



Local Community Foundation Development

Building Grassroots Philanthropy for Rural Communities

COMPREHENSIVE FUND DEVELOPMENT

◁ Strategic Considerations for Long Range Sustainability ▷
Prepared by Big Sky Institute for the Advancement of Nonprofits

Are All the Fundamentals in Place?

- Written Board of Directors job description that includes fundraising as a responsibility.
- Board recruitment process that is explicit about Board fundraising responsibilities.
- Orientation for new Board members that prepares them for their fundraising role.
- Promotional materials about the community foundation and its accomplishments that can help support fundraising for operating costs.
- A growing base of contributors and good visibility in your geographic service area.

Has Adequate Groundwork Been Laid with Board Leadership?

- Is the Board chair in agreement with starting this new chapter, and prepared to help set tone, be a role model, and encourage the whole board to become engaged in this effort?
- Is the Executive Committee adequately informed and supportive of this effort?
- Does the Fund Development Committee have this set of responsibilities included with its job description, and does it have sufficient membership to manage this new set of tasks?

Develop a Comprehensive Plan for Sustainably Raising Operating Costs

- This is intended to be a multi-year plan that has a framework for implementation that includes near-term, midterm and longer range time horizons.
- There is a 6-page Big Sky Institute handout that gives a very substantial menu of possible options that your community foundation can consider.
- Why develop such a plan?
 1. The planning process will support decision-making that prioritizes choices that will align with Board member interests and networks;
 2. A comprehensive plan gives alternative options for consideration, should a prospective donor need different pathways to explore;
 3. For those donors who like to see comprehensive, sustainable plans – you'll be able to show that your community foundation has done its homework; and
 4. For the staff you hire – the existence of such a plan (plus the demonstration of progress in implementing it!) will be immensely reassuring, thereby contributing to staff wellbeing (sustained daily sanity and inspiration).

Engage the Entire Board in Developing the Comprehensive Plan

- This will ensure that choices are truly grounded in what Board members are willing and able to do.
- This will help with identifying as many prospects as possible for each part of the plan.
- This will help build full Board ownership of the plan that emerges, which is critical for successful implementation.

Check the Adequacy of Internal Tracking Systems

- Community foundations can ill afford the costs of re-inventing the wheel when key leadership and/or staff turn over, and the institutional knowledge leaves with them.
- Can your systems track: who suggested the prospects, who made the contact/request, what feedback was generated from the prospect/donor, would the Board member who made the request be willing to do it again next year; etc.?
- Can your systems retain and track the annual plan for carrying out each component of the comprehensive plan, along with templates for the requisite written requests, thank yous and specialized promotional materials?

Test the Waters

- It's always good to practice, especially when undertaking new activities.
- Share the draft plan with current donors with whom there is a relatively good relationship; do this in an informal, in-person meeting.
- Ask for feedback on what they liked, and what they didn't like.
- Ask for suggestions for how the plan, and its presentation, could be improved.
- Determine how to use the feedback and make changes accordingly.
- Most importantly, take good notes about who said what – you may gather invaluable insights regarding what parts of the plan most appeal to each donor, thereby informing your follow-up strategy for making requests.

Involve Former Board Members and Others Close to the Organization

- If former Board members left their term of service feeling good about the community foundation and what they helped accomplish, they may be good candidates to help with fundraising that will strengthen the organization and make it more sustainable.
- Do not put off implementing the comprehensive plan, awaiting the results of outreach to get the assistance of former Board members. Current Board members must lead by example.
- If you are making progress with implementation – that can be a very good selling point for recruiting others to help with these efforts.

Develop an Implementation Plan and Associated Timeline

- This is just a reminder; everyone knows how important this is!

Evaluate Annual Progress and Revise the Multi-Year Plan as Needed

- This is another one of those important activities we all know we are supposed to do – but time pressures, competing demands, and the reality that Murphy's Law appears to be operating on high performance steroids these days – all too often take us away from this important task.