

Strategy to Fundraising

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Speaker

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- Fundraising professional, consultant, volunteer leader, trainer, nonprofit management geek
 - Senior Director of Development, Virginia Hospital Center Foundation
 - Founder of Capital Development Strategies
 - Former vice chair of the AFP Foundation for Philanthropy
 - Former selection committee chair for the AIM for Excellence Award Competition
- **Passionate about philanthropy!**
 - Professional roots are in fundraising/resource development
 - Associate member of the National Network of Consultants to Grantmakers
 - Advocate for smart, effective philanthropy



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Organizational Strategy is the Beginning

The work cannot begin until there's a strong strategy in place

"For some things, spontaneity is highly desirable, but any fundraising professional will tell you that planning a [fundraising] campaign isn't one of them."

- - The EveryAction Team (EveryAction.com)

"Return on Mission" is one of Network for Good's "8 ways to measure fundraising success"

- If fundraising tactics are meant to advance organizational strategy, can that impact be quantified and measured? Beyond simply how much money is raised?



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Intentional and connected

Implementation requires equal amounts of attention, intentionality and engagement by all

Strategy impacts all components of an organization's ongoing life

Strategy drives everything, and it's all connected

- Staffing
- Leadership development
- Operational planning
- Messaging
- Fundraising

And as suggested... it all needs to be measured to evaluate effectiveness



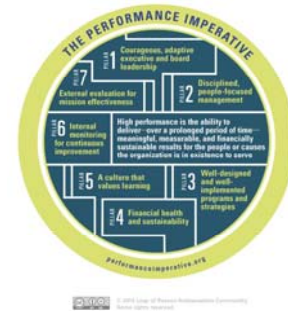
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A key ingredient for high performance

In the **Performance Imperative** (*Leap of Reason Ambassadors Community*), strategy is central to Pillar 3 – “**Well-Designed and Well-Implemented Programs and Strategies**”

- ❑ Defining a clear target population/audience
- ❑ Designing programs and strategies that will lead to the desired change
- ❑ Designing programs within the context of the larger ecosystem
- ❑ Implementing high-quality programs
- ❑ Learning from intended beneficiaries
- ❑ Developing strong relationships for strong results
- ❑ Guarding against the temptation to veer off course

<http://leapambassadors.org/resources/performance-practice/>



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Narratives are linked

Organizational Strategy, and the Strategy Narrative (*Breakthrough Strategy*) drive both the fundraising and communication narratives

- The fundraising case (a good example of “strong levers for action”)
- The messaging through which the strategy is shared with stakeholders

Organizational Strategy and the Strategy Narrative also undergird operating plans and organizational components

- Provides structure for action plans – what happens first, second, then third, etc.
- Drives the allocation and prioritization of often limited resources
- Shapes the revenue model – income and expense



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Donors are investing in ...

Donors are looking for evidence that their contributed dollars :

- Have the impact that they – the donors – intend
- Have the impact that the nonprofits propose

Donors do NOT invest in the strategic plan (despite how wonderful it might be)

- It's been said that no one marched on Washington because of a strategic plan

BUT, the fundraising message must be grounded in the strategic plan

- Donors want clear answers: "Why do you need my resources?" "What will my dollars make possible?"
- Donors are unlikely to respond to "Our budget grew 5% this year, so we're asking everyone to give 5% more!"



Strategy creates a framework for the conversation with donors, investors, partners, etc.

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Using strategy to develop the case

Consider the elements of the strategy development process; assess how they can lead to the creation of a good case for support

- The journey from the current reality to the ideal future
- The target population being served
- The relationships between organization and those served
- The impact the organization will have on the community, ecosystem, people, etc.
- The articulated vision, the mission gap
- The resources needed to realize the strategy
- Staying focused on the mission, avoid distraction



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Conversation and Discussion

How might various strategic planning structures (Sheehan, Bryson, Perf. Imperative) result in differing “tools” with which to develop a case for support?

Strategic planning, strategy development maps, theories of change, performance pillars, etc. – they’re all kind of “academic” and potentially “sterile.” How do we “humanize” them to make them resonate with current or potential donors/investors/supporters?

If you ignore strategy and simply move directly to fundraising, what do you risk?

Who should be having this conversation (the role of strategy)? Just the CEO, board chair, senior management? Everyone associated with the organization? How does this discussion get adapted and transmitted across an entire organization?



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Thank you

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