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**TECHNICAL ASSISTANCE IN FUND  
RAISING PROVIDED TO MEXFAM**

**OCTOBER 13 - 21, 1993**

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**FAMILY PLANNING MANAGEMENT DEVELOPMENT**

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## **I. Executive Summary**

The FPMD consultancy with the Mexican Family Planning Foundation [MEXFAM] October 13-21, 1993 was the first in a series of interventions designed to develop a volunteer-based personal solicitation fund raising program at MEXFAM. The identification of the need for such assistance came from MEXFAM in recognition of the USAID Population Strategy of encouraging private sector programs to mobilize local [Mexican] resources and to generally develop strategies and programs that emphasize financial stability.

In support of that strategy, FPMD made a trip to MEXFAM in March 1993 to explore what kinds of assistance it could provide to the organization to mobilize local resources. During that visit, both the Executive Director and the Board President of MEXFAM expressed their interest in developing a fund raising program, along the lines of those they had seen at United States based Planned Parenthoods, that could be adapted to the Mexican context. The FPMD consultant made a presentation on such a program to the full Board of Directors during the March visit. There was unanimous agreement to move ahead with the process.

A subsequent visit to Planned Parenthood of Central and Northern Arizona during their fund raising campaign in May 1993 [a trip supported by the Packard Foundation] further motivated the key decision-makers at MEXFAM and convinced them of the additional need for a specific MEXFAM staff person to facilitate the fund raising activities of the volunteers. As a result of that visit, and due to the lack of any additional resources, MEXFAM requested that funding for such a position be included in the package of assistance to be provided by FPMD. Permission was received for that position from USAID/México. Due to the traditionally slow period of volunteer activity during the summer months, the position was filled October 1, 1993.

The purpose of this consultancy was to provide an orientation and initial training for the new fund raising staff person, to familiarize her with the planned FPMD interventions over the coming year and to hold an initial retreat with the Fund Raising Committee. The purpose of the retreat was to establish consensus regarding the organizational need for fund raising, to define the responsibilities of the committee and its members and to assess their skills and training needs.

After working intensively with the new fund raising person on such issues as preparing for the Fund Raising Committee retreat, it became clear that she was not an appropriate choice for the position. While she was of a social standing that allowed her to interact comfortably with the volunteers and wealthy potential donors, she lacked the educational background and management experience to oversee and take charge of the program. As a result of that assessment, it was mutually agreed that she would resign from the position. Learning from this experience, MEXFAM has already identified a more suitable candidate and she will begin work January 1, 1994.

The Fund Raising Committee retreat proved to be an important first step in a process that both raised the consciousness of volunteers concerning the need for the initiative and also further defined their specific roles and responsibilities. While the committee represents an excellent core group of approximately 10 members who are willing to participate, the retreat made it clear that a systematic and sustained nominating and recruitment effort needs to take place in order to bolster and diversify the membership of the committee. The committee should ideally be composed of 20-30 members that have been carefully screened and selected and that have made an informed commitment to the considerable work of fund raising. To assist this effort, FPMD worked with MEXFAM to identify the types of people needed and to develop a job description for the committee to give potential candidates a specific understanding of the nature and extent of the commitment being asked of them. A membership application was also developed to provide more information on potential candidates, to be used for screening purposes and to facilitate the establishment of a data base for the recruitment process. Finally, a short term recruitment process was identified with the Executive Director and the Board President and will be implemented immediately. The goal will be to have a fully constituted committee of committed volunteers by the end of the first quarter of 1994.

## II. Background

This visit to MEXFAM was the first in a year long series of planned consultancies designed to develop a personal solicitation fund raising capability among the Board of Directors of MEXFAM [see FPMD report "Developing a Personal Solicitation Fund Raising at MEXFAM" March 2 -4,1993]. This effort is a direct result of the USAID México Population Strategy whose key objectives for the Non-Governmental Organizations [NGO] 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.

Presently, 87% of MEXFAM's five million dollar annual budget comes from external sources with 40% coming from USAID and 23% from the International Planned Parenthood Federation [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 USAID/Mexico strategy stressing self-reliance, MEXFAM requested the assistance of FPMD to develop a fund raising program based on the successful examples that its Executive Director had seen among the Planned Parenthoods in the United States. FPMD visited MEXFAM in March 1993 to explore that possibility and to develop a year long intervention design that would respond to MEXFAM's needs.

Initiation of the assistance was timed to coincide with a number of important considerations. Recognizing the importance of continuity, and building of the momentum of the fund raising program, it was decided to delay start up until after the traditionally [for the Board of Directors] slow summer months. This period also allowed MEXFAM time to respond to the important issue of how they were going to provide staff support for the fund raising effort. After visiting the fund raising program of Planned Parenthood of Central and Northern Arizona in May 1993 [under the auspices of the Packard Foundation], it became clear to both MEXFAM and FPMD that MEXFAM would need to identify and engage specific staff to assist the efforts of the Board of Directors. Given the importance of such a position and the lack of funds at MEXFAM to support it, they approached FPMD with a request to include it in the overall assistance being provided. USAID/México received approval, a job description was developed, and the position filled by MEXFAM as of Oct. 1, 1993. This consultancy was then scheduled for shortly after the arrival of the new fund raising staff person.

### **III. Purpose**

The FPMD visit to MEXFAM had the following objectives:

1. To assess the skills and knowledge of the newly hired fund raising staff person and to provide feedback to MEXFAM's Executive Director as to the overall appropriateness of the selection.
2. To provide an orientation to the new staff person as to the basic elements in building a fund raising program, the key steps involved and the assistance to be provided by FPMD over the coming year.
3. To identify, with the new staff person, the systems, materials and procedures needed to provide adequate staff and institutional support to the fund raising efforts of the volunteers.
4. To facilitate, along with the new staff person, an initial two day retreat with the Fund Raising Committee of the Board of Directors that would establish the organizational need for the program, define their responsibilities in fund raising and assess their skills, personal contacts and training needs.

### **IV. Activities**

#### Oct. 13

Consultant sick and unable to work.

#### Oct. 14

- Provided orientation to new fund raising staff person.
- Reviewed key steps in fund raising process and the role of staff and volunteers in each.
- Identified the essential type of volunteer needed for a successful fund raising program.
- Developed draft job description for Fund Raising Committee to be presented for review and approval at the retreat. (see Appendix I)

#### Oct. 15

- Developed membership application for Fund Raising Committee to be used to assess personal contacts and to eventually assign individual volunteer fund raising tasks.

- Held preliminary discussions with newly hired Marketing staff person to explore ways to integrate fund raising and marketing efforts.
- Developed agenda and assigned tasks for the two day Fund Raising Committee retreat. (see Appendix II)
- Given what appeared to be a limited attendance for the retreat, identified the initial tasks and assigned responsibilities for continued recruitment of fund raising volunteers.

#### Oct 18

- Worked with MEXFAM training staff to develop exercises for the retreat that would educate volunteers about the work of MEXFAM and solidify their willingness to be involved in the fund raising program.
- Finalized agenda and materials required for the retreat.

#### Oct. 19 & 20

- Held retreat with the Fund Raising Committee.
- Provided assessment of new fund raising staff person to Executive Director.
- Identified required future steps in the continuing recruitment process to bolster membership of the Fund Raising Committee.
- Debriefed with Executive Director.

### **V. Results and Recommendations**

It will be important for all parties involved to keep in mind that the development of a volunteer based fund raising program is a long term process and an investment in the future of the organization. It will require the recruitment of the appropriate volunteers who make an informed commitment to fund raising and who generally recognize their primary responsibility to ensure that there are adequate financial resources to implement the strategies and programs of MEXFAM. This is a far more pro-active role for volunteers than the more traditional and passive one of oversight. This change in emphasis demands a thorough recruitment process that carefully identifies and screens potential candidates and that elicits a specific and long term commitment to participate in the program. It is a building process that will take time. Eventually this process will produce a change in volunteer attitude and composition.

The development and constant upgrading of the number and quality of a data base of potential donors is another long term process. Such donors need to be identified, educated, cultivated and their level of giving constantly upgraded. This will only happen over an extended period of time. Development of staff skills and the systems and materials to support this effort will also be an ongoing, long range process.

Patience and a long term systematic approach will be the keys to eventual success. What is important to recognize is that MEXFAM has made this commitment and understands the importance of limited expectations for immediate results. MEXFAM should be commended for making this commitment in anticipation of future changes in the international donor environment and not because of any immediate financial problems. The organization is not contesting USAID/Mexico strategy; to the contrary, it is in complete agreement with the need to mobilize local support for its programs and has attempted to approach the challenge in a structured and systematic manner to avoid future crises. MEXFAM should be commended for this positive and pro-active attitude.

### MEXFAM Fund Raising Staff

By the end of this consultancy it was clear to the consultant, the Executive Director of MEXFAM and to the new fund raising staff person that she was not appropriate for the position. After several discussions, it was mutually agreed that she would resign. MEXFAM learned an important lesson, that while any candidate for the position must be of a social standing which would allow him or her to move comfortably in the social environment of wealthy volunteers and potential donors, that is not the only quality to be considered. There are essential managerial, training and facilitation skills that are also necessary. Future candidates for the position should have a successful track record in most, if not all, of these areas. To MEXFAM's credit, they immediately recognized the problem and have moved very quickly to recruit a more appropriate person. A replacement has already been identified and will hopefully begin working January 1, 1994.

It will be important for FPMD to use the initial months of the new fund raising staff person's time, while the volunteer recruitment process is occurring [see next section], to provide a detailed orientation as to all aspects of a personal solicitation fund raising program. That staff person should develop a detailed workplan for the program that also indicates his/her specific duties and responsibilities. Planning for and development of materials, systems and trainings should continue and should anticipate the expected mobilization of an expanded Fund Raising Committee by the end of the first quarter of 1994.

### Fund Raising Committee and the Retreat

Initially it was difficult to decide whether there should be a retreat, as only a few volunteers had committed to attend. As a result of considerable last minute efforts by both MEXFAM staff and the Board President, ten volunteers did attend the retreat. Generally there was a uniform recognition of the need to mobilize local resources and

the importance of developing a fund raising program. Many had some personal experience with fund raising either with other organizations in Mexico or in other countries and recognized that fund raising could be an important source of additional resources.

There was not a uniform understanding of the level of work and/or commitment necessary on the part of volunteers to make such a program successful. Several participants also felt strongly that while it needed to be done, they did not feel comfortable actively participating. A considerable number of Board Members were also hesitant to identify and eventually use, their personal relationships with potential donors to solicit funds. Participants were very clear that the Board in general, and the Fund Raising Committee in particular needed a formalized recruitment and nominating process that was systematic, continuous and had a strong follow-up component.

It is clear that due to the size and scope of MEXFAM as a national organization and the size and potential of Mexico City in terms of local financial resources, the organization will need a core group of at least 20-30 volunteers. That group must have a clear understanding of what is expected of them and must make a strong commitment to the program and to MEXFAM. Since this is the first and most essential step, MEXFAM must develop and undertake a recruitment drive for the Fund Raising Committee. This was discussed at length with the Board President and the Executive Director and they are in full agreement. A job description for the committee was developed to give potential candidates a clear understanding of the level and content of the commitment they would be asked to make. A recruitment process was also identified with the Executive Director and he has already begun to implement it. Names will be solicited from existing volunteers and small groups of potential candidates will be assembled in private homes to begin to educate and orient them as to the mission, programs and strategies of MEXFAM. Small groups will then be invited to MEXFAM to see actual programs and the headquarters' operations. As candidates are screened during these encounters, the Board President and the Executive Director will hold individual interviews with those persons who seem most appropriate for committee membership. The committee job description will be used to indicate and elicit the specific commitments necessary to be a successful committee member. The membership application (see Appendix III), developed during this consultancy, will also be used to more systematically assess each candidate and to begin to develop a data base for the recruitment process. The expectation is that by the end of the first quarter of 1994 MEXFAM will have a 20-30 member Fund Raising Committee of carefully screened individuals who are committed to active and continuous participation in the MEXFAM fund raising program.

## APPENDICES

## **APPENDIX I**

### **COMITE DE DESARROLLO DE RECURSOS**

#### **DESCRIPCION DE CARGOS**

##### **OBJETIVO:**

Asistir a MEXFAM, con el apoyo del Consejo de Administración, en la planeación, organización e implementación de campañas anuales de recaudación de fondos que ayuden a la operación y a la satisfacción de las necesidades de MEXFAM.

##### **RESPONSIBILIDADES:**

- Participar en el reclutamiento de nuevos miembros del comité.
- Ser donante.
- Estar dispuesto a solicitar fondos personalmente.
- Hacer un compromiso formal con MEXFAM de ayuda y tiempo; por ejemplo 2 horas a la semana.
- Asistir a las reuniones y a los entrenamientos.
- Organizar, con la ayuda de MEXFAM, visitas programadas.
- Participar en la planeación y evaluación del programa de recaudación de fondos.

## **APPENDIX II**

### **Fund Raising Committee of MEXFAM**

#### **Retreat Agenda**

**Oct. 19-20, 1993**

#### **Oct. 19**

- 10:00 - 10:45 Overview of MEXFAM mission and strategies for the next five years.
- 10:45 - 12:30 Expectations of participants and of MEXFAM  
Video and group dynamics - Getting to know MEXFAM.
- 12:30 - 1:30 Why are we here? How can we help MEXFAM?
- 1:30 - 2:30 Lunch
- 2:30 - 3:00 What kinds of volunteers do we need for fund raising?
- 3:00 - 4:00 How can we identify and recruit the "right" volunteers?
- 4:00 - 5:00 Review of job description for fund raising committee.

#### **Oct. 20**

- 10:00 - 11:00 Video and group dynamics - Getting to know MEXFAM.
- 11:00 - 12:00 Identifying characteristics of potential donors.
- 12:00 - 1:00 Identifying types of potential donors.
- 1:00 - 2:00 Structuring MEXFAM volunteers - Next steps.

Volunteer Attenders

Mirtala de Arias

Adriana Bravo de Fernández

Cristina Brockmann

Monchita Cosío

Guadalupe Langenscheidt

Elizabeth Beteta

Cathie Pani

María Elena Aguilar de Cantu

Marilyn Covo

Patricia Ramírez de Suárez

MEXFAM Staff

Alfonso Lopez Juarez

Jose Aguilar

Cristina Martín del Campo

Olga Rivera

## APPENDIX III

### Solicitud de Membresía

1. Nombre:

Nombres y edades de los hijos:

2. Dirección:

3. Teléfono Particular:  
de Oficina:

4. Ocupación:

Ocupación del Esposo(a):

Nombre de la Empresa:

Dirección de la Empresa:

5. Grado Escolar:

6. ¿Ha participado en afiliaciones o actividades comunitarias, en el pasado y/o el presente? Mencíonelas.

7. Por favor mencione personas asociadas a MEXFAM que conoce. (personal, comités, voluntarios, etc.)

8. (El propósito de esta pregunta es considerar su apoyo en el futuro para contactar a donadores potenciales.) ¿Tiene usted contactos con miembros de instituciones de Gobierno, y/o representantes de partidos políticos? Mencíonelos.

9. Areas de experiencia e interés: (recaudación de fondos, mercadeo, hablar en público (oradores), servicios médicos, eventos especiales, otros (especifique).

Muchas Gracias Por Su Interés

Fecha: