



Donor Involvement

Strategic Planning and Fundraising

Whenever a major fundraising effort is contemplated, at least one volunteer can be counted on to ask, “Why can’t we just skip the planning part? We know what we need to do: get out there and raise the money!”

It’s a fair question. What does the strategic leadership process – or any planning process – have to do with attracting major gifts?

Staff, donors, and volunteers should be actively engaged.

Today, American philanthropy is stronger than ever. Economic recovery may be proceeding at a measured pace, but there is no shortage of available funds to be raised.

From the donor’s point of view, the issue is not the capacity or willingness to invest, but the capacity of the organization to meet real needs and provide real benefits. Being a worthy cause is no longer sufficient. Competition is intense, and donors expect more from the organizations that seek their support.

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Organizational Success

What Ever Happened to Our Strategic Plan?

What is the relationship between your organization’s fundraising objectives and its long-term vision for the future? Most fundraising professionals will concur that your campaign objectives should be tied to a higher vision developed through long-term planning.

In our experience, however, we have witnessed a much different reality:

- We have seen the endless, all-consuming, staff-driven planning efforts that provide little or no clarity of direction to the organization’s future.
- We have counseled organizations that have no overall financial plan except the present cause celebre of its board or executive director.
- And, we have noted numerous carefully drafted strategic plans that fail to influence the organization’s board and staff, and simply collect dust on the CEO’s bookshelf.

People must be at the center of every planning effort.

Long-term planning is vital to the health of a nonprofit organization and to its fundraising success. However, we must also create the structure that avoids these common pitfalls. Perhaps the best first step is to redefine expectations of what the process is, who is involved, and what success will look like.

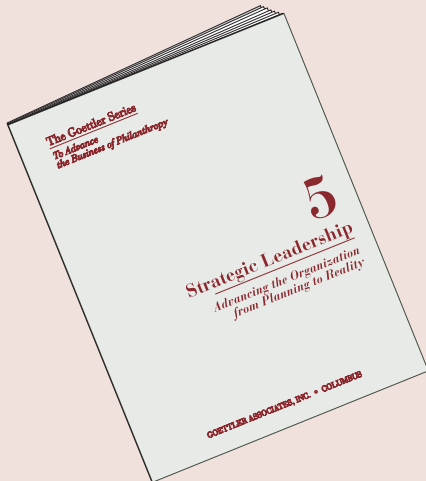
Regardless of your organization’s mission, the core of what you do is accomplished through people, for people. Therefore, people must be at the center of every planning effort. At the same time, the end result does not rest the plan itself, but in its implementation and action. People are the key to this implementation. People do not follow plans. People follow leaders.

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*To Advance the Business of
Philanthropy*

Strategic Leadership *Advancing the Organiza- tion from Planning to Reality*

Is it time to refresh your organiza-
tion's planning efforts? Strategic
leadership is a planning process
that places a premium on involve-
ment, follow-through and results,
creating the type of organization
worthy of donor investment.



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What Ever Happened to Our Strategic Plan?

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Strategic LEADERSHIP is a different approach that encompasses both
planning and implementation. This approach creates a process that
involves your people—your staff, board, and volunteers—in creating
goals for the future. Greater involvement leads to greater ownership,
which then leads to greater commitment and support.

***People do not follow plans. People follow
leaders.***

Strategic leadership does not focus on the creation of plan. It is a
process that starts with an understanding of how your organization
serves the needs of the community and pays attention to both posi-
tive and negative outcomes. Opinions and experiences must be heard
and acknowledged from both internal and external constituencies,
creating opportunities for involvement in the organization's future.

Through greater involvement, your constituencies can focus on the
vision and mission of the organization to identify the actions it must
take to achieve success. Most traditional planning approaches end
with the identification of goals. If implementation is an acknowl-
edged part of the process, it is usually identified as the final phase in
the planning process. But with strategic leadership, implementation
is just the beginning.

Strategic leadership drives the organization to realize its vision for
the future. It ensures that all resources (i.e. financial resources, pro-
fessional staff, trustees, volunteers) are channeled for this purpose.
Unlike traditional planning, strategic leadership is a continuum like
the fundraising efforts that support it. It is an ongoing process of
assuring that an organization identifies and implements the actions
that bring the desired results. It creates the structure that assures
the strategic plan will be implemented. It involves actively promoting
and celebrating progress towards the vision and goals, so the people
involved in the organization stay committed and excited as they
create their new future.



For more on **Strategic Leadership, Advancing the
Organization from Planning to Reality**, access
Goettler Series Volume 5 at **www.goettler.com**.

Strategic Planning and Fundraising

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To attract major gifts today, for example:

- The organization needs to be driven by a compelling vision and a results-oriented plan.
- Staff, donors, and volunteers need to be actively engaged in creating the vision and carrying out the plan.

In other words, both excitement and credibility are required in order to stimulate initial interest and involvement. In time, meaningful involvement will lead naturally to investment.

In several ways, the strategic leadership process can lead an interested observer to become an enthusiastic advocate and sponsor. Through this process:

- Staff and volunteers are actively involved in doing important work for the organization.
- As the mission, vision, and goals are better defined, it becomes easier for staff and volunteers to make the case for philanthropy.
- As the organization successfully carries out its plans, both staff and volunteers gain credibility in the community.
- For similar reasons, donors and other constituents gain confidence in the organization.
- Finally, quality staff and volunteers are increasingly attracted to the organization, seeing an opportunity to accomplish something meaningful.

An organization can realize long-term benefits by investing in a disciplined planning process that includes donors, volunteers, and other key constituencies.

As they become more involved, and results are produced, leaders in your community will begin to see the organization in a different light. They will want to invest their time, talent, and treasure in an organization that makes the best use of the resources at its disposal.

This is what distinguishes an organization that understands the value of planning and strives to realize a vision from one that exists from year to year and struggles to maintain the status quo.



Will Strategic Leadership Help Your Organization?

The strategic leadership process is a disciplined approach to getting organizations to focus on results. The process helps leaders define and successfully implement their goals. It can be beneficial to almost any organization, public or private, that seeks to improve its service to society. The process has proven especially effective in organizations where:

- Strategic plans have not been successfully implemented
- Goals are frequently being added or changed
- No clear vision or goals exist
- The organization seems to produce more activity than results
- Community and/or board support is weak.
- Staff and/or volunteer departments seem to be working at cross purposes
- A reorganization or merger has recently taken place
- A new direction is being embarked upon (often in response to market changes)
- Staff and volunteers often complain about lack of direction or communication



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How Effective is Your Planning?

A simple self-evaluation

To assess the effectiveness of your last planning endeavor, ask yourself and your colleagues if the effort generated the desired results and impact on your organization. Use the following checklist to assess your performance.

	YES	NO
Are all of your board members, staff, and key volunteers able to articulate the organization's mission and goals?	<input type="checkbox"/>	<input type="checkbox"/>
Does the board, staff, and volunteers demonstrate a firm commitment to the mission through their involvement and financial support?	<input type="checkbox"/>	<input type="checkbox"/>
Does your organization have difficulty recruiting top community leadership to your board and volunteer committees?	<input type="checkbox"/>	<input type="checkbox"/>
Does your organization have a compelling story to tell that accentuates the common values and aspirations of your organization and the constituency that it serves?	<input type="checkbox"/>	<input type="checkbox"/>
Has the strategic plan resulted in the direction of organizational resources to enhance, expand, or launch prioritized programs?	<input type="checkbox"/>	<input type="checkbox"/>
Has your strategic plan resulted in the elimination of programs that are not advancing the organization's mission?	<input type="checkbox"/>	<input type="checkbox"/>
Have the priorities and goals identified in your strategic plan been implemented according to schedule?	<input type="checkbox"/>	<input type="checkbox"/>
Can you demonstrate results and success to the organization's constituents, (especially donors), tied to the actions recommended in your strategic plan?	<input type="checkbox"/>	<input type="checkbox"/>

If your answers are not affirmative, you should consider redefining and re-energizing your next planning effort. To learn how to strategically lead your organization to the next level, read Volume 5 of the acclaimed **Goettler Series: Strategic Leadership: Advancing Your Organization from Planning to Reality.**