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**DEVELOPING A PERSONAL
SOLICITATION FUNDRAISING AT
MEXFAM**

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FAMILY PLANNING MANAGEMENT DEVELOPMENT

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I. EXECUTIVE SUMMARY

This visit to the Mexican Family Planning Foundation [MEXFAM] came at the request of its Executive Director, Mr. Alfonso Lopez Juarez. Mr. Lopez Juarez had asked for the assistance from the Family Planning Management Development Project [FPMD] in designing a multi-faceted intervention that would lead to the establishment of a personal solicitation fundraising program at MEXFAM. In addition to developing the intervention design, Mr. Lopez Juarez also requested FPMD assistance in presenting it to the National Executive Council (NEC) of MEXFAM at its March meeting.

In November of 1992, the FPMD Regional Director for Latin America and the Caribbean participated in a team assessment of non-governmental organizations (NGO) under U.S.A.I.D./Mexico's new Population Strategy for the country. That Strategy, while mainly aimed at strengthening the public sector's ability to deliver services to rural populations in ten priority Mexican States, also has as objectives for the private sector programs to: 1) increase domestic support in both absolute and proportional terms; 2) improve their income-generating capability; and 3) establish mechanisms to ensure their long term financial stability. In general, U.S.A.I.D. will be looking at ways to assist both the public and private sector programs over the next five years in ways that specifically and substantially reduce their reliance on external donors and the need for ongoing U.S. assistance.

MEXFAM, a member of the International Planned Parenthood Federation [IPPF], is the largest NGO working in family planning in Mexico. With a budget of over five million dollars, it operates in 28 Mexican states and serves over 500,000 clients annually. Over 40% of its operating funds come from U.S.A.I.D. sources with another 20% from IPPF. The eventual reduction of U.S.A.I.D. funds could have a major impact on the organization which is not only a significant service provider but also a symbol and source of innovation and excellence for the entire National Program.

Mr. Lopez Juarez has been aware of U.S.A.I.D.'s desire to begin a phase-out process in Mexico and had begun a process of identifying strategies to meet this challenge facing MEXFAM. During the U.S.A.I.D. team visit in November he presented a list of seven income-generating activities for their consideration and possible support over the next five years. It is clear that no one activity will replace external donor support but rather the development of a comprehensive portfolio of approaches will be necessary. Included in the list of potential activities presented to the team was the proposed establishment of a strong personal solicitation fundraising campaign that would use MEXFAM volunteer Board Members to mobilize individual (domestic) and corporate financial support for its programs.

FPMD, with the approval and support of MEXFAM, is proposing a year's worth of training and technical assistance to develop the personal solicitation fundraising program at MEXFAM.¹ It will develop a cadre of national volunteers at MEXFAM to do personal solicitation on an annual basis and establish the systems and staff support necessary to facilitate that activity. In presenting the proposed plan to the NEC it is clear that they are very supportive and most willing to take on this important responsibility. They are also well aware that this is only a beginning and that it will take several years of consistent effort identifying and cultivating donors for the program to begin to produce significant results.

¹ See section IV.

II. BACKGROUND

This consultancy with MEXFAM was a follow-up activity to the trip made by the FPMD Regional Director for Latin America and the Caribbean, Ms. Nancy Murray, in November 1992. During that trip, Ms. Murray participated in a team assessment of non-governmental organization's (NGO) technical assistance needs under U.S.A.I.D./Mexico's new Population Strategy.² The main thrust of that Strategy will be to provide assistance to four public sector institutions in order to increase contraceptive practice in rural areas in ten selected Mexican states while also putting into place a durable, self-sustaining family planning service infrastructure capable of continuing to meet the needs of rural clients after the conclusion of A.I.D. support. The key objectives for the private (NGO) sector are to: 1) increase domestic (Mexican) support in both absolute and proportional terms; 2) improve their income-generating capability; and 3) establish mechanisms to ensure their long term financial stability.

As Executive Director of MEXFAM, Mr. Alfonso Lopez Juarez has long been aware of A.I.D.'s evolving strategy to limit NGO assistance to activities that encouraged local support and that therefore reduced financial dependency on external donors. Presently, 87% of MEXFAM's five million dollar annual budget comes from external sources with 40% coming from A.I.D. and 23% coming from IPPF. Given that MEXFAM is the largest NGO working in family planning in the country, with a presence in 28 states serving more than 500,000 clients annually, it is essential that it continue to play its important role in the National Program. In recognition of that vital role and the new A.I.D. strategy, Mr. Lopez Juarez presented the assessment team with a seven point list of income generating activities for its consideration and possible funding. Included in that list was the creation of a Development Program for fundraising at MEXFAM that would identify and mobilize domestic financial support for its programs among both individuals and corporations.

To further pursue the possibility of establishing a Development Program, Mr. Lopez Juarez invited FPMD to return to Mexico March 2-4, 1993 to develop a technical assistance plan and to present it to MEXFAM's National Executive Council (NEC). The NEC is made up of volunteers that oversee the work of the organization and would be responsible for soliciting local individuals and corporations in the proposed fundraising activities. FPMD and MEXFAM had collaborated on a number of successful activities in the past and Mr. Lopez Juarez was aware of the specific FPMD expertise in the areas of income generation and self-sufficiency.

III. PURPOSE

The purpose of the trip was to develop a mutually agreeable intervention design that would lead to the establishment of a personal solicitation fundraising program at MEXFAM. It would be implemented by volunteers and would lead to the identification and mobilization of domestic individual and corporate financial support for MEXFAM's programs. Given the crucial role that volunteers, and specifically the NEC, would play in such a program, it

² See FPMD report Needs Assessment of Mexico's NGO Family Planning Organizations: MEXFAM and FEMAP, November 16 - 23, 1993.

was also essential to assess their recognition of the problems associated with reliance on external donors and their willingness to actively participate in a domestic personal solicitation fundraising program.

IV. INTERVENTION DESIGN

The intervention design represents the training and technical assistance necessary to develop a personal solicitation program at MEXFAM.³ It specifically identifies trained and motivated volunteers as the key ingredient of a successful program. The year long intervention would include the following activities:

1. Study Tour A visit by key MEXFAM staff and volunteers to Planned Parenthood of Central and Northern Arizona (Phoenix) during their annual fundraising campaign to see the various elements of a successful personal solicitation program in action.

2. Environmental Assessment An assessment by FPMD and MEXFAM of the external environment in Mexico in order to develop an overall strategy for the program and an internal assessment of MEXFAM to determine the specific content of trainings, technical assistance and systems development required.

3. Nominating Process Development of processes and systems necessary to identify and recruit volunteers to do personal solicitation of individuals and corporations.

4. NEC Retreat This activity would serve to solidify volunteer commitment to the program and to develop the overall Strategy and Annual Fundraising Plan.

5. Volunteer Training Volunteers would be given training in how to do personal solicitation.

6. Staff and Systems Development Staff would be trained in how to facilitate the personal solicitation work of volunteers. Software would be installed that would be used to build a data base on all existing and potential donors.

7. Annual Campaign Technical assistance would be provided to plan for and execute an annual personal solicitation campaign.

V. CONCLUSIONS

It is clear from this consultancy that both executive staff and national volunteers are convinced of the importance of mobilizing domestic financial support for MEXFAM and are anxious to establish a personal solicitation fundraising program. They recognize the realities of A.I.D.'s strategy with the NGO community and the inherent vulnerability of MEXFAM's reliance on external donors. They are convinced that potential domestic financial support

³ See Attachment 1.

does exist and they are more than willing to take on that challenge. Particularly impressive, and essential for program success, is the fact that volunteers see this as one of their primary responsibilities and are eager to be an active part of the program.

It is important to recognize that successful fundraising programs are not built in a year nor are they the sole solution to the potential loss of external donor support. For MEXFAM to successfully navigate the change in A.I.D. strategy it will have to develop a portfolio of income generating activities that identify and mobilize domestic support in a variety of ways. Along with new "businesses", sale of services, etc., fundraising will eventually be an important part of that portfolio. Initial training and technical assistance will establish such a program but it will be the refinement of that program and the continuing identification and cultivation of donors over the years that will pay off in the future. Inputs provided now will not only give MEXFAM the technical ability to mount such an effort but equally important, it will provide a structured opportunity domestically for individuals, corporations, service organizations, etc. to support a quality organization that serves their "communities."

ATTACHMENT 1
FPMD - MEXFAM
Fundraising Intervention Design

FPMD - MEXFAM
Fundraising Intervention Design

I. Study Tour [3 days]

Key executive staff and volunteers to visit Planned Parenthood of Central and Northern Arizona during its annual fundraising campaign. Meet with principal staff and volunteer counterparts to understand and observe essential elements, activities and systems used in personal solicitation. (This activity was paid for by the MSH/Packard Foundation Grant).

II. BOD Retreat [3 days]

Previous Environmental Assessment: Bring information to retreat.

A. External Environment:

1. Research appropriate solicitation approaches in Mexico.
2. Research successful models in Mexico.

B. Internal Environment: At Retreat

1. Assess Board of Directors/Volunteers skills and personal contacts.
2. Assess staff, systems and written materials needs.

C. Volunteer and Recruitment Process

Develop and implement a nominating/recruitment process that ensures a cadre of trained volunteers to carry out a successful personal solicitation campaign.

Hold a NEC retreat to: [1] solidify volunteer commitment to personal solicitation [2] develop overall campaign strategy [3] begin development of Annual Fundraising Plan.

III. Staff and Systems Development (Staff and Volunteer Training)

Train staff in the facilitation of volunteer personal solicitation and install software to provide data base on existing and potential donors.

Train volunteers in personal solicitation and begin development of written materials required. (2-3 days)

IV. Annual Campaign (Materials Development and TA for Campaign Design)

Provide technical assistance in the implementation of annual personal solicitation campaign.

Develop written materials to be used by volunteers in personal solicitation.