Dr Claire Routley

FUNDRAISING STRATEGY





Today:

- Auditing the environment in which you're operating
- Using the audit results to set your objectives
- Finding your strategic direction
- Choosing your tactics
- Keeping your strategy relevant over time



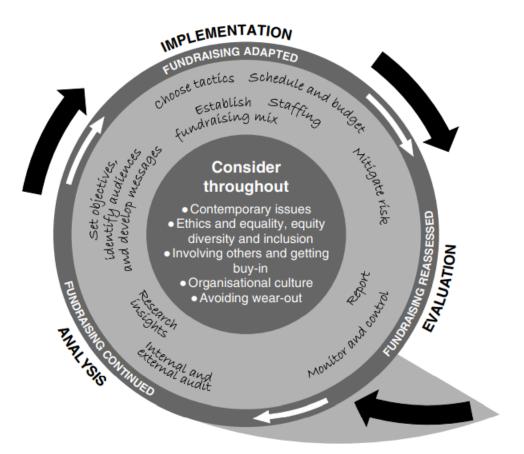
Why invest time and effort?

- 95 per cent of respondents said that they believed that fundraising planning was an immensely valuable process
- 90 per cent said that having a formal fundraising plan increased their effectiveness
- Organisations with a plan had higher levels of donor retention; were more likely to have increased income in the last two years (whilst being less likely to have decreased income)
- The more the plan adhered to good practice (i.e. there was a plan in place, including strategies and tactics; the plan was integrated in the organisational budget and had resource allocated to it; senior management were involved; fundraisers were held accountable and team members committed), then the more confidence the organisation had in achieving its targets

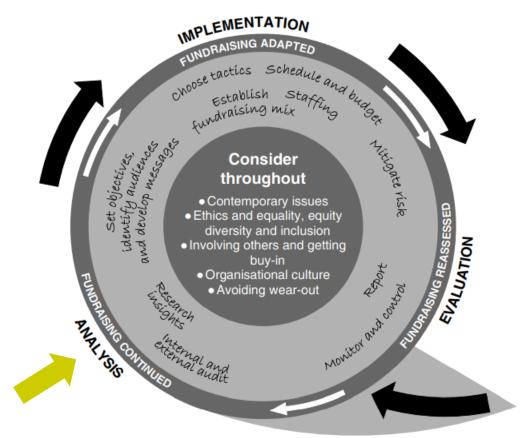


helping you to help others

Sargeant and Carpenter 2020





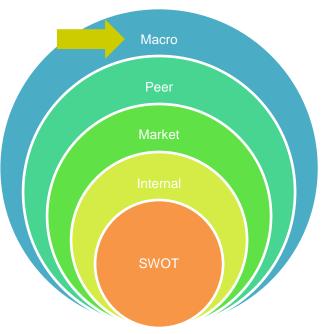








Fundraising Audit Framework









PEST analysis

- Political / Legal
- Economic
- Social
- Technological

What are the key trends? What does this mean for me?





Fundraising Audit Framework









Peer analysis: what to include?

- **1. Who** can teach me the most for my fundraising strategy?
- 2. What **results** have they achieved?
- 3. What are the broad underlying reasons? **Strategy and tactics?**
- 4. What does this mean for me?



DID YOU SEE SOPHIE?

Have a look at page 45. Did you see her? Or did you look past her and carry on with your life?



Like many of the young people who come to Centrepoint, Sophie is no stranger to being ignored. Her mother used to lock her in a cupboard and her step-father would hit her in the face to keep her quiet.

"My first memory is of being beaten black and blue by my step-father when I was three years old," she recalls. "I don't remember anything before that."

Sophie left home as soon as she could and fled to London where she slept rough for three years.

"I slept in the doorways of cafes and restaurants, under bridges and in parks; anywhere I could put my head. I was only 18 but people just walked past me."

Sophie was constantly cold, hungry, dirty, tired and worst of all scared. She saw many friends get attacked and her best friend was raped, murdered and set on fire. Sophie thought it was only a matter of time until something similar happened to her, as no one seemed to care.

While Sophie's story may sound shocking to you, many of the homeless young people who come to Centrepoint have been through similar experiences. They find themselves homeless after being victims of neglect, sexual abuse, violence and family breakdown.

Once on the street, they immediately face new dangers. It can take just hours for them to be approached by drug dealers and pimps.

By sponsoring a room at Centrepoint – just 40p day (£12 a month) – you could get a vulnerable homeless young person like Sophie off the streets right now.

The Centrepoint noom sponsorship scheme offers homeless young people like Sophie a safe, secure room of their own for up to two years – enough time to turn their lives around and turn their back on homelessness (or good.

Just think for a minute what it will be like for someone like Sophie when they open the door of the room you sponsor, for the very first time. Your room will contain a warm, soft bed where they I'll ea able to sleep soundly, after night after night of hunching up in a binerily cold doorway. A shower where they ill be able to stand under seaming hot, soapy water, after day after day of trudging around in clothes that sever feel clean. And a kitchenetic where they il be able to cook ruttritious meals that will restore them back to bealth.

Call 0800 23 23 20 or visit www.centrepoint.org.uk/roomsponsor

While staying in your room, the young person you're helping will receive all the support they need to rebuild their life. Counselling to deal with their problems, career advice to help them into college or a job, and basic life stills, such as how to cook, budget and pay bills. So, when they leave Centrepoint, they are ready to live independently. When that time comes, they'll continue to receive support for as long as they need it.

Today, you can give a homeless young person, who is being ignored right now, the chance of a new life. All it will cost you is 40p a day. Because someone like you responded to an advertisement like this a few months ago, Sophie is now safe at Centrepoint rather than living in fear on the streets.

So many people don't give homeless young people like Sophie a second glance, but today you can be the person who chooses not to ignore them

Sponsor a room at Centrepoint by calling 0800 23 23 20, visiting www.centrepoint.org.uk/roomsponsor returning the form below.



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and young arough

changing.

iser a room at £12 a month	Full Name	Centrepoint room
sor two rooms at £24 a month sor rooms at £ a month	AddressPostcode	 A virtual recreation room online that you using personal login i
payment on the 1sU15th of every month date Bank or Building	Telephone □ House this bea, and complete your details if you would like to receive sends communications trees. Comproposes Email: 1s accordance this the Tell face Presention has, we had possed about to pumple you to spendage that the Tell face Presention, but, we had possed about to pumple you with spoken and appeals. If you do not make correct these places content Company.	 A plan of your room information about the person staying in it, the post.
Postcode	Under the Covernment's Gift AM as februaries. Ill donations made by UK of the Lax payers are were thanked a filled in Competent to draw had been a fine of the Competent to draw had been as fill assumed as found in the Competent to draw had for some and the local payers to the draw payer as fill as some and in the competent to draw had for the local payers and in the competent to draw payer as fill as some and in the competent to draw the had been some payer as fill as the competent to the compe	Regular updates abyoung person's life is Information about a person moving in, will the young person cur occupying your room If you'd like to spons
Building Society: Please pay Contempoint Disord Debits from Distriction, without on the Sunganesh assumed by the Disord and that this instruction may remain with Contempoint and, if economically to my Bank, Building Society. Date	Please ceturn this form to: FREEPOST RIXE-RIGE-AUAE. Centropoint, Central House. 25 Camperdown Street, London E3 BDZ. Thank you	than one room, pleas more rooms you spot more young lives you



helping you to help others

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Name and full ado

Name(s) of Account
Bank Sort Code:
Account Number:
Instructions to your Back of
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Fundraising Audit Framework





Market analysis: what to cover?

1. Who is my market(s)?	e.g. alumni or cyclists or women aged 45-64 (etc etc)
2. What do I already know about them from internal data?	Who, what, why, where, when, how questions
3. What can I add from external research?	400000
4. What are the trends in my area(s) of fundraising?	e.g. growth in virtual events, value exchange

What does this mean for me?



Fundraising Audit Framework









Results



dSCdirectory of social change

The 5 Ms

- Men
- Money
- Machines
- Minutes
- Mission

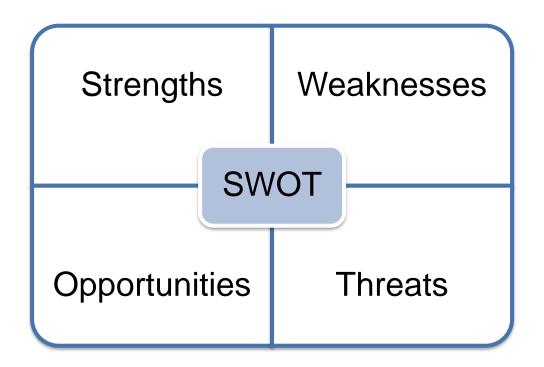




Fundraising Audit Framework





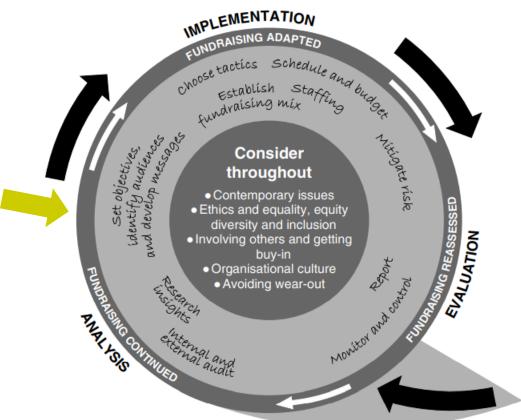




SWOT	Γ	ΑÌ	V	A	L	Y	S	ľ	S
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+		SWOT ANALYSIS	
		Strengths	Weaknesses
		1.	1.
		2.	2.
		3.	3.
		4.	4.
	Opportunities	Opportunity-Strength	Opportunity-
	1.	strategies	Weakness strategies
	2.	Use strengths to take	Overcome weaknesses by
	3.	advantage of	taking advantage of
		opportunities	opportunities
	4.	1.	1.
		2.	2.
	Threats	Threat-Strength	Threat-Weakness
	1.	strategies	Strategies
	2.	Use strengths to avoid	Minimize weaknesses
	3.	threats	and avoid threats
		1.	1.
	4.	2.	2.







Objectives



"Objectives are a critical part of the plan as they are the only mechanism by which its success can be measured. If a plan achieves its stated objectives we might reasonably conclude that it has been a success. Without them, one can only speculate as to the planner's original intent and the effectiveness of the activities undertaken. Valuable resources (donated by donors!) could be being wasted, but the organization would have no mechanism for identifying that this was in fact the case."

Professor Adrian Sargeant

























Am I SMART?

- To raise awareness of the charity in 2022
- To grow our events programme by September 2022
- To raise £5000 from a new corporate partner
- To recruit 400 new donors by June 2022



Strategy

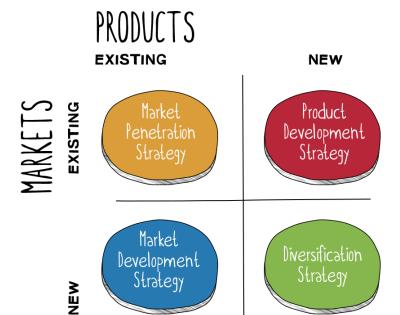








THE ANSOFF MATRIX



CREATED BY: IGOR ANSOFF, 1960 ESSENTIAL MARKETING MODELS HTTP://BIT.LY/SMARTMODELS



Segmentation

...is the process of splitting [donors], or potential [donors], in a market into different groups or segments, within which [donors] share a similar level of interest in the same, or comparable, set of needs satisfied by a distinct marketing proposition



McDonald and Dunbar 2004



1. Define the market





2. Identify the best segmentation criteria

To do a successful segmentation you need to chose the variable that is the most predictive of profitable behaviour by your audience to your brand(s).

(CIM Marketing Expert)



MARKET SEGMENTATION APPROACHES











- continent
- country
- country region
- city
- density
- climate
- population
- subway station
- city area

- age
- gender
- family size
- occupation
- income
- education
- religion
- race
- nationality

PSYCHOGRAPHIC

- lifestyle
- social class
- AlOs (activity, interest, opinion)
- personal values
- attitudes

BEHAVIORAL

- occasions
- degree of loyalty
- benefits sought
- usage
- buyer readiness stage
- user status

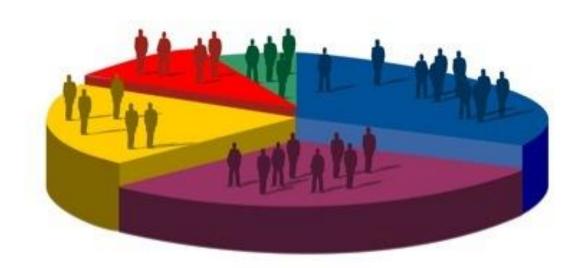
Webographics e.g. internet experience, computer experience, usage level (time spent), access device, access place, web skill and type of data plan

Digital

Campaign type	Audience type
Display	Affinity: Reach users based on what they're passionate about and their habits and interests. Custom audiences: Depending on your campaign goal, reach users based on what they're passionate about, their habits and interests, and reach users based on their recent purchase intent. You can learn more About custom audiences. Detailed Demographics: Reach users based on long-term life facts. Life Events: Reach users when they are in the midst of important life milestones. Inmarket: Reach users based on their recent purchase intent. Remarketing: Reach users that have interacted with your business. Customer Match: Reach your existing customers based on your CRM data. Similar audiences: Reach new users with similar interests to your website visitors or existing customers. Learn more by reading Reach the right audience at the right moment.
Search	Affinity: Reach users based on what they're passionate about and their habits and interests. Detailed Demographics: Reach users based on long-term life facts. In-market: Reach users based on their recent purchase intent. Remarketing: Reach users that have interacted with your business. Customer Match: Reach your existing customers based on your CRM data. Similar audiences: Reach new users with similar interests to your website visitors or existing customers.
Video	Affinity: Reach users based on what they're passionate about and their habits and interests. Custom audiences: Depending on your campaign goal, reach users based on what they're passionate about, their habits and interests, and reach users based on their recent purchase intent. Detailed Demographics: Reach users based on long-term life facts. In-market: Reach users based on their recent purchase intent. Remarketing: Reach users that have interacted with your business. Customer Match: Reach your existing customers based on your CRM data. Similar audiences: Reach new users with similar interests to your website visitors or existing customers.



3. Apply the segmentation criteria and divide the market





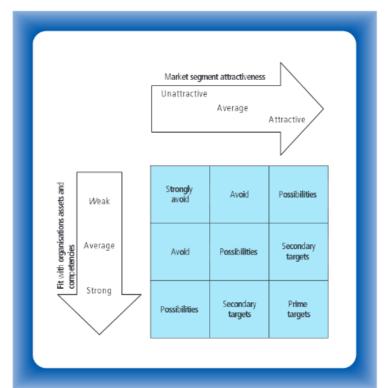


Figure 9.5 Adapted Shell directional policy matrix applied to target market selection (Source: Shell, 1975)



5. Evaluate

- Measurable
- Accessible
- Substantial
- Stable
- Appropriate
- Unique
- Sustainable













Positioning



Local











Case for support

- Lets break the ho-hum barrier
- We're relevant in a broad context
- We're proud of our history
- Please read on...this is what's special about us
- A compelling future vision that deserves your attention
- What's in it for you?
- Do it now please...

Adapted from Raise-funds.com



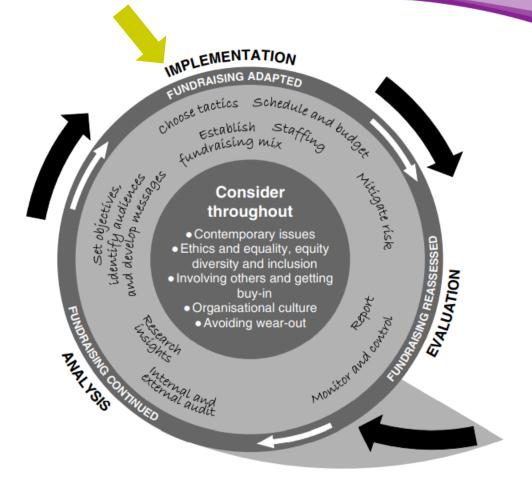
The case statement has four pillars...

- Vision
- Enemy
- Hero
- Recipient



Vision Enemy Hero Recipient No deaths at The cruel sea Tough, Silly day-sailor who fell off bearded, sea volunteer their boat crewman He'll face 30ft, waves, There is no neace blizzards, force 9 gales and sub-zero temperatures LIFE-BOAT INSTITUTION







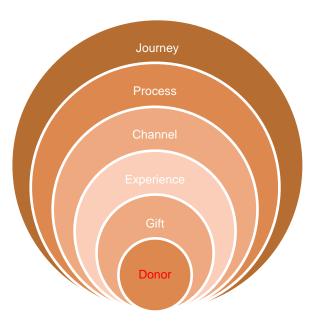
Good tactics?

- Meet objectives and ROI requirements
- Relevant to strategic decisions
- Reflect our audit results
- Trends in type of fundraising activity
- Reflect best practice and evidence
- Realistic resource



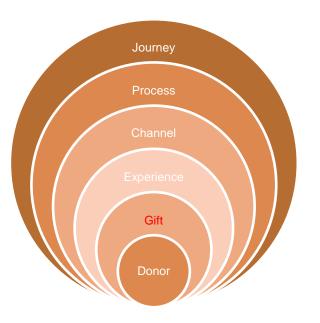


Tactics





Gift



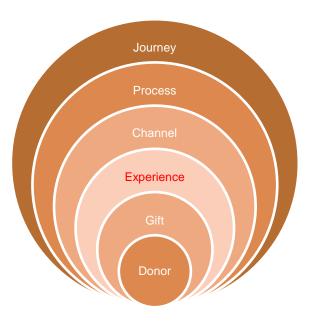








Experience





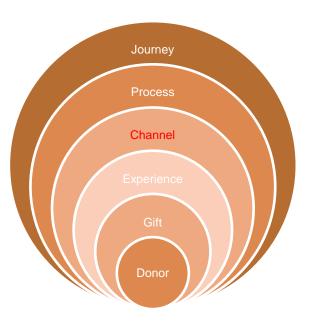
Experience – the cycle







Channel

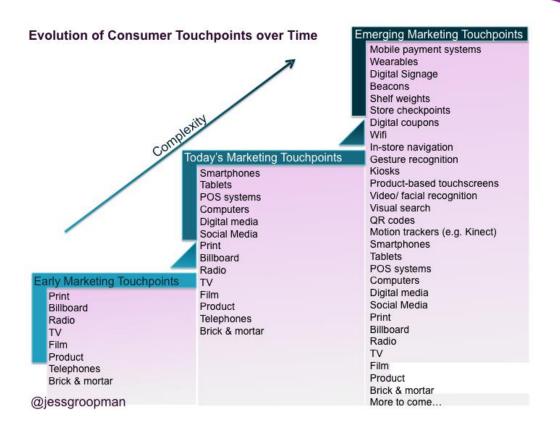




Some channels...

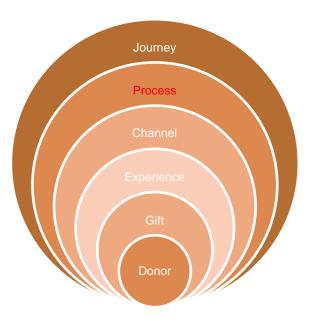
- Personal communication
- Direct mail
- Email
- PR
- Online advertising
- SEO
- PPC
- Social media
- Billboard advertising
- Inserts
- Shops

- Text
- Telephone
- Face to face/door to door
- DRTV
- Presentations
- Trade shows
- Newspaper/magazine advertising
- Website/blog
- Influencers



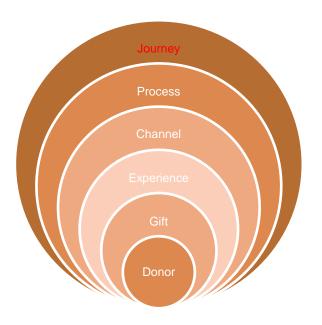


Process



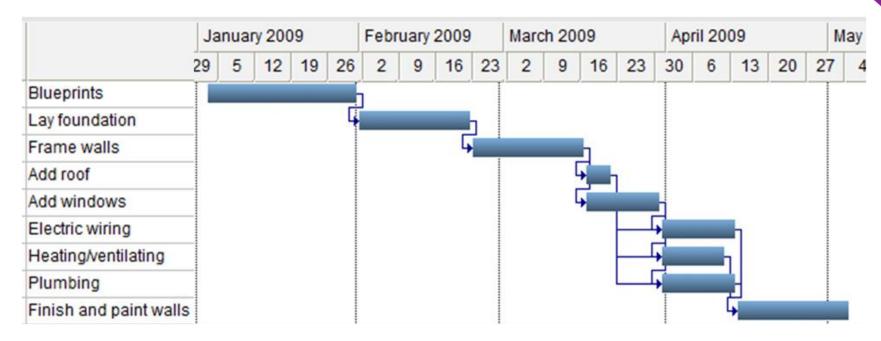


Journey





Schedule

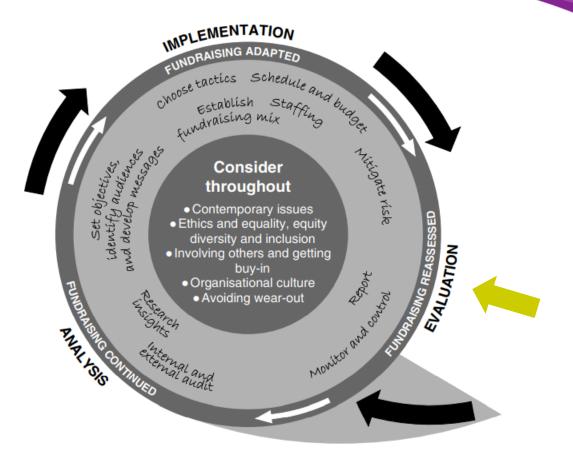




Budget

<u>Item</u>	<u>Detail</u>	Expenditure	
Creative costs	Copywriter & Designer	£5000	
Leaflet printing	10k x 2p	£2000	
Postage	100 batches @ £0.90	£90	
Online advertising	7 sites	£5000	
Internal costs	Processing returns	£250	
Total		£12,340	
<u>Item</u>	<u>Detail</u>	<u>Income</u>	
Joint membership x 34	34 x £800	£27,200	
Single membership x 16	16 x £500	£8,000	
Total		£35,200	
ROI		2.85	







Measurement

- What will you measure? And why?
 - What are your metrics and KPIs?
- Who will measure it?
- How will they measure it? Do you have processes in place?
- Where will it be measured e.g. a dashboard in the CRM?
- When (how often) will it be measured?

Ultimately, what went wrong and what went right? And why?



Types of risk

- Strategic
- Financial
- Logistical
- Reputational
- Relational
- Compliance and/or ethical
- Other e.g. weather



		А	В	С	D	Е
		Negligible	Minor	Moderate	Significant	Severe
Е	Very Likely	Low Med	Medium	Med Hi	High	High
D	Likely	Low	Low Med	Medium	Med Hi	High
С	Possible	Low	Low Med	Medium	Med Hi	Med Hi
В	Unlikely	Low	Low Med	Low Med	Medium	Med Hi
А	Very Unlikely	Low	Low	Low Med	Medium	Medium

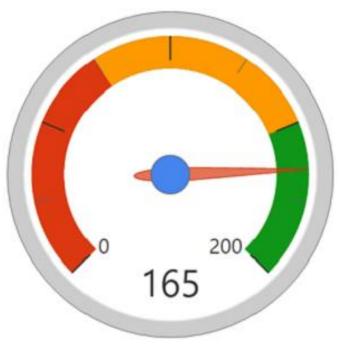


Will you?

- Tolerate
- Terminate
- Treat
- Transfer



Avoiding strategic wearout

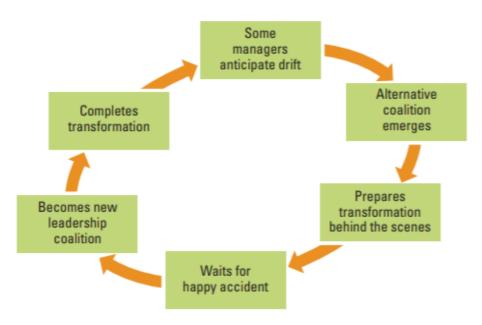




But...

- Signals can be missed
- Signals can be misinterpreted
- It might be difficult to change
- People might refuse to change





Johnson et al 2012



Emergent strategy

- Creating an initial hypothesis about the market
- Testing it quickly, and assessing the feedback
- Change either the strategy, or the way it is executed
- Revise plans and budget, then communicate changes to the organisation, and monitor the execution of the revised strategy





Thank you so much!

