

VISIONEERING YOUR ORGANIZATION— HOW TO SET A BOLD VISION AND STRATEGIC PLAN THAT INSPIRES

Presented by Barbara O'Reilly, CFRE
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Nice to Meet You

- 25+ year career as a fundraiser, earning my stripes at big shops like Harvard, American Red Cross, National Trust for Historic Preservation
- CFRE, AFP Master Trainer, Immediate Past President, AFP Washington Area Metro Chapter, Board Member, The Giving Institute
- Tailored 1:1 consulting on annual funds, major gifts, campaigns, assessments/studies, CEO/CDO coaching, strategic planning, and board training



What We'll Learn Today...



What are the
core elements
that make up a
strategic plan



How to shift
thinking from
operational list-
making to
aspirational
visioning



Ways fundraising
can support and
complement—not
drive—the
roadmap forward

Getting Started...



In preparing for battle I have always found that plans are useless, but planning is indispensable.

—General Dwight D. Eisenhower

Why Are Strategic Plans Necessary?

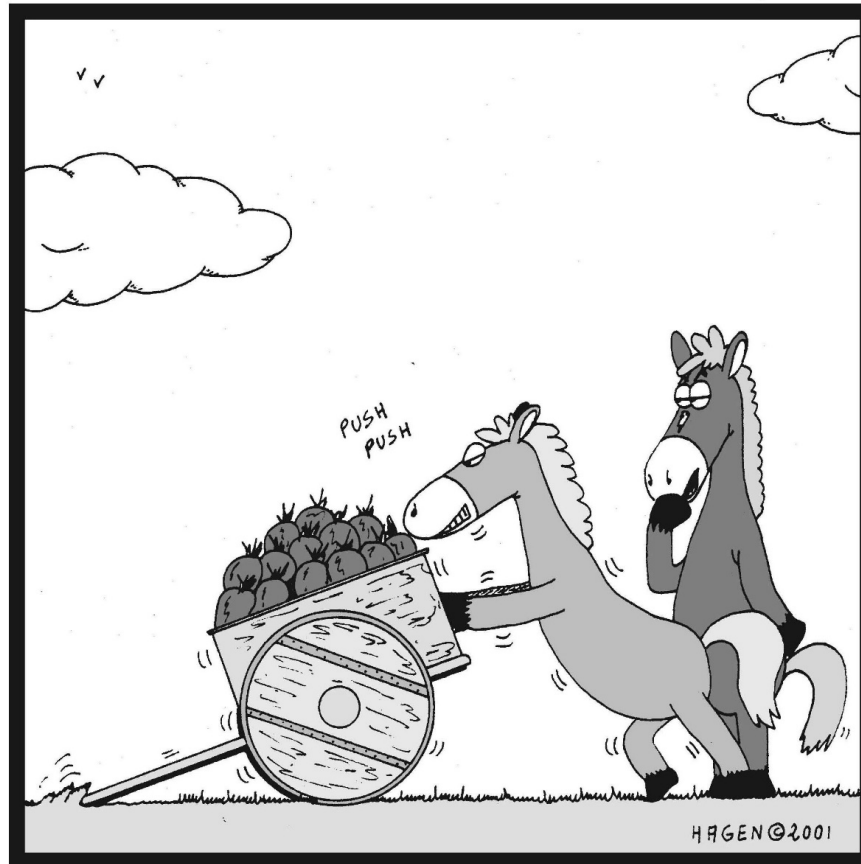
Provide direction
beyond your
annual work
plans

Inform how you
advance and
grow your
organization

Offer a steady
guide during
times of
uncertainty

Underpin your
fundraising case
for support

Strategy Informs Fundraising



Hang on... We must be doing something wrong...
How does the saying go again?

Where Do You Want To Go?



Charting Your Direction

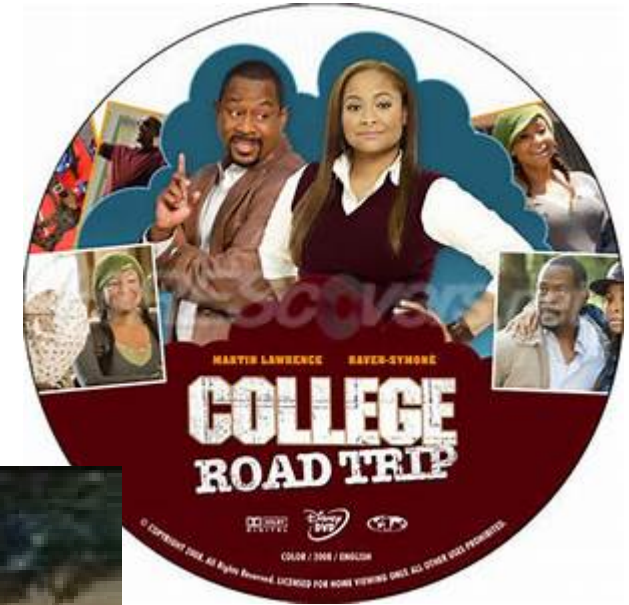
Where do you want to go?

- ✓ Start with the end in mind (h/t Franklin Covey)
- ✓ Vision
- ✓ Mission



Ask Yourself: What does 100% mission accomplishment look like for our organization?

Who's Voice Needs to Be Included?




Choosing Your Stakeholders

- Create a Task Force of Diverse Voices
 - Board members/potential Board members
 - Donors (current/inactive)
 - Funders not yet giving to you
 - Beneficiary voices
 - Staff



Defining Your Vision

What does 100% mission accomplishment look like for our organization?



What do you need to do to move from where you are today to the future state you envision?



What factors from the landscape scan must we factor in to our planning?

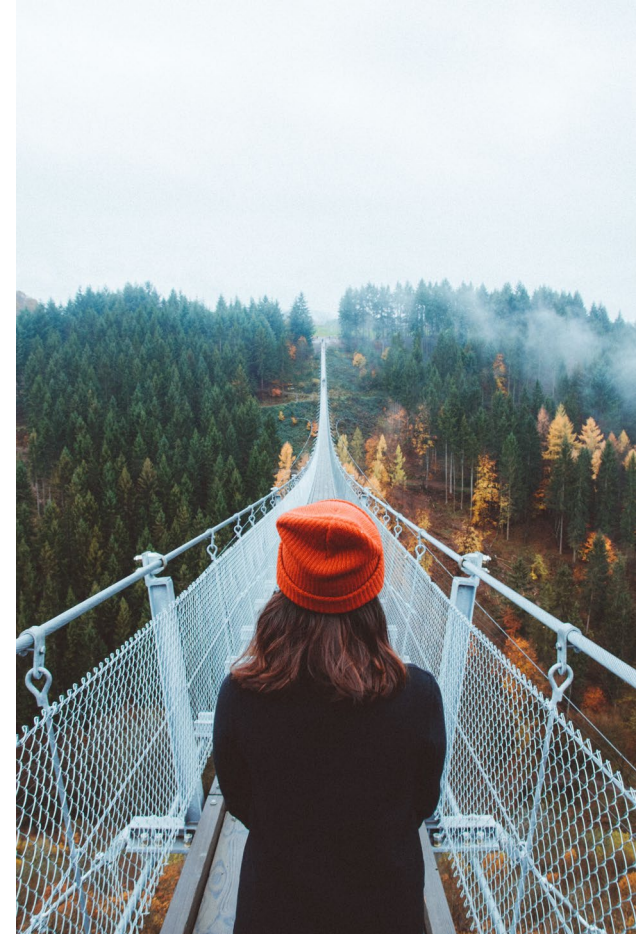


What are the strategic goals that stretch us enough to move closer to that future state?

Defining Your Starting Point

Where are you now?

- ✓ Internal assessment — SWOT
- ✓ External landscape scan — PESTLE
- ✓ Stakeholder Feedback — Survey



Taking Stock–SWOT



Taking A Look Around–PESTLE

POLITICAL



- Tax Policy
- Trade / Tariffs
- Regulation
- Policy
- Immigration
- Defense / Wars
- Human Rights
- Infrastructure
- Political Structure
- Corruption / Graft
- Protectionism
- Fiscal Policy / Debt

TECHNOLOGICAL



- Innovation
- Digitization
- Robotics
- AI / Analytics
- Automation
- Infrastructure
- Mobility
- 3D Printing
- Biotechnology
- Miniaturization
- Internet of Things
- Cloud Technology

ECONOMIC



- GDP Growth
- Income / Wages
- Business Cycles
- Interest Rates
- Monetary Policy
- Inflation
- Investment
- Unemployment
- Income Inequality
- Savings Rate
- Financial Markets
- Financing Accessibility

LEGAL



- Risk
- Legal System
- Litigiousness
- Employment Law
- IP Protection
- Business Law
- Safety / Health Law
- Consumer Protection
- Corruption / Graft
- Liability
- Legal Costs
- Enforcement

SOCIAL



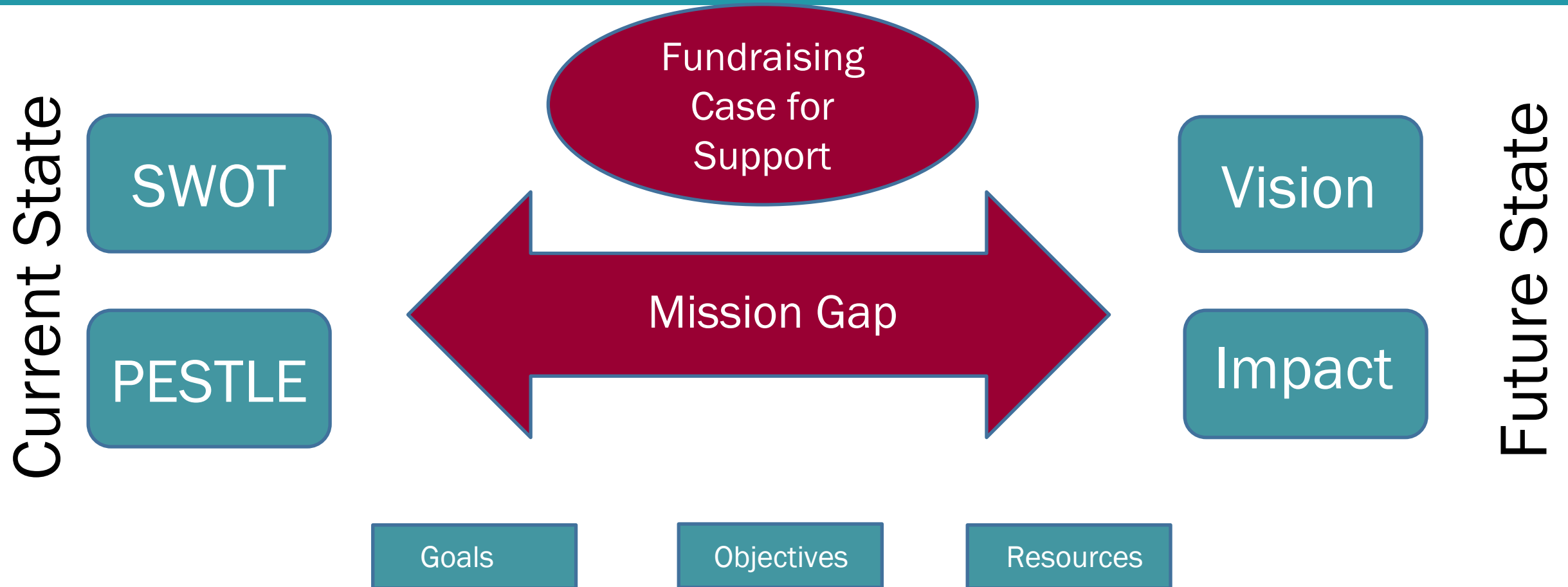
- Education
- Aging Trends
- Population Growth
- Cultural Dynamics
- Race Dynamics
- Geo Migration
- Religion
- Recreation
- Attitudes
- Behaviors
- Health Trends
- Family Trends

ENVIRONMENTAL



- Natural Resources
- Ecological Attitudes
- Policy
- Climate Change
- Weather
- Natural Disasters
- Environmental Law
- Pollution
- Resource Depletion
- Sustainability
- Location
- Agriculture

What's Your Mission Gap?



Mapping Your Direction

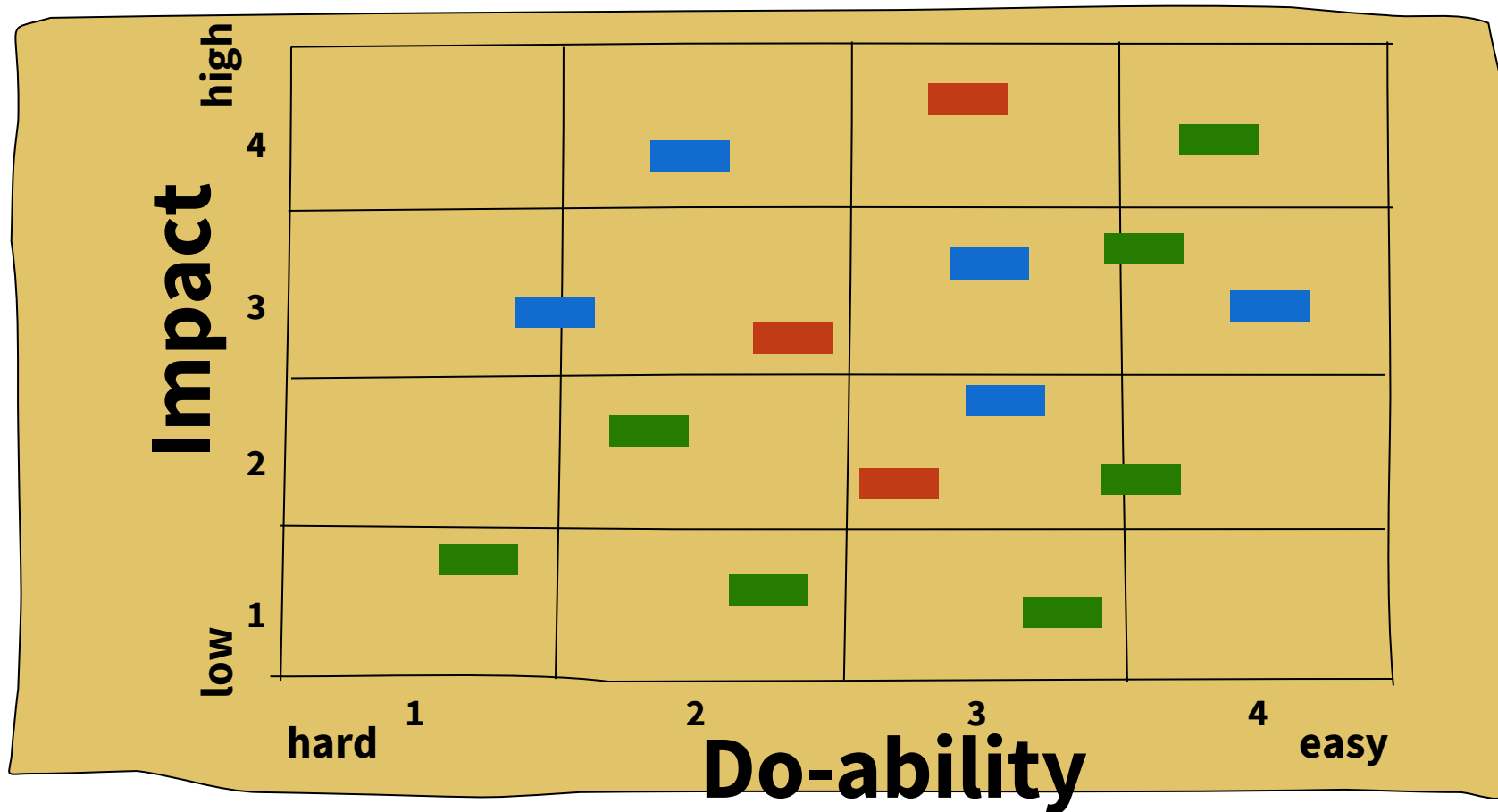
Goals—keep it focused on outcomes that are measurable (What's attainable? What's just slightly out of reach?)

Objectives—define the activities that will help you accomplish your goals.

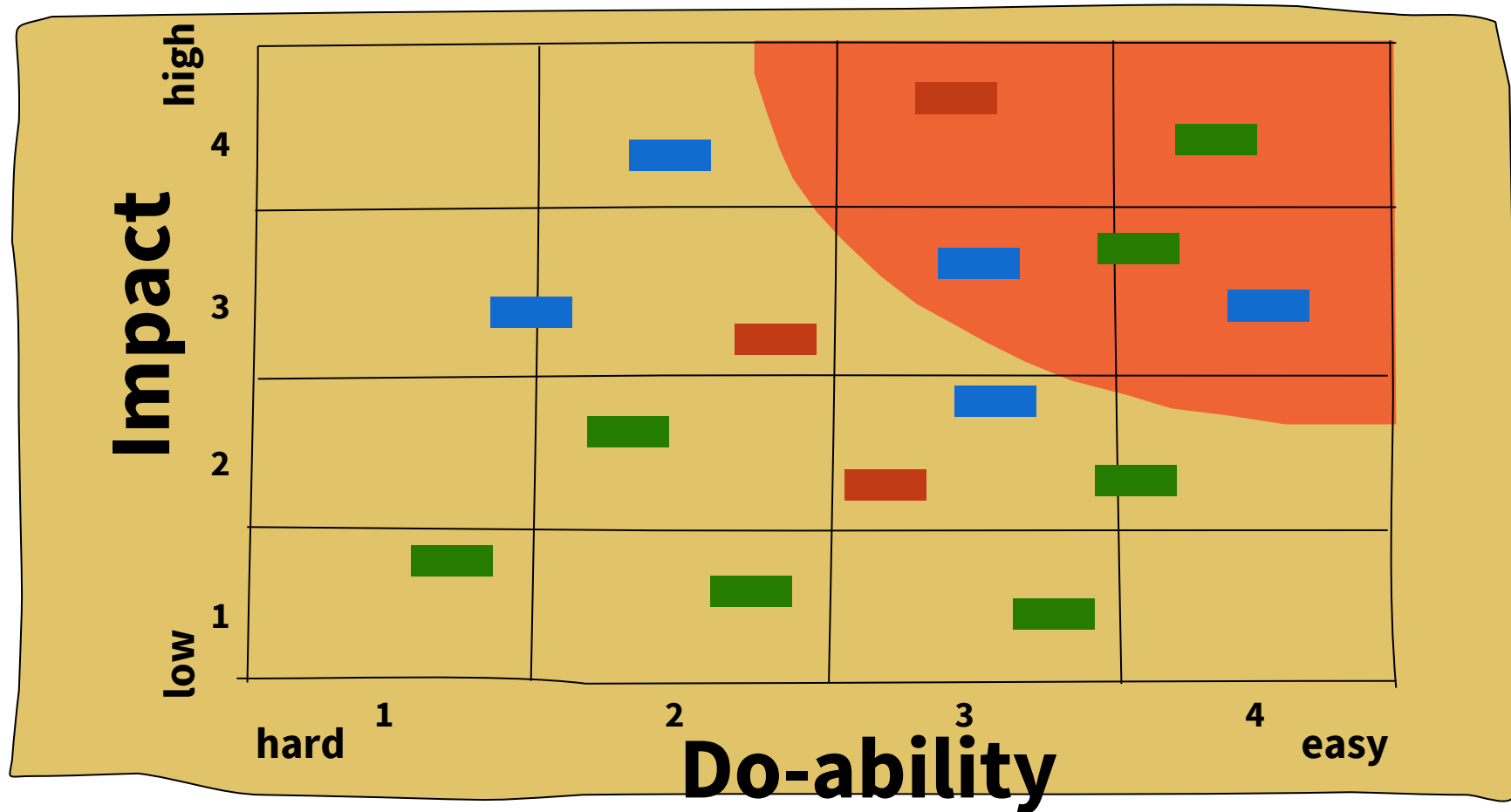
Timeframe—determine the timing for all this work (phased over 2-3 years reasonable).



Prioritizing Is Key



Focusing on High Impact



Identifying What You'll Need

Ask yourself: What do we need to implement these goals successfully?

Staffing

Materials/Physical Space

Financial Resources

Tally up how much this would increase your budget.

This now becomes part of your case for support.



Strategy In Time of COVID-19

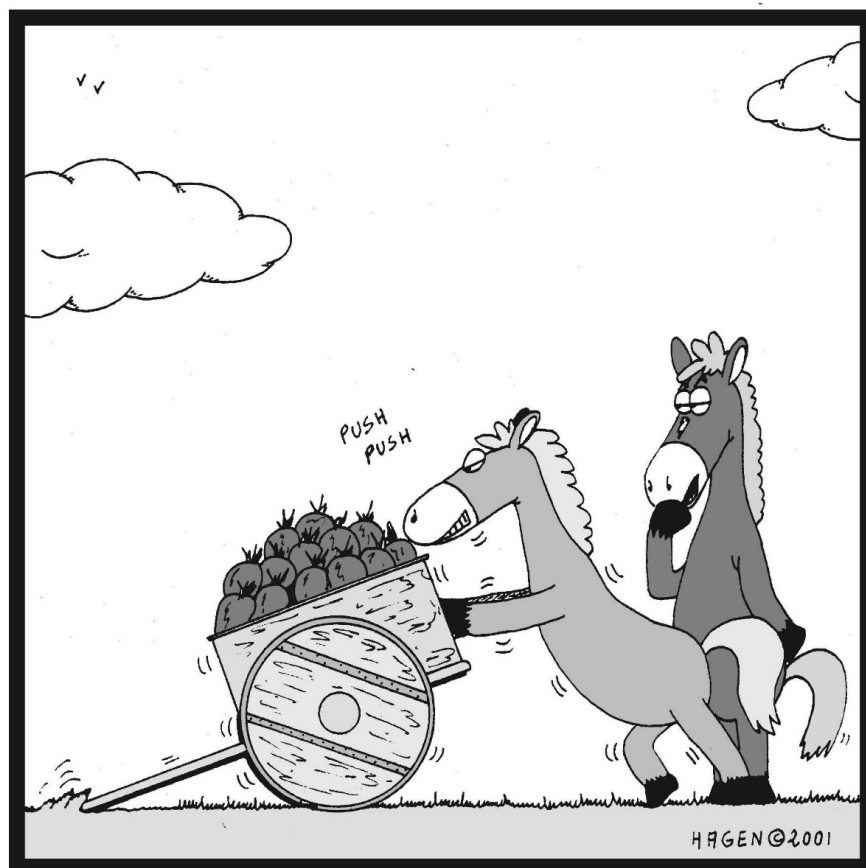


Course Correcting

- Trust in your vision in the first place.
- Re-evaluate
 - Financial assumptions/projections
 - Strategic goals
- What needs to stay? Go? Pause?
- Resist the tendency to imagine the future as it is right now.



Strategic Plan First



Hang on... We must be doing something wrong...
How does the saying go again?

Your fundraising must be built off your organizational strategic direction...not the other way around.

Your mission gap defines your funding needs.

Your strategy offers the big, bold vision that can inspire your donors.

Recap

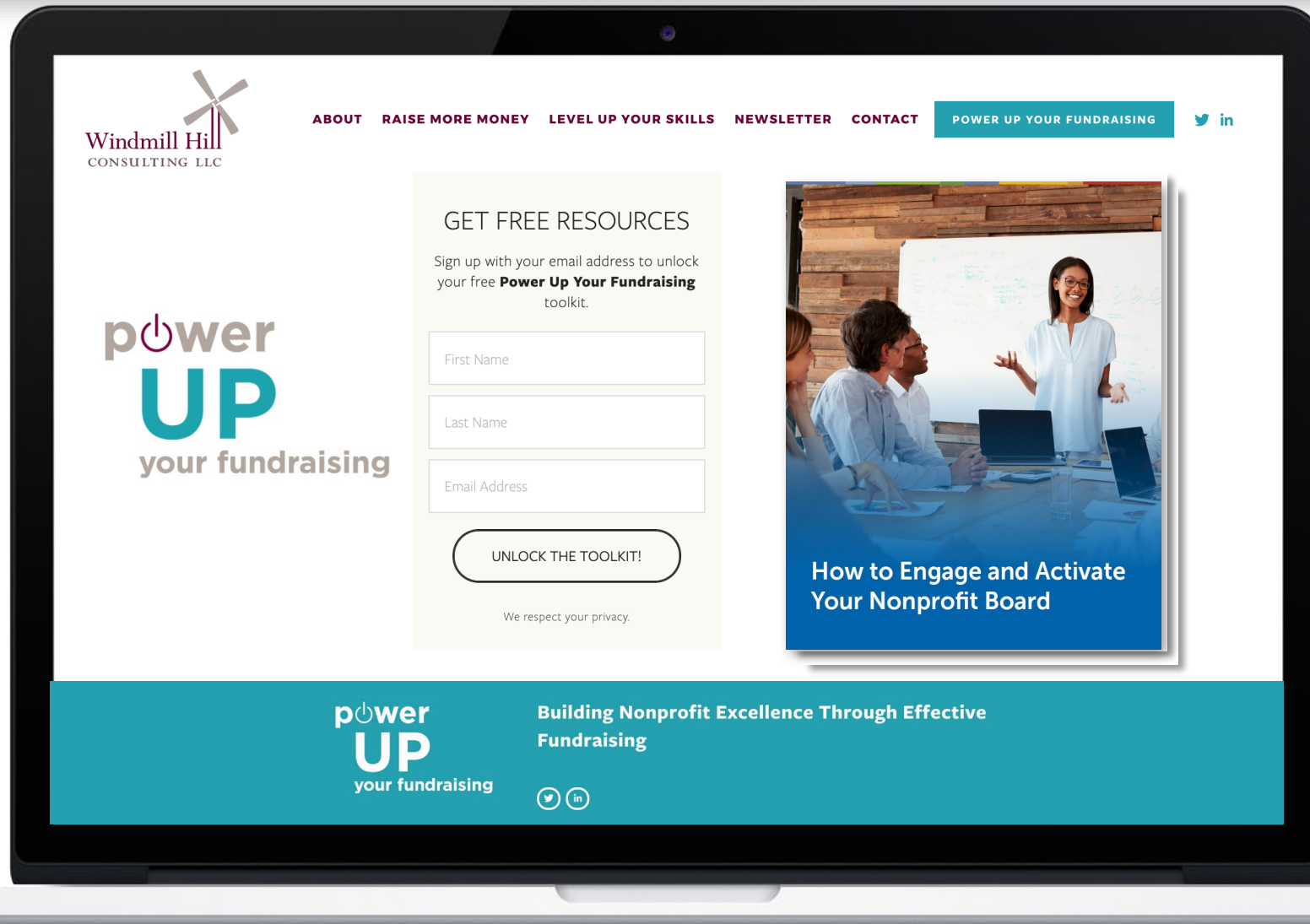
To Do

- Keep it realistic in scope
- Focus on the Future State
- Have courage to stretch
- Develop metrics
- Regularly track progress

Not to Do

- Make the strategic planning process overly long and complicated
- Allow complacency with what you've always done
- Limit buy-in of stakeholders
- Let it sit on the shelf once finished

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LET'S STAY CONNECTED

Want to chat further?

Email me boreilly@whillconsulting.com

Interested in more resources?

www.whillconsulting.com/power-up-your-fundraising

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