



APERIO  
PHILANTHROPY

APERIO GUIDE

## ARTICULATING YOUR VISION

You're ready to create a major gifts program, or grow your program to the next level. But first, it's time to get clear about how you would use the additional funding.

Why?

1. **Major donors expect it.** Major donors expect that, when you approach them for big dollars, you have big goals. Yes, they want to know *what* they're paying for—but they especially want to know *why*. Why it matters. Why you need them specifically. Why a donation will open new doors, propel new progress, and make new impact. Philanthropists are in the business of what's next, so to engage them, your organization must be too.
2. **Your team expects it.** Asking for big gifts is stretch for even career gift officers. As they cultivate donors, make asks, and steward gifts, they need to believe—confidently, in their gut—in the vision and the behind it. That means, they need leadership to be clear and aligned on the organization's ambitious for the near and far future.

This guide provides a series of conversation topics—intended to be worked through in order—that enable nonprofit leaders to articulate their vision.

It is designed around key questions philanthropists will ask when considering a large gift. That means, it requires you to be forward-thinking, imaginative, and forward-looking.

Use this when you can take a break from the day-to-day minutiae and dream big on behalf of their mission. Bring trusted thought partners to the table to talk it out with you. Even if you're undertaking this exercise in the context of dire financial straits, indulge in a few hours of forgetting current constraints and suspending disbelief.

The questions may seem basic, but they will spark creative conversation if you let them. Before you know it, you'll see new ideas and new potential taking shape. Try answering them in your own words, forgetting for a moment your go-to talking points.

You'll emerge with a vision that is compelling to philanthropists—and inspiring to your team.

### What's next?

When you've crafted your vision, you'll be ready to create a case statement to share with prospective supporters.

## What are you aiming for?

Zoom out. Assume the world is your oyster. Articulate: at the heart of it all, what are you trying to accomplish? How? Why? Be bold. Be forward-looking. You should be able to answer each of these questions 1-2 powerful sentences.

- What is the overarching problem your organization works to solve?
- What is your solution?
- Why is your organization the one to lead the way?
- Why does it matter that the problem be solved?

## What are you tackling next?

Zoom in a little. Assume you have all the resources you need. Which piece of the puzzle could you feasibly tackle in the next 3-5 years? If everything goes your way, what could you accomplish? Stretch. Be ambitious on behalf of your mission. Resist the urge to dive into details (that's next!). Ban the phrases: "we've tried that and it didn't work" and "that's impossible." Summarize your plan in concise, compelling sentences—no more than 2-3 per answer.

- Which piece of the overarching problem will you work to solve during the next 3-5 years?
- What will be your solution?
- Why is your organization the one to do it?
- What will be the impact of the progress you make?

## Where will you focus?

Time to get specific. But, for the moment, pretend your various programs don't exist. Think about *how* you are going to get to your solution. Where will you focus?

Why is this step important? A laundry list of programs is difficult for supporters to understand—or explain to their friends. Organizing your work into 3-5 "buckets" that are easy to understand (and remember!) makes your story more compelling and easier to tell. Each "bucket" should represent a specific area of *impact*. For example: Advance Life-Saving Research, Improve Food Access, Improve Education, Build Community.

- What are the 3-5 steps you will take or focus areas of your work?
- For each...
  - What problem are you trying to solve?
  - What will be your solution?
  - What will be the impact of your solution?
  - Why does it matter?
- Based on the above, what is the most impact-oriented name for each "bucket"?

## What will you do?

Assuming you had all the funding you needed, what programs will you run. How do they fit together? (Note: It's okay—often *good* even—if a program fits into more than one "bucket.")

- For each "bucket" you've created, what will you do to accomplish the goal?
- What are all the programs you'd like to continue, grow, or create in the next 3-5 years?

## What will you need?

Okay, time to bring money back into the picture. Here, resist the urge to cut corners based on current or projected resources constraints. Scope out the full investment needed to make the impact you're aiming for. If you don't know the details, estimate. Round up to account for unknowns. Use whole, round numbers. This is not a budget; it's a tool for explaining your vision—to people who may just be interested in investing the funding you need to move it forward.

- For each program, what will it take to accomplish your goal?
- What funding will you need?
- Adding programs together, what do you need for each "bucket"?
- Adding the "buckets" together, how much funding you need overall?