

# Implementing a Fundraising Strategy

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Many strategies fail at implementation, because they are not translated into the effective action necessary to make them happen.

Therefore, you may wish to ask yourself if you have plans and procedures in place to ensure:

- It is communicated and will achieve buy-in from the key stakeholders, particularly the Board and staff.
- It is fully embedded in your organisational systems and plans.
- Any necessary training and resources are being provided.
- Progress will be monitored and action taken when things don't go according to plan, as they inevitably will.

## Communicating Your Strategy

The world is full of unread strategic plans. Consequently, thinking about how to present your work in a compelling way for your readers is important in communicating it and achieving buy-in.

### Communication

Make your plan as accessible and interesting as possible.

- Use clear, simple language, explain acronyms that not everyone may understand and avoid jargon.
- Be as succinct as possible and consider including any spreadsheets/substantive analysis as appendices.
- If your strategy is long/complex, consider including an executive summary. This may be read, even if the whole paper isn't, and flagging your key points at the beginning is always useful.
- Engage your readers by talking about what is important to them. Perhaps by framing the narrative around delivering the resources they need and highlighting the impact on beneficiaries.

### Buy-in

A strategy is what an organisation does, not what is written in a plan. Consequently, it is extremely important that the plan is not only communicated, but also sold to the wider team. Questions you might ask yourself:

- What are the main risks/blocks to success are in terms of the wider team taking ownership and helping to deliver the strategy?
- Which departments/groups or individuals are less likely to come on board?
- What might any objections be and are would these be legitimate or not? For example:
  - They don't know what is expected of them.
  - They lack the skills, resources or support they need.
  - The necessary systems, procedures and reports to coordinate and make this work aren't in place, or are complex/time consuming to understand and use.
  - They're busy and don't see this as their job, or a priority.
- What motivates them and what reasons/explanation could you offer that would encourage them to come on side?
- Who will they listen to?

Next, take any necessary action to address legitimate concerns and make available any other reasonable support or resources that might be helpful to them.

Work out the key messages most likely to win over the wider team. Talk to people about what matters to them.

Talk to and win over the key players. The Board, CEO and senior team are always critical, because without them, no strategy will be successful.

Communicate your strategy to the wider team, some ideas:

- Getting out and talking to people.
- A presentation at a team meeting.
- Creating a summary version of your strategy that everyone can understand and buy-in to.

## Implementation

Year 1 of your strategy is this year's business, budget and risk plans, so the action that needs to be taken in the near term needs to be fully reflected in these.

## Content

Your plans should include:

- Not only this year's income targets and the action to be taken to deliver these, but also:
- Actions to maximise efficiency and effectiveness, and ensure compliance, of fundraising operations;
  - And not only within the fundraising department, but across the whole organisation.
  - The fundraising diagnostic will enable you to identify potential issues and opportunities and you can use the results of this to create an action plan.

- The necessary actions to develop future year income streams, such as planning activities, prospect research and donor engagement.
- And the development/training, resources and support that will be needed support to deliver these.

## Other Plans

Where appropriate, these actions need to be included in the relevant plans of other departments, such as:

- **Communications and marketing** – fundraising messaging and campaign materials.
- **Finance** – adequate budgets are allocated.
- **HR** – fundraising objectives for at least the executive team and personal development plans to ensure you have the skills needed.

## Managing Implementation

Inevitably, some aspects won't work and others will work better than had been hoped for. There needs to be a system to monitor progress and learn from this.

**Measuring.** Use [SMART target setting](#) in developing your plans:

- **Simple** – to measure and understand.
- **Measurable** – clear criteria for measuring progress.
- **Achievable** – may be ambitious, but can realistically be delivered given your available capacity, capability and timescale.
- **Relevant** – what you are reporting is a good measure of the objective.
- **Timely** – have a specified timescale.

Ensure that responsibility is allocated to someone for delivering and reporting on each action.

**Reporting.** Identify how reporting is to be carried out - at what level, by whom, how often and what is to be reported.

- Include fundraising as a standing agenda item for Board, Executive and Team meetings.
- Identify key milestones through the year and include these in Board/Committee workplans.
- Managing everything may appear daunting, so manage workload to focus on what matters for decision making:
  - Reporting by exception – don't simply create standard reports covering everything, but rather report on where decisions are needed to deal with problems or exploit opportunities.
  - Only give people what they need to actively manage delivery – the right information, to the right people that is understandable to them and in good time to make the decisions they need to.



- For example, don't give operational detail to the board and, instead, focus on strategic and key issues. Give the operational detail to those who need it.
- Using graphs and reports with traffic lights and/or trend indicators can help make these more useful.

**Environmental Scanning.** It is also essential that you continue environmental scanning (monitoring developments in the external world) to identify and respond to threats and opportunities, as quickly as possible.

**Strategic Review.** Finally, ensure that there is a process to review and update your strategy at least annually, preferably as part of your annual planning cycle.