

LEADERSHIP CONSENSUS BUILDING

A For Impact Teleseminar

**THE MILLION DOLLAR IDEA:
Involvement Begets Investment**

Dear FOR IMPACT Leader,

As you move from **“nonprofit”** to **FOR IMPACT**, I would strongly encourage you to review the following thoughts on the LEADERSHIP CONSENSUS BUILDING PROCESS.

Over **30 years** of working with thousands of wonderful organizations has given me a unique perspective on what it takes to FUND YOUR VISION. I believe the following ideas are worth millions and millions of dollars as you strive to **MATCH your INCOME to your IMPACT!**

The essence of what follows is:

INVOLVE and **ENGAGE** your STAKEHOLDERS in the Leadership Consensus Building Process!

I believe this is the **single most important component** in any successful FUNDING EFFORT!!!


I've tried **to simplify** and **summarize** this concept: **30 pages ... 30 minutes ... 30 ideas/(minimum)!**

But don't get caught in the 'process' ...just get your TOP STAKEHOLDERS **INVOLVED** in **building** the **plan** for **both IMPACT and INCOME!!!**

That **“OWNERSHIP”** will translate into a **HUGE RETURN** on the **time, energy and resources** you INVEST in this process.

If you need more help or someone to **facilitate/coach** you through this process, give us a call.

GOOD LUCK!



Note Bene: “PASSION IS CONTAGIOUS!”

The **energy, enthusiasm**, even **enlightenment**, created by getting all of your stakeholders together in talking about **VISION, MISSION, MESSAGE, PRIORITIES, PROGRAMS and PROJECTS** could be the day that literally **TRANSFORMS** your old “not-for-profit” into a **FOR IMPACT ORGANIZATION!**

THE LEADERSHIP CONSENSUS BUILDING PROCESS (OVERVIEW)

THE WHY:

~~Not For Profit~~ **FOR IMPACT**

IMPACT *drives* **INCOME**

Organizational Development ↔ Income Development

CAST A VISION... STAFF A VISION... FUND A VISION

The 3 Double Questions of Every Investor:

1. **WHERE** does the money go (and **Why**?)
2. **WHO** decided that? (and **HOW**?)
3. **WHAT** do you want from me? (and **WHEN**?)

INVOLVEMENT *BEGETS* **INVESTMENT**



LEADERSHIP **CONSENSUS** **BUILDING**



MESSAGE ... MOMENTUM ... MONEY.

~~FEASIBILITY
STUDIES~~

~~5-YEAR
STRATEGIC
PLAN~~

~~INTERNAL
CASE
STATEMENT~~

THE WHAT:

The LCB Process is a **methodology** and a **framework** ...to generate STAKEHOLDER :

INVOLVEMENT LEADERSHIP

INVOLVE your best LEADERS
in the **process** of FUNDING
the Vision.

ENGAGEMENT CONSENSUS

ENGAGE your key STAKEHOLDERS
in **prioritizing** goals and needs.

COMMITMENT BUILDING

The **“action word”!**
People will COMMIT to **FUND**
what they help BUILD!

(LEADERSHIP) CONSENSUS CREATES COMMITMENT!!!

THE HOW:

The **3 components** of a successful LCB Process:

PREPARATION

PREDISPOSITION

PARTICIPATION

THE WHO:

Involve **internal** and **external** LEADERS from ALL of your STAKEHOLDER group:

Those SERVED
Those IMPACTED
Those LEADING

Those DELIVERING
Those INVESTING
Those PARTNERING

Look for **positive, supportive, candid participants** who will add value, creative thought and significant contribution to the process.

WHEN:

You should use this LCB process for:

MESSAGE CLARIFICATION. Your VISION/MISSION/MESSAGE is NOT clear, concise and compelling ... and CANNOT be delivered in a consistent way by all of your STAKEHOLDERS ... then move on an LCB ASAP!

CAMPAIGN PLANNING. This process is considerably more productive and valuable than the typical “Feasibility Study” or “Internal Case Statement”.

FUNDING NEEDS. Your “needs” require FUNDING that is greater than you’ve ever attempted!!! (And, you are not celebrating your “150th anniversary”, nor have “10,000 great relationships” in your database!)

VISION DAY AGENDA (OVERVIEW)

THE 3 GOALS:

1. CLARIFY THE MESSAGE
2. CREATE CONSENSUS AROUND PRIORITIES
3. COMMIT TO A FUNDING PLAN

INTRO: **CHANGE THE WAY YOU THINK**

Objective #1: Start with that “VISION” Thing

... to elevate the level of dialogue.

Objective #2: Set some B.H.A.G.s (Big Hairy Audacious Goals)

... to raise ‘sights’.

Objective #3: Introduce THE LAST INVESTOR METAPHOR

... to provide focus.

GOAL 1: **Clarify the Message**

Objective #1: Draft a VISION CARD

... with the WHAT, WHY & HOW answered.

Objective #2: Brainstorm multiple METAPHORS & “VISUALS”

... to provide re-description and re-enforcement.

Objective #3: Build the RETURN-ON-INVESTMENT (ROI)

... for both left side and right side.

GOAL 2: **Create Consensus Around Priorities**

Objective #1: List all Priorities

... grouped under the “3 Buckets”.

Objective #2: Create Consensus

... around Top 3 Priorities per “Bucket”.

Objective #3: Translate into a Draft Plan

... around a 1,000-DAY JOURNEY.

GOAL 3: **Commit To A Funding Plan**

Objective #1: Outline 1,000-Day Action Plan (Funding)

... built to match the Priorities.

Objective #2: Introduce the QP³ ↔ QP Formula

... to reinforce the importance of the Vision Day.

Objective #3: Share a Simple FUNDING PYRAMID

... to demonstrate the need for a Major Gifts FOCUS.

SUCCESS: INCUBATION ILLUMINATION ILLUSTRATION

THE LEADERSHIP CONSENSUS BUILDING PROCESS

THE WHY:

~~Not For Profit~~ **FOR IMPACT**

As you reinforce your transformation to a FOR IMPACT ORGANIZATION, it will become clear to all of your stakeholders that this is NOT about “an IRS designation”, “charity”, “donors”, “donations”, or “not making a profit”.

IMPACT drives INCOME

One of the simplest but most powerful reasons for doing Leadership Consensus Building is:

The size of your INCOME does not match the size of your IMPACT!

You’ve got to figure out a way to convey your IMPACT (your message) to a qualified group of potential investors who can then help you generate the INCOME to FUND YOUR VISION.

Organizational Development ←→ **Income Development**

It’s a new millennium. You cannot simply just pat your Development Staff on the back and say, “Go raise money.” Your INCOME DEVELOPMENT **TEAM** needs to be able to truly understand the Vision, Mission and Message ... the Goals, Priorities and Programs of your For Impact Organization, in order to effectively FUND YOUR VISION.

CAST A VISION... STAFF A VISION... FUND A VISION

This **FOR IMPACT Leadership Mantra** is a reminder to all of your stakeholders that it’s about VISION (not survival). Those same stakeholders, through this Leadership Consensus Building Process, can help you both **CAST A VISION ...** and **FUND A VISION.** (It’s up to you to **STAFF the Vision.**)

THE 3 DOUBLE QUESTIONS OF EVERY INVESTOR

1. **WHERE** does the money go (and **Why?**)
2. **WHO** decided that? (and **HOW?**)
3. **WHAT** do you want from me? (and **WHEN?**)

The LCB Process is designed to help you answer the 1st and 2nd double question of every investor. In fact, it becomes the single, most powerful and most compelling answer to Question #2: *“WHO decided where the money goes???”*

“YOU DID!” (Or “People just like you.”)

(“HOW was this done???”) “Through a LEADERSHIP CONSENSUS BUILDING PROCESS that involved all of our stakeholder groups ... ”

INVOLVEMENT BEGETS INVESTMENT

This is “THE MILLION DOLLAR IDEA” that makes this process worth every bit of the time, energy and effort required to make it happen. Remember, doing your “Vision in a Vacuum” is worthless. Setting your “priorities in private” is just as bad.

“STAKEHOLDER INVOLVEMENT” is where it’s at!

LEADERSHIP CONSENSUS BUILDING

translates into:

MESSAGE ... MOMENTUM ... MONEY.

This simple, 3-word mnemonic is an easy way for you to remember the **RESULTS** that come from involving your key leadership and stakeholders in this consensus building process.

Actually INVOLVING your best prospects and potential investors **BEFORE** you Present the Opportunity allows that person to say:

“I get it. I helped build it. I love it.”

“What can I do to help???” (“WHAT DO YOU NEED FROM ME?”)

~~FEASIBILITY
STUDIES~~

~~5-YEAR
STRATEGIC
PLAN~~

~~INTERNAL
CASE
STATEMENT~~

I have watched hundreds, maybe even thousands of “nonprofit organizations” do “**Feasibility Studies**”. I still wonder WHY???

“If we were to do a ‘HYPOTHETICAL’ Campaign ... with ‘HYPOTHETICAL’ goal of ‘X’ ... how much ‘HYPOTHETICAL’ money would you ‘HYPOTHETICALLY’ give to this ‘HYPOTHETICAL’ Campaign???”

Same thing with “**5-Year Strategic Planning Process**”. All of your Qualified Prospects and potential investors know that in this eve-changing world the idea of a specific detailed 5-Year Strategic Plan is an anomaly. On top of that, the time and energy spent in trying to get it done seems particularly wasteful when this “Strategic Plan” hits 100 pages, is bound and then stuck on a shelf!

The “old line, old school” **Case Statement Processes** were good for their time. The challenge is that almost every one of these is **INTERNALLY** driven! There is NO sharing of vision, NO engagement, NO dialogue, NO involvement, AND NO predisposition for the eventual presentation of the opportunity.

There is too much to do. Too many lives to save. Too many lives to impact.

Stop thinking “**activity**” (Feasibility Studies, Strategic Plans, etc.)

Start thinking **PRODUCTIVITY**.

THE WHY:

The LCB Process is a methodology and a framework ...to generate **STAKEHOLDER**.

INVOLVEMENT ENGAGEMENT COMMITMENT

I believe this is very straightforward. Rather than just “a wishing ... a hoping ... and a praying” that your stakeholders will come together to help you Fund the Vision, you need to take **specific action!**

Although there is a **inherent risk** in pulling together all of your stakeholders for this kind of session, I strongly believe the “**RISK**” of **NOT** doing it far outweighs the issues and discussions and vigorous dialogue that comes about during this process. That real risk is reduced impact, reduced funding, and ultimately obsolescence or even going out of business.

LEADERSHIP

INVOLVE your best LEADERS in the **process** of FUNDING the Vision.

CONSENSUS

ENGAGE your key STAKEHOLDERS in **prioritizing** goals and needs.

BUILDING

The **"action word"**! People will COMMIT to **FUND** what they help BUILD!

I've chosen these 3 words very carefully, and have used this process effectively for the last 20 years.

LEADERSHIP.

It is what it is. It is what it says. Involving your best leaders in the process of Funding the Vision is worth **millions and millions of dollars ... and untold IMPACT.**

CONSENSUS.

This engagement with your key stakeholders not only helps with the MESSAGE, but it generates unbelievable MOMENTUM to generate the MONEY to FUND YOUR VISION!!

Consensus does not necessarily mean **UNANIMOUS**. It does mean that a significant majority of your KEY STAKEHOLDERS **AGREE** with the **priorities** and the **plan**.

BUILDING.

This is the kicker! The action word! This is also what makes this idea worth **MILLIONS!**

You provide the framework and the Vision Day ... but your STAKEHOLDERS actually help you **BUILD** the Plan.

You cannot FUND THE VISION with getting your TOP STAKEHOLDERS deeply ENGAGED and INVOLVED and COMMITTED to your **IMPACT!**

Feasibility Studies, 5-Year Strategic Plans and Internal Case Processes are antiquated, questionable and most worthless. They create:

CONSENSUS CREATES COMMITMENT.

The Leadership Consensus Building Process and the *Vision Day* are an almost **"perfect"** **PREDISPOSITION to the PRESENTATION OF AN OPPORTUNITY!**

The LCB Process answers the first 2 questions of every investor (**Where** and **Why; Who** and **How**) ... and provides a wonderful **"set up"** for answering Question #3: **WHAT** do you want from me?

THE HOW:

The **3 components** of a successful LCB Process:

PREPARATION

PREDISPOSITION

PARTICIPATION

Here is one way to actually DO Leadership Consensus Building.

1. PREPARATION

Gather ALL relevant material.

The goal here is to pull together as much as possible to help both the internal Preparation, as well as the Predisposition.

Look at:

- Interim Reports
- Development Reports
- Needs Assessment
- Current "Presentation Tools"
- Audits
- Strategic Plans
- Additional Case/Rationales for Support

Do your best to summarize for the VISION DAY.

Internal Discovery Process around Vision Day Goals.

Gather a small internal team to meet and brainstorm the Goals and Objectives for the Vision Day. There may even be some "blue sky" with the staff and an "inner circle" of key stakeholders or Board Members.

Create Invitation List.

Review STAKEHOLDERS... and look for representation from all 6 groups.

2. PREDISPOSITION

A carefully worded invitation to all invitees.

This has to communicate the IMPORTANCE of this process and this Vision Day in the history of your organization. The invitation should come from your most respected leaders and leave very little "wiggle room" to 'opt out'.

- "Most important day in our recent history."
- "We need you there."

Send out package of reading material and questions to begin the process.

Review the Vision Day Agenda and share 3 questions that you would love to get the attendees to think about before they show up. (e.g., Vision of the organization, some B.H.A.G.s, taglines, metaphors, etc.)

Devise a specific strategy to get KEY STAKEHOLDERS to ATTEND.

Have Board Members or Natural Partners call. Check preliminary dates with the 3 absolute most critical stakeholders to ensure their attendance. Do phone follow-up on all invitees.

3.PARTICIPATION

A 6-hour VISION DAY

This is the **centerpiece** of the Leadership Consensus Building Process.

Create an “offsite” environment to foster thinking, productivity, and results.

Enlist a FACILITATOR (either internal or external) to ensure the FLOW of the day.

Ideally, that facilitator will understand both the Process and the desired results.

Plan on a one-on-one follow-up of both attendees and non-attendees.

Results/Deliverables from the Vision Day.

1. Create **TOOLS**, in draft form, that can be shared with both attendees and non-attendees. This would include the **Vision Card** and any additional **visuals**.
2. The Outline of the **1,000-Day Journey**.
3. Translating the Priorities into an actionable **FUNDING PLAN**.

All of these are “works in progress” and can be customized and modified as the **JOURNEY** continues.

VISION DAY AGENDA

THE 3 GOALS:

AVERAGE TIME SPENT ON GOAL:

| | |
|---------------------------------------|----------------------|
| 1. CLARIFY THE MESSAGE | 3 Hours (spread out) |
| 2. CREATE CONSENSUS AROUND PRIORITIES | 1 Hour |
| 3. COMMIT TO A FUNDING PLAN | 1 Hour |

ICEBREAKER

There are a number of Icebreaker Activities that can set the tone for the day. We use wrist ropes, a clothing change activity, the nine-dot "out-of-the-box" exercise (four straight lines and then three straight lines and then one straight line), or "sacred cows". Idea is to challenge attendees to open their minds, let go of baggage ... and get creative!

For you, I would strongly recommend that you begin your Vision Day with **CHANGE YOUR VOCABULARY** (Appendix A) to help make a giant paradigm shift in thinking.

OLD THINKING

NOT-FOR-PROFIT
CHARITY
MISSION STATEMENT

DONOR
DONATION
"WARM FUZZIES"

SURVIVAL
INFORM
COMPETITION

TRANSACTION
ACTIVITY
ASK FOR MONEY

ON THE BOARD

NEW THINKING

FOR IMPACT
CAUSE
MESSAGE

INVESTOR
INVESTMENT
RETURN-ON-INVESTMENT

VISION
INVOLVE
COLLABORATION

RELATIONSHIP
PRODUCTIVITY
PRESENT THE OPPORTUNITY

ON BOARD

INTRODUCTION: CHANGE THE WAY YOU THINK

Objective #1: Start with that “VISION” Thing

... to elevate the level of dialogue.

ACTION:

- Share some Vision Quotes, and share any current Vision Statements.

“Without VISION, the people will perish.”

“Great accomplishments require great VISION.”

“If your imagination is out of focus, you cannot see clearly.”

Mark Twain

“LEADERSHIP is the ability to translate VISION into REALITY.”

Warren Bennis

*“CATHEDRAL BUILDERS were VISIONARIES who shared a single desire:
to create something that endures.”*

Bill Shore

- Ask everyone to write out his or her own “Vision” for the organization.
- Share LEADERSHIP CONSENSUS BUILDING PROCESS vs. Feasibility Study.
[“Why we’re here today.”]

*You might want to share the Feasibility Study Scenario.

1. INTERNAL senior staff gets together; agree they need more money.
2. This INTERNAL group decides to do a “CAMPAIGN” to raise more money.
3. For justification, credibility and backup (Can you say “CYA”?) ...
these INTERNAL leaders enlist EXTERNAL “consultants” to do a
“FEASIBILITY STUDY”.

Then what happens??? These EXTERNAL “consultants” go out with an ominous-looking five-page “form” and ask your TOP STAKEHOLDERS a series of “HYPOTHETICAL” questions, closing with:

* “If XYZ NONPROFIT ORG were to do a ‘HYPOTHETICAL Campaign’ ... and a ‘HYPOTHETICAL goal’ is set ... how much ‘HYPOTHETICAL money’ would you ‘HYPOTHETICALLY give’ to this ‘HYPOTHETICAL Campaign’???”

- Then, I would review the Leadership Consensus Building Process [WHY, WHAT, WHO, WHEN] with the group.

Objective #2: Set some B.H.A.G.s (Big Hairy Audacious Goals)

... to raise 'sights'.

ACTION:

- Challenge the group to **THINK BIG ... and BUILD SIMPLE.**
- Have everyone write out their own BIG HAIRY AUDACIOUS GOALS for the organization, and share at the table. Collect and summarize.

Objective #3: Introduce THE LAST INVESTOR METAPHOR

... to provide focus.

ACTION: SHARE THE LAST INVESTOR METAPHOR

WHAT IF ... you were literally down to your "LAST INVESTOR"???

They have great capacity, a terrific relationship with your For Impact Organization, a solid gift history, a clear philanthropic vision, and the timing is "perfect".

This LAST INVESTOR could FUND YOUR (entire) VISION with a very, very significant investment ... and by engaging everyone in his or her "circle of influence" as well.

However, if they "don't get it" ... "don't understand the message" ... "don't agree with the "priorities" ... you are literally OUT OF BUSINESS!!!

Using THE LAST INVESTOR as a metaphor:

How could you totally re-think the models, philosophies, processes and attitudes you have about Income Development/ Fundraising/Funding ... and its implication to your entire For Impact Organization???

GOAL 1: CLARIFY THE MESSAGE

Objective #1: Draft a VISION CARD

... with the WHAT, WHY & HOW answered.

Come up with 3 words or phrases to answer each of these questions:

- **WHAT do we do?**
- **WHY do we do it?**
- **HOW do we do it?** (Which should answer WHERE the money goes!)

I use the following process:

1. Word Association.

I have them brain dump/write down every word they can think of that comes to mind when talking about your organization.

*Then, make sure they look at all existing material for existing words, to make sure we're not re-inventing the proverbial wheel as they look for the "right" words and phrases.

2. Group Words.

I have the participants work at their tables to group these words into "like-kind" AND to circle those words that they think???

Then I have them fill out the Vision Card Template (Appendix B) which usually helps focus the Vision Card Process.

Special Note: The Vision Card is not an "easy" thing to do, but worth the effort.

3. Unique Selling Points.

Have attendees brainstorm/build your organization's USPs.

Differentiation is one of the simplest, yet most overlooked principles, of the CASE FOR SUPPORT ... and of a **great PRESENTATION!**

In the sales world, these are called **UNIQUE SELLING POINTS or USPs.**

- **UNIQUE!** One of a Kind, Not Common to All, Unusual.
- **SELLING!** "*Selling is not telling.*" Use these Unique Selling Points to generate DIALOGUE!
- **POINTS!** These are "bullet points" not Powerpoints!!! They fit on the back of the Vision Card, not on 15 pages in a presentation!

Some other words that may help you with this:

- DISTINGUISHING CHARACTERISTICS.
- DRAMATIC DIFFERENCES.
- STARTLING STATISTICS.
- TAGLINE/BATTLE CRIES.

Special Note: If possible, I try to get the group to think about taglines and **battle cries** that are simple ... powerful ... and memorable.

For example, think about this simple tagline, battle cry, message from one of my favorites FOR IMPACT ORGANIZATIONS, The Living Skills Center in San Francisco:

“We teach people to live independently ... by living independently.”

GET IT???

Objective #2: Brainstorm multiple METAPHORS & “VISUALS”

... to provide re-description and re-enforcement.

METAPHORS are particularly powerful ways to **simplify** and **explain** your Message.

| | |
|-------------------|-----------------|
| Fire Extinguisher | vs. Smoke Alarm |
| Aspirin | vs. Vitamin |
| Epidemic | vs. Vaccine |
| Treat | vs. Prevent |
| Thermostat | vs. Thermometer |
| Control | vs. Monitor |

Simple descriptive metaphors help to remember the organization and the Message.

Great example ... World of Children: The Nobel Prize for Children’s Advocacy.

VISUALS!

More than half of your prospects/potential investors/ stakeholders are very VISUAL people.

What are some simple visual ways to explain your program? Your business model? Can you “draw in on the back of napkin”? Can you incorporate these visuals in your material?

Metaphors and Visuals are all about “RE-DESCRIPTION”: Presenting the same idea in different ways! You’ve got to “say it” and “show it” in several different ways.

*There's a wonderful new book out called CHANGING MINDS by Harvard Cognitive Psychologist Howard Gardner (who's been changing the way people "think about thinking" for 35 years). He talks about the "7 levers" for changing minds, and calls as the most under appreciated. He reminds us that it's not enough to repeat something a million times.

Objective #3: Build the RETURN-ON-INVESTMENT (ROI)
... for both left side and right side.

INVESTMENT \longleftrightarrow **INVESTOR** \longleftrightarrow **RETURN-ON-INVESTMENT**

Actually enlist the "collective brain" of the group to build your For Impact Organization's ROI!!!

Think about these 3 things, as you build your ROI:

1. Define your **IMPACT** ... tied to your **VISION**.
2. Define your **VALUE** ... tied to your **STAKEHOLDERS**.
3. Build your **BENEFITS** ... tied to your **INVESTORS**.

Don't be afraid to answer the "radio station question": **WIIFM (What's In It For Me?)**

Quick Tip: The LAW OF BOTH/AND

Build around BOTH the "left brain" and the "right brain":

The following words seem to be opposite or paradoxical, but you'll get the "LOGIC" and "MAGIC" of BOTH/AND.

| LEFT BRAIN | RIGHT BRAIN |
|-------------------|--------------------|
| HEAD | HEART |
| TANGIBLE | INTANGIBLE |
| RATIONAL | EMOTIONAL |
| MIND SHARE | HEART SHARE |
| LOGIC | MAGIC |
| EYES | EARS |
| VISIBLE | INVISIBLE |
| STATS | STORIES |
| NUMBERS | GUT |
| HARD | SOFT |
| SCIENCE | ART |
| OBJECTIVE | SUBJECTIVE |

"The 'soft stuff' is always the 'hard stuff!'"

Tom Peters

GOAL 2: CREATE CONSENSUS AROUND PRIORITIES

Objective #1: List all Priorities

... grouped under the "3 Buckets"

(*The "3 BUCKETS" is a simple metaphor to help explain WHERE the money goes.)

Once you have established the **WHAT** and the **WHY** and the **HOW** ... you are ready to start simply listing all of your priorities, needs and even dreams.

Then, group all of these under the specific "bucket" (the **HOW**) that seems most appropriate.

Objective #2: Create Consensus

... around Top 3 Priorities per "Bucket"

The goal is to try to establish some kind of **consensus** around your Top 3 Priorities within each "Bucket" (**not unanimous ... but consensus**).

Ideally, you can take ALL of your priorities that you have grouped together and establish **3 larger, over-arching PRIORITIES** ... which will allow you to place almost all of the remaining priorities under one of those 3.

Objective #3: Translate into a Draft Plan

... around a 1,000-DAY JOURNEY

Special Note: This is a pretty BIG concept/idea. It comes mostly from my work with entrepreneurs, and then became part of this LCB/Vision Process for Social Entrepreneurs and For Impact Organizations.

Using all the work that has been accomplished within the Vision Day, CHALLENGE the STAKEHOLDERS to begin preparing 1,000-Day Plan/Journey for the organization that will provide you a map or blueprint for the next 2 ¾ years ... 11 quarters ... and 33 months

- Begin with the end in mind. What do you look like in 1,000 days?
- Incorporate your Vision, your Goals, and your Priorities into this 1,000-Day Journey.
- Ultimately, you can transfer these specific Goals/Priorities to a Monthly Benchmark Sheet (Appendix C). The first 4 quarters will be very specific and have depth and detail around 3 major accomplishments or goals per quarter. As you get further out in the 1,000 days ... these benchmarks become more visionary/big picture.

GOAL 3: COMMITTO A FUNDING PLAN

Objective #1: Outline 1,000-Day Action Plan (Funding)

... built to match the Priorities.

This is pretty simple. It's tied to **IMPACT** \longleftrightarrow **INCOME**. Begin immediately to **TRANSLATE** the 1,000-DAY JOURNEY (Organizational Plan) into the 1,000-DAY ACTION PLAN (Funding Plan).

Think Projects. Think Major Gifts Initiative. Think Phases.

During the Vision Day, the goal is **COMMITMENT TO A FUNDING PLAN**... NOT to actually have that 1,000-Day Action Plan complete.

Objective #2: Introduce the QP³ \longleftrightarrow QP Formula

... to reinforce the importance of the Vision Day.

You want those stakeholders present at the Vision Day to begin to how the work today impacts FUNDING THE VISION tomorrow.

The "Magic Formula" is:

$$\frac{QP^3}{QP} = I^2$$

$$\frac{QP^3 \text{ (Qualified Priorities, Projects and Programs)}}{QP \text{ (Qualified Prospects)}} = I^2 \text{ (Impact and Income)}$$

You just spent the last 4 to 6 hours working on "QP³". It should be fairly simple to reinforce with the group that in order to create **INCOME** and **IMPACT** ... we need **QUALIFIED PROSPECTS**.

Special Note: If time permits, I actually ask those present to brainstorm specific Qualified Prospects who might be interested in funding specific Qualified Priorities, Projects or Programs.

I also touch on the importance of a MASTER PROSPECT LIST.

Objective #3: Share a Simple FUNDING PYRAMID

... to demonstrate the need for a Major Gifts FOCUS.

FUNDING THE VISION is all about **"SALES"**. (Your "business" stakeholders will get this immediately!) For you, it's about a **Major Gift FOCUS**.

If you show a simple Funding Pyramid with **LEADERSHIP INVESTMENT** at the top of the pyramid, Major Gift Initiative in the middle, and your **Leadership Society** at the base ... it should reinforce the fact that:

97% OF YOUR FUNDING will come from 3% of your constituency!!!



*This 1,000-Day Action Plan/Funding Plan could turn into a Campaign ... a Major Gift Initiative ... or just a series of Project-Focused Funding efforts.

SUCCESS: INCUBATION ILLUMINATION ILLUSTRATION

My closing thoughts for this Vision Day and Vision Day Agenda are around these 3 words:

1. INCUBATION. This plays off both the PREPARATION and PREDISPOSITION components, as well as "thinking time" during the Vision Day itself.

2. ILLUMINATION. Think "luminaries"; ideation and encouraging the free flow of dialogue. Spend whatever time necessary in sharing, discussing and "illuminating" the issues.

3. ILLUSTRATION. Your ultimate goal is to transform all of the wonderful work from the Vision Day into powerful VISUALS!

The Vision Card. Napkins. Metaphors. Even Business Models.

*If you are seriously committed to this Leadership Consensus Building Process and the Vision Day itself ... you should even look to bring in a graphic/sketch ARTIST to help you as you move through the day.

INVOLVEMENT BEGETS INVESTMENT!!!

GO FOR IT!!!

APPENDIX A: CHANGE YOUR VOCABULARY

OLD THINKING

NOT-FOR-PROFIT

CHARITY

MISSION STATEMENT

DONOR

DONATION

“WARM FUZZIES”

SURVIVAL

INFORM

COMPETITION

TRANSACTION

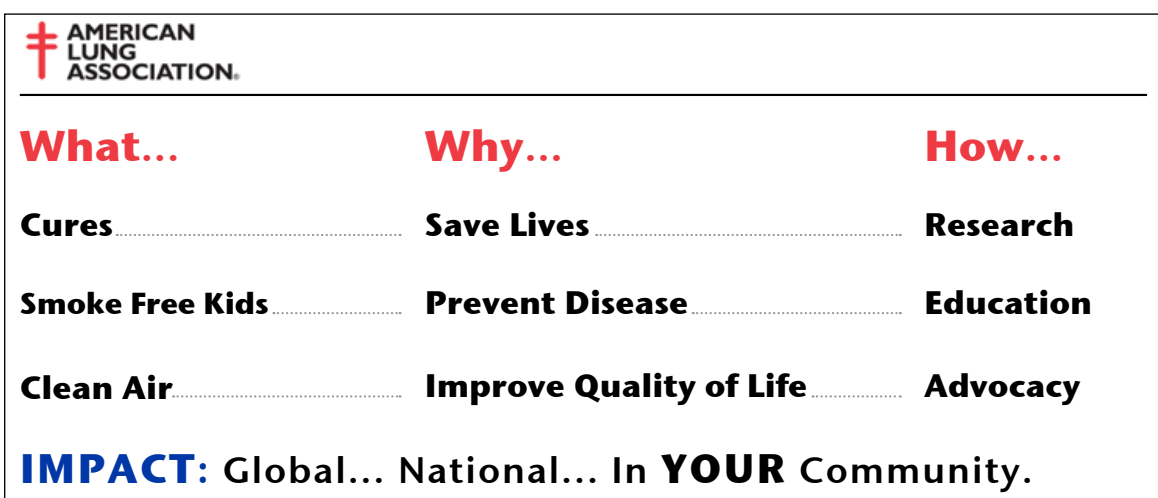
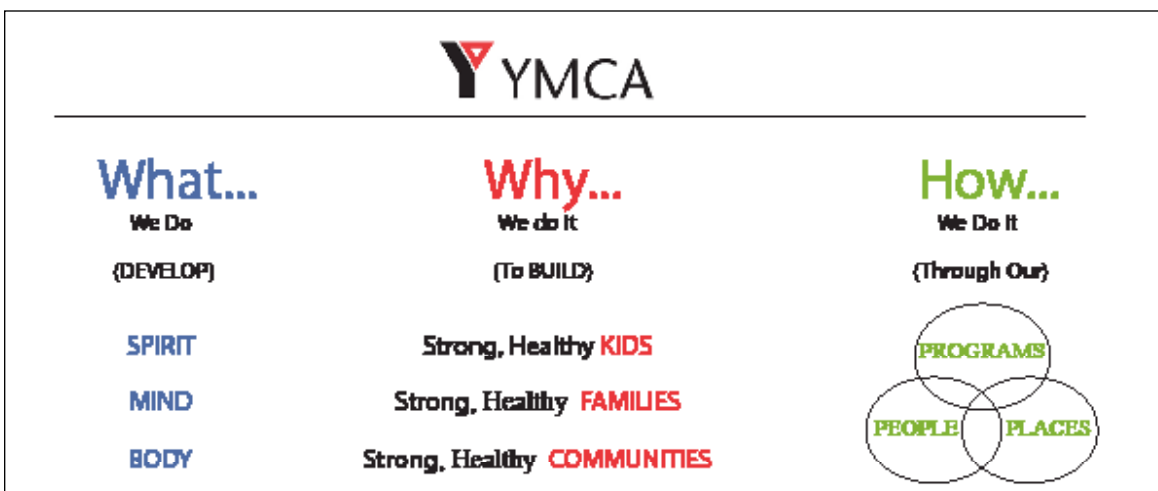
ACTIVITY

ASK FOR MONEY

ON THE BOARD

NEW THINKING

APPENDIX B: VISION CARD EXAMPLES

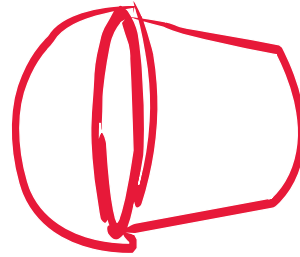
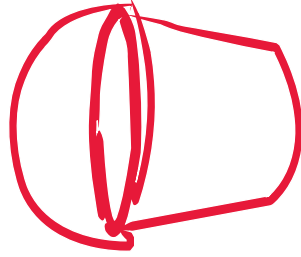
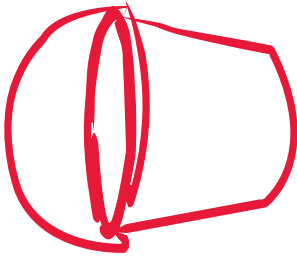


PRESENTATION TOOL TEMPLATE B

WHAT
WE DO

WHY
WE DO IT

HOW
WE DO IT
(Where The Money Goes)



1.

2.

3.

APPENDIX C: MONTHLY BENCHMARK SHEET

Relationship Manager _____
 Month _____

DRAFT

MONTHLY FEEDBACK

*“You get what you **MEASURE.**”*

\$UCCESS = # of times we Share The Story + Present The Opportunity!

\$UCCESS = Activity & Productivity

\$UCCESS = # of Visits (with Qualified Prospects) & # of 'ASKS'.

\$UCCESS = RESULTS = GIFTS (Money) to FUND the VISION of your organization.

\$UCCESS = R.O.I. + R.O.E. + R.O.R. (Return On Investment, Energy & Relationships)

| ACTIVITY | | PRODUCTIVITY |
|--------------------------|----------------------------|---------------------------------|
| VISITS (PERSONAL) | ASKS (PTO) | RESULTS |
| # of Top 25 VISITS _____ | # OF ASKS _____ | # COMMITMENTS _____ |
| # of Total VISITS _____ | \$ AMOUNT (on table) _____ | \$ COMMITTED ('CASH') _____ |
| | # P. C. ASKS _____ | # NEW PRESIDENT'S CIRCLE _____ |
| | # Planned Gift ASKS _____ | # NEW LEGACY SOCIETY _____ |
| | | \$ VALUE OF PLANNED GIFTS _____ |
| | | #/\$ PENDING _____ / _____ |
| | | # DECLINED _____ |

OWNERSHIP ACCOUNTABILITY MEASUREMENT