

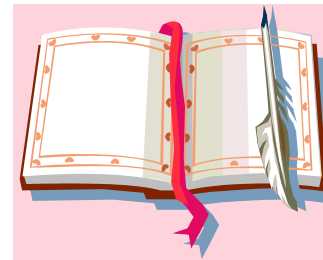
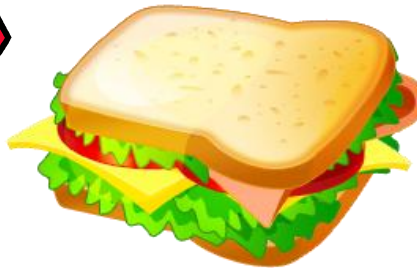
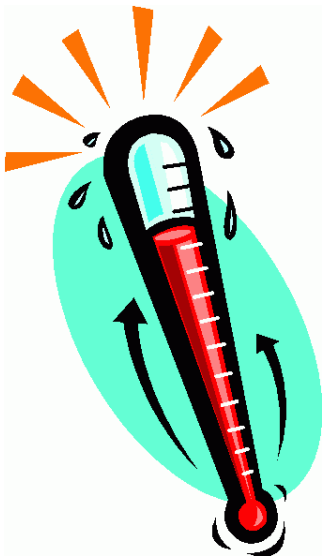
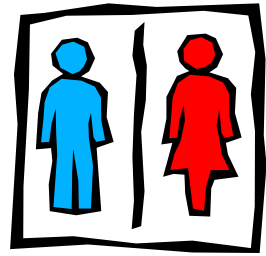


Developing a Heritage Fundraising Plan



The
Heritage
Alliance

For your comfort



Declaration

All information is given by the Institute of Fundraising as current best practice, or is existing research which is credited.

However, this is not a substitute for professional legal or financial advice.

Learning Outcomes:

By the end of this course you will be able to:

- Understand the range of fundraising methods and their key features
- Develop a fundraising plan for a fundraising activity
- Review the fundraising environment, identifying appropriate fundraising opportunities
- Conduct a review of the performance of past fundraising activity
- Establish objectives, timescale, budget and appropriate fundraising techniques
- Discuss fundraising plans with a line manager and other relevant colleagues/stakeholders and seek authorization for its go ahead as necessary
- Ensure that any relevant legal and ethical requirements have been met and that that (if appropriate) the plan takes account of the organisation's policies and procedures

Scene Setting

If you don't know where you are going you are almost certain to end up somewhere else

(Mark Twain)

Session 1

FUNDRAISING METHODS

TRUSTS

- Bedrock of most charity fundraising
- Good ROI
- Relatively straightforward to manage
- Low investment

CORPORATE FUNDRAISING

- Wide range of support eg employee, marketing, donations.
- Great deal of competition.
- Good source if have existing contacts.
- Examples of corporate support of small charities in addition to big brands

STATUTORY

- Large sums available
- Often very tight constraints which can make it unprofitable.

MAJOR DONORS

- High ROI
- Needs buy in from trustees/CEO.
- Ideally have existing contacts to work with
- Needs structured process

CAPITAL APPEALS

- Attractive proposition for major donors.
- Can be a good way of getting local support eg via newspaper
- Need to consider timescales to avoid fundraising after building complete

HIGH PROFILE EVENTS

- Needs right kind of supporters who want to attend.
- Risky and high set up cost.
- Good if can delegate to a committee

CHALLENGE EVENTS

- Can attract people who specifically support your cause but also people who just like the event.
- Donors expect a degree of support.
- Can be addressed in a low key way or be a major part of a strategy eg investing in bespoke events

LOCAL AND COMMUNITY FUNDRAISING

- Classic committee type fundraising declining
- Volunteers often like to support a specific activity
- Still popular form of fundraising
- Need to avoid too much staff support time or ROI can be low

DIGITAL/WEB

- Includes donation via web, text donations etc.
- Some charities receive high percentage of income /supporters via web profile
- Need to invest to get it right.
- Amateur websites rarely cost effective
- Online platforms such as JustGiving good for small charities especially as they handle gift aid.

INDIVIDUAL DONORS/DATABASE MARKETING

- Takes time to build up
- Needs high levels of investment to do properly
- Often up to 5 years before gaining a net profit.

LOTTERIES/RAFFLES

- Many charities now have weekly/monthly/occasional lotteries.
- Taps in to new audiences.
- Management can be contracted out

LEGACIES

- Good potential for most charities. E
- Essential to invest in some form of legacy marketing.
- Investment unlikely to pay off for many years

MERCHANDISE

- Small scale can work well for small/niche charities
- Need to consider issues such as stock risk, who customers will be/who competitors are etc.
- Needs expertise as competing with big names/big budgets



Break

Session 2

WHAT ARE YOU FUNDRAISING FOR?

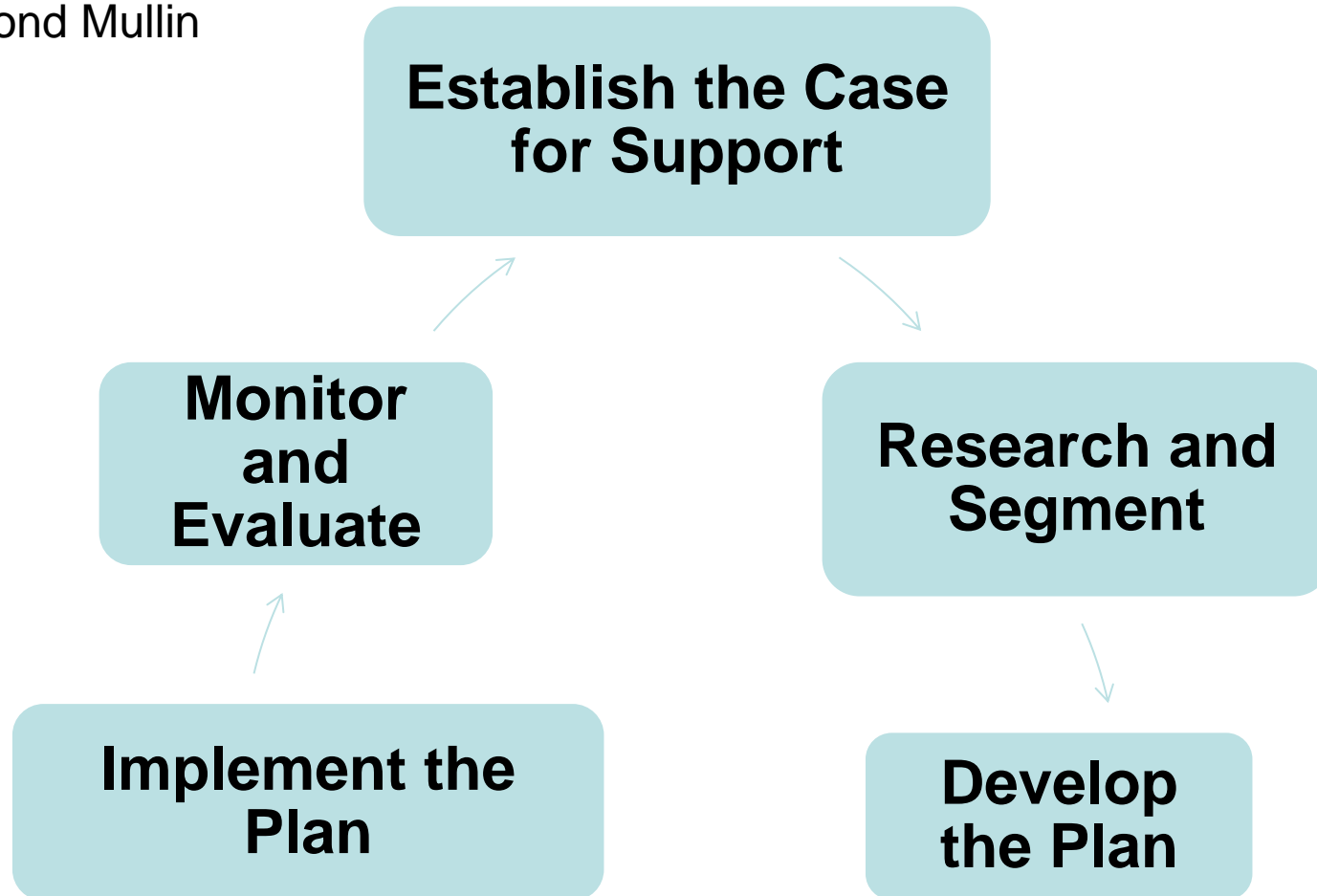
Excellent fundraising *for a better world*

**GIVING TO
HERITAGE** 
TRAINING FOR FUNDRAISING

 Institute of
Fundraising

Adapted Fundraising Cycle

Redmond Mullin



Fundraising Dictionary

- A -Full cost recovery
- B -Restricted income
- C -Unrestricted income
- D -Endowment funds

Session 3

DEVELOPING THE PLAN – ROLE AND STRUCTURE

FUNDRAISING PLAN STRUCTURE

- The need
- Audit
- Aims
- Objectives
- Strategy to achieve objectives
- Action plan
- Budget
- Monitoring and evaluation)

Session 4

DEVELOPING THE PLAN – AUDIT

THE AUDIT

- Internal
- External environment (STEEPLE)
- Competitors
- Market

External Audit - STEEPE

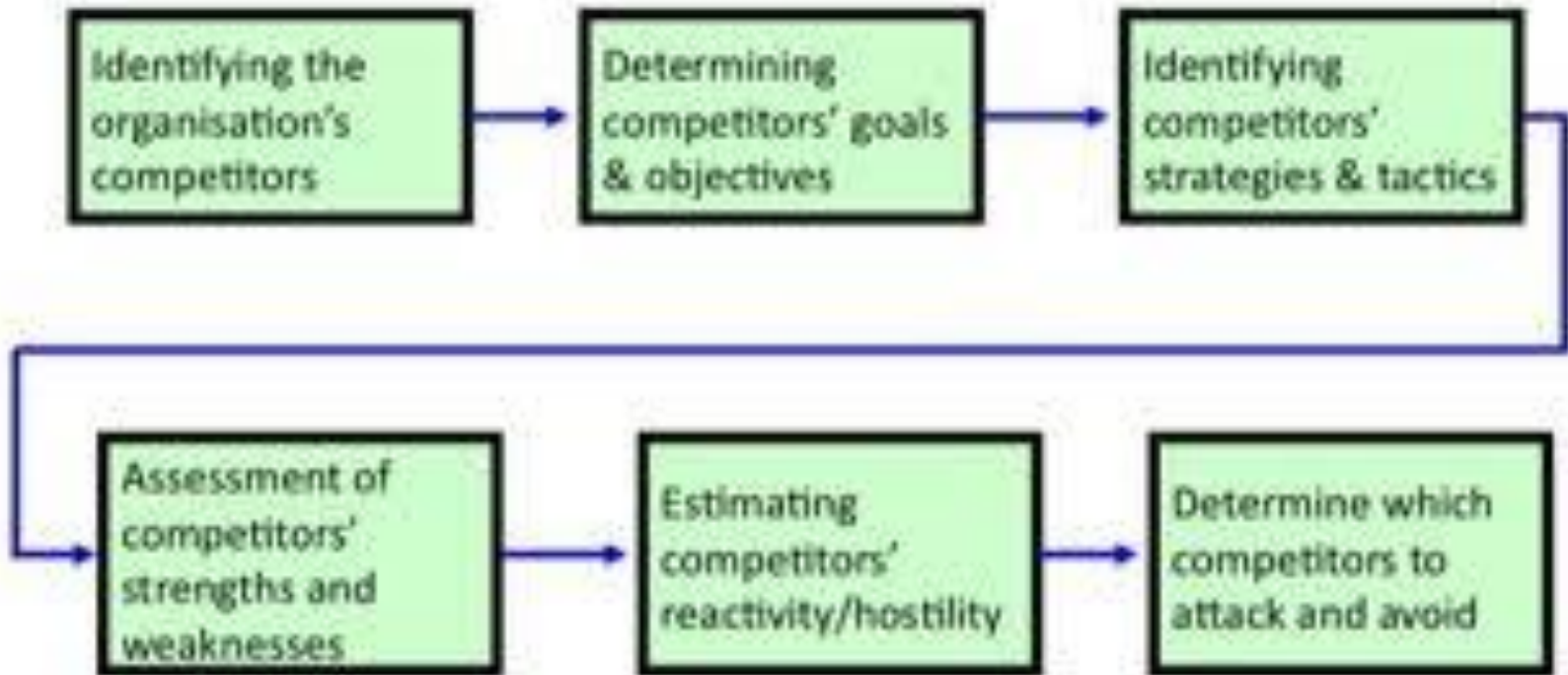
Wordle Applet



Technological Ethical Social
Legal Economic
Political Environmental

Competitors

Steps in Analysing Competitors



Competitor Analysis

Who to select

- Geographic Location/Proximity
- Type of heritage organisation
- Size of organisation
- Market leader

Internal Audit

- Past successes and failures
- People
- Governance & leadership
- Fundraising culture
- Policies & procedures
- Database & website
- Brand and reputation
- History and previous case for support examples

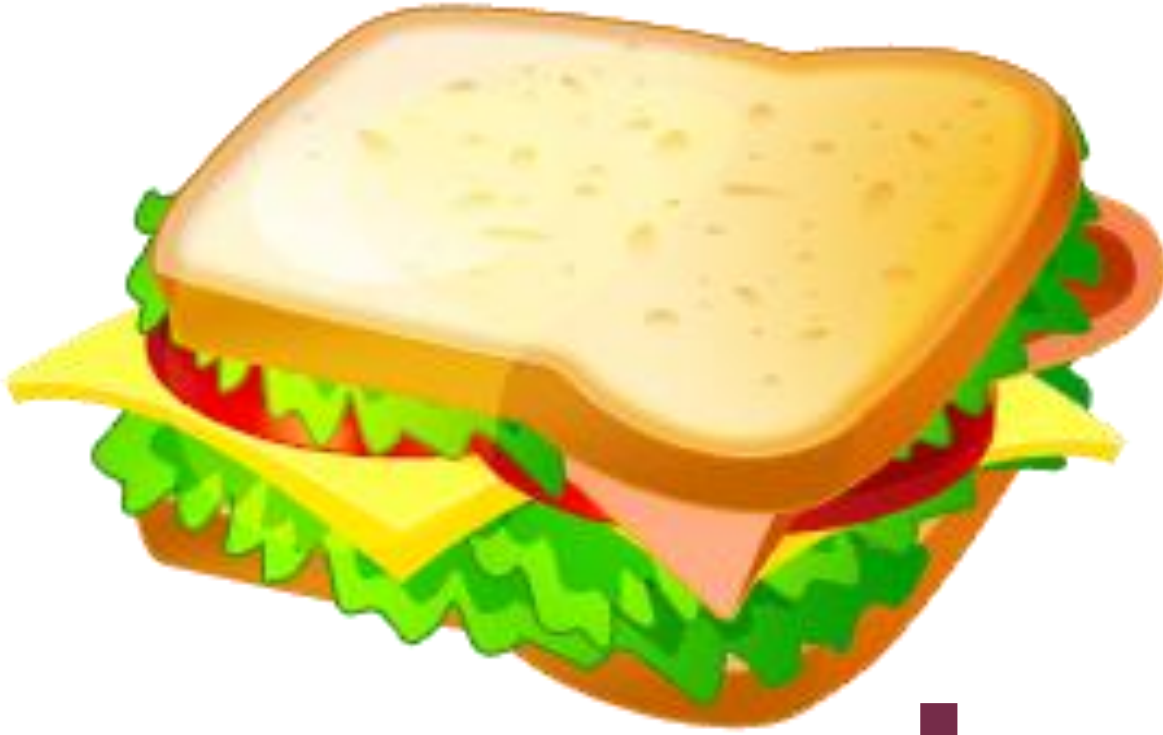
The Market

- What are the trends in fundraising?
- Are new forms of fundraising being successful?
- Are some forms of fundraising dying out?
- What kind of return on investment (ROI) are charities receiving for each type of fundraising?
- Are there any new legal, ethical or best practice issues ?

SWOT Analysis



- Summary of your audit research and findings
- Have you based your analysis on evidence?
- How significant is each factor?
- Which factors will most influence your plan?

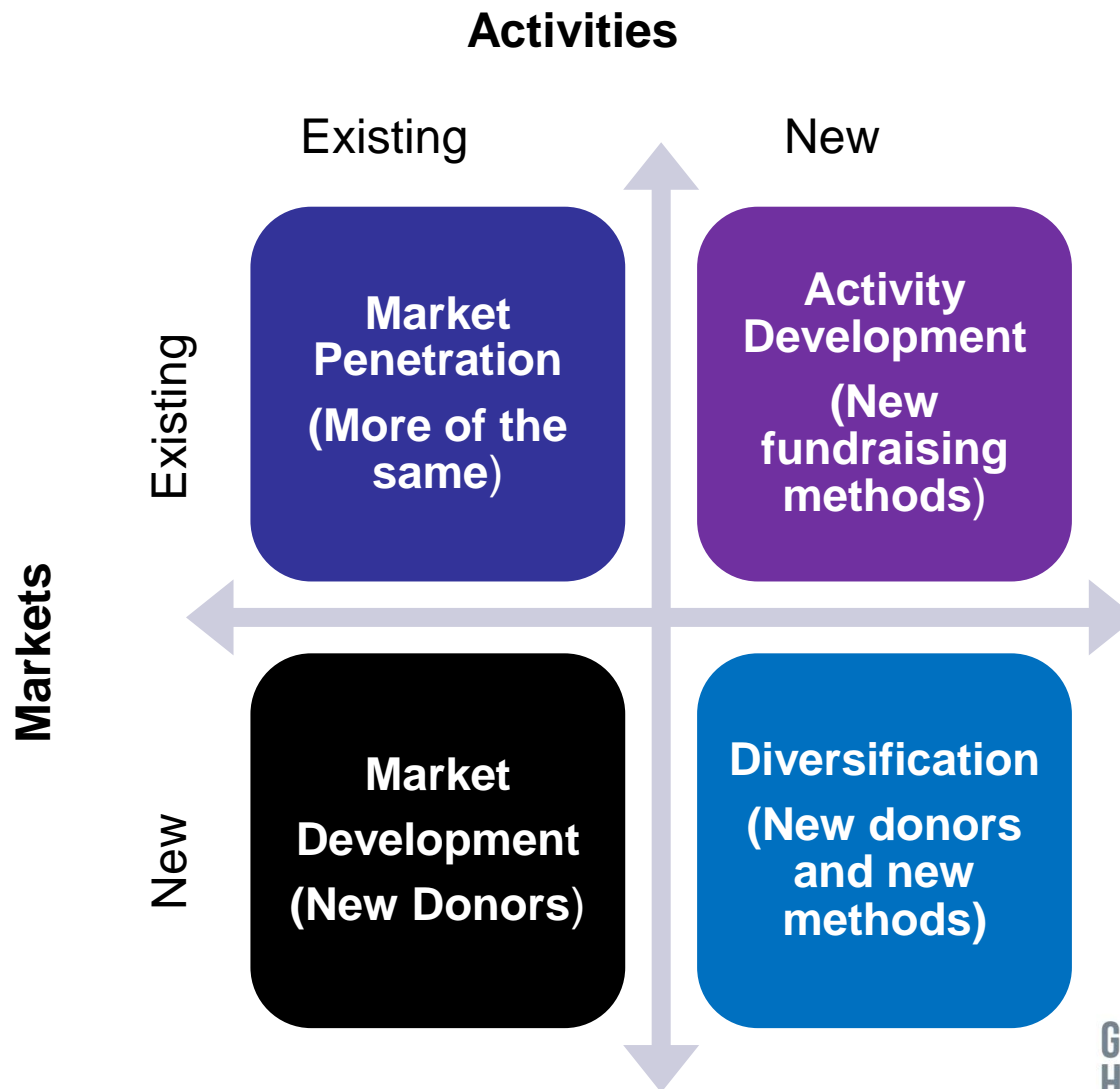


Lunch

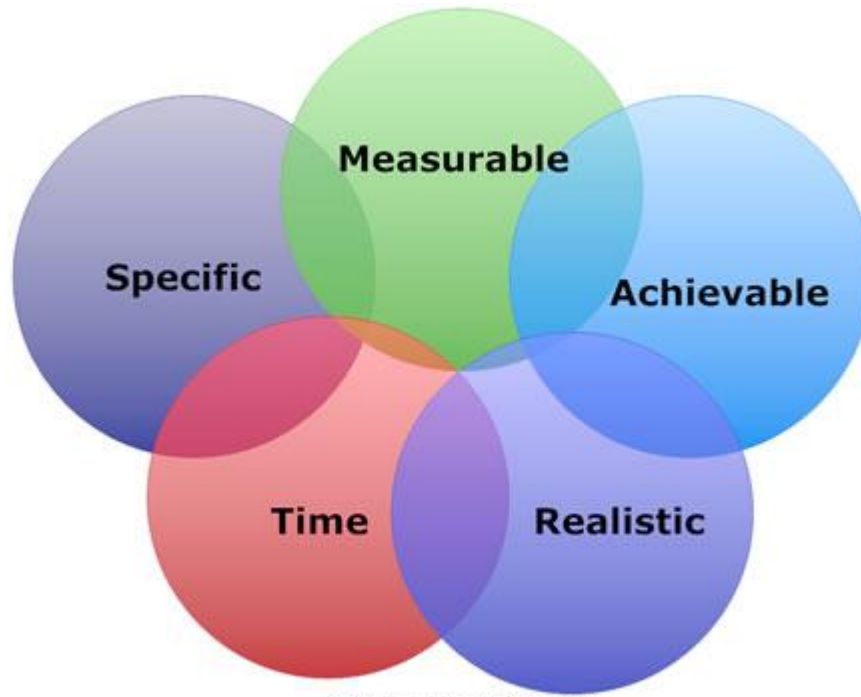
Session 5

DEVELOPING THE PLAN

Overall Direction - ANSOFF



SMART OBJECTIVES



www.learnmarketing.net

Or ...

- Strategic/specific
- Measurable
- Achievable/attainable /agreed/aligned
- Relevant/realistic
- Time bound/timely/timed

Objective	Measurement	Timescale	Responsibility

Session 6

IMPLEMENTING THE PLAN

GANTT Chart

#	Task	Assigned To	Department	Cost	Start	End	Dur	% Complete	2012							
									Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
					11/1/12	5/8/12	148									
1	Complete the plan				11/1/12	13/3/12	45	0								
2	Market Research				1/3/12	25/5/12	61									
2.1	Buying Data				1/3/12	25/5/12	61	0								
2.2	Putting data onto database				2/3/12	7/4/12	26	0								
3	Copy design				2/4/12	24/5/12	38									
3.1	Website design				2/4/12	21/4/12	15	0								
3.2	Design and Print Copy				12/4/12	24/5/12	30	0								
4	Milestone				24/5/12	24/5/12										
5	Testing of the mailings				2/4/12	26/5/12	40	0								
6	Prepare internal systems				1/5/12	3/7/12	45	0								
7	Milestone				3/7/12	3/7/12										
8	Run Adverts				1/4/12	26/6/12	61	0								
9	Text				12/4/12	14/6/12	45	0								
10	Email				1/5/12	14/6/12	32	0								
11	Mail				2/6/12	4/8/12	45	0								
12	Milestone				5/8/12	5/8/12										
13	Thank and Bank				1/5/12	9/6/12	29	0								
14	Update records				12/5/12	23/6/12	30	0								
15	Milestone				23/6/12	23/6/12										
16	Follow up non-responders				23/6/12	6/7/12	9									

Budgets

- Direct and indirect costs
- Fixed and Variable costs
- ROI (return on investment)
- LTV (lifetime value)

Likelihood	Consequences				
	Insignificant <i>(Minor problem easily handled by normal day to day processes)</i>	Minor <i>(Some disruption possible, e.g. damage equal to \$500k)</i>	Moderate <i>(Significant time/resources required, e.g. damage equal to \$1million)</i>	Major <i>(Operations severely damaged, e.g. damage equal to \$10 million)</i>	Catastrophic <i>(Business survival is at risk damage equal to \$25 Million)</i>
Almost certain (e.g. >90% chance)	High	High	Extreme	Extreme	Extreme
Likely (e.g. between 50% and 90% chance)	Moderate	High	High	Extreme	Extreme
Moderate (e.g. between 10% and 50% chance)	Low	Moderate	High	Extreme	Extreme
Unlikely (e.g. between 3% and 10% chance)	Low	Low	Moderate	High	Extreme
Rare (e.g. <3% chance)	Low	Low	Moderate	High	High

Monitoring & Evaluation





Break

1.

Excellent fundraising *for a better world*

Session 7

MAKE THE PLAN A REALITY

Excellent fundraising *for a better world*

**GIVING TO
HERITAGE** 
TRAINING FOR FUNDRAISING

 Institute of
Fundraising

Why do plans fail?

- Not created from a strong case for support
- Case based on assumptions and not facts
- Inappropriate fundraising methods selected
- Unrealistic costs , income or timescales
- Plan not followed through
- Weak risk assessment and controls
- Lack of buy-in and investment by decision makers
- Plan does not follow best practice

Reflection

The word "Reflection" is rendered in a bold, 3D, golden-yellow font. The letters are thick and have a metallic sheen. Below the text, a dark blue, glossy surface reflects the letters, creating a clear mirror image. The background is a gradient of blue, and the floor is a grid of blue lines that recede into the distance, creating a sense of depth. A bright blue light source from the bottom right creates a lens flare effect on the floor.

Post Course

Feedback is so important to the success of this programme.

To receive a copy of the slides by email (and maybe win a prize in our raffle later this year) please do complete the evaluation (the link will be sent to you)!

Sign up for further courses and support!

Contact Details

Giving to Heritage:

www.theheritagealliance.org.uk/gth/

The Heritage Alliance, Clutha House, 10 Storeys Gate, London SW1P 3AY.

Website: www.theheritagealliance.org.uk

Registered charity No 109479

Institute of Fundraising

Charter House, 13-15 Carteret Street, London SW1H 9DJ

Tel: 020 7840 1020

Website: www.institute-of-fundraising.org.uk

Registered Charity No: 1079573 in England & Wales, SC038971 in Scotland

**GIVING TO
HERITAGE**
TRAINING FOR FUNDRAISING

Institute of
Fundraising



Developing a Heritage Fundraising Plan



The
Heritage
Alliance