

Strategic Planning for Development: How It Works

When an organization is ready to plan for future fundraising, there are a number of steps that lead to an effective Strategic Plan for Development. With variations, this is how the process flows:

1. The organization decides it wants to pursue a strategic direction for fundraising.

This is often stimulated by a capital campaign or other special effort, or it may happen after a major fundraising program concludes. In some cases, it's used to be a catalyst for a slow-growing development program. The top leadership of the organization, understanding the cost-efficient return on investment that fundraising provides, makes a decision to grow the program even further. Counsel is engaged to develop the roadmap for that growth.

2. Counsel conducts a Development Program Audit.

Before strategic planning can take place, Counsel must consider the current state of the development program. This is best accomplished by a Development Program Audit. That process uncovers vital information that guides the Strategic Plan. It also engages key stakeholders and brings them closer to your organization.

3. Counsel works with staff and volunteer leaders to shape strategic imperatives for the next three to five years.

Strategic planning is an interactive process. It works best when key leaders are engaged throughout the process to identify, discuss, and develop solutions for your organization's needs. From this interaction, Counsel develops three to eight strategic imperatives. These "global" strategies encompass the entire scope of the plan. All aspects of the Strategic Plan fall under one of these imperatives.

4. Once strategic imperatives are defined, strategies are developed for each point.

When the general direction of the fundraising program is set (strategic imperatives), the next step is to develop specific strategies that support that direction. Generally, eight to twelve strategies are developed for each strategic imperative. These strategies are the middle ground between strategic imperatives and day-to-day tactics.

5. For each strategy, a series of tactics is identified to fulfill the strategy, complete with assignments.

In turn, five to fifteen tactics are developed to fulfill each strategy. These tactics

involve the day to day execution of the Strategic Plan. They can be modified or expanded to meet new challenges and opportunities. Each tactic is assigned to a person or group to make it happen.

6. The plan is accepted or approved, and tactics begin to be executed.

Your organization's Board of Directors needs to be involved in the strategic planning process. Typically, three to five Directors are interviewed for the Development Audit and they are kept informed as the Strategic Plan is developed. When it comes time for approving the plan, these development insiders are able to speak directly to the Board of Directors regarding the plan. By gaining Board approval, the development program is given the mandate it needs to execute the plan, to secure resources, and to develop programs for growth.

7. Regular review provides focus and accountability.

A Strategic Plan should never sit on a shelf. It needs to be a dynamic document that is used continuously to chart directions and to evaluate progress. For the first year of the plan, monthly review with Counsel is necessary. After that, quarterly review is typically sufficient. These review times keep development staff focused on the most important aspects of their work.

A Strategic Plan for Development is an efficient tool to build consensus, provide a roadmap for growth, and focus everyone's energies and resources in the right areas.

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