

Fundraising Now 29 March 2023 – George Knight, Training Consultant

FOOL PROOF FUNDRAISING STRATEGY

Working Together, with Tech!

Some things remain the same

- There's no such thing as a silly question
- Respect – space and values for others
- Participation – involvement/contribution

Some things because we're virtual

- Where possible, video always on during whole group or breakout room discussion
- When we break, feel free to switch camera off
- Take a screen rest during breaks

... a virtual handshake

With the end in mind...



Prepare



Train



Targets



Implement



Review



Teach



Share

Key takeaways

- What do we need before we apply
- How to understand the bigger fundraising picture
- Building effective relationships with funders

*“Today, somebody has to ask
somebody for money”*

How can we organise our fundraising?

- Strategy
- Organised office
- Annual reports
- Marketing materials
- Process for receipt of gifts

Strategy

- Assess fundraising position
- Projection of needs
- Proposed income
- Timeline
- Align stakeholders



Downsides of not having a strategy?

- Crossover of workload
- Unclear priorities
- Lengthy decision making
- Unclear approach
- Teams siloed

Before you start

- Accounts
- Case for support
- Impact of work
- Ideal donor profile

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?
- What is the future of your organisation?

Ideal Donor



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 read 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



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+

Application journey

1. Identify projects
2. Build credibility
3. Plan your project
4. Cost the project
5. Research grant prospects
6. Write a good proposal
7. Make the approach
8. Follow up

What is a project?

A service delivered by your charity

What about a core project?

A core service is one that when not delivered means that your charity is unable to operate

TASK: Identify projects

- Using the excel document provided, fill out your initial project details



Measure impact

- Measure 3-5 potential outcomes
- Set SMART indicators to measure progress against these outcomes



TASK: Identify projects

- Add in 3 performance measures for your project





ROI?


- Previous funding
- Staff time
- Viability



TASK: Viability study

- The Little Berry Nursery are losing their £20,000 grant from the Department for Health and Social Care
- By looking at last years viability, decide where they should focus their fundraising effort this year





How much to ask for?

Costing your fundraising

- Salary
- Equipment
- Stationary
- Expenses
- Overheads

TASK: Costing projects

- Back at the Little Berry Nursery they are costing a 2 day project
- Using the costing document how much will this project cost over a year?
- Over 9 months?



TASK: Costing projects

- Project costs:
 - Support worker: £15,000
 - Equipment: £1,500
 - Training: £200
- Variable costs (full recovery):
 - Full time salaries: £21,500
 - Utilities: £5,000
 - Building costs: £10,000
 - Stationary: £200

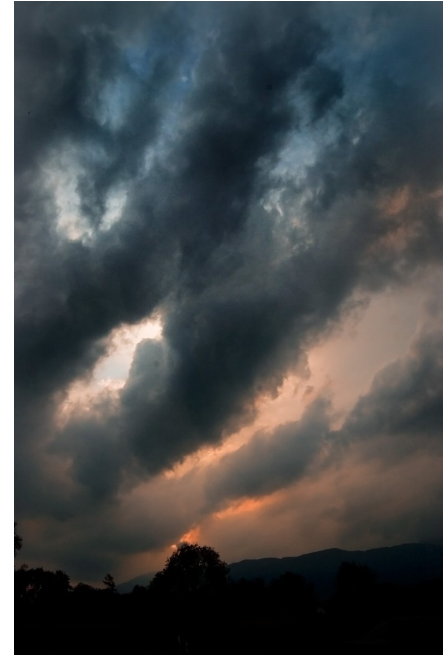


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Pipeline

- Organising Projects
- Plan communication
- Stress-free productivity
- Use of an app?
 - Raisers Edge, Salesforce.org



What does a good pipeline include?

- Projects
- Dates
- Deadlines
- Personnel
- Stakeholders



Review Projects and Pipeline

- Regularly
 - Weekly, Monthly, Quarterly...
- Working group
 - Internal
 - Trustees
- Go through Projects and Pipeline documents
 - Make comments against each project

What does win-win look like?

- Non-financial support
- Beneficiary led projects
- Working with your competitors

The Complete **Fundraising** Handbook

7th edition

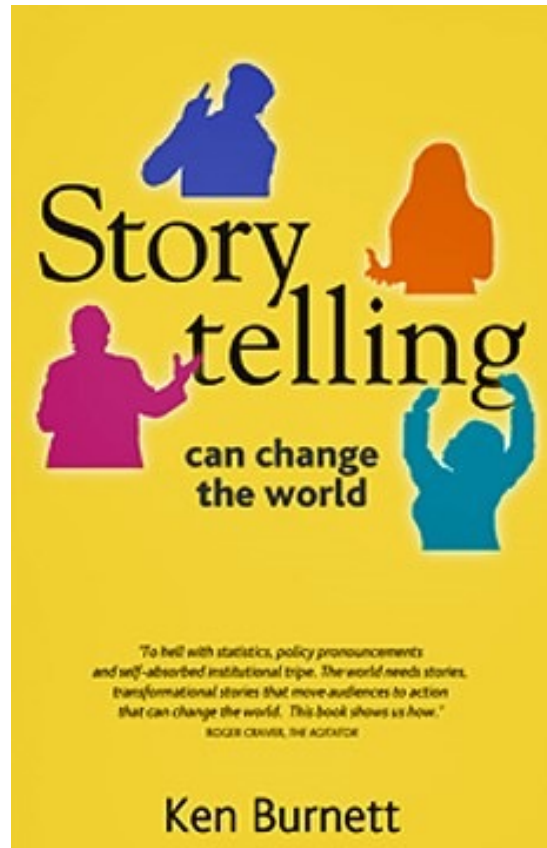
Nina Botting Herbst
with Lianne Howard-Dace



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directory of social change

dsc
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helping you
to help others

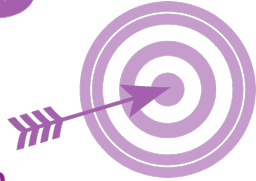




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START

STOP

CONTINUE

Any questions?

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Thank you

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