

First, Know What You Do (Part I)...Getting Funded Is Easier When You Can Communicate Your Scope

By

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How do you communicate your organization's scope? This may be even more important after September 11 than it was before. Why? People are focusing on absolutely immediate crisis needs. If you're not telling people clearly and succinctly what you're doing, they are probably forgetting or at least not remembering – and your organization's fundraising will suffer.

I recommend my clients think of scope as having three parts: mission, programs and current initiatives.

Mission

Answer these questions: Why does your organization exist? What issues does it address? How significant are those issues? What values guide your organization? What benefits will accrue to those you serve, the community and the world when your organization is successful at carrying out your mission?

Programs

Answer these questions: What programs has your organization created to address these issues and how do these programs address those issues? What are the benefits of those programs to those you serve, the community and the world?

Be careful here. Organizations frequently have many programs, but don't simply list all of them. Group the programs into just a few categories. For example, a social services organization with 10 different programs could group them into only 3 areas: direct services, community education and political advocacy. Direct services may break down into crisis intervention, short-term care and longer-term transition.

More questions: Where do your revenues come from (e.g., contracts, fee-for-service, voluntary support, government, etc.)? How do your expenses break down? It's best if this expense break down mirrors the program break down you've just shown. You can either show simple line items or pie charts.

Current initiatives

The questions: What are you working on right now that will improve your ability to carry out your mission? Do you want to provide more services in an existing program? Do you want to establish new services? Are there staffing or administrative issues that require work? What would be the benefits to those you serve, the community and the world if you could implement these initiatives?

Current initiatives should build on existing programs that flow from your mission. Remember to stress the importance and benefits of these specific current initiatives. I recommend that current

initiatives include price tags and even some idea about how you plan on paying for them. If you plan to pay for them with fundraising, say it.

Again, try to avoid long lists. For example, group together existing program enhancement, new programs and administrative issues. Don't forget to talk about how beneficial these initiatives will be.

Format

I recommend using PowerPoint with certain (admittedly!) arbitrary standards:

- Don't use a font size smaller than 18 point (24 point is even better). Why? You'll have to be more concise, so you can't use too many words.
- Don't exceed 15 "slides." Why? You have to "boil it down" and can't present any extraneous material. Note: you could cut the number of slides down even more.
- Budget yourself: 3 slides on mission, 9 slides on programs and 3 slides on current initiatives. Remember: less is more.

Making the presentation

Try these set-ups and transitions for each section:

- *Mr./Ms. Prospect, today we'll talk about our mission and why we exist, programs and how we implement our mission and finally, the plans we have to improve our ability to carry out our mission. The purpose is threefold: 1) to give you the big picture; 2) to get your candid comments on what we are doing; and 3) to get you more involved. My goal is to get through my part in 15 minutes or less.*
- *First, why do we exist?* Then present the mission part and close the section with a question: *Pretty important work, isn't it?*
- *Now I'd like to describe how we actually implement our mission.* Then present the program part. Close with another question: *which of these programs do you think is the most important?*
- *Finally, we're constantly looking for ways to improve the work we do. Let me give you some ideas of what we have on the drawing board.* Close with a third question: *we'd be doing even better work if we can implement these initiatives; don't you agree?*
- If this is a solicitation for a gift or for board involvement, you can follow-up the third question with a statement: *One of the reasons I wanted to talk to you today is to find out if you'd consider helping us fund one of these initiatives or joining our Board or whatever it is that you'd like this person to do.*
- Finish the presentation by summarizing the high points *quickly.* *I hope I've been able to show you that the mission we have is important, that our programs support the mission in practical ways and that we're looking hard at maximizing that impact and enhancing our services. Do you have any final questions? Thanks very much for your attention and your very perceptive comments. I look forward to seeing you again.*

Use and benefits of the presentation

The work it takes to put together this presentation will focus your thinking dramatically. You now have a description of your organization that does not leave out anything significant.

People will be impressed that you've thought everything through, that you know and understand your organization and what is important about it, that you didn't go "on and on," that you understand the importance and benefits of your organization's work to the community and world, that you have not only a grasp of the present time, but that you've formulated goals for the future too.

Now, they can ask you questions about mission or program or current initiatives and you can demonstrate an in-depth knowledge of each area in answering these questions. Questions are likely to focus on the listener's interests. Later, when you're preparing a proposal (if this was a cultivation visit or the first step in a solicitation), you know that focusing on your listener's interests will probably get you farther than focusing on something else.

Finally, once you've done all this work, you can probably throw the presentation itself away. You'll understand your organization in a completely new way. You'll be so confident and excited that you'll want to talk to as many people as possible. And when you talk to people, you'll be successful because you'll have time to listen.

So go for it! Spend the time and the energy and you will actually start looking for opportunities to tell people what it is that your organization does. And believe me, they'll respond positively. Good luck!

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