Income Generation,
Building Effective Strategy

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

Cormac, Lally,
June 10th,2015

Introduction

Foundations

- Aims & Objectives
- Introductions
- Irish Context

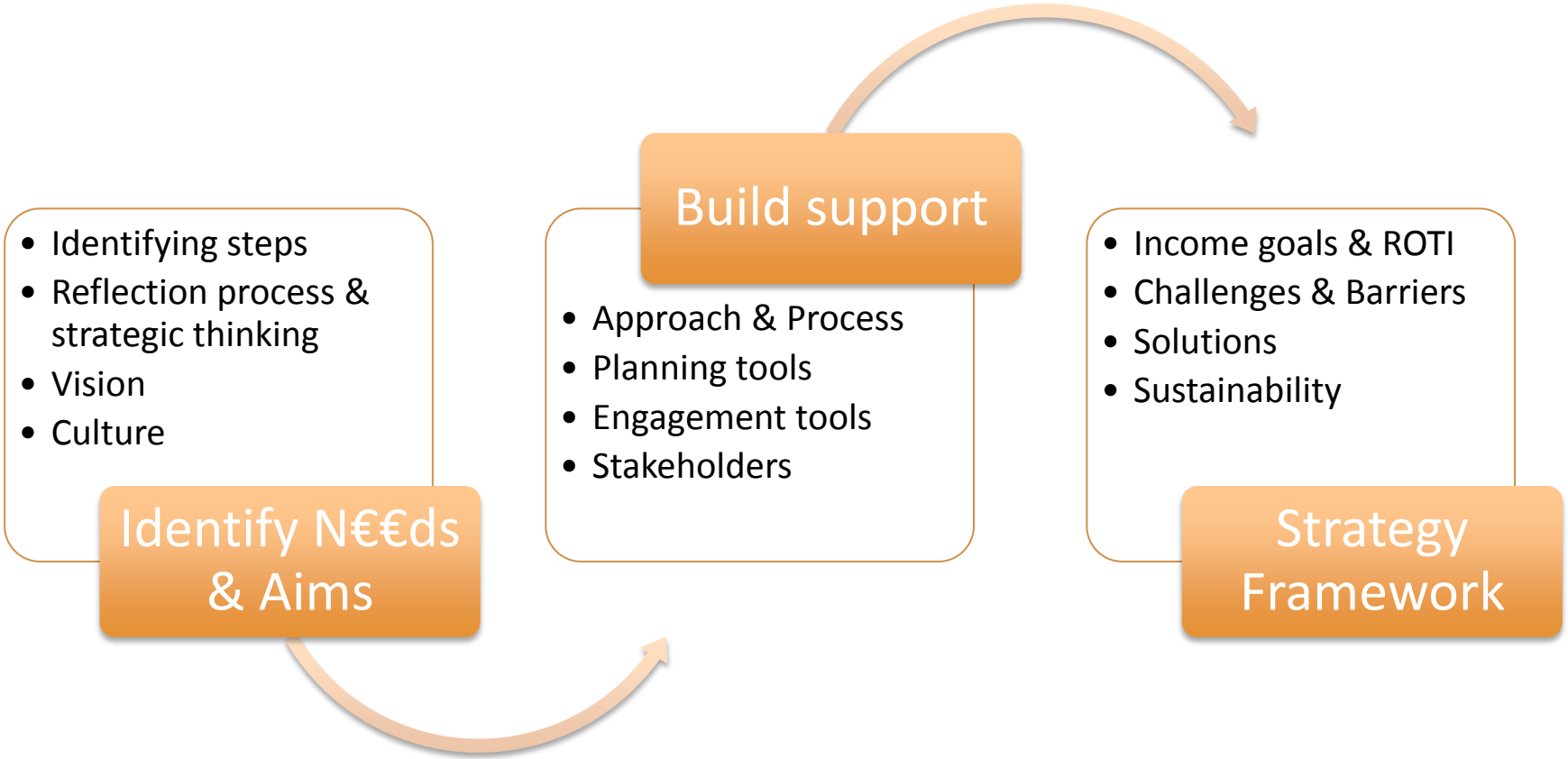
Building Strategy

- Set the Scene
- Designing Your approach
- Where to Begin?

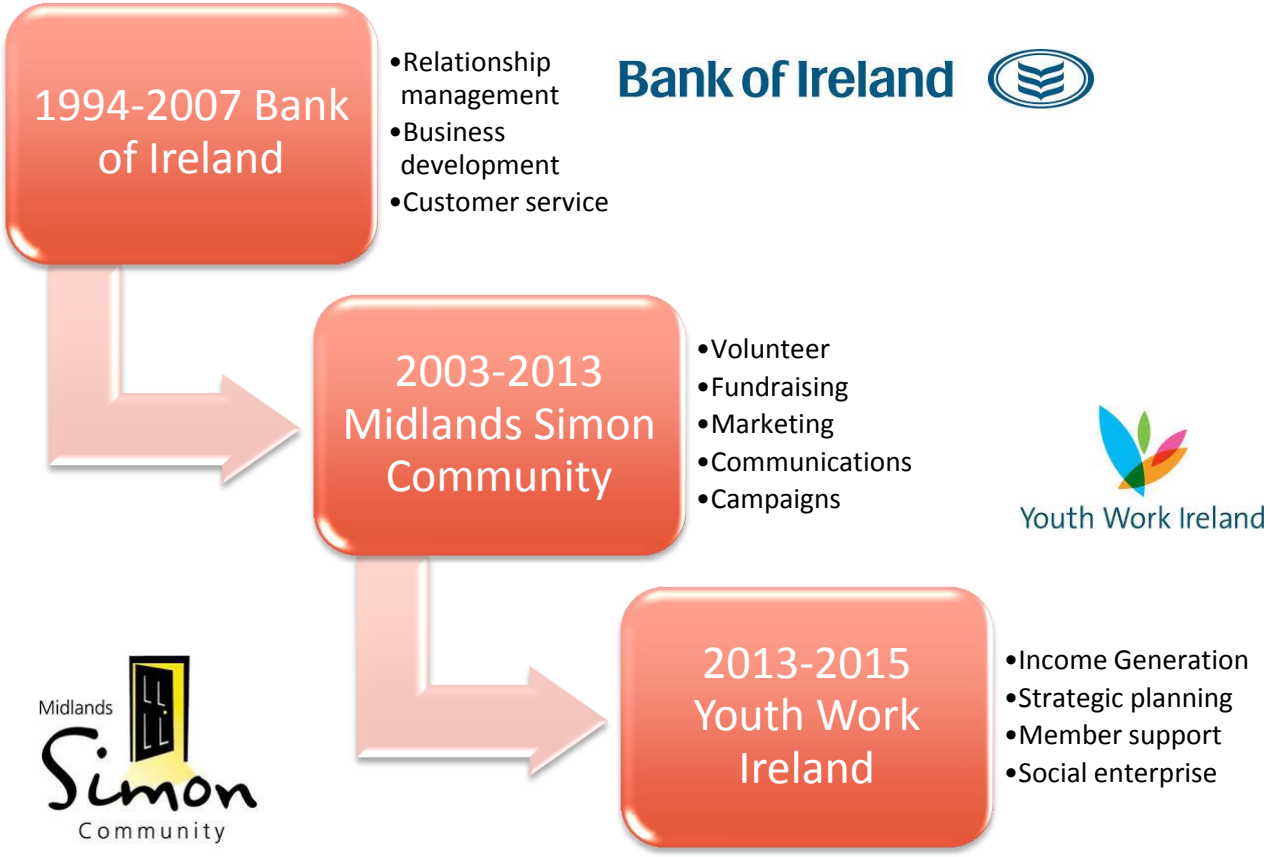
Time to Act

- Prioritise
- Ask, Ask, ask!
- Final Thoughts & Questions

Aims & Objectives



My Unusual Journey



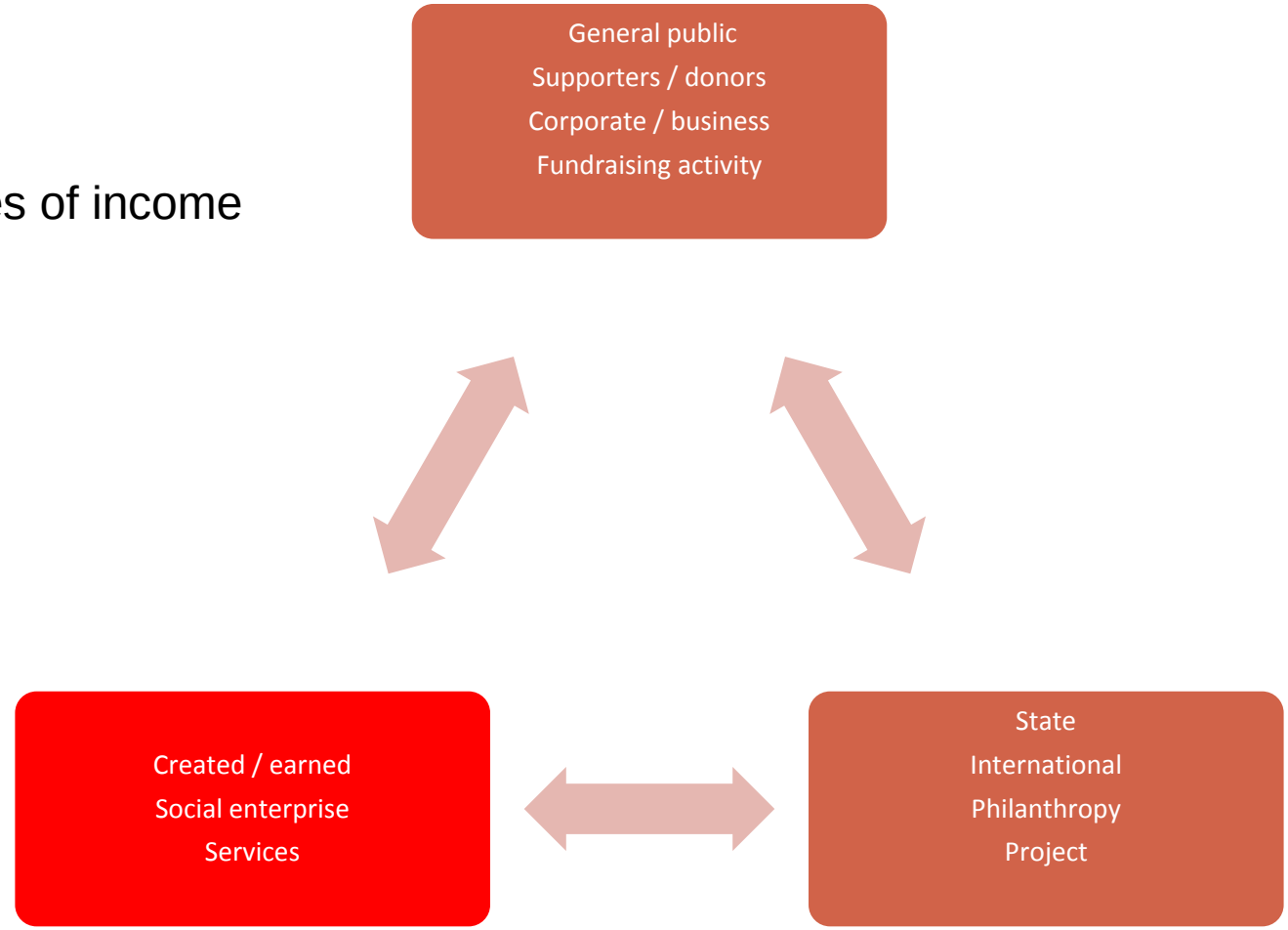
Ethos and Principles

KEEP
CALM
IT'S NOT
ROCKET
SCIENCE

Relationships
Communication
Focus & Flexible
Prioritisation & Return
Networks
Win Win

Ethos and Principles

Sources of income



Irish Context

- 20,000 Non-profits
- 9,000 registered Charities
- €5.5bn turnover
- Intense competition
- Fragmented market
- Duplication and consolidation
- Stampede to fundraise
- Lack of expertise
- Public perception & Trust
- Governance issues
- Income reductions (40% approx)

Irish Context

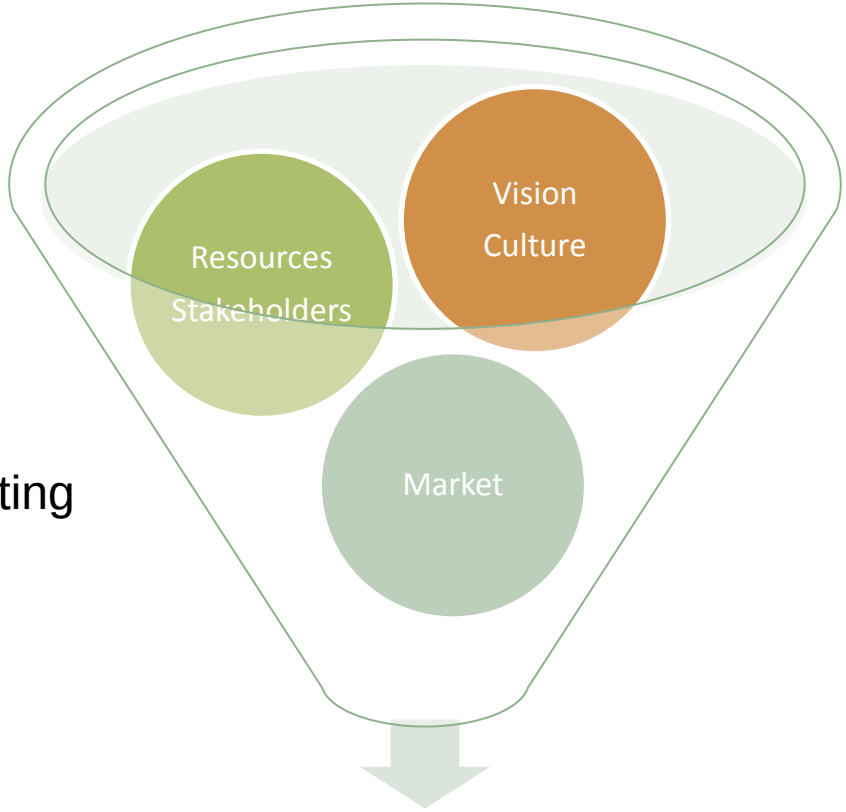
- Improving market
- Employment figures
- Halt to emigration
- Youth unemployment figures
- Low interest rates
- Greater disposable income
- Regained trust
- Charities regulator established
- Register operational

Irish Context-Key Trends

- Corporate support changing
- Skills giving
- Technology / time
- Regulation & accountability
- Evidence base & data
- Social enterprise
- Fatigue of supporters
- Time / volunteering
- Outsourcing of fundraising
- Consolidation-forced & choice
- Outsourcing of services
- Increased trust
- Improved governance / compliance

Set the Scene-Where are we?

- Key elements
- Establish starting point



Strategy

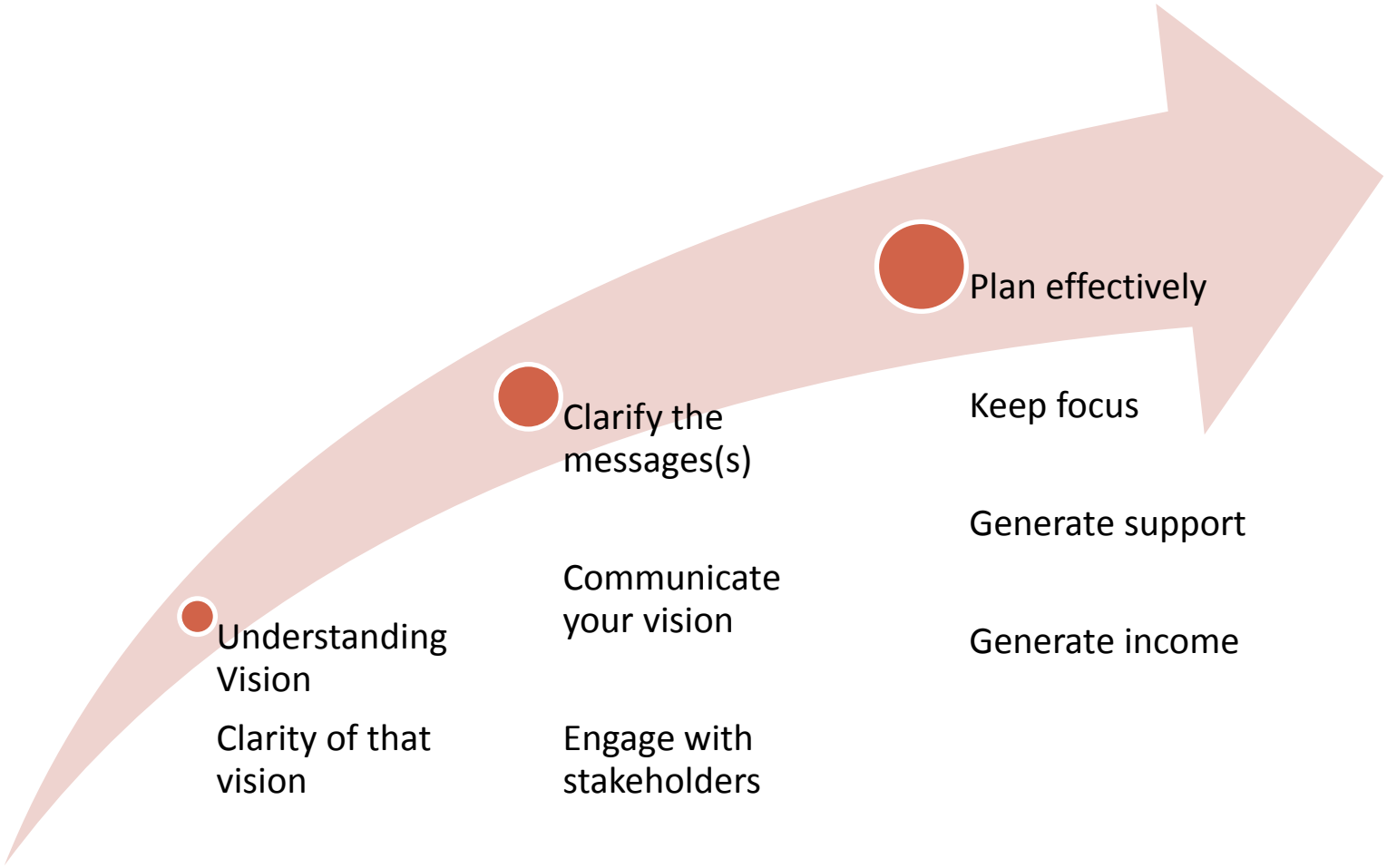
Set the Scene-Vision

- *You've got to think about big things while you're doing small things, so that all the small things go in the right direction.*
  Alvin Toffler

- *Determine that the thing can and shall be done and then we shall find the way.*
  Abraham Lincoln

- *If you don’t know where you want to go how can you possibly get there.*
  Anonymous

Set the Scene-Vision



Set the Scene-Vision

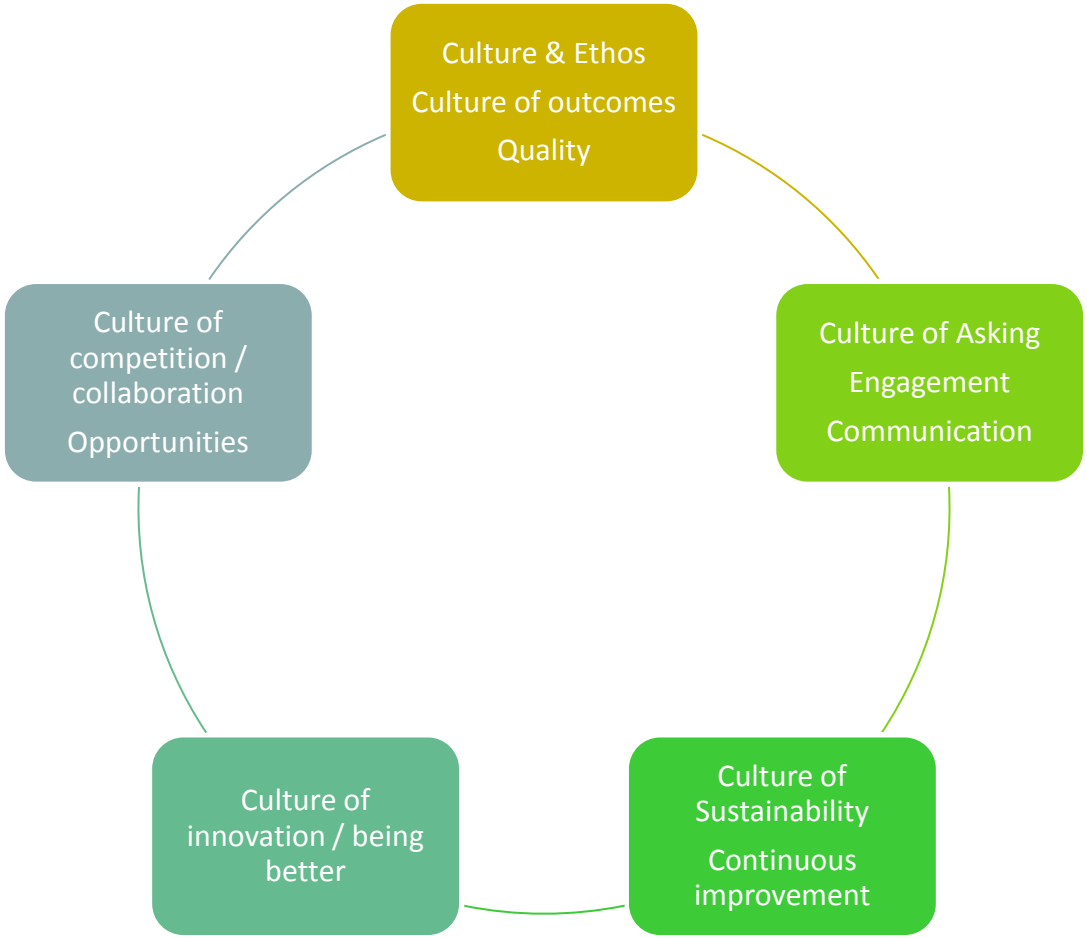
- What is our Vision?

- Brief exercise:
- Spend some time (5 mins) to write down your organisation vision
- Work in pairs and deliver your organisation vision
- Change and feedback to person
  - Does it engage with people and supporters emotionally?
  - Why should people support us?
  - Can you communicate it in 30 seconds to someone who does not know your organisation?
  - Does it align with your current strategy?
  - Is your current strategy delivering on your vision?

Set the Scene-Vision

- Feedback on exercise

Set the Scene-Culture



Set the scene-Vision

"We are amazing" syndrome

Why should we have to?

It will be ok

+

Too focused on internal

Public don't care

Politics

→

Poorly executed strategy

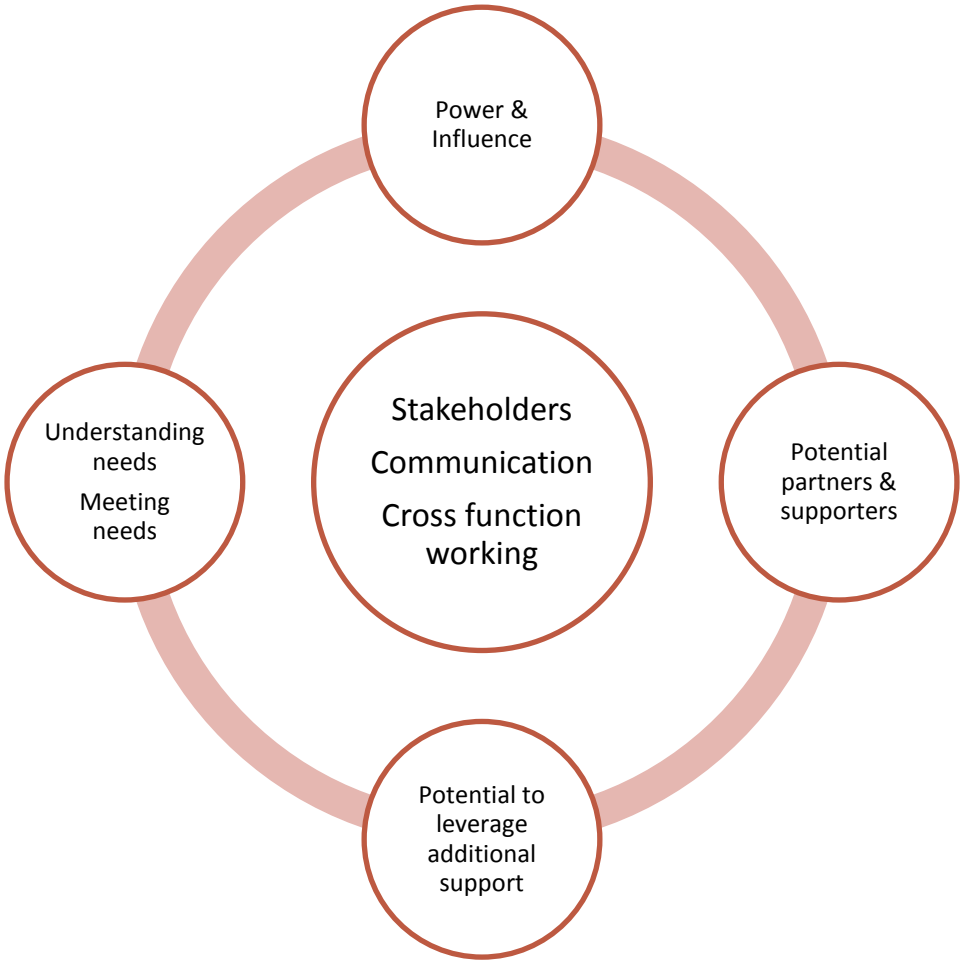
Poor engagement

Poor communication

Stampede to raise money

Lack of understanding

Set the Scene-Stakeholders



Set the Scene-Operating Environment

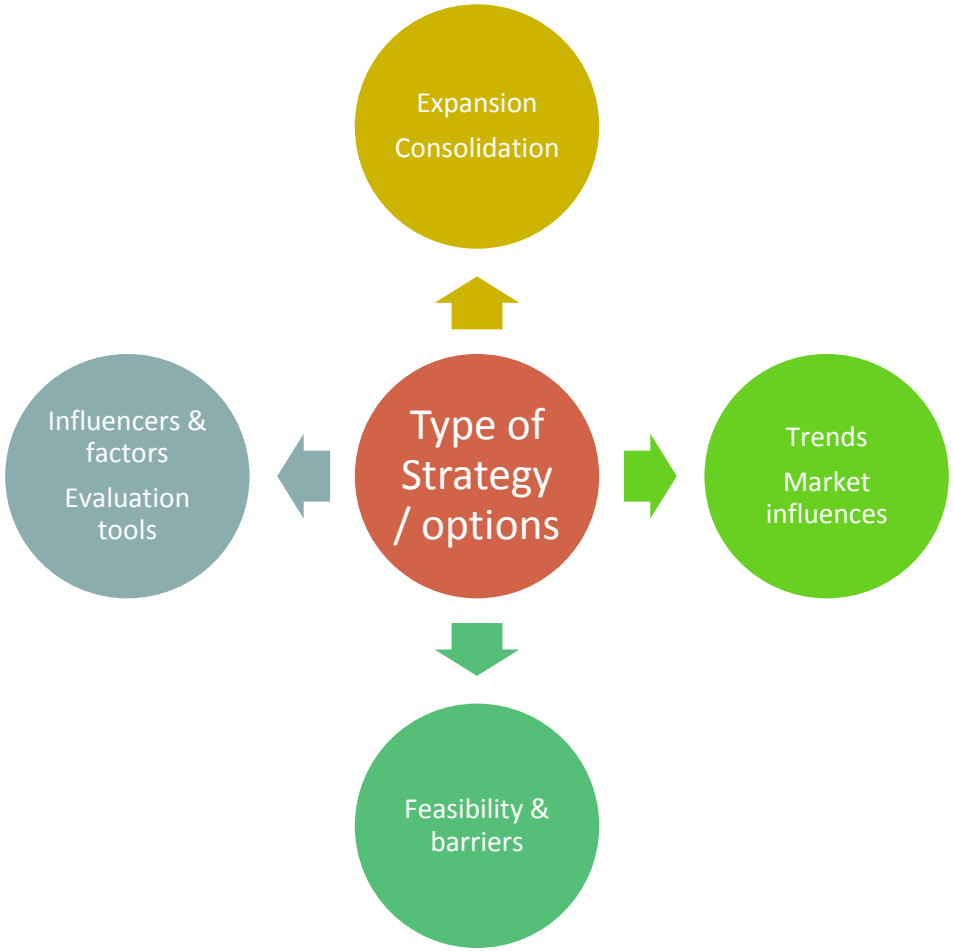
Set the Scene-Operating Environment

- Short exercise:
- Work Individually and then in pairs for 2 Minutes
- Share your challenges and opportunities
- Collate responses and integrate them into process
- Write down on slips the 3 greatest challenges you face to end 2017
- Write down on slips the 3 biggest opportunities you see to end 2017

A Road Map to Growth

Approach Design

- Once scene is set
- Variables
- Information required



Approach Design-Analysis & Evaluation

Internal analysis

- VIA: Vision in Action-strategy map with development areas
- Resource Audit
  Stakeholder analysis

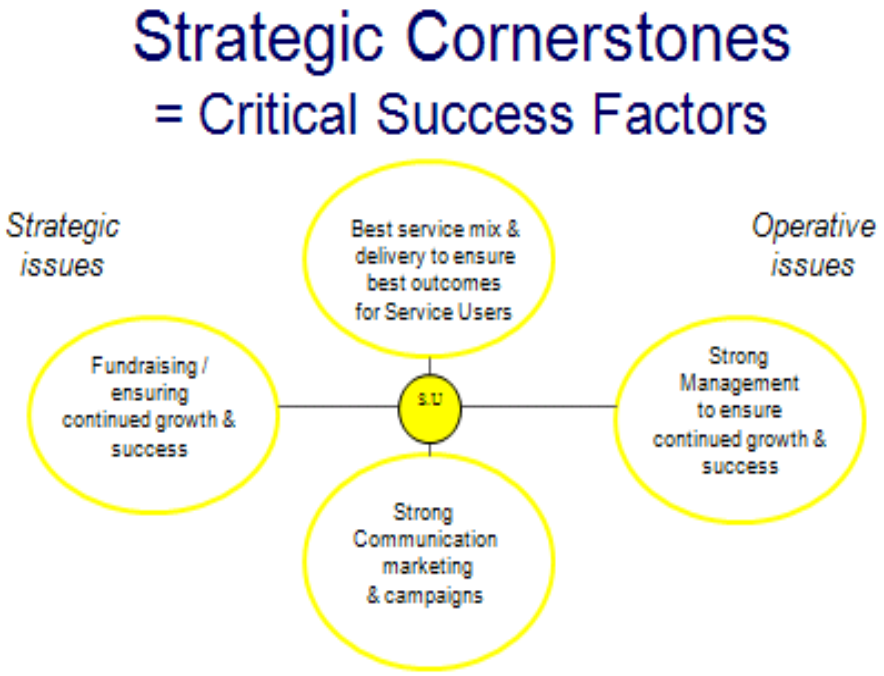
External analysis

- PESTEL
  Political,Economic,Societal,
  Technology,Environmental,Legal
- Marketing Mix
  Sector analysis

Strategic options

- Bowman`s Strategy Clock
- Ansoff Matrix

Approach design-Vision in Action



Vision in Action

Approach Design-Factors and Influencers

Structure

Structure
Reach / geography
Policy
Priorities

Sharing / learning
Risk
Feasibility & ROTI
Governance

Resources

Tangible
Investment
People & Brand
Services
Finance

Intangible
Knowledge
Networks
Trust / perception
Vision & Culture

Systems

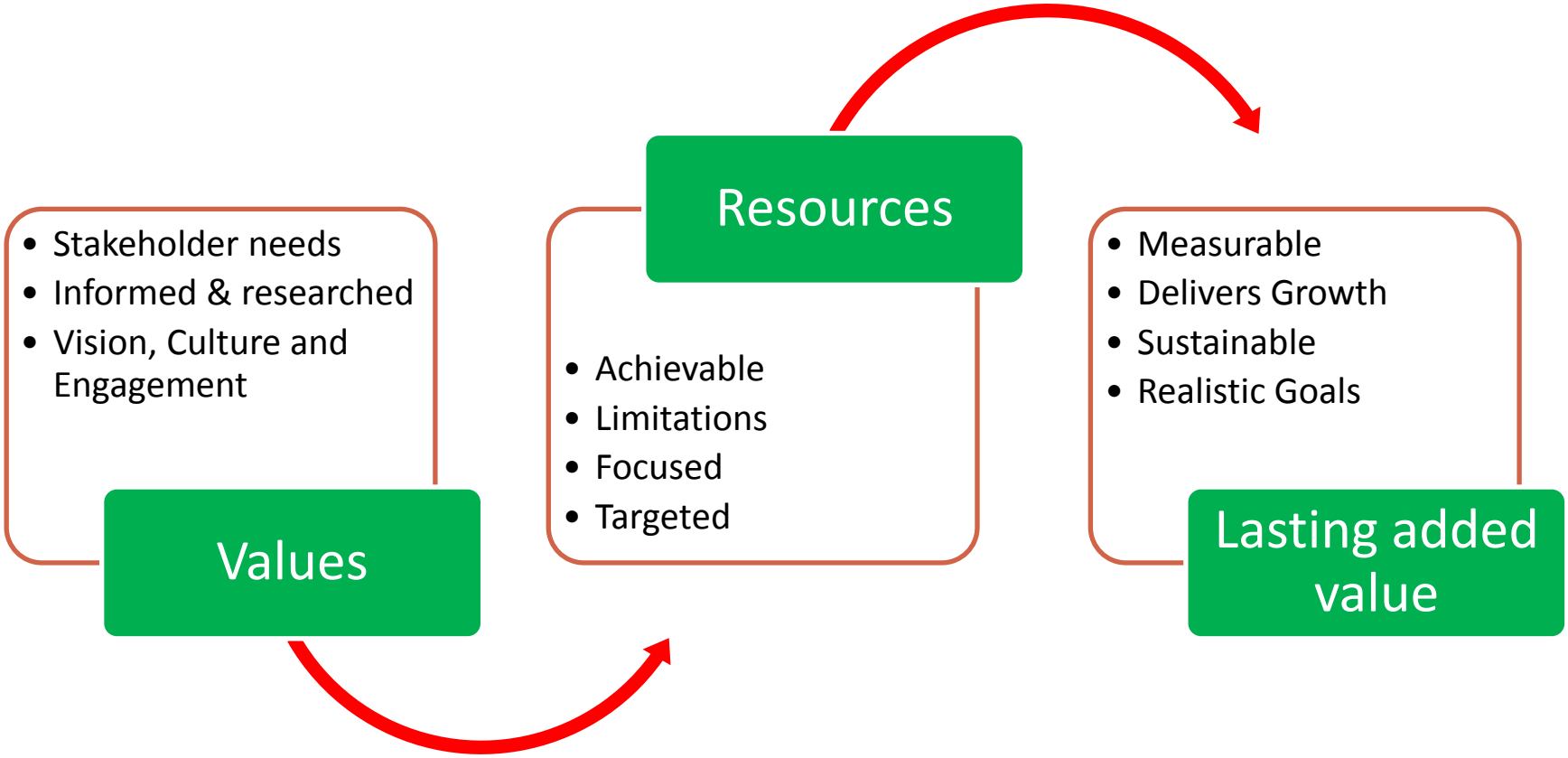
Communication
Evidence & data
Messaging
Market / environment
Measurement & reporting

Outcomes & quality
Engagement tools
Platforms and channels
Capacity
IT / apps / databases

Where to Begin?

- Scene is set
- Analysis complete
- Approach decided

Where to begin- Final Considerations



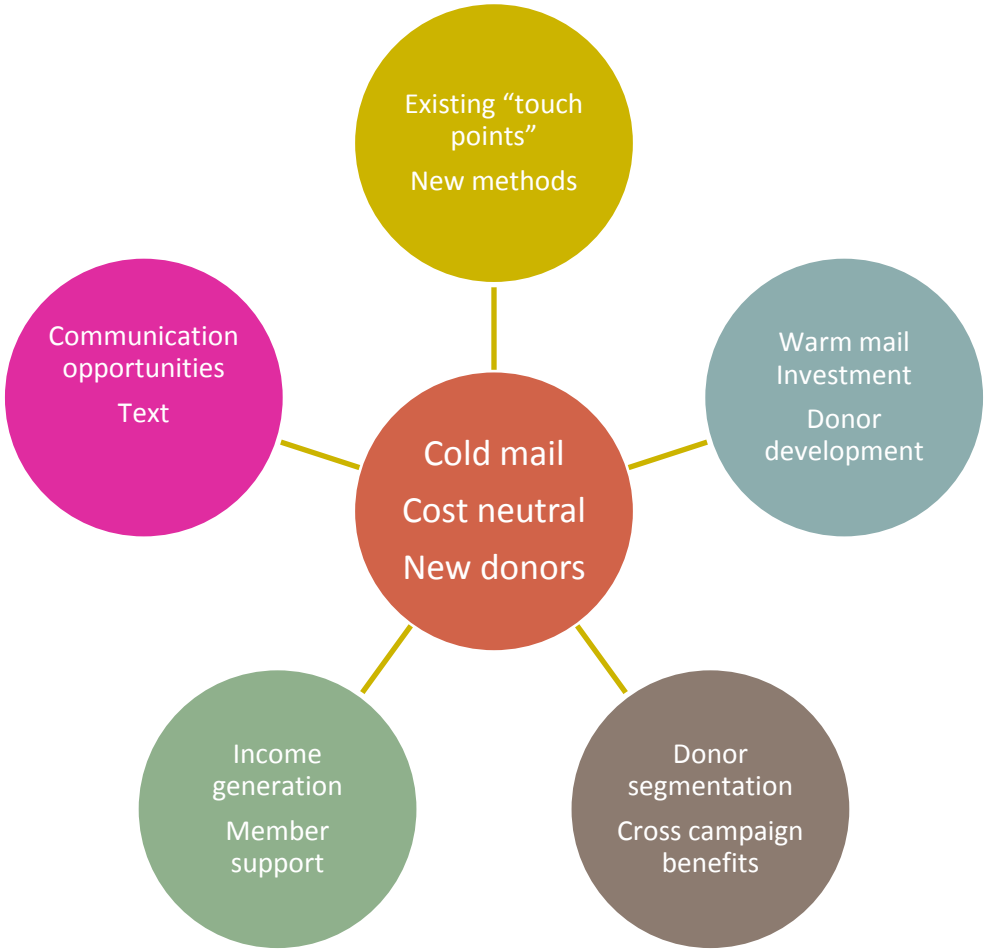
Where to Begin-Potential income areas

- 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

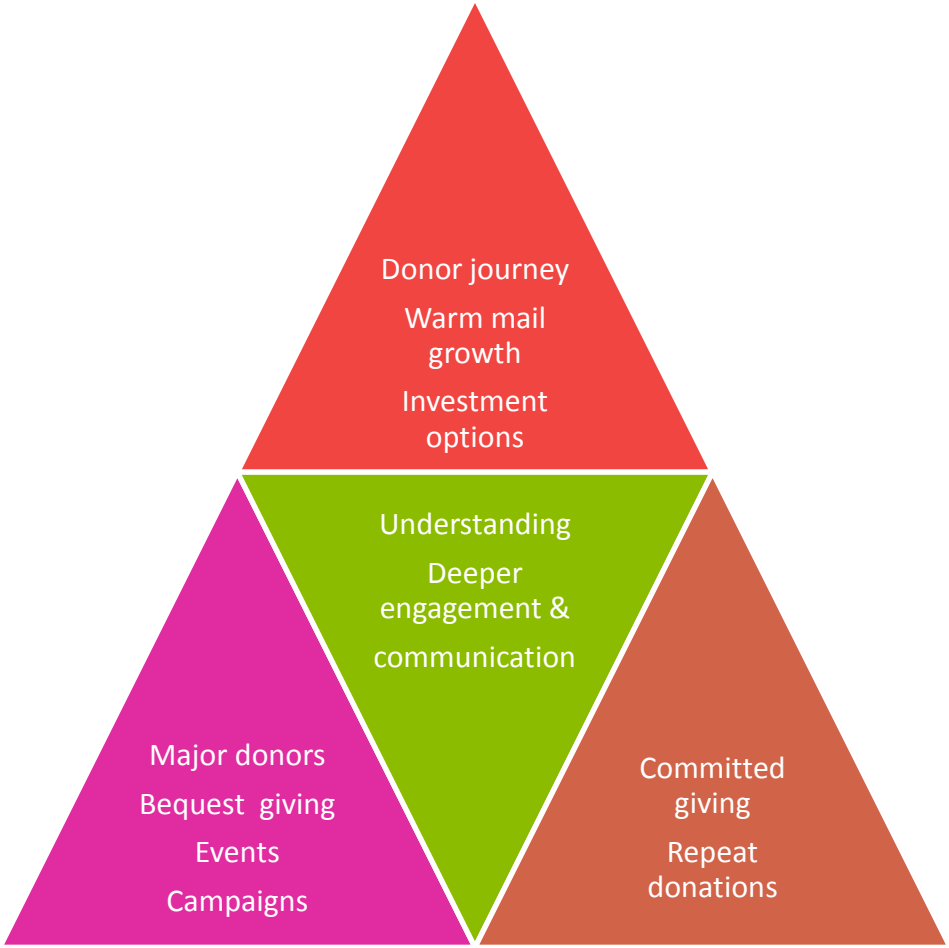
Prioritise activity areas

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

Building Direct Mail Income Stream



Acquiring Supporters



Building Legacy & Bequest Income Stream

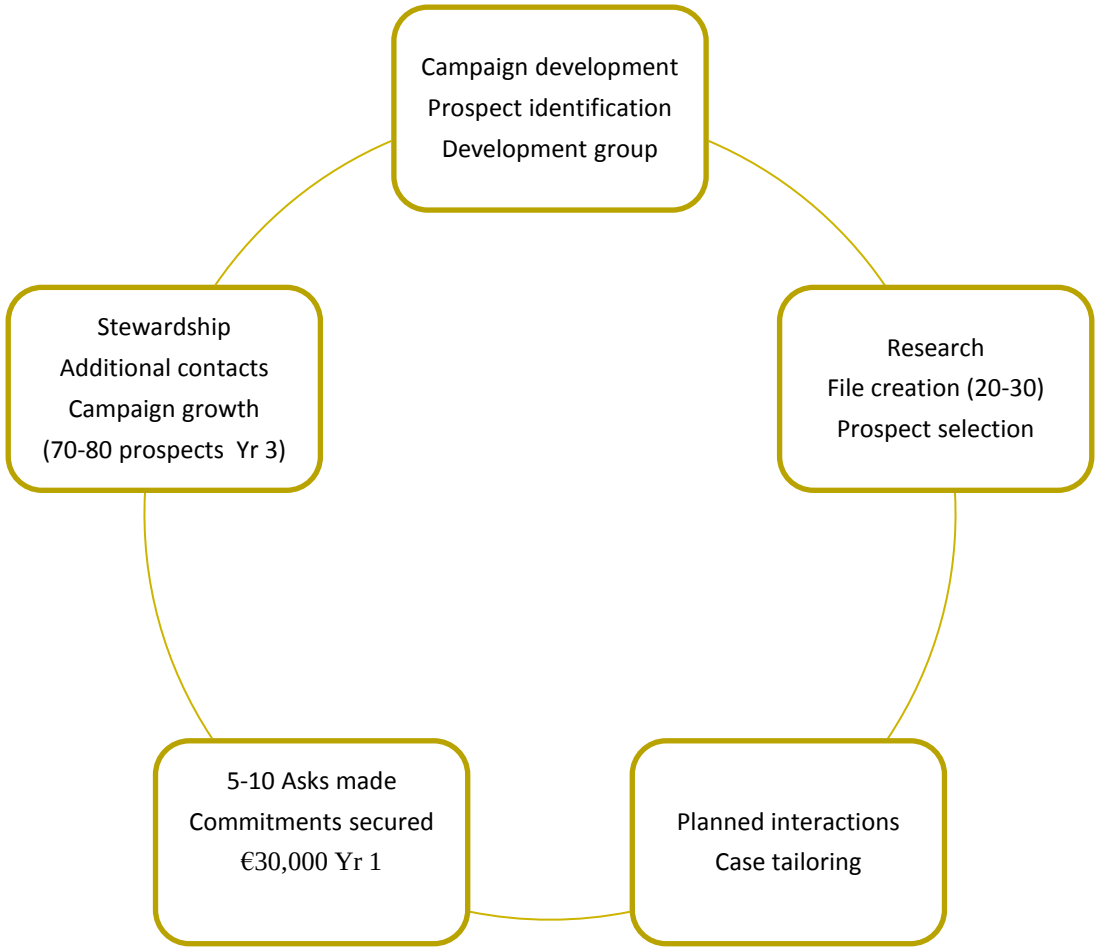
Solicitors

- Existing contacts
- Phased roll out
- Research
- MyLegacy.ie

Accountants
Tax advisors

- Parallel campaign
- Investment in materials
- Longer term
- Information and opportunities

Building Major Donor Income Stream



Building Corporate Income Stream

Develop cases for support
Focused on Impact
Tailored to Company needs

Database of prospects
Lead Generation
Networking and Influencing

Filtering of relationships
Corporate
Business

Developing and refining of opportunities
Increase in COTY partnerships / presentations

Winning National COTY Yr 1
Securing min 2 partnership in yr 2

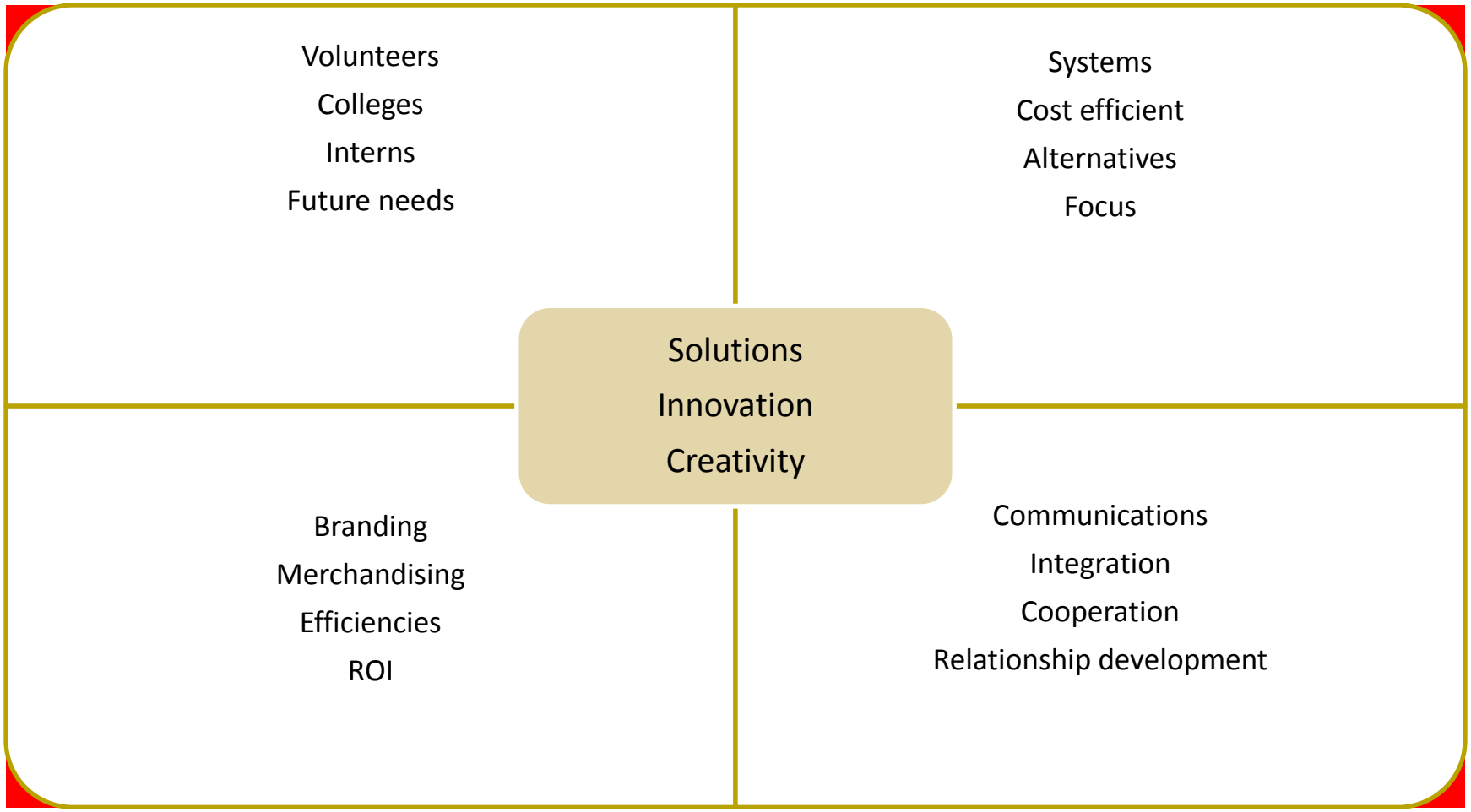
Building Philanthropy Income

Funds	Grants	Trusts
• Identification of prospects • Understanding criteria • Monitoring of deadlines • Planning “pitches” • Creating pipeline of opportunities	• Development of “Cases for Support” • Tailoring applications • Focused on impact & breadth of YWI • Securing support • Target €45,000 Yr1	• Lead generation • Identifying gatekeepers • Developing relationships • Presenting cases (1 per Qtr) • Securing €10,000 in Yr 1

Building Online Support

Development Opportunities

Impacts on Resources



Ask, Ask, ask!


Case for support
Tailoring
Relationships
Communication
Messaging
Language
PR plan &
Integration
Targeting
Identify audiences
Identify channels
& platforms
Acknowledgement
Stewardship
Timing
Different amounts
Different levels
Planned asks
There is no No
#1 reason for giving
Engagement
Define support
Today, Tomorrow &
Forever
Values / alignment

Ask, Ask, Ask!-New Thinking & Language

Old language	New Approach
Survival	Vision
Inform	Involve
Competition	Collaboration
Cultivation	Communication
Appointments	Visit
Traditional Campaigns	Funding Initiatives
Donor	Investor
Transactions	Relationships
Interactions	Relationships
Special events	Memorable occasions
Speak to	Engagement with
Text heavy brochures	Engagement tools

Writing, Monitoring & Reporting

Strategy Document	Reporting	Operational Plan
• Sections • Rationale • Context • Areas • Targets / Investment	• Stakeholders • OFI / Flexibility • Funders / partners • SMART	• More detail • Who, what, When • Specific actions

Final Thoughts

Don't boil the ocean
Risk / opportunities
Simple
Plan & Ask

Values
Vision
D.R.I.V.E.
Ambition

Sustainability
Achieving Goals
Outcomes