



## ***2012 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 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.

### **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 winning advocacy campaign plan.

**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: working with organizational chapters or affiliates; selecting and adapting a new fundraising/communications database; revamping your fiscal management systems; 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

### **Elections/Advocacy**

- Developing a campaign plan \* Lobbying 101 or Lobbying 201 \* The Cycle of Accountability \* Program evaluation \* Volunteer recruitment \* Candidate recruitment \* Top-notch endorsement processes \* Effective voter contact \* Elections and your 501c3 status

### **Communications**

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

### **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

### **Organizational Development**

- Effective Strategic Planning \* Why organizations thrive \* How do you evaluate your systems \* Fiscal management systems \* Board governance 101

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

Some examples of 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.