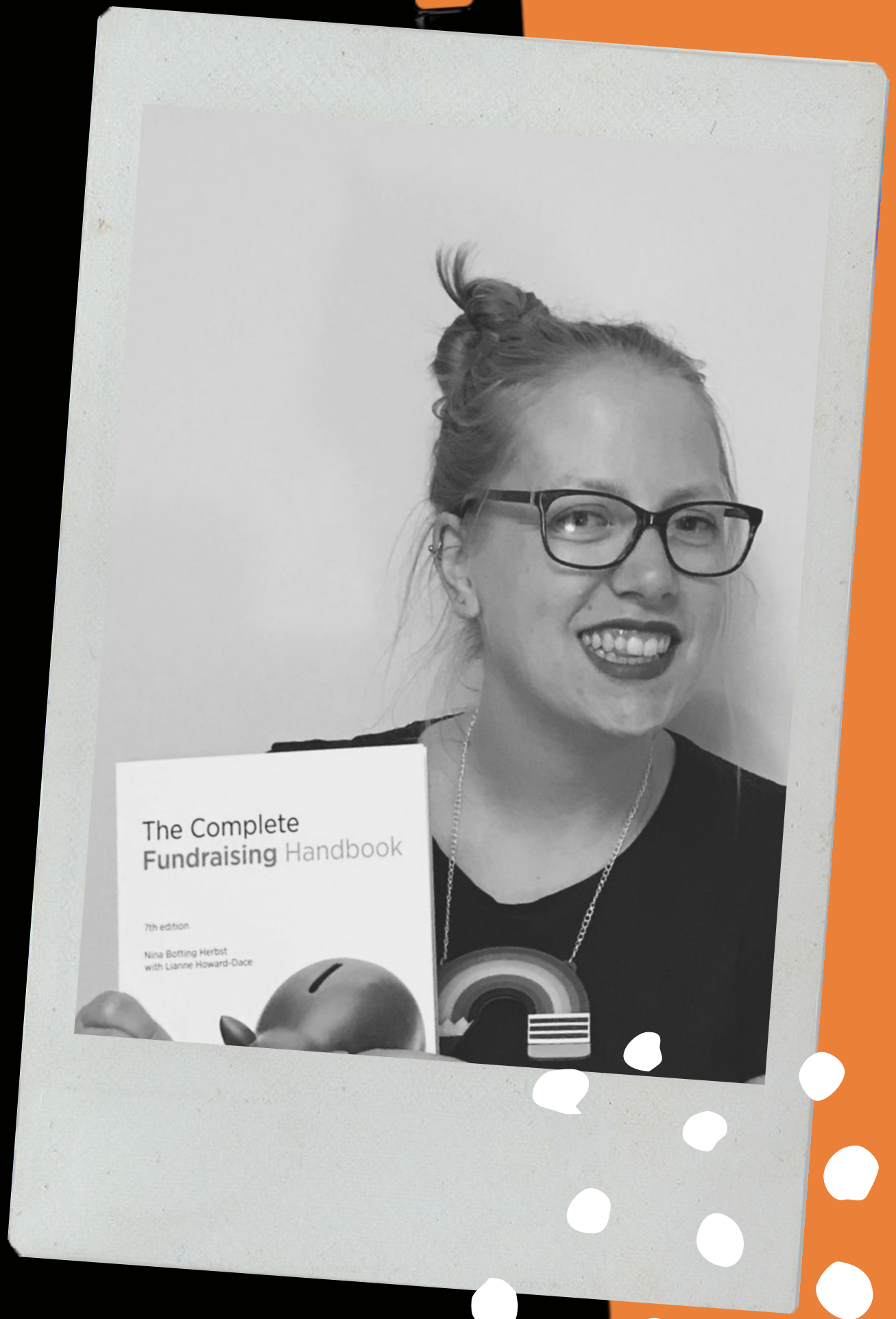




It's all about the fundraising strategy?

LIANNE HOWARD-DACE

TX 5063



About me...





[SUPPORTEREXPERIENCE.CO.UK](https://supporterexperience.co.uk)

INTRODUCTION

INTENTION

Explore different frameworks and tools for fundraising strategy

DESIRED OUTCOME

Everyone can recognise where they are in the strategy development process and has options for next steps to move forward



INTRODUCTION

AGENDA

- What is a strategy?
- Why have a strategy?
- What makes a good strategy?
- Collaborative strategy development
- Formats and tools...



INTRODUCTION

ROLES

Lianne facilitating + all joining in!

RULES

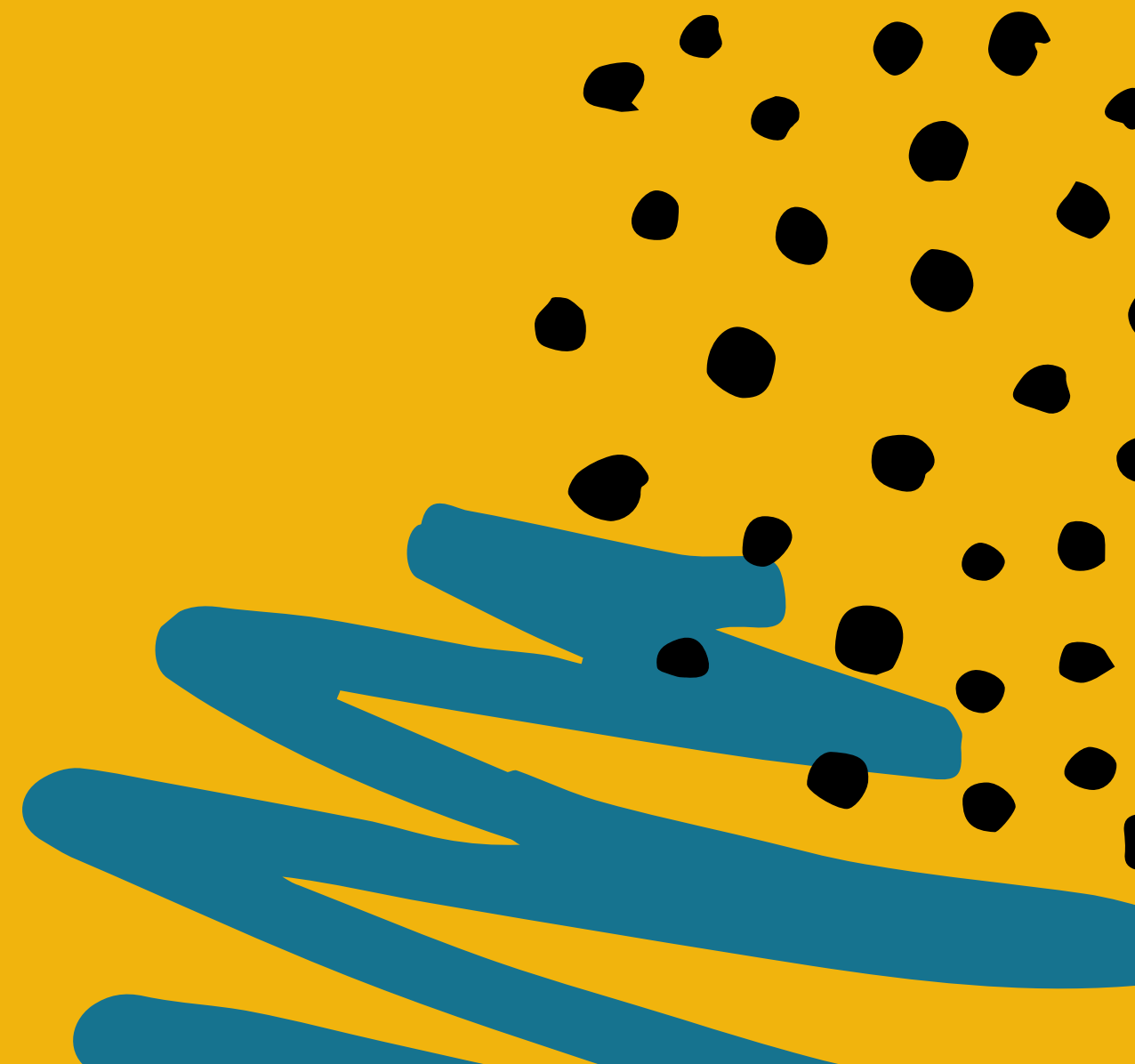
Get stuck in

Ask questions

Keep engaged

TIME

1 hour including questions





**What is a
strategy?**





SYDNEY
11 642 KM

RIO DE JANEIRO
6 055 KM



AMSTERDAM
9 635 KM

LONDON
9 623 KM

IRMANDADE
NEW YORK
12 541 KM



- Where are we?
- Where do we want to be?
- How are we going to get there?
 - Who will we ask?
 - What's the message?
- What resources do we need?
- How will we know when we're there?





**Why have a
strategy?**

WITHOUT A STRATEGY

- Everyone has own idea of what your department does
- Crossover of workloads
- Unclear priorities
- Lengthy decision making
- Unclear approach
- Teams disconnected/siloed



WITH A STRATEGY

- Align stakeholders
- Avoid duplication of effort
- Set priorities
- Aid decision making
- Communicate our approach/purpose
- Team members understand their contribution and collaborate





**What makes a good
fundraising strategy?**



QUESTION

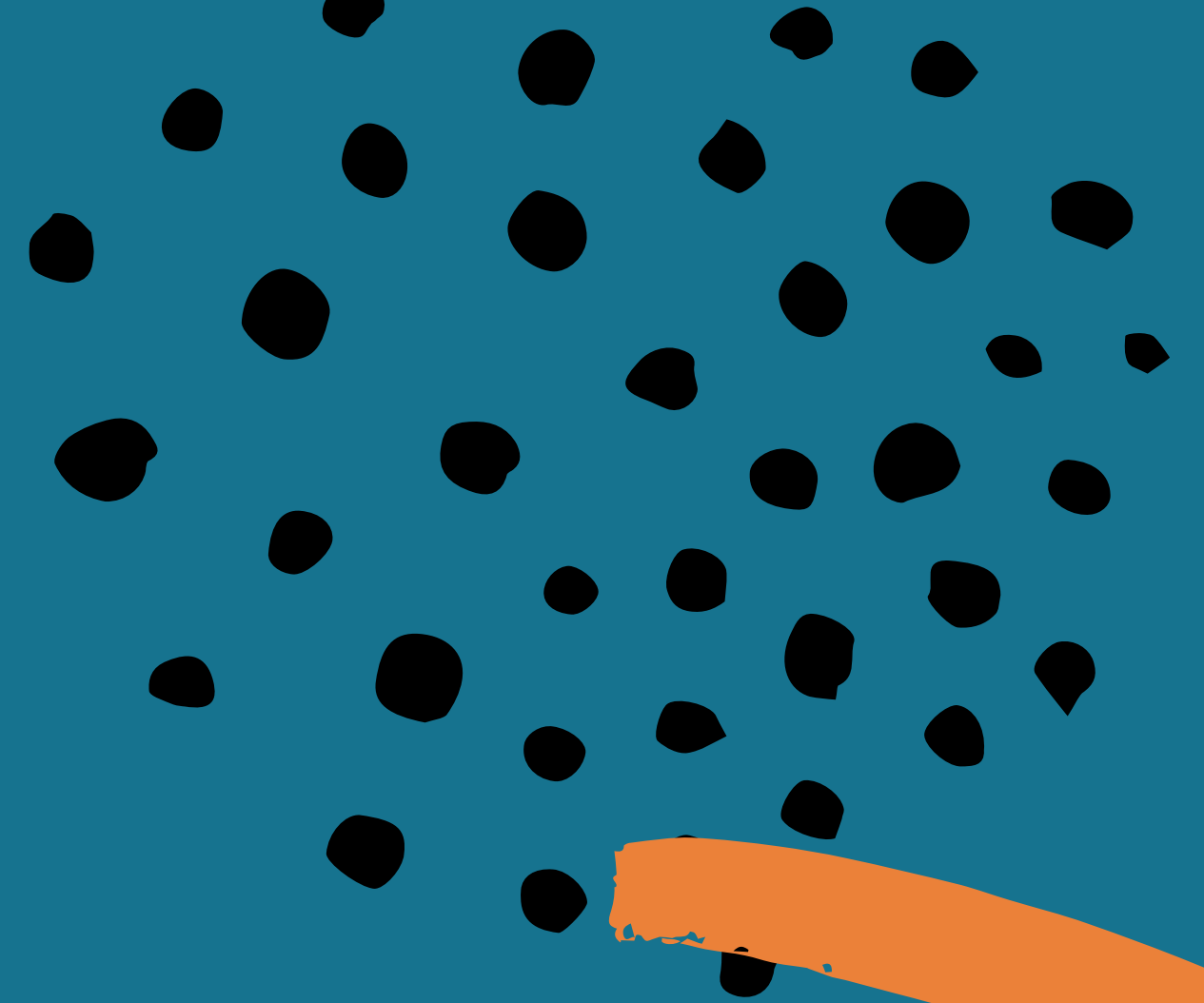
Characteristics of good/bad strategies?



“A vision without a strategy
remains an illusion.”

Lee Bolman





Collaborative Strategy Development

“Alone we can do so little;
together we can do so much.”

Helen Keller





QUESTION

How can you develop buy-in to your strategy?



MAKE IT COLLABORATIVE

- 1:1 interviews
- Workshop
- Share work-in-progress
- Road-test ideas



Frameworks



VMOST

VISSION/MISSION

Clear, Concise, Repeatable

OBJECTIVES

Precise, Smart

STRATEGY

Broad, Theme

TACTICS

Actionable, Granular Tasks & Projects

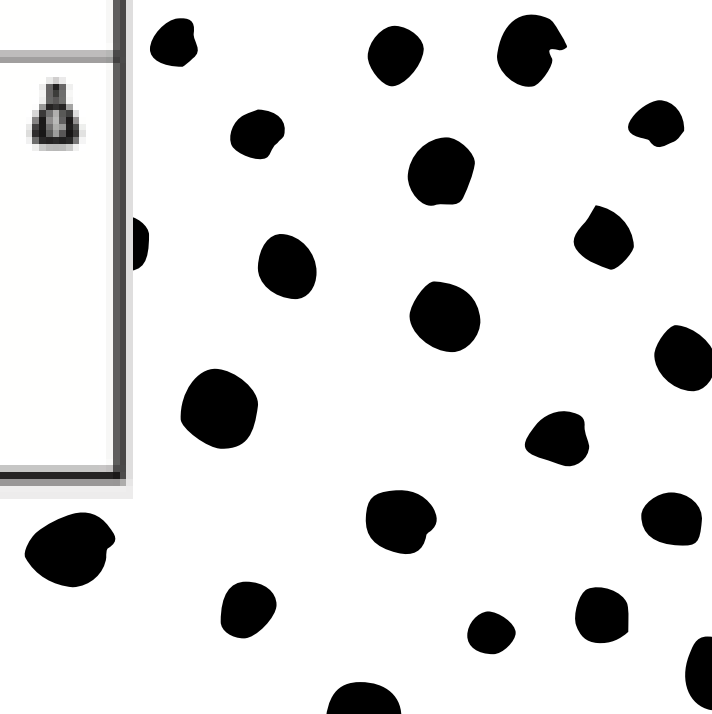
The Business Model Canvas

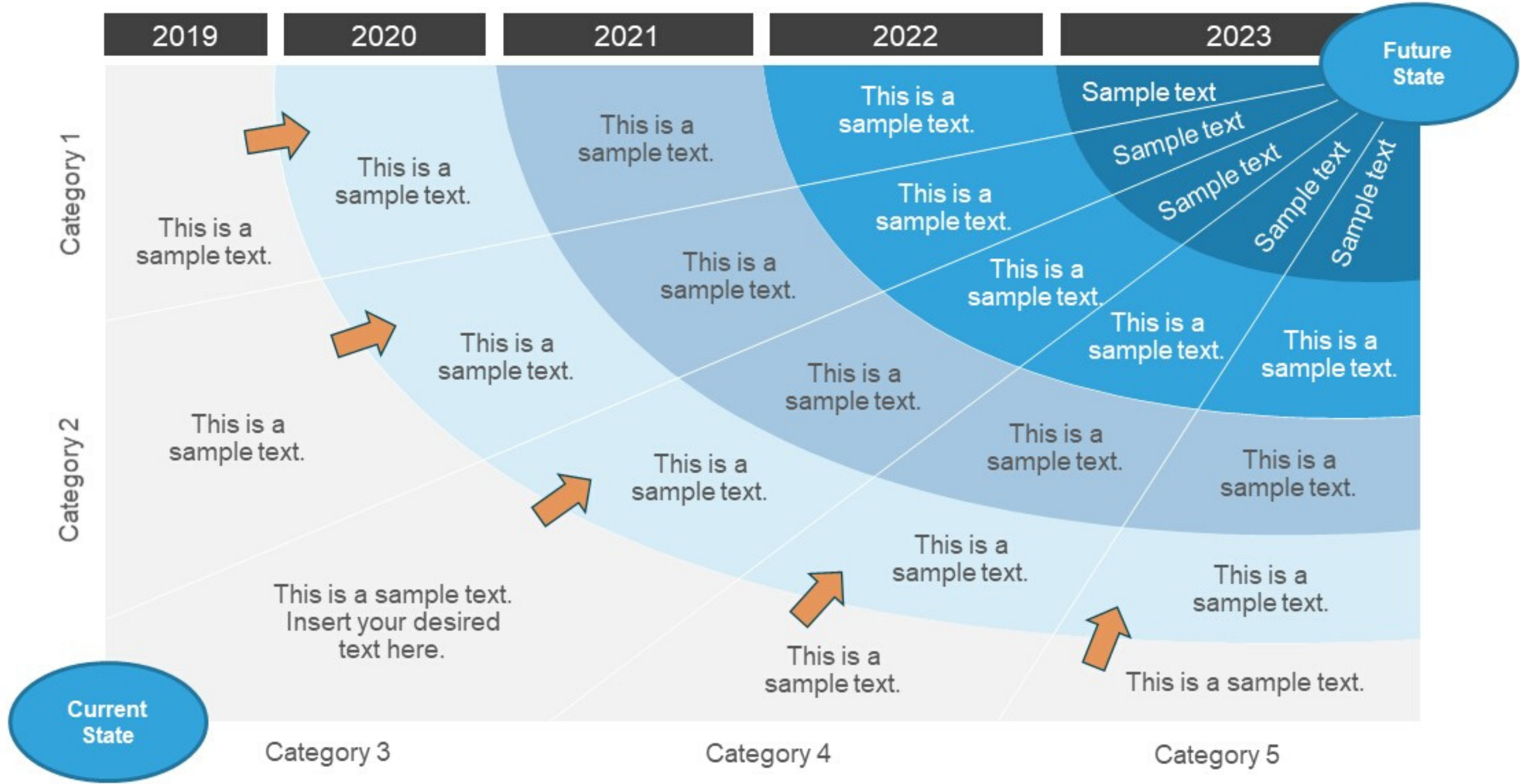
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Date: _____

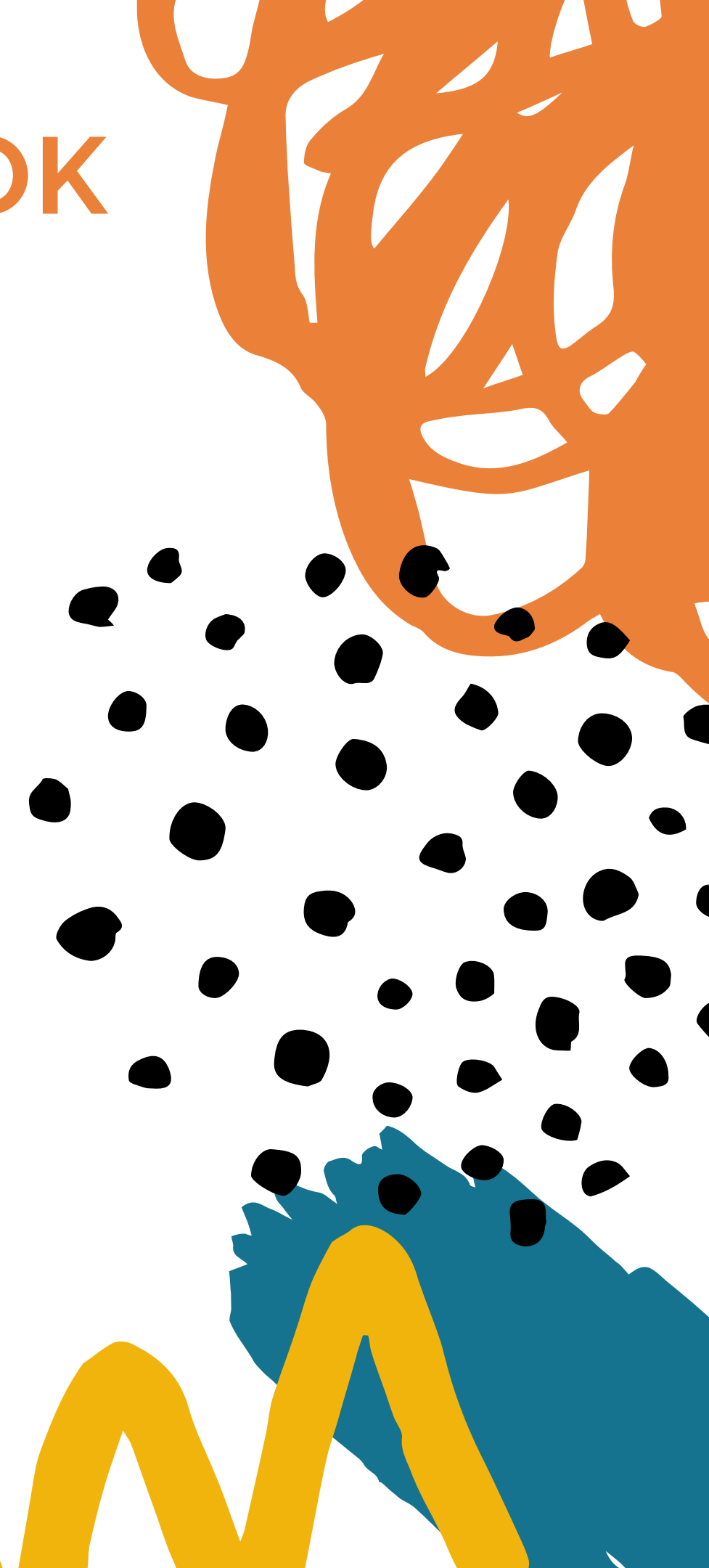
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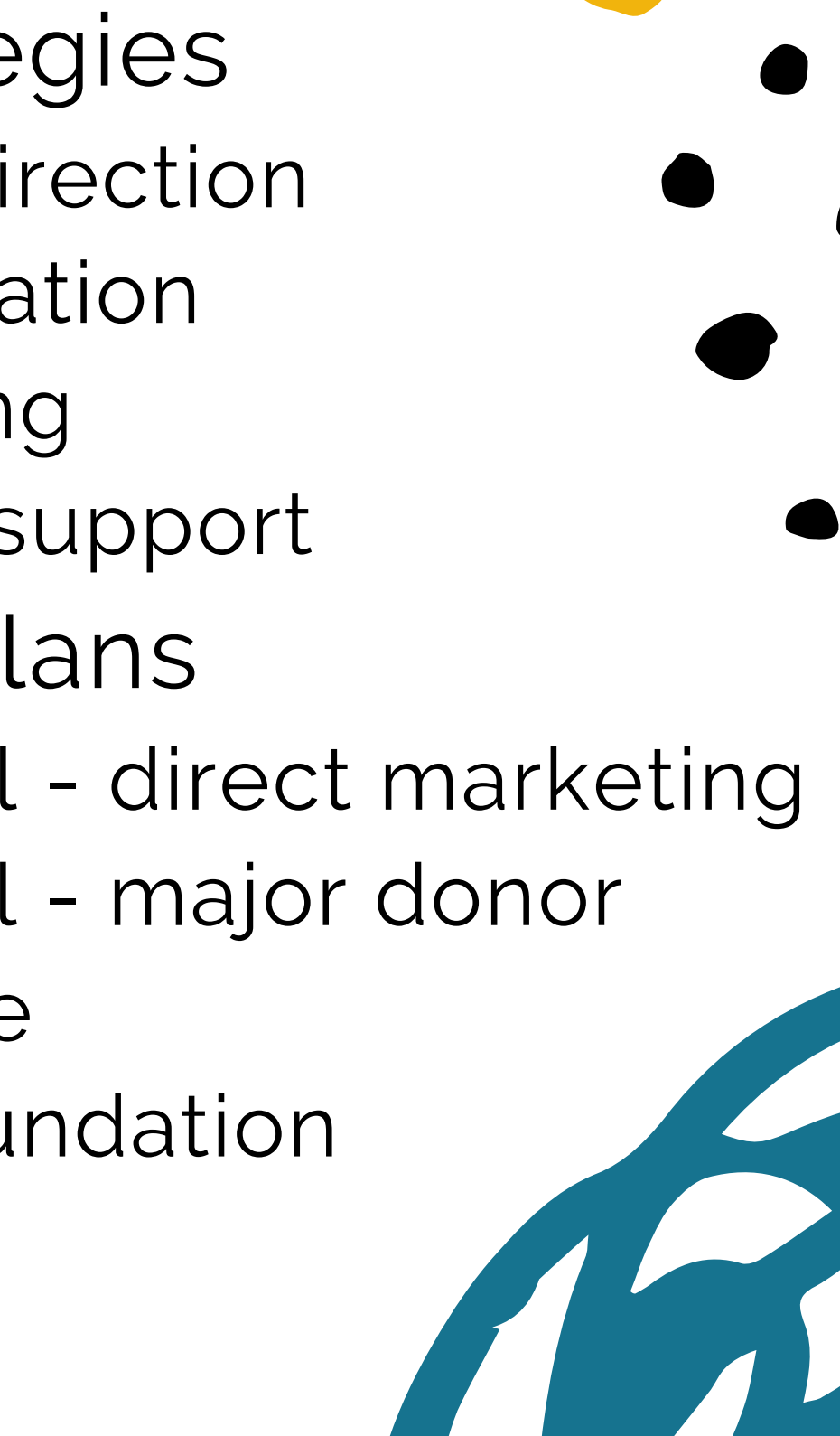


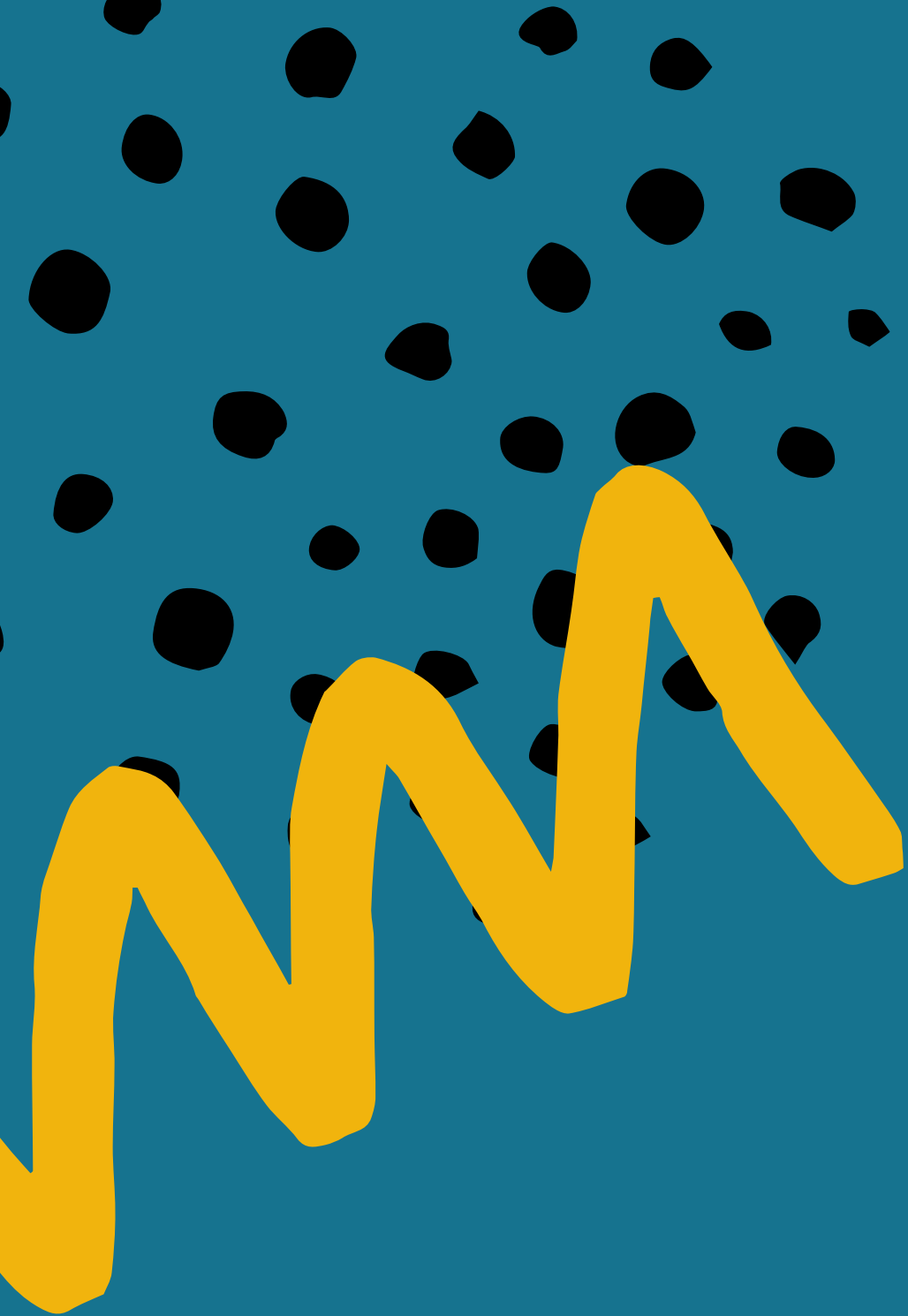
COMPLETE FUNDRAISING HANDBOOK

- Current position
 - Strengths and weaknesses
 - Past activity
 - Link to mission, vision and values
 - Existing fundraising resources
- Projection of fundraising needs
- Funding strategy and targets
- Proposed new sources of income
- Suggested methods to meet targets
- Resources required
- How it will be measured and assessed
- Timeline



FUNDRAISING MANAGEMENT

- Vision/Mission
 - Organisational objectives
 - Fundraising audit
 - PEST analysis
 - Competitor analysis
 - Collaboration analysis
 - Market analysis
 - Internal analysis
 - SWOT analysis
 - Fundraising objectives
 - Key Strategies
 - Overall direction
 - Segmentation
 - Positioning
 - Case for support
 - Tactical plans
 - Individual - direct marketing
 - Individual - major donor
 - Corporate
 - Trust/foundation
 - Budget
 - Schedule
- 



Tools

The background is a solid orange color. In the top right corner, there are several thick, yellow, hand-painted brushstrokes. To the left of these strokes is a cluster of small, white, irregular dots. In the bottom left corner, there is a blue, brush-painted wave shape with a yellow zigzag line on top of it.

Where are we?

Sources of insights

Accounts

What are the numbers saying?

Reports

What narrative can you draw from?

Past performance

Are you meeting targets?
What's the trajectory?

Internal interviews

What do key stakeholders say?

External interviews

What do your supporters think?

Surveys

What else do you need to ask?

SWOT analysis

STRENGTHS

What are you good at?
What distinguishes you?

WEAKNESS

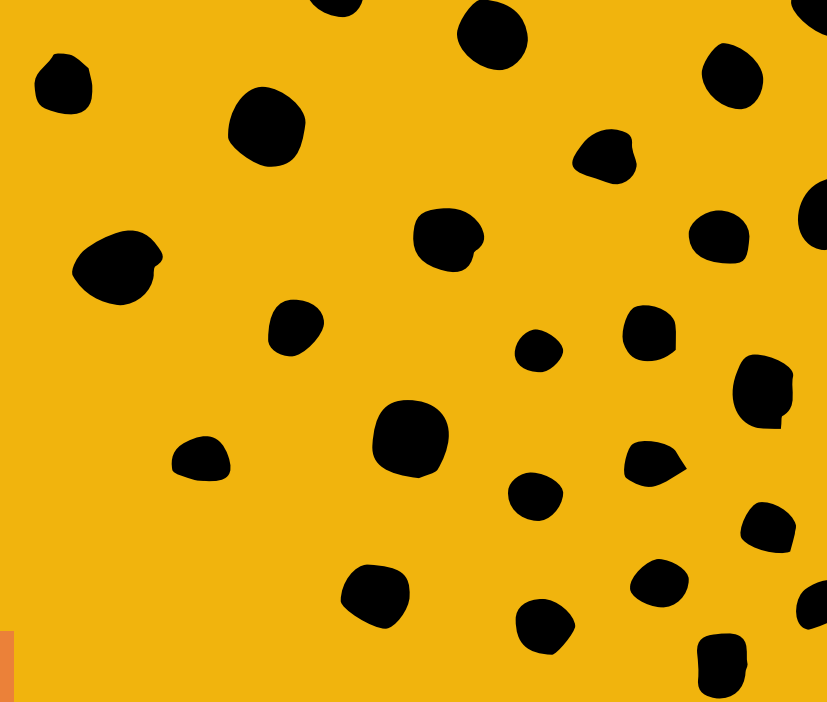
What expertise are you missing? Where are you being left behind?

OPPORTUNITIES

What can you capitalise on?
What are you well positioned to scale up?

THREATS

What might disrupt your business model? What risks are you monitoring?





**Where do we
want to be?**

SETTING DIRECTION



VISION



MISSION



VALUES



BHAG
Big Hairy Audacious Goal





**How are we going
to get there?**



Who will we ask?





Audience segment: Secure Families (Mosaic)

Age: 37

Marital status: Married

Children: two boys, 3 and 7

Undergraduate study: English lit

Occupation: Marketing Exec (part-time)

Location: St Albans

Income: Household income £60k+

Bio

Jessica met her husband Mike on an online dating site and they've been married for eight years. When she got pregnant they moved out of London to St Alban's. After her maternity leave Jessica went into a job share in her marketing role, now working 20hrs per week.

Jessica wants to look after her family's and her own physical and mental health. She tries to buy good quality food, she goes for a run twice a week and yoga once a week plus they try to do something active as a family on Sundays.

Jessica and Mike worry about how much things are changing and wonder about what their kids future will be like. They want things to get better for the next generation, not harder like it did for them.

Goals / Needs

Jessica wants to maintain the quality of life for her family and for her kid's and their generation to have a bright future.

Ideal experience

That it would be easy to give, she's made to feel good about giving and gets to hear about the impact she's making.

"I know we're lucky but it still feels hard a lot of the time"

Technology & Information Sources

Jessica spends most of her online time on Facebook and some time on Instagram. She's part of an NCT Whatsapp group where she gets a lot of articles and blogs about parenting shared.

She and Mike get the Sunday Times delivered and she reads the supplements through the week. She subscribes to BBC Good Food and also loves reading OK when she gets her nails done at the salon.

When she's at home or in the car she listens to Capital Radio or podcasts like Happy Mum Happy Baby, The High Low and Happy Place. In the evenings her and Mike like to binge the latest Netflix trending dramas.

Pain points

Time management: balancing work and family

Spending their money well so they can still afford holidays and saving for retirement

Favourite brands

M&S
EST. 1884

LUSH
FRESH HANDMADE COSMETICS

ASOS

NETFLIX

Persona

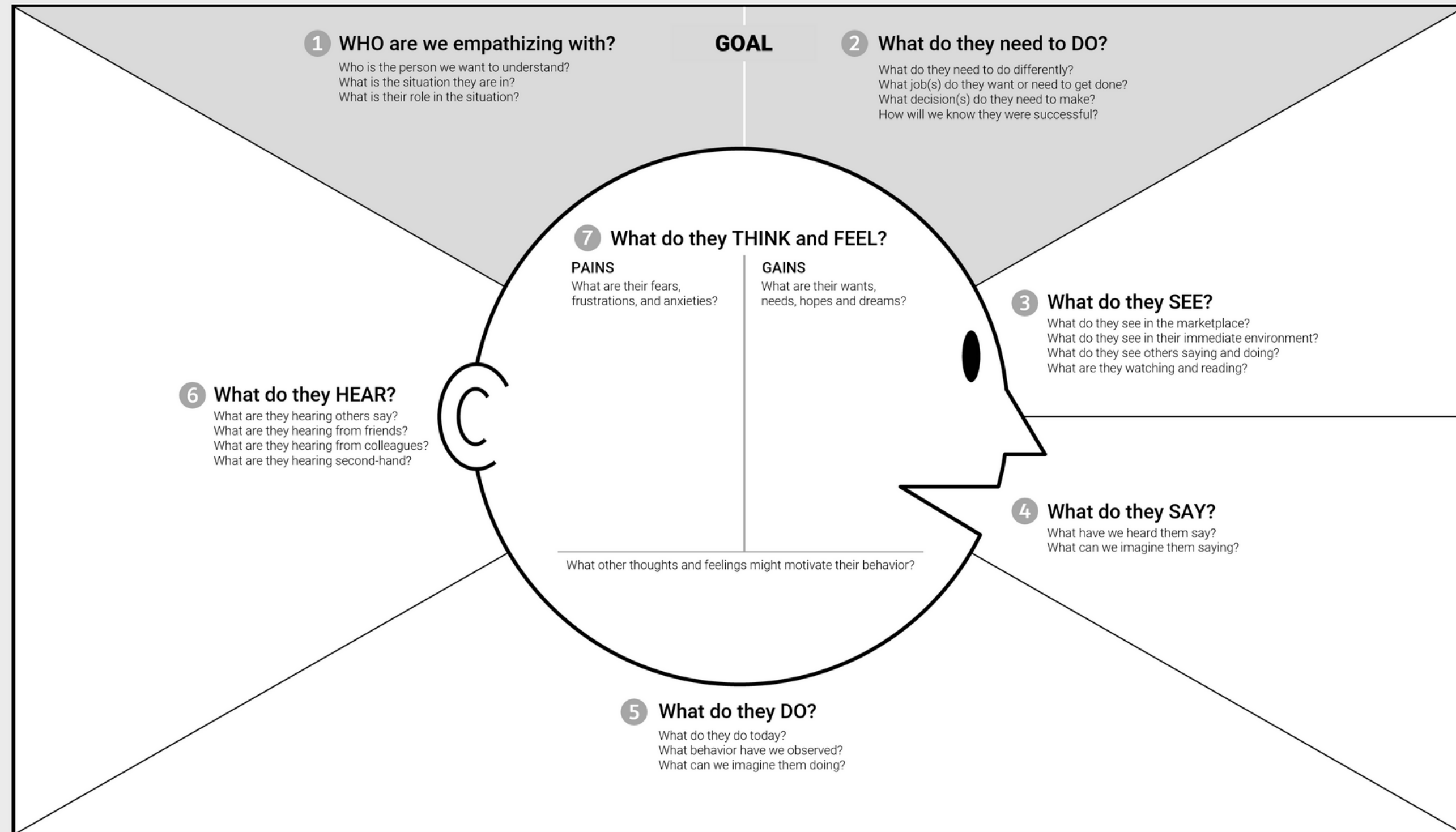
Empathy Map Canvas

Designed for:

Designed by:

Date:

Version:



Last updated on 16 July 2017. Download a copy of this canvas at <http://gamestorming.com/empathy-map/>

© 2017 Dave Gray, xplane.com

Empathy Map



What's the message?

Case for support

- Who are you?
- What is the need that is to be met?
- What is the solution that will be offered?
- Why should your organisation be the one to take on the work?
- How much funding is needed?
- What is the future of your organisation?



Appeal proposition

Build hope: help build our new centre and give local families a bright future

Reason to believe

Your local Young Mums Group have been supporting young people and families in the community for 65 years and we'll keep standing by their side

Hero Case Study

Ali, 22, single mum + Tyler, 18 months. Was really struggling with post-natal depression, family worker helped her access local services and meet other young mums in the area. Now has a part time job and enjoying spending time with her little boy. She went from hopeless to hopeful because of people like you.

Audience	Channels	Call to action	Ask
Individuals (Women 55-75)	Direct mail Paid social Local press Local radio	<ul style="list-style-type: none">Your gift is vital to reaching more families like Ali and Tyler	Regular gift of £12 a month
Community groups (faith and youth focus)	Direct mail Paid social ads	<ul style="list-style-type: none">Raise money to help us build our new family centre	Hold an event
Trusts	Phone/email/mail (1:1)	<ul style="list-style-type: none">Help us scale this service to reach 100 more families per month	£10k+ gifts
Local corporates	Mail Phone	<ul style="list-style-type: none">Your team's support can help us build our new centre	Gift in kind donations



**What resources
do we need?**

- **Team**
 - Right balance of skills
 - Admin support to free fundraisers up
- **Budget**
 - BAU expenditure
 - Investment expenditure
- **Interdependencies**











Team Canvas

Version 0.8 | theteamcanvas.com | hello@theteamcanvas.com

Most important things to talk about in the team to make sure your work as a group is productive, happy and stress-free

Team name

Date

<p>PEOPLE & ROLES </p> <p>What are our names and the roles we have in the team?</p> <p>What are we called as a team?</p>	<p>COMMON GOALS </p> <p>What you as a group really want to achieve? What is our key goal that is feasible, measurable and time-bounded?</p> <p>PERSONAL GOALS </p> <p>What are our individual personal goals? Are there personal agendas that we want to open up?</p>	<p>VALUES </p> <p>What do we stand for? What are guiding principles? What are our common values that we want to be at the core of our team?</p> <p>NEEDS & EXPECTATIONS </p> <p>What each one of us needs to be successful? What are our personal needs towards the team to be at our best?</p>	<p>RULES & ACTIVITIES </p> <p>What are the rules we want to introduce after doing this session? How do we communicate and keep everyone up to date? How do we make decisions? How do we execute and evaluate what we do?</p>
<p>STRENGTHS & ASSETS </p> <p>What are the skills we have in the team that will help us achieve our goals? What are interpersonal/soft skills that we have? What are we good at, individually and as a team?</p>		<p>WEAKNESSES & RISKS </p> <p>What are the weaknesses we have, individually and as a team? What our teammates should know about us? What are some obstacles we see ahead us that we are likely to face?</p>	



Team Canvas

Team Canvas is a free tool for teams to get to know each other and work better together. Created by Alexey Ivanov, Dmitry Voloshchuk. Team Canvas is inspired by models of Chris Argyris, Spencer Kessler, and others.

This work is licensed under the Creative Commons Attribution-Share Alike 4.0. To view a copy of this license, visit: <http://creativecommons.org/licenses/by-sa/4.0/>





**How will we know
when we're there?**

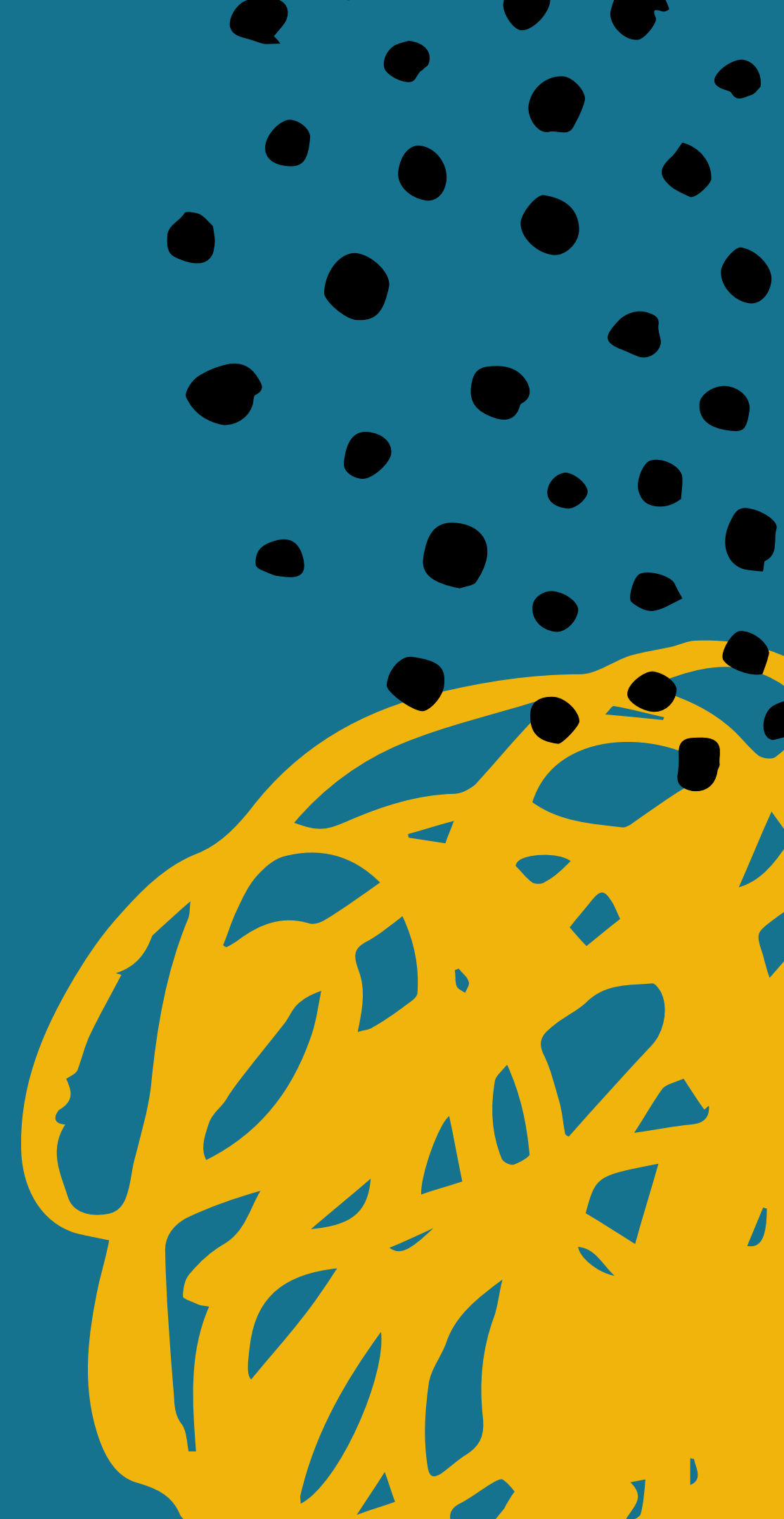
- **Targets**
 - ROI
 - Based on past performance
 - Balance ambition and realism
- **Non-financial KPIs**
 - Reinforce your priorities
 - "What gets measures gets managed"



PIRATE METRICS

- Acquisition
- Activation
- Retention
- Referral
- Revenue





**Further
reading/resources**



MANAGEMENT 3.0

re:Work

HYPER ISLAND

SY/Partners



Liberating Structures

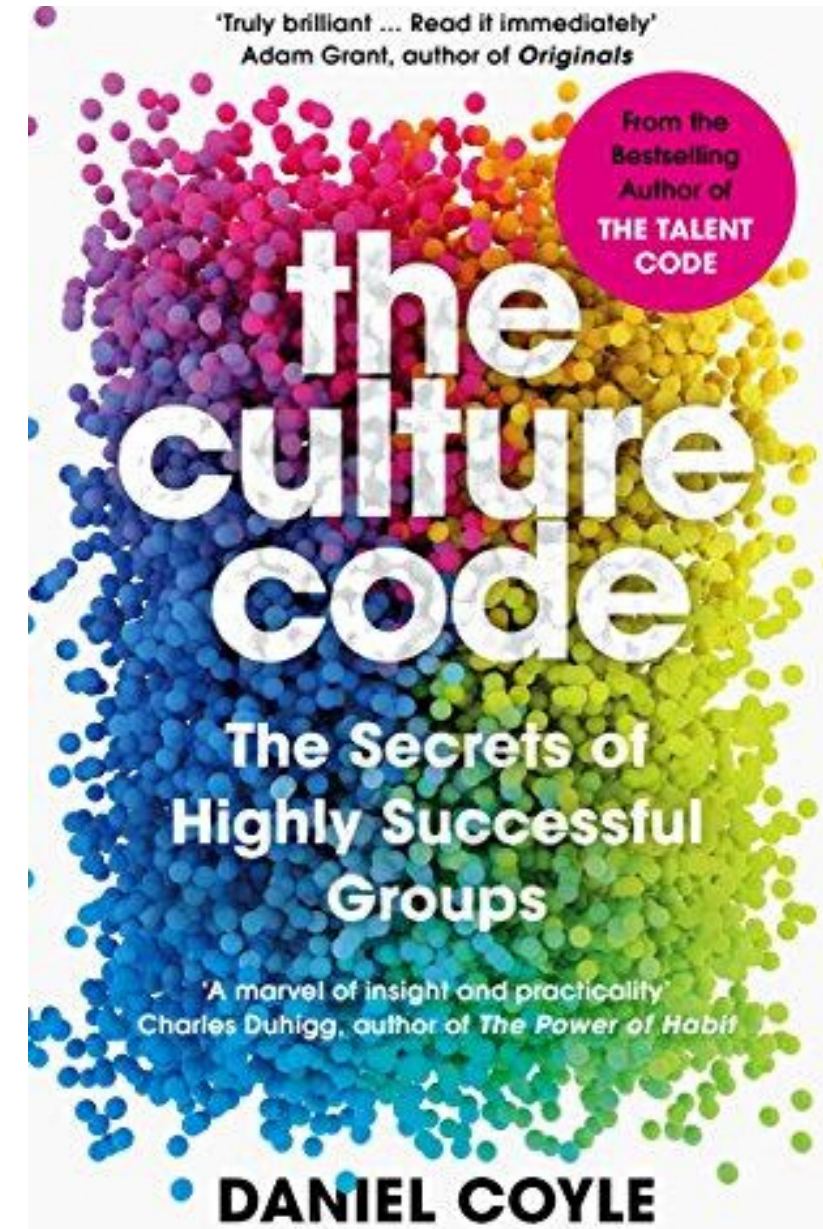
The Complete Fundraising Handbook

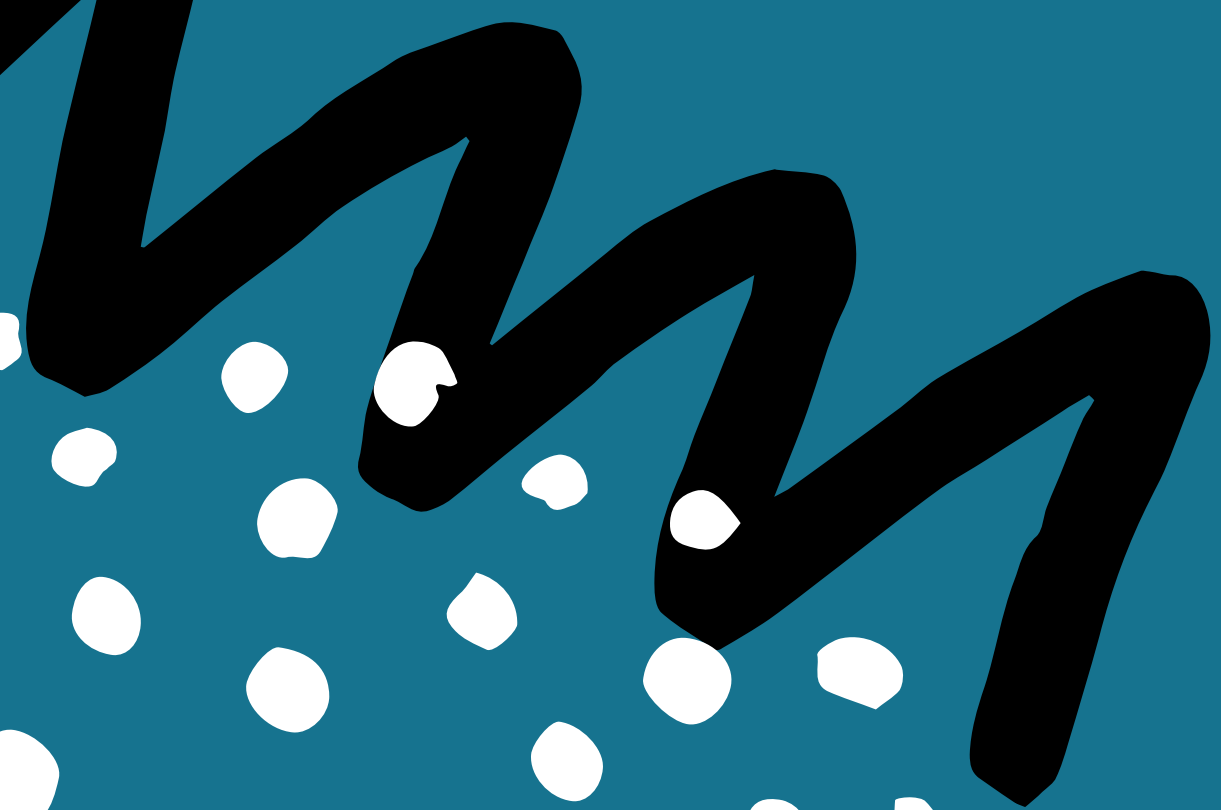
7th edition

Nina Botting Herbst
with Lianne Howard-Dace



dsc
directory of social change





Questions



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