



2011 Consulting and Training Services

How I Can Help You

I help organizations and coalitions thrive.

While I am generally hired for an identified project, I always help organizations think about the relationship between the project at hand and other challenges. Based on my dozen years as Executive Director of a constantly growing organization, I understand the critical importance of adopting solutions that maximize long-term organizational effectiveness, not just short-term gain.

Some of the challenges clients have faced include:

- A small, one-year old organization is growing by leaps and bounds. Its leadership recognizes the board must be united in having a plan for continued growth. They need a clean and simple strategic planning process to get the board on the same page for this important step in organizational development.
- A mid-sized organization with a half-dozen staff is operating without a strategic plan. They need an outsider who can talk to stakeholders, facilitate a process, and craft a plan that helps the board and staff reach consensus on priorities for the next three years of organizational development.
- An advocacy organization wants to establish a coalition to make progress in the Legislature. They've recruited potential partners, but need someone to facilitate meetings to create a coalition governance system and to set initial coalition priorities.
- A staff-driven organization finally has its board ready to raise money. They need a consultant to both train and excite the board before and during the initial campaign.
- An Executive Director is overwhelmed and a new Development Director has gaps in their experience. They ask me to train them on major donor fundraising, to help them turn a skeletal development plan into a fleshed out plan that's ready to implement, and to improve their fundraising case statement, visit scripts, and membership materials.
- An Executive Director needs help with major donor fundraising. They hired me eight hours of coaching to help revamp their case statement and work with them on performance when calling donors and making fundraising asks during personal meetings.
- An organization has outgrown its fiscal management system. They need expertise to help them transition to a new, unified budgeting and accounting system that will provide them with information that matches up with their needs for strategic decision-making.

Project-Based Consulting and Coaching

Strategic and Campaign Planning: I can design your strategic planning process, conduct stakeholder research, plan and facilitate retreats, and write the strategic plan. I can work with staff, stakeholders, and/or coalition partners to craft a plan for winning an advocacy campaign.

Facilitation: I can facilitate your staff or board retreat, or a coalition-wide governance or agenda-setting meeting.

Fundraising: I can provide training, coaching, and direct assistance in developing your fundraising message, tactics, plans, events, and budgets. I have particular expertise in major donor fundraising, membership fundraising, and fundraising events.

Communications: I can help you revamp your messaging to better connect with the public, focused on print and online communications and/or public speaking. I can help you develop a long-range communications plan that will help win short-term campaigns and build your institution.

Organizational Development: I can help you with specific organizational development challenges, such as: selecting and adapting a new fundraising/communications database; revamping your fiscal management systems; working with organizational chapters or affiliates; or setting up systems to evaluate your programs.

Executive Transitions: I can help boards (or an outgoing ED) with transition planning, identifying the most important attributes of a new ED, and effective hiring processes.

Coalition Development: I can help you through the formation of a coalition, from identifying its purpose, to developing shared governance, to creating an initial plan and set of priorities.

Training

Fundraising

- Major donor fundraising * Successful fundraising visits with donors * Getting over the fear of the ask * Successful events and house parties * Fundraising by mail and phone * Developing a long-range major donor fundraising plan * Getting your board to fundraise

Communications

- Communications planning for the long-haul * Values-based communications * Elements of a successful message * Working with the media

Elections/Advocacy

- Developing a campaign plan * Lobbying 101 * Program evaluation * Volunteer recruitment * Candidate recruitment * Effective voter contact * Elections and your 501c3 status

Organizational Development

- Why organizations thrive * How do you evaluate your systems * Fiscal management systems

Don't see something here that I might do? Just ask. Adaptability is one of my strengths.