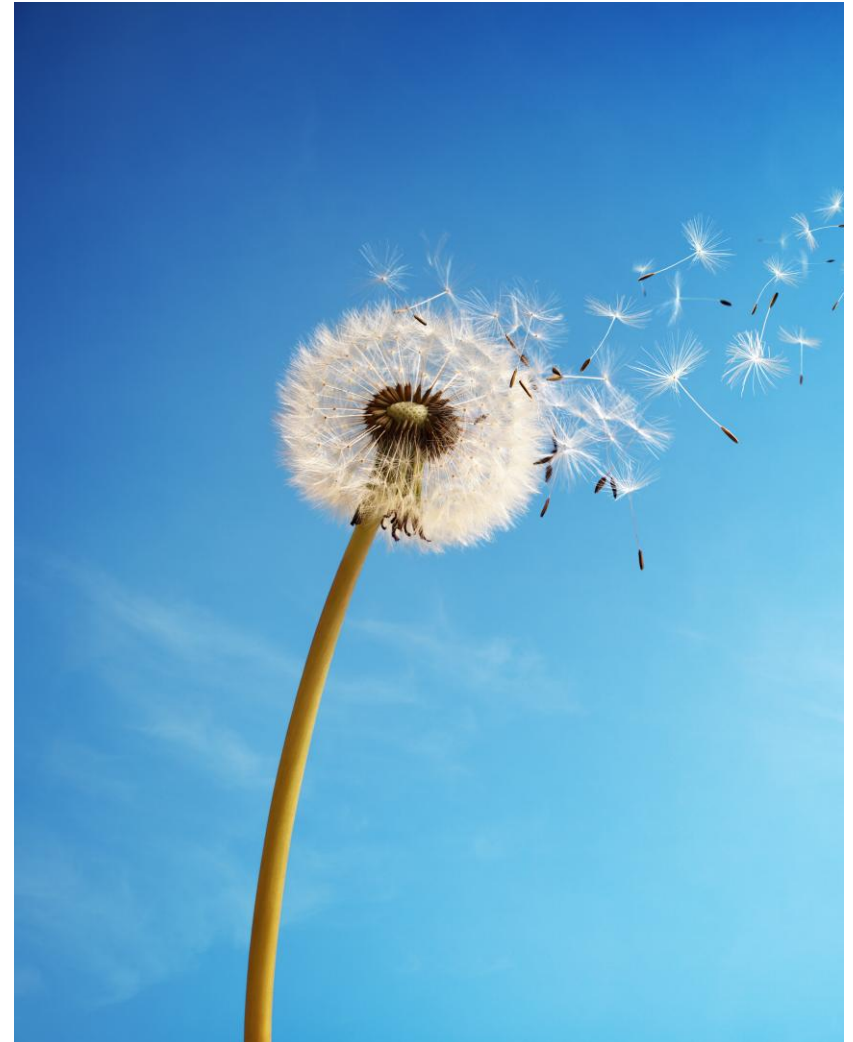
Why Donors Want to See a Strategic Plan

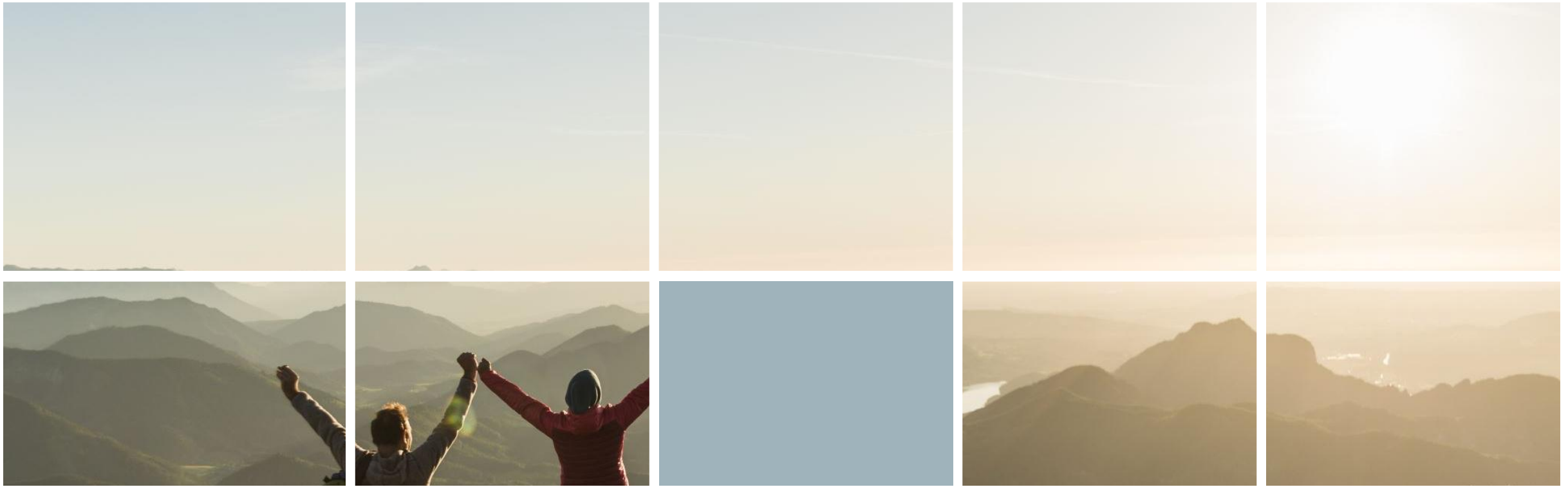


Donors are INVESTORS



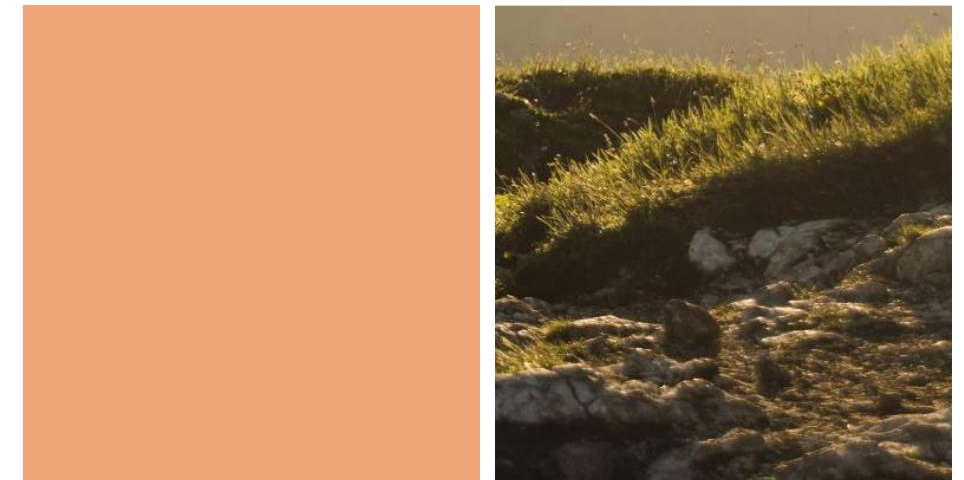
Investors want to see a return on investment either in dollars OR meaningful impact.[ROI]





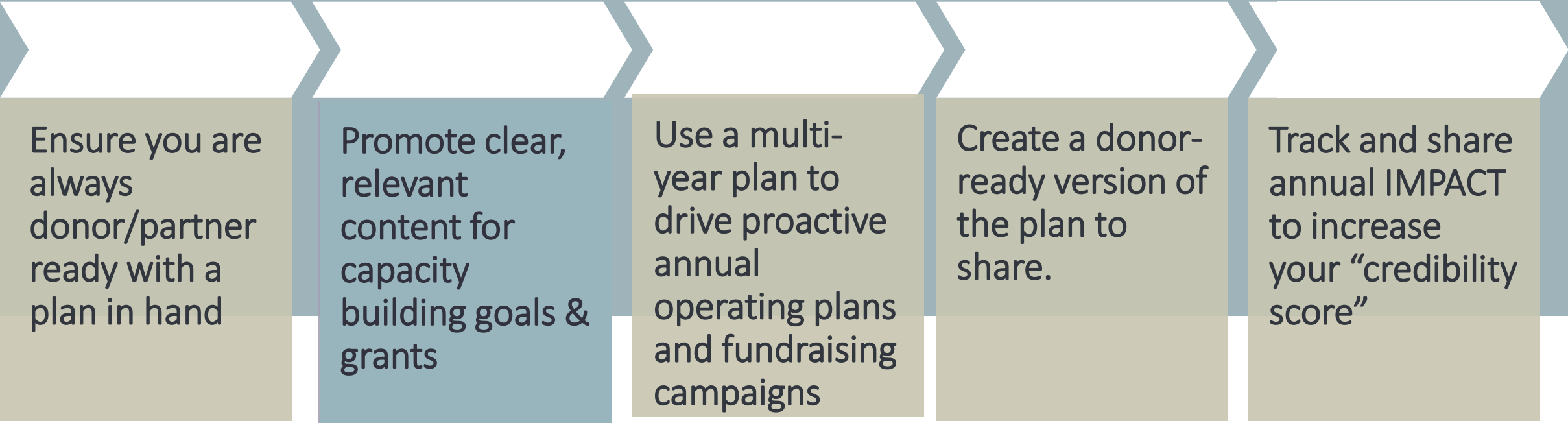
Investors need to know:

1. **What do you need?** [The “Ask”]
2. **Why?** [Proposed Work/Measurable Impact]
3. **Current Realities** [Capacity]
4. **Credibility** [“Credit Score”]



Using a Strategic Plan to Generate Resources





Ensure you are always donor/partner ready with a plan in hand

Promote clear, relevant content for capacity building goals & grants

Use a multi-year plan to drive proactive annual operating plans and fundraising campaigns

Create a donor-ready version of the plan to share.

Track and share annual IMPACT to increase your “credibility score”



5 Ways to Use Your Strategic Plan to Leverage Dollars and Donors



Reframing Donors

Donors are investors.

- ✓ Driven by purpose
- ✓ Motivated by personal interests/priorities
- ✓ Seeking organizations that steward resources wisely
- ✓ Are not obligated to offer continued support
- ✓ Often willing to share giving opportunities with their contacts

Understanding Your Donors

Who are your DONORS?

- Government entities (federal, state, local)
- Foundations (public, private)
- Businesses (large corporations, small businesses)
- Civic organizations (faith-based or secular)
- Individuals

How are your donors GIVING?

- Grants
- Sponsorship
- Charitable gift
- In-kind contribution



Capacity Building

“The process of developing and strengthening the skills, instincts, abilities, processes and resources that organizations and communities need to survive, adapt, and thrive in a fast-changing world.”

(As defined by the United Nations)

What Counts as Capacity Building?



Anything that...

- ✓ Improves
- ✓ Enhances
- ✓ Grows
- ✓ Expands
- ✓ Sustains

...your ability to fulfill the organization's vision and mission.

Examples include:

- Leadership development
- Marketing and community engagement
- Systems to increase efficiency/effectiveness
- Updated infrastructure
- Strategic partnerships
- Efforts to increase service capacity
- Sustainable funding, and more...

Why donors are willing to fund your strategic planning process



1. Donors understand that strategic planning [done well] positions essential organizations for sustainable growth.

2. Donors don't want to invest in whims or dead-end dreams. They want to support...

- ✓ Strategic capacity building
- ✓ A clear vision for the future [3-5+ years]
- ✓ Measurable goals and objectives
- ✓ Clear strategy
- ✓ Strong buy-in from leadership and community stakeholders



Donor's look at plans to determine...

- ✓ Do you understand the issue/problem?
- ✓ Do you have a viable solution?
- ✓ Do donor priorities & passions align with the organization's strategic goals?
- ✓ What does success look like in measurable terms?
- ✓ Is the plan realistic?
- ✓ What resources do you need to address the problem?
- ✓ Can the donor play an impactful role?
- ✓ Can you sustain the initiative beyond their contribution?

Helpful Hint:

Be prepared to share how your proposal/request for funding directly aligns with your strategic plan and how the donor's support can help you cross the finish line.



Content without Context is Meaningless

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Wordsmithing Basics:

It's not just what you say...it's how you say it.

Postage, paper, brochures= **Marketing Materials** to increase awareness and engagement

T-shirts, water bottles, incentive= **Team identity** items to increase program visibility

Vehicle, travel reimbursement, maintenance= **Transportation Security** to increase program access

Website update, software purchases= **Technology** enhancements to increase client and staff accessibility/efficiency

Increasing staff hours, adding new positions= **Increasing human capacity** to achieve _____

Rent, build, expand on current space= **Maximize service space and capacity**

Impact Reporting

All reporting should happen through the lens of the strategic plan.

- ✓ What did we propose to do?
- ✓ Did we fall short, meet, or exceed goals?
- ✓ What impact resulted from the generosity of donors?



Consider: Top Reasons Plans Fail



1. The right people aren't at the decision-making table
2. Facilitation failures- process or techniques
3. The plan is too "broad"
4. The plan is too "narrow"
5. Unrealistic goals
6. Failure to establish/enforce accountability processes
7. Inability to distill "major goals" into "action and implementation plans."



Maximizing the Value of Your Strategic Planning Efforts



Positioning for Success: Demonstrate Commitment To



Engaging in a comprehensive, evidence-based planning process



Utilizing professional, quality facilitators to ensure focused and inclusive conversations



Investing time and energy to secure feedback from stakeholders [internal/external]



Establishing processes to ensure ongoing support and accountability for long-term success.

FREE KIT



Strategic Planning

QuickStart Kit

Align your team, clarify your vision
and grow your impact.



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FREE CALL

Strategic Planning

Discovery Call

with Marie

Start aligning your
team today.



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Facilitation Considerations

It's impossible to be a “neutral facilitator” and “active participant”

How will participants react to and engage with the facilitator?

Does the facilitator use an evidence-based model?

How will the facilitator customize the planning process for maximum success?

What are your “must haves in a facilitator?”

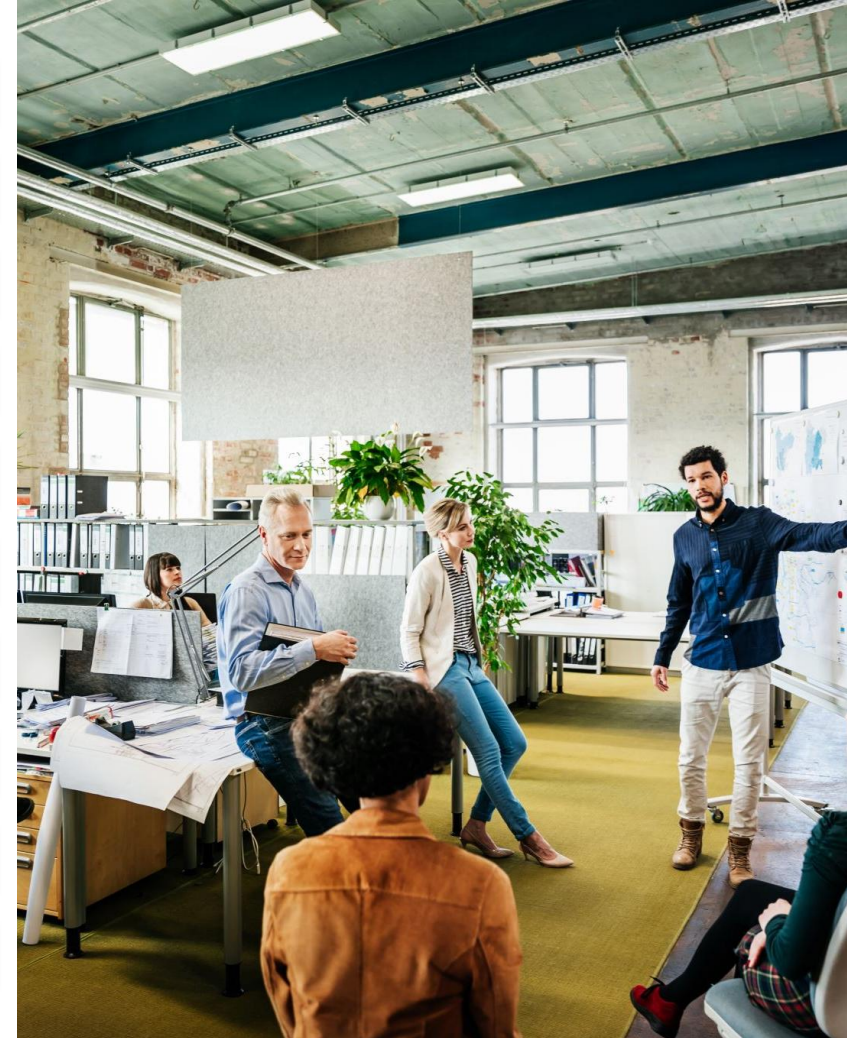
What are your “deal-breakers”?

How will the facilitator engage with your leadership/team throughout the process?

Who is responsible for what? [detailed scopes of work]

Does the facilitator have the capacity/skills to offer follow-up support?

What is the cost of facilitator services? [project-based or hourly based?]



What roles might a “consultant” play in the process?



Educator

This is what you should know



Consultant

This is what I recommend you do



Facilitator

What do YOU believe you should do?



Coach

You can do it! I'm here to support.

Pro Tip:



An “evidence-based model” is a gift.



Every facilitator packages and delivers that gift differently.

Quick Tips: Getting a Planning Process Funded

- Pursue capacity-building grants
- Seek funding from local banks [community giving/grant programs]
- Explore your local Small Business Development Center resources
- Leverage a matching funds opportunity in partnership with the board or donor
- Crowd-fund [highlighting current needs and proposed impact]
- Seek free or in-kind services through your local community foundation, state nonprofit center, or other professional networks
- Explore special discounts or referral perks from professional consultants

**“If you always do what
you always did, you
will always get what
you always got.”**

-Albert Einstein



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Align your team, clarify your vision
and grow your impact.



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Start aligning your
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Funding For Good

Lead Consultant, Marie Palacios

Strategic Planning Facilitation • Meeting Facilitation •
Stakeholder Processes • Board Solutions •
Leadership Development

Book a Call About Strategic Planning or Board Development

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Q + A