



“SEVEN KEY SUMMERTIME ADVANCEMENT ACTIVITIES!”

Summertime is a great time for organizations, foundations and advancement programs to evaluate the past year’s activities and plan for the upcoming fiscal year. It is important to use this time well, evaluate your program’s key areas and set goals so that you can be more effective and successful.

- 1. Update Your List of Publics and Supporters** – Your “publics” are those people or groups who have a stake in seeing your organization succeed. Update the contact information of your A) Boards and committee members, B) Staff, C) Volunteers, D) Current members, E) Alumni or previous active members, F) Neighbors, G) Local business leaders, and H) Local political leaders. Each of these groups should be communicated with periodically.
- 2. Evaluate and Plan** – Review all your activities for the previous year and make plans for the coming fiscal year in the A) Foundation or Advancement Oversight Board, B) Alumni, C) Annual Fund (All the fundraisers you do each year), D) Marketing/Communications, E) Estate Planning, F) Major Gifts, and G) Recruitment.
- 3. Foundation Board and Advancement Oversight Planning** – Your Board or Council keeps you foundation or advancement program focused and effective. Spend a retreat morning or day with them, your staff and your volunteer leaders in setting goals for the upcoming year. With the previous year’s plan in hand, you may ask: What worked well? What do you want to keep? What do you want to eliminate? What should you add?
- 4. Alumni** – Evaluate your past alumni events and consider what you might add in the way of new alumni activities. Consider activities that build alumni ties to your organization and that raise money in support of your organization.
- 5. Annual Fund** – Many organizations have many fundraisers. They are important for your organization’s support. But they are also important because they tie so many volunteers and supporters to your organization! Create your Annual Fund calendar for the upcoming fiscal year that includes such things as galas, development dinners, golf tournaments, fundraising letters, phone-a-thons, walks/runs, dinners, raffles... Consider what is vital for your office to oversee and what can be delegated to competent volunteers.
- 6. Estate Planning** – The estate planning component of any foundation or advancement program is vitally important. With little effort so much can be gained by these activities! Create your estate planning calendar that involves letters and pamphlets, workshops, and Legacy Society enrollment drives.
- 7. Major Gifts** – As a Major Gifts Committee, identify your top 25 or 50 or 100 supporters and make plans during the year to meet with them on a regular basis for cocktail hours and breakfasts, lunches or dinners to build the bonds of friendship, receive their input, and share your organization’s plans and dreams with them. Strong and personal relationships are the foundation of giving. Start somewhere. Make a little plan. And start building friendships with key stakeholders in your organization. This is rewarding and financially important!

A strong foundation or advancement program is key to a non-profit’s growth and ability to fulfill its mission! VisionWorks specializes in helping organizations create and grow their foundations and advancement programs.

Contact VisionWorks at 888.948.1113 or markf@VisionWorksCo.com so that we may help you with your foundation or advancement program 1) Creation, 2) Assessment and 3) Strategic Planning.