

Sharper Marketing and Fundraising For Smaller Charities

Are you spending too much time and money on activities that don't seem to generate enough income or result in more donations?

Do your efforts to win customers and donors lack focus and impact?

Are you so busy running your day-to-day operations that you spend little time thinking about marketing and fundraising?

These are common challenges that hold many organisations back from achieving their full potential - and in some cases actually cause them to fail.

That's why this results-focused, practical marketing and fundraising programme has been created specifically for smaller charities. It'll help give sharper focus and structure to your marketing and fundraising, with objective, specialist support and direction from experienced marketing and fundraising professionals.

Who it's for

Ambitious smaller charities will benefit from this programme.

How you'll benefit

You'll end up with:

- A practical, joined-up marketing and fundraising plan ready to be implemented immediately and that will act as your clear action plan for the year ahead and will help improve your organisation's performance;
- A process and tool kit for effective marketing and fundraising planning that you can use again and again;
- Marketing and fundraising skills which will last for rest of your life and give you increased confidence to make better marketing and fundraising decisions.

What it involves

Over the course of six tailored, one-to-one sessions, lasting 2.5 hours each and with one week between each, you'll develop a thorough marketing and fundraising plan for your organisation. You'll commit time between each session, so that you get the most out of the session itself. Knowledge will be transferred on an ongoing basis to enable you to make informed marketing and fundraising decisions yourself and to ensure sustainable effort and results going forward.

You'll use practical tools based on proven techniques to develop your plan, which will include:

- Clear objectives to be achieved (with measures of success);
- Strategies to achieve them;
- Positioning, branding and core messages to be communicated;
- Trends to be exploited;
- Customer/donor propositions and products/services/projects to be promoted;
- Key geographic markets and customer segments to be targeted and engaged;
- Recommendations on how to use your existing resources effectively;
- Competitor review and potential collaboration partners; and
- A calendar of relevant, prioritised, integrated, cost-effective promotional and fundraising channels and activities, with responsibilities allocated, timescales set and budgets set.

The schedule will be:

Session 1: *Research and Analysis*

We'll talk through how to develop a marketing and fundraising plan from beginning to end, using a planning tool which you'll work with over the following few weeks. You'll complete part of your plan a few days ahead of each session, so that practical advice can be given and we can discuss it in detail.

During this first session we'll explore what you want to achieve, who you're marketing to, the external and internal context that needs to be taken into account, who else is competing with your organisation and who you might collaborate with. We'll also identify your fundraising objectives, income target and previous fundraising activity. One of your tasks that will likely result from this session will be a research exercise with customers, donors and other relevant parties to gain a first-hand insight into their needs, behaviours and perceptions. This will also serve as a promotional campaign for the organisation.

Session 2: *Marketing Strategy*

During this second session we'll look at how to segment and select target customer groups, as well as the branding and positioning of your organisation. We'll also look at other elements such as product/service range, pricing and distribution channels.

Session 3: *Fundraising Strategy*

During the third session we'll look at prospect research – from resources to help you identify more prospects, to looking at your existing donor base – segmenting them to establish where your gifts are coming from. We will also give you the tools to enable you to review your potential fundraising projects and programmes, helping you to allocate fundraising targets and determine what will appeal to potential donors and sponsors.

Session 4: *Marketing Programme*

During this session we'll consider the most appropriate tools to use to reach and influence your target customers, so that you can create a calendar of targeted activities. This will include guidance on cost-effective solutions that will help you save your budget. We'll also look at how to set meaningful and precise milestones and performance indicators to monitor and measure your progress.

Session 5: *Fundraising Plan*

This session will deal with resource allocation - how you can best manage fundraising within your existing resources. Building on your tasks from session 3, we will help you to identify

methods of reaching your donors, helping you to create a fundraising activity calendar – from approaches to communication. We'll also give you tools to measure success and regularly assess progress.

Session 6: Preparing for Implementation

Ahead of this session you'll complete the remainder of your marketing and fundraising strategy, so that we can finalise it. You'll be given clear direction on how to implement the activities in your plan.

There will be a follow-up telephone call to check on progress within a few weeks. And if appropriate, we can organise a cost-effective ongoing support service to keep you on track too.

Where and when it'll take place

The sessions will be held at a time and place that suits you and your organisation. The programme should take six or seven weeks to complete.

Who you'll be working with

Activate Fundraising provides tailored fundraising for a range of organisations – including arts & heritage; education and the voluntary sector – working with clients to provide fundraising suited to their specific needs. By taking a proactive, hands-on approach, Activate achieves tangible results and leaves clients with a legacy of skills.

Heather Stewart (Activate Fundraising) has been a fundraiser for over 15 years, with specific experience in major donor and trust fundraising; sponsorship; and donor stewardship. Her clients include small to medium-sized charities and arts organizations in the UK, where she has worked with them to develop comprehensive fundraising strategies; helped them to plan their resources effectively and at a low cost; provided fundraising training, governance advice, and hands-on fundraising. She is a member of the Institute of Fundraising.

Strategy Point is a pragmatic, strategic marketing consultancy that helps small and medium-sized organisations grow by focusing them on customer demand generation. It works across sectors, bringing fresh, customer-focused thinking.

David Wallace (Strategy Point) has over 20 years' experience in planning, developing and executing marketing strategy for organisations of all sizes in the private, public and voluntary sectors. He has significant experience in corporate social responsibility from the commercial organisation's perspective. His track record includes several awards, including being voted UK Marketing Director of the Year. With an MBA from London Business School, he is able to take a broad business perspective. He is a Fellow of the Chartered Institute of Marketing and a Marketing Society Business Leader. David is also a volunteer aftercare advisor for the Prince's Scottish Youth Business Trust and a public speaker for Marie Curie Cancer Care.

David and Heather have cooperated successfully on several projects in the past, including for the National Museums of Scotland, Edinburgh Napier University and Scottish Dance Traditions.

What clients say

Heather worked with us to create a robust fundraising strategy and prepare initial bids. She left us with the right tools to set about achieving our goals and we are progressing very well.
Executive Director, Children's Charity

We were absolutely delighted with David's practical, sound advice which gently jolted the organisation into thinking in 21st century marketing mode.
Chairman, Dance Charity

How much it'll cost

The price for this programme is £1,950.

What to do next

To get started, please contact:

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