



30 years as a fundraiser (American Cancer Society, Save the Children UK, Business in the Community, Royal National Lifeboat Institution).

Annual income targets ranging from \$200,000 to £160 million

From front line to Executive Director and Trustee

Fundraising Director in the first major charity to accept donations in crypto currency

Fundraising and charity consultant - specialising in charities aiming to transform their funding model.

LEESA HARWOOD CREATING A FUNDRAISING STRATEGY What is a strategy?

Setting direction

Setting measures



What is a strategy?

"How you're going to achieve your goals in a particular situation. Not what you are going to do." Liz Broadbent, Head of Strategic Marketing, Oxford Brookes University

"The route by which you'll achieve the impossible with insufficient resources."

Derek Humphries, Fundraising Consultant and Creative Director

WHAT IS A STRATEGY "Objective: what you want to achieve. Strategy: your approach for achieving it. Tactics: what you're going to do."

Lesley Pinder, Head of Supporter Experience, British Red Cross "It's as much about what you're not going to do as what you're going to do."

Angela Cluff, Fundraising
Consultant, Deputy Chair of Oxfam
GB

"The art of making choices and saying no to things."

Karl Wilding, CEO, NCVO

"Too many people confuse a strategy with a plan." Marcus Missen, Director of

Fundraising and Communications, WaterAid

"A coherent road map to deal with a specific challenge."

David Lacey, Head of Fundraising, The Eve Appeal

"The thinking behind the doing."

Jessica Sumner, CEO, Community Works

"Deciding where to play and how to win." Russell Findlay, CEO of the Speakers' Trust (quoting Roger Martin)

#### What is a Strategy?

'The essence of strategy is choosing a unique and valuable position rooted in systems of activities that are much more difficult to match'

Michael Porter, Harvard Business Review 1996

STRATEGY?

WHAT IS A

Do what everyone else is doing but spend less doing it and do it better.

Shrinks the pie Rush to the bottom Profitability declines Quality declines Sustainability diminishes

Stake out a sustainable position based on a unique advantage you create.

> Expands the pie Blue ocean Better profitability Quality control Sustainable

#### What is a Strategy, Again?

WHAT IS A STRATEGY?

'It's hard to agree that strategy boils down to a discouraging choice between "do something so dauntingly original that no one can copy you" and "fight to the death with your rivals over the pie." [It is] not the terrifying terrain of competitive jeopardy but a broad expanse of opportunity—in the face of rapidly changing technologies, globalization, and the inexorably accelerating pace of change, there remain endlessly clever new ways to make money, beat the competition, and nudge Adam Smith's invisible hand toward truly productive and profitable enterprises.

Andrea Ovans, Harvard Business Review 2015

Build something new

Build on what you already do

React opportunistically to emerging possibilities

#### Agile, enabling

Innovation - React opportunistically to emerging possibilities

WHAT IS A STRATEGY?

Culture eats strategy for breakfast

Form follows function

A Direction and set of priorities to achieve a goal or solve a problem

Entrepreneurial - Build something new Start up structure

Improvement - Build on what you already do

**Existing structure** 

Innovation
React opportunistically to emerging possibilities

By Social Entrepreneurs For Social Entrepreneurs ISSUE INVEST

THE BC SSUE





Start Up
Build something
new

Improvement
Build on what you already
do

WHAT IS A STRATEGY?

# Strategic, Structural and Cultural Synergy

WHAT IS A STRATEGY?











Setting direction



What will our charity be doing in 10 years time?

What's the problem we're trying to solve and what will it look like in 10 years time?

How can we fix our current plan and projects?

What is the ideal solution and how will we know when we have achieved it?

Working forwards what happens next?

Working backwards from our solution what are the key milestones?

What strengths and weaknesses do we have in our organisation?

What opportunities and threats will we find in the external environment?

### STRATEGIC QUESTIONS ...

SETTING DIRECTION Are solution focused

Seek clear success criteria

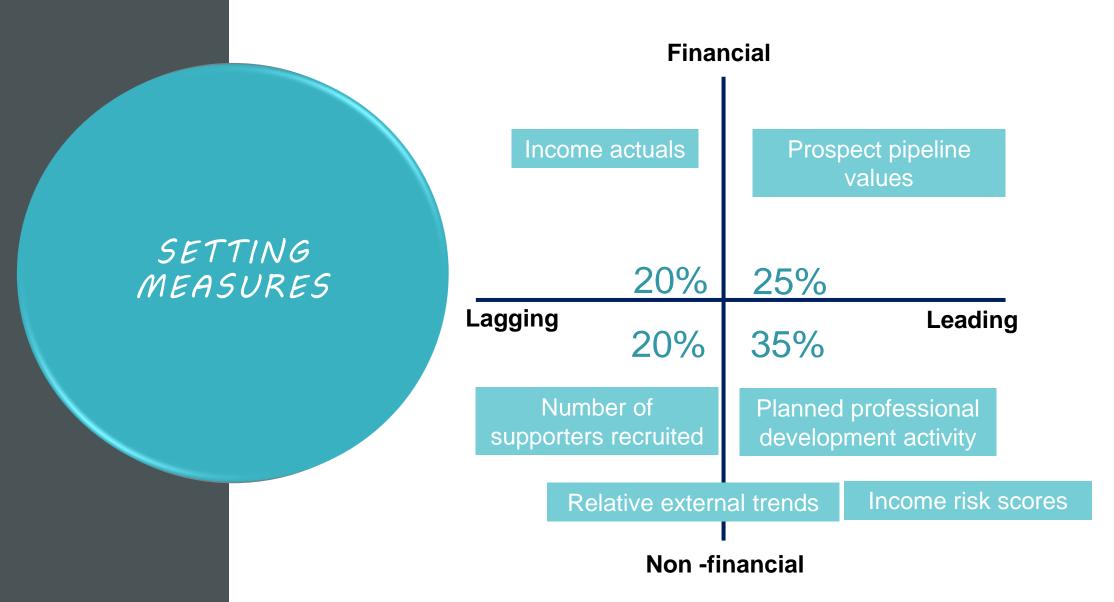
Work backwards from the goal

Have an external, future focus



#### Setting measures

#### **Balanced Measures**



## Funding Mix

Income requirements
Restricted/unrestricted
Long tail/short tail
Commercial/Donation
Social Investment

#### **Prioritisation**

What gets funded first?

'Lights Out' clarity
Funding key dependencies
External opportunities

SETTING MEASURES

**FUNDRAISING STRATEGY** 

#### Alignment

Align income risk with programme risk
Cultural alignment
Talent alignment
External trends

#### Ethics &

#### Compliance

Legislative
Regulatory
Ethics
Value alignment

## **SUMMARY**

CREATING A FUNDRAISING STRATEGY A strategy is direction of travel to achieve a goal. It is not an action plan

Cultural and structural synergy is critical to the sustainability of a strategy

Start with the problem you're trying to solve. Not the organisation

Working backwards from the goal not forwards from the status quo

Set a balanced bank of measures