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BANFF COMPASS™

Designing Your Functional Fund Development Plan

May 30, 2011
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The Development Group

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What is a hybrid plan?

It's your map that guides development activities


**Strategic Framework
+
Annual Details**



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Common challenges



Managing expectations

Maintaining momentum

Interfacing with budget cycle

Resistance to change

Nurturing a philanthropic culture

Group facilitation

Benchmarking

Simultaneous planning & implementation

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Excuses

- The 'no time' excuse**
 - Many needs & no time
 - Impatience with process
- The 'we are OK' excuse**
 - Previous plan ignored
 - We're doing OK
- The 'I don't know how' excuse**
 - We know our mission
 - We don't know how to start

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Benefits of hybrid plan

- ✓ Set long term goals
- ✓ Instill ownership
- ✓ Change culture
- ✓ Visionary, practical & implementable

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Critical success factors

- Commitment
- Ownership
- Engagement
- Accountability



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Participation is key

A diagram illustrating the components of 'The Plan'. On the left, three red circles are stacked vertically, labeled 'Staff', 'Board', and 'Key Funders'. Each circle is connected to the next by a plus sign. An arrow points from the 'Board' circle to a large central red circle labeled 'The Plan'.

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Teamwork & planning

The importance of leadership participation & proper planning should not be underestimated in fund development.

An illustration of four diverse people sitting around a table in a meeting. Above them is a glowing brain icon with lightning bolts, symbolizing ideas and teamwork.

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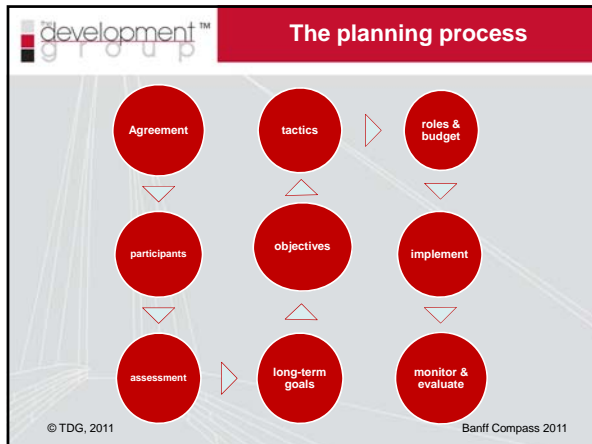
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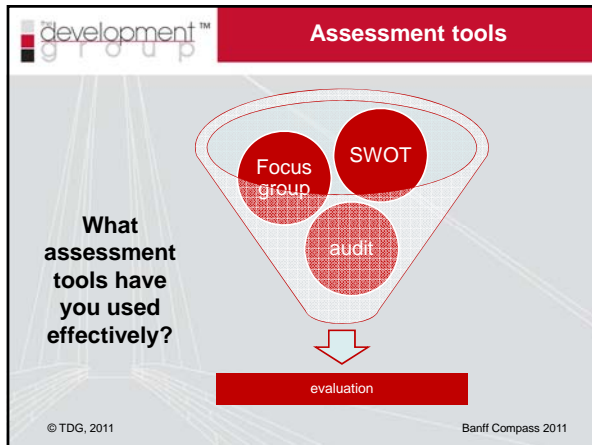
Facilitator trinity

A diagram titled 'Facilitator trinity' showing three red chevron shapes pointing downwards, each containing a role. To the left is a compass icon.

- Director of Development
- CEO
- Chair, FD Committee

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Terminology

- **GOALS** – general guidelines for achievement; long-term; global vision
- **OBJECTIVES** – strategies to attain the identified goals; are specific and measurable
- **TACTICS** – the details (dates, costs, who, what, when, where, and how)

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Sample goal

To integrate the fund development plan throughout the organization and to facilitate staff and Board members working together in an effective and strategic manner to secure funds.



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How many goals?



Start at 4 – the evaluation will indicate if your team has the resources to incorporate more in year 2

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Elements of a plan

- Strategic & financial goals
- Environmental scan (internal & external)
- Strategies & responsibilities
- Budget & timelines

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Sample table of contents

- State of Your Union
- Audit Findings
- Financial Overview
- Goals, Objectives & Tactics
- Annual Activity Calendar
- Strategy Summaries (Excel worksheet)
- Team Contact Information

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Helpful resources

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Thank you!

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