

# Fundraising Strategy Development, Building Effective Strategy

« *Strategy is a pattern in a Stream of Decisions* »  
Henry Mintzberg

Cormac, Lally,  
September 9th & 10th, 2015

# Introduction

Chatam House Rules

Building Trust & Engagement

# Aims & Objectives

## Foundations

- Why are we here?
- What do we hope to achieve?
- Where do we want to get to?

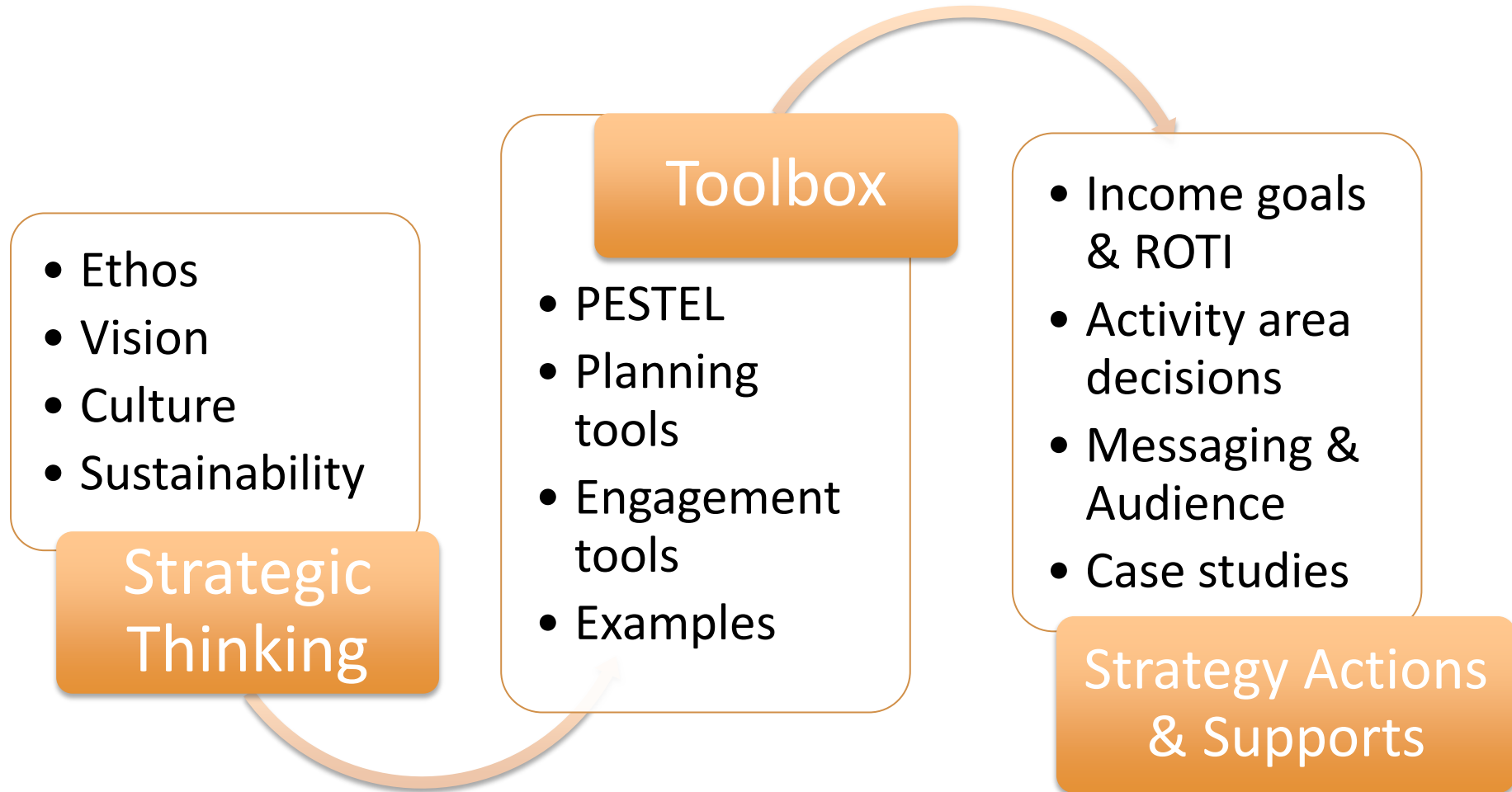
## Building Strategy

- Where are we starting from?
- What have we tried before?
- Where to Begin?

## Time to Act

- What can we do?
- What do we need to have?
- What is our plan?
- How will we deliver our plan?
- Tools, templates & examples

# Recap on June Seminar



# Key Trends & Considerations



- Where are the opportunities?
- Where are the traps?
- What needs to change?
- What are the key trends to look for?

## • Corporate Giving

- Employee engagement opportunities
- “Volunteering Partner”
- Tighter Criteria
- Simple programmes
- Impact assessments
- Evaluation metrics
- Charity of the Year Partnerships
- Corporate Social responsibility
- Skills giving
- In Kind support
- Reducing admin burden

# Key Trends & Considerations

## • Individual Giving

- More individual lives
  - Ease of donating
  - Smaller, tighter, communities of interest
  - Trust of peer recommendations
  - Trust in organisations
- Emotional engagement
    - *Why do you want my money?*
    - *What will you do with it?*
    - *How can I trust you?*
    - *How much are you looking for?*
  - Brand values
  - Because I was asked
  - Rise of mobile / IT engagement
  - Time considerations & constraints

- **State & Allocated funds**
  - Impact of recession
  - Cuts to project funding
  - How to replace lost income?
  - Next year?, 3 years time? , 5 years time?
  - Drive the collaboration agenda
  - Consolidation and mergers
  - Cost reduction and efficiencies
  - Economies of scale
  - Fundamentally not strategic!!
  - Can generate a “firefighting” culture



- **Social Enterprise**

- Fastest growing sector of funding stream
- Very significant opportunities
- Wide range of options
- Extensive potential partnerships and collaborations
- Lithuanian context restricted opportunities
  - Lobbying opportunities
  - Likely to align more closely with EU practices
  - Positioning opportunities for future

## • Technology

- Rapidly changing landscape
- Significant opportunities & challenges
- Range of platforms & channels
  - NGO – Individual
  - Brand – Individual
  - Business – Brand-Individual
- Exciting Opportunities
  - Embedded Payments
  - Post office Giving / bar code
- Capacity considerations
  - Software
  - Database
  - Data protection implications

# Key Trends & Considerations

- How are we reaching & engaging our target group?
- Who is our target group?
- What is our message to our target group?
- What is effective and ineffective?
  - Channels
  - Language
  - Our impact

# Case Study- Youth Work Ireland

- Secured meeting with largest food retailer in Ireland (Europe)
  - **Significant excitement**
  - **Game changing opportunity**
  - **Significant synergies between organisations**
- Feedback on Youth Work Ireland
  - **Message**
  - **Branding**
  - **Impact**
- External support
  - **Stronger resonance of message**
  - **New strategy on branding**
  - **Significant consensus & changes**

# Key Trends & Considerations

- Capacity and resources
  - Can we deliver?
- Building consensus internally
  - Engagement
- Prioritising & understanding our priorities
  - Cash generation?
  - Long term planning?
- Developing key measurables
  - How will we know if its working?
  - What does a win look like?

# Telling Your Story / Identifying Your Impact

- Building messaging priorities
- Consistency of use
- Repetition
- Key audiences?
- Tone & tactics?
- When and where to use?

# Developing Your Asks

- Types of asks
  - Face to face
  - Online
  - Engagement tools
  - Broad and narrow
  - Danger of restricting funds
  - Corporate
  - State
- Why are we asking?
- Who are we asking?
- When and how are we asking?

# Developing Your Asks

- Build a “case for support”
- Can be an entire campaign
  - “Major donor” example
- Incorporating all previous elements of strategy
- Example of strategy *in practice*
- Planning every step and move essential
- Sweat your assets!
- Test, learn, tweak and improve
- Build an evidence base for future
- Ask, Ask!!! There is No NO!!!



# Developing Your Asks

- **Short exercise (15 mins)**
  - Identify your top “asset” that can be used to develop an ask
  - Develop short case for support based on examples

# Areas of Activity

- What activities work?
- What is the evidence base?
- What have we done that does not work?
- What activities can we do?
- What do competitors and others do?
- What legal & resource barriers are there?
- Can we co-operate to increase return?
- Collaboration and synergies maximisation
- Where is the best return
  - What return do we require?
  - What is best and worse case scenarios?
- What activities best align to our ethos & culture
  - McDonalds
  - Paddy Power
  - Guinness

# Areas of Activity

- **Short group exercise (10 mins)**
  - Brainstorm & Identify current activities

# Potential income areas

- Direct Mail & Marketing
- Donor / supporter Acquisition
- Donor / supporter Development
- Major Donors
- Bequest & Legacy giving
- Corporates
- Funds, Grants & Trusts
- Online & Website
- In kind / leveraged
- Committed Giving
- Events & Occasions
- Stakeholder Engagement
- National Campaigning
- Europe & project
- International partnerships
- International funds
- Community fundraising
- Team ....
- Friends of ...
- Christmas
- ... week
- Other
- Shops
- Merchandising
- Social enterprise
- Member supports



# Prioritise activity areas



- Cash generation?
- Scalability?
- Sustainability?
- Resources & Investment?
- Capacity?
- Potential for growth
- Maximise ROTI
- Minimise cost
- Risk?
- Feasibility

## • Don't Boil The Ocean!!!

- Essential to prioritise
- Reduces “firefighting”
- Keeps focus on strategic issues and goals and questions
- Identify and agree key priorities
- Where are we at?
- What are challenges we need to overcome?
- Will be informed by number of issues and areas
- Will dictate some areas of activity
- Will influence which resources are deployed
- Where should we focus our efforts?
- Will strongly influence goals and metrics

# Developing a Campaign

- Developing an A-Z for campaigns
  - Clear goals and objectives
  - Building consensus and support
  - Clarity
  - Basis for focus
  - Milestones and key project points
  - Significant work initially
- Collaborate or alone?
- Stakeholder involvement and support
- Communication planning

# Questions & Answers

- **Day 1 session close and Q & A**



# Day 2 Introduction and Recap

- Review and recap on day 1
- Aims and Objectives for Today
  - Writing a fundraising strategy
    - Sections of a fundraising strategy
    - Areas of activity
    - Tailoring the plan
  - Implementation of strategy
    - Monitoring and evaluation
    - Governance & reporting
    - Adaptability & flexibility

# Writing the Strategy

- **Bringing together all the strands**
  - Rationale
  - Vision & future aims
  - Current priorities
  - Current and future resources
  - Legal and environmental framework
  - Fundraising landscape
  - Trends and opportunities
  - Challenges and barriers

# Writing the Strategy

- **Examples**
  - Small local organisation
    - Loughrea Family Resource Centre
  - Medium Organisation
    - Midlands Simon Community
  - Large Organisation
    - Youth Work Ireland

# Sketch Your Outline

- **Short individual exercise (30 mins)**
  - Take some time to sketch out the headings you might use
  - Include key rationale
  - Areas of activity
  - Areas of development
  - Areas of Investment
  - How might you evaluate and monitor & report

# Implementing the plan

- Strategy is only as good and as strong as its implementation
- Most common mistake with strategy
- Must be achievable
- Significant effects on morale
- Must be realistic
- Initial work to develop implementation
- Incorporate measurables

# Final Thoughts

Don't boil the  
ocean

Risk /  
opportunities

Simple

Plan & Ask

Values

Vision

D.R.I.V.E.

Ambition

Sustainability

Achieving  
Goals

*Outcomes*

# Next Steps

- Identify your key stakeholders
- Who are your allies internally
- Complete your own sketch draft
- Identify and prioritise your areas of activity
- How would you implement your plan, what resources would you need
- Ongoing support in development of strategy

# Conclusion

## Thank You



## Questions?