



## **Conceptual Design Process**

Through the process of Conceptual Design, Achieve defines clarity for a specific program or organization itself, tests potential support, and creates a short-term action plan.

Conceptual Design has improved our clients' ability to:

- Define Program Effectiveness
- Increase Public Awareness
- Effectively Promote Their Brand
- Increase Organizational Credibility
- Secure Philanthropic Support (Donors and Volunteers)
- Convey why the organization exists and the community need it serves
- Convey the value provided by the organization

The Conceptual Design process has several components.

### Mission and/or Program Case Statement Clarification

Successful fundraising and promotion is often built upon an organization's ability to communicate its mission and philanthropic needs in a strong case for support. Achieve works with clients to create a well-written case that can be actively used in fundraising and serves—at a minimum—the following functions for an organization:

- Documents the organization's story (past, present and future)
- Details the organization's vision
- Clearly articulates the need served
- Maintains consistency in donor visit conversations
- Communicates to donors and prospective donors, the "why" in their consideration of providing support
- Serves as a repository of accepted language for grant proposals and solicitation letters
- Provides credibility to the organization in a "take away" for donors

This stage of the process results in an expertly drafted case for support document for the organization, its programs and the need addressed. Achieve develops a clear and concise document piece for consumption by the public (i.e. potential supporters and volunteers). The case also serves to support a strong fund development program, by providing consistent and approved, branded language for use in publications, gift solicitations/grant proposals and other communications initiatives



## Program Receptivity & Philanthropic Support Testing

A Philanthropic Support Test will help Achieve clients determine the organization's fundraising potential by conducting personal interviews with external constituencies, such as funders (i.e. individuals, local community foundations, other funders, partners) to determine the philanthropic community's willingness to invest in a client's mission or specific program.

The Program Receptivity Test will also "test" a current program to ensure a need exists. The outcome also identifies possible revenue sources capable of providing long-term sustainable support for the program.

Feedback received from programmatic and philanthropic testing interviews will be shared with the organization, including the following:

- Candid expert feedback from Achieve regarding challenges and opportunities regarding fundraising and programming
- Feedback on the need the organization or program is focusing on
- Summary comments from the interviews
- Case statement reactions and possible changes
- Specific recommendations to address challenges facing the organization (if any) that will improve fundraising outcomes
- Strategic direction to be executed by board
- Future fundraising potential

## Short-Term Organizational Action Plan

Looking forward, it is important to have a short term action plan. Achieve clients have benefited from a highly flexible plan to prioritize opportunities and guide the overall strategic direction of the organization. The action plan will outline:

- The priorities necessary to grow the organization and/or a program
- The strategies and tactics to enact these growth priorities
- How to ensure the long-term sustainability of the organization/programs

Organization's interested in Achieve's Conceptual Design process should contact Nick Parkevich, Director of Client Development at 317-637-3000 or [nparkevich@achieveguidance.com](mailto:nparkevich@achieveguidance.com)