

# Welcome!

## How to ensure you are set up for fundraising success

Richard Sved, DSC Associate

Please settle in and we'll be kicking off shortly...



# Welcome from the Benefact Group

Our common purpose is to **give** all available profits **to good causes**



\*DSC – The guide to UK Company Giving 2023-24



# How we give – the Benefact Group



1. **Small donations** to charities doing every possible kind of good
2. **Partnership funding** to charities doing amazing work really important to our customers and communities
3. **Charity support** enabling charities to be more successful and sustainable

Visit [www.movementforgood.com](http://www.movementforgood.com)  
today to nominate



# How to ensure you are set up for fundraising success

Richard Sved, DSC Associate, February 2025



# How to ensure you are set up for fundraising success

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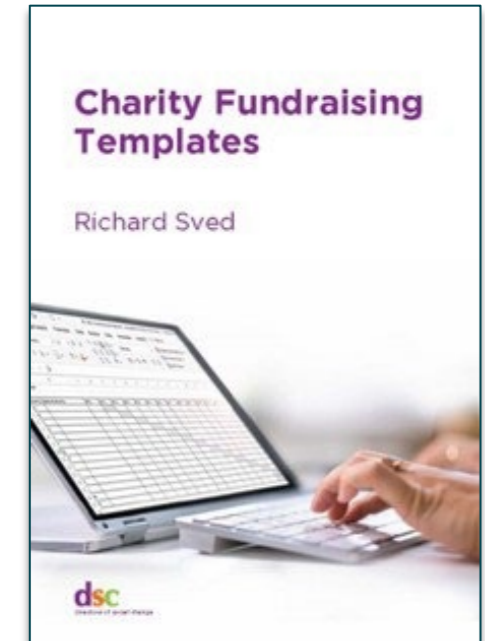
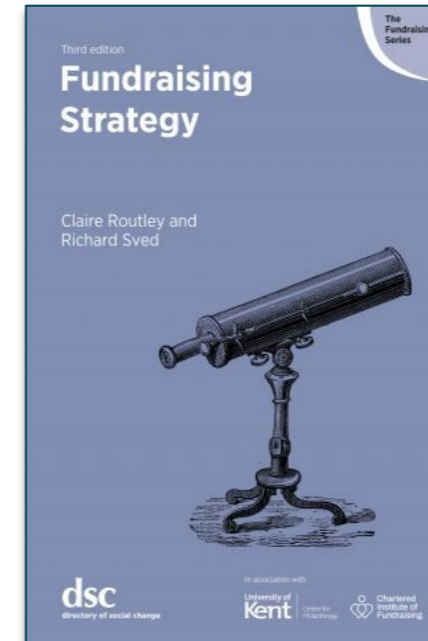
## What we will cover in this session:

- Thinking strategically
- Getting organisation-ready
- Getting your colleagues on board

# How to ensure you are set up for fundraising success

## Firstly, a bit about me:

- Charity sector specialist, focusing on fundraising, governance, communications, strategy
- DSC Associate
- Founding director of 3rd Sector Mission Control
- Fundraiser, trustee, volunteer, mentor, consultant, author, enthusiast



**3rd Sector Mission Control**  
Focus | Strategy | Fundraising

**dsc**  
directory of social change

# Thinking strategically

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## Link your fundraising strategy to your organisational strategy

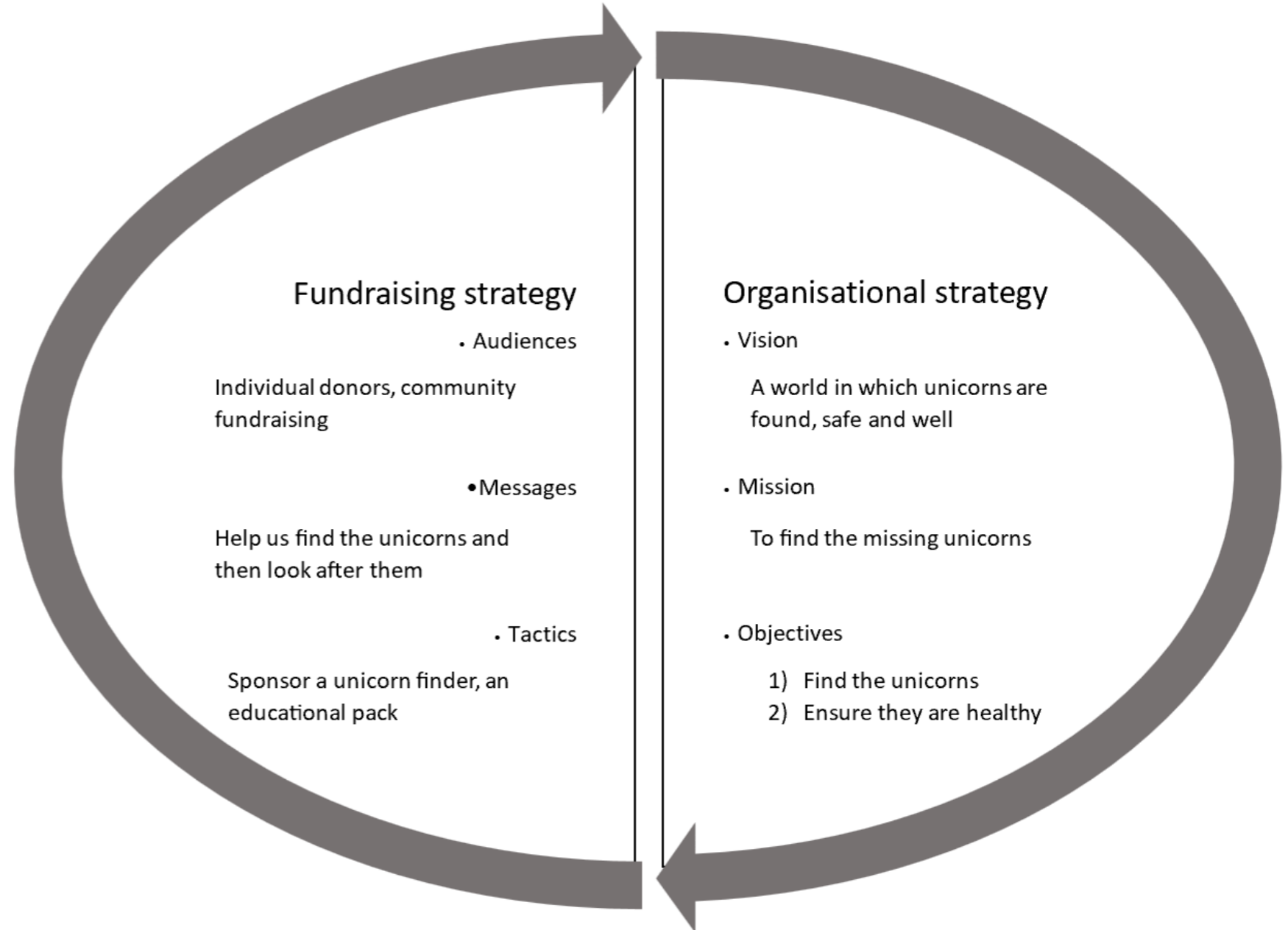
- Fundraising strategy: what money your organisation needs to raise and how
- Organisational strategy: what your organisation does with the money and why

Your fundraising needs to be about helping your charity to achieve its mission.



# Thinking strategically

## Link your fundraising strategy to your organisational strategy





# Thinking strategically

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## Set out your fundraising planning process

- Audit: Where are we now?  
(current fundraising performance, internal strengths and weaknesses, external environment, opportunities and threats)
- Objectives: Where do we want to be?
- Strategy: How will we get there?
- Tactics: What will we do to get there?


	Our answers
Where we are now	<ul style="list-style-type: none"><li>•</li><li>•</li></ul>
Where we want to be	<ul style="list-style-type: none"><li>•</li><li>•</li></ul>
How we will get there	<ul style="list-style-type: none"><li>•</li><li>•</li></ul>
What we will do to get there	<ul style="list-style-type: none"><li>•</li><li>•</li></ul>

# Thinking strategically

## Think about your fundraising portfolio

- Which income streams are doing well?
- Which should you invest in?

		Products	
		Existing	New
Markets	Existing	Market penetration	Product development
	New	Market development	Diversification



### Examples:

- Ansoff's Growth Matrix: developing or diversifying your fundraising products and/or audience
- Boston Matrix: financial return against growth potential
- Return on Investment: calculated, in simple terms, by dividing income by expenditure

# Thinking strategically

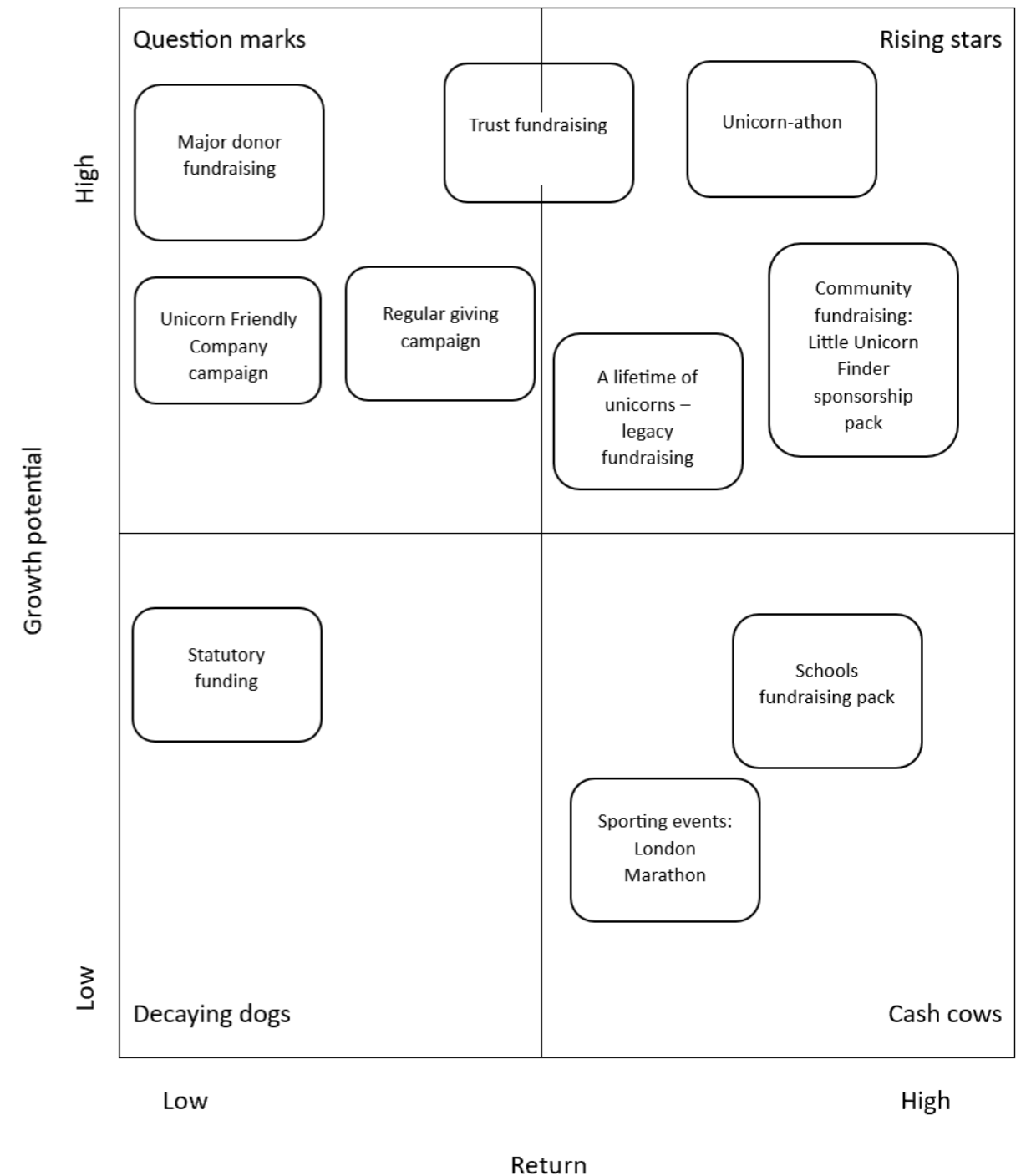
## Ansoff Matrix example: Find the Unicorns

		Products	
		<i>Existing</i>	<i>New</i>
Markets	<i>Existing</i>	Asks for occasional gifts, primarily targeted to parents of primary school children – could increase budgeted spend or make asks more effective	Development of a regular-giving product, primarily targeted to parents of primary school children
	<i>New</i>	Asks for occasional gifts to a new audience of grandparents of primary school children	Development of a regular-giving product to a new audience of grandparents of primary school children



# Thinking strategically

## Boston Matrix example: Find the Unicorns



# Thinking strategically

## Return On Investment example

Income stream	Income from this income stream (I)	Expenditure on this income stream (E)	ROI (I/E)
Fundraising from grant-making charities	£100,000	£30,000	3.33
Cold (i.e. new to the charity) direct mail appeal	£6,000	£8,000	0.75
Marathon Challenge event	£120,000	£80,000	1.5

# Getting organisation-ready

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## Set out your inputs, outputs, outcomes and impact

- Inputs: money, staff, resources, time
- Outputs: activities, services, products you provide
- Outcomes: changes, benefits, learning, other effects that happen as a result of your organisation's activities, services or products
- Impact: the change, effect or benefit your activities or services have on wider society

# Getting organisation-ready



## Set out your inputs, outputs, outcomes and impact: Find The Unicorns example

Term	Our answers
Inputs	<ul style="list-style-type: none"><li>£250,000 in year 1, rising to £500,000 by year 3 to fund staff, to run the office and to carry out all of the organisation's unicorn-finding activities.</li></ul>
Outputs	<ul style="list-style-type: none"><li>Ten unicorn-finding expeditions by year 3</li><li>Three unicorn-protection programmes operating by year 3</li><li>One rewilding programme in development by year 3</li></ul>
Outcomes	<ul style="list-style-type: none"><li>More detailed understanding of locations of unicorns globally</li><li>Growing understanding of how to protect unicorns through programmes</li><li>Changed behaviour in areas local to unicorn populations, e.g. reduction in hunting activities</li></ul>
Impact	<ul style="list-style-type: none"><li>Arrested decline in unicorn numbers initially and their growth globally in years 3 to 5.</li></ul>

# Getting organisation-ready

## Consider your fundraising processes involved

Before you undertake any type of fundraising, you need to consider the processes involved in order for it to run smoothly.

<b>Fundraising method</b>	<b>Some key processes to consider</b>
<b>Trusts and foundations</b>	How will information on each funder be recorded? How will you know when to apply to each? How will you gather internal data from your organisation (for example, budgets and programme data) needed to support applications and reports to funders? How will you know when to complete relevant reports for the funder and what needs to be in each report? What is the internal sign-off process for applications and proposals?
<b>Direct marketing</b>	Who will need to be briefed internally about communications? How and when will you access donor data? Who needs to sign off communication with supporters and potential supporters? How and when should the messages be signed off? Are you set up to process Gift Aid? How will you record donor communication preferences? How will donors opt in or out of communications?
<b>Major donors</b>	How will you record data about potential donors (in a legal and ethical way)? How will you record who is responsible for working with each donor? How will you carry out due diligence on prospective donors?
<b>Legacy giving</b>	Do you have processes and documents in place to record non-financial actions, such as a commitment or pledge to leave a gift in the future? How will you ensure that gifts received are dealt with in the appropriate legal manner?
<b>Events</b>	How will donors buy tickets or sign up to events? Is there a process for risk assessment? How will volunteers and staff be briefed about their roles in an event? What post-event actions need to be put in place (for example, to collect sponsorship money)?



# Getting organisation-ready

## Consider your fundraising processes involved

<b>Fundraising method</b>	<b>Some key processes to consider</b>
<b>Volunteer fundraising</b>	What processes do you need, for example, for cash handling, data protection or insurance? What about collection box management and procedures, digital payment methods and volunteer management?
<b>Corporates</b>	How will you research which companies you might approach? How will you decide which companies to actually approach? How will you record the various relationships your staff and volunteers have with representatives of the companies? How will you ensure due diligence is carried out on a company?
<b>Digital fundraising</b>	What platforms do you use? How do you collect data and handle permissions? Can you set up Gift Aid for digital donations? Who signs off the digital fundraising messages?
<b>Interaction with other teams/processes</b>	
<b>Finance</b>	What type of income do you have – cash, credit card payments, direct debits, cheques, international currency, shares, gifts via an intermediary like Charities Aid Foundation? How often do you bank and reconcile (i.e. check internally that your income figures are aligned)? How do you manage donation returns? How often do you claim Gift Aid?
<b>Customer and supporter care/engagement</b>	How do you thank your supporters? How quickly do you respond to enquiries? How do you respond to complaints?

# Getting organisation-ready

## Address your fundraising risks

- Compliance
- Ethical
- Financial
- Logistical
- Relational
- Reputational
- Strategic

No.	Risk event	Cause(s)	Impact	Owner	Score			Actions
					Likelihood	Impact	Total	
1	Garden party event called off	Bad weather	Loss of income	Fundraising manager	3	4	12	Make marquee available
2								

# Getting your colleagues on board

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## Involve your colleagues at every step

- Make your colleagues feel genuinely involved in the process of developing your fundraising strategy and in fundraising itself
- Involve them in the other areas mentioned in this webinar
- Get their opinion, listen to it, and feed back



*My AI colleagues*

# Getting your colleagues on board

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## Get leadership buy-in

Three 'types' of knowledge that might be important to them and how you will cater to them:

1. Strategic (understanding broader organisational goals)
2. Relational (understanding the key players in the decision and how they might react)
3. Knowledge of organisational norms (for example, how the organisation presents information)



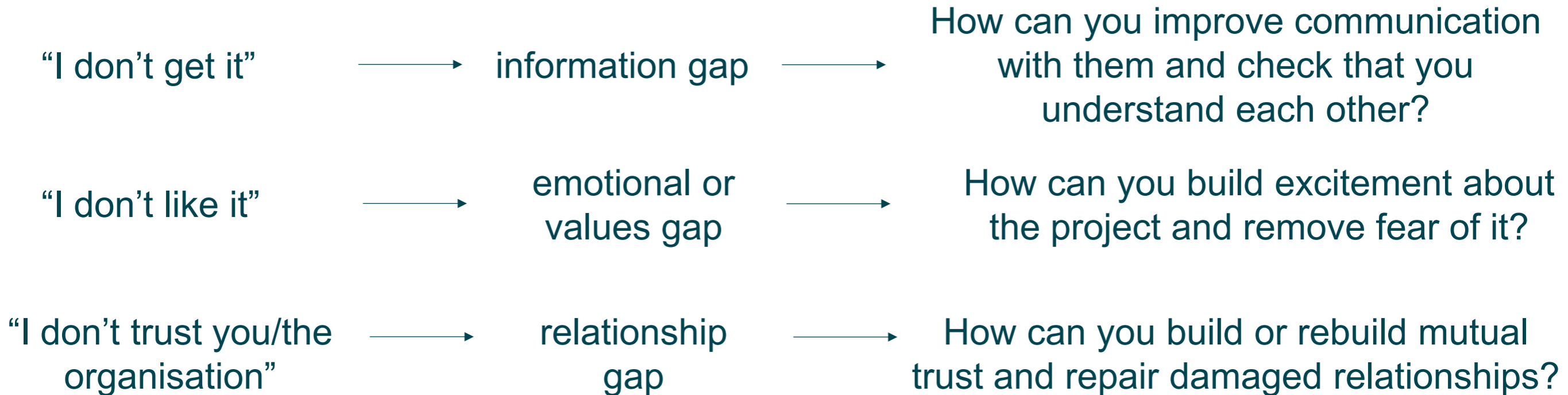
*More AI colleagues*

# Getting your colleagues on board

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## Understand how colleagues might react to change.

Why might you encounter resistance around fundraising?



# Getting your colleagues on board

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## Involving non-fundraising colleagues

*“I think there needs to be a **distinction between providing insight and providing opinion**. Getting insight from wide range of places is key. As is taking a strategic approach to who can add what at different stages of fundraising relationship. But not every opinion is equal here!”*

- David Burgess

*“Do this early on, avoid jargon, **genuinely listen** so not just a token gesture”*

- Tahera Mayat

*“THIS IS ESSENTIAL! **Everyone needs to be involved with & understand fundraising**. They do with finance (setting budgets etc) or HR (recruiting teams etc). Planning together, sharing successes & **time together is key.**”*

- Lucy Stone

*“We’re trying to build a more engaged community with our supporters online...simply having other perspectives & ideas is an incredibly powerful tool for progress in so many areas, including fundraising. **You don’t always see the picture when you’re in the frame.**”*

- Cathie O’Farrell

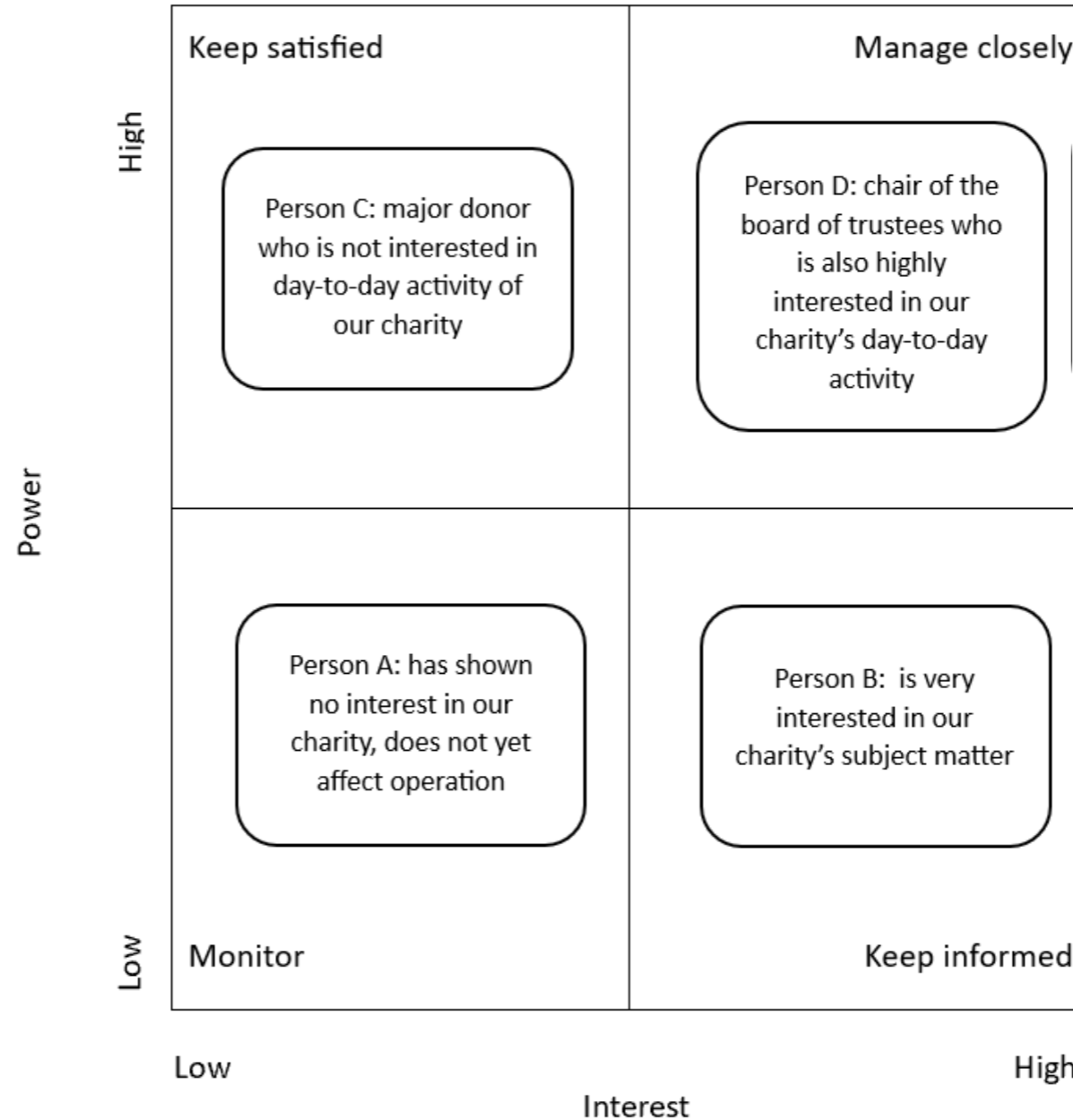
*“Always start by listening. Ask all of your stakeholders how they think they could best contribute to fundraising – making it clear that money is neither the first goal or the last... **reach is first, and charitable outcomes are last. Money is the how in between.**”*

- Nest + Grow



# Getting your colleagues on board

## Think about your stakeholders



# Final summary slide of all the tips

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## Think strategically

- Link your fundraising strategy to your organisation strategy
- Set out your fundraising planning process
- Think about your fundraising portfolio

## Get organisation-ready

- Set out your inputs, outputs, outcomes and impact
- Consider your fundraising processes involved
- Address your fundraising risks

## Get your colleagues on board

- Involve your colleagues at every step
- Get leadership buy-in
- Understand how colleagues might react to change



# Thank you!

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## Any questions?

<http://www.dsc.org.uk/cft>  
code **SVE15** for 15% off  
Until end of May 2025



[www.dsc.org.uk](http://www.dsc.org.uk)

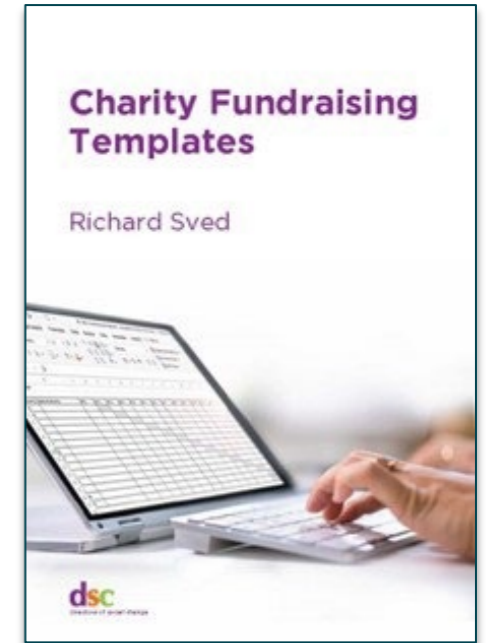
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## And finally... Five exciting things to leave you with

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1. Attend future webinars
2. Register your interest in one of our regional, face-to-face, Fundraising forums
3. Are you a founder? Register your interest to attend one of our Founders forums
4. For Impact: The Charity Podcast
5. Join our Movement for Good Network

# 1. Attend future webinars

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Webinar

**Fundraising: How to improve fundraising opportunities with AI**

03 April 2025

[Terms apply](#)

Webinar

**Maximising success: What's hot in fundraising right now**

22 May 2025

[Terms apply](#)

Webinar

**Trusts and Foundations: How to write a winning application**

3 July 2025

[Terms apply](#)

Webinar

**How to secure corporate fundraising**

9 October 2025

[Terms apply](#)

Webinar

**Storytelling: How to attract and nurture donors**

13 November 2025

[Terms apply](#)

Register online at  
<https://benefactgroup.com/charity-support/>

## 2. Register your interest in one of our face-to-face fundraising forums

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Our in-person forums bring together fellow fundraisers for a half day of networking, learning, and support. Hear from a sector expert on a key subject impacting the charity/fundraising sector. Find out more about the valuable support The Benefact Group provides to charities and other charitable organisations, including our current offering and any exciting new initiatives. Connect with other passionate fundraisers, share best practices and leave feeling energised and better equipped to make a greater impact.

- 20 March 2025 - Gloucester
- 27 March 2025 - London
- 15 May 2025 - Manchester
- 11 June 2025 - Dublin
- 18 September 2025 - Newcastle-Upon-Tyne
- 02 October - Birmingham
- 06 November – Gloucester
- 20 November – London

Register your interest at <https://benefactgroup.com/charity-support/>



### 3. Register your interest in one of our Founders forums

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We know that being a charity founder can be a challenging and multifaceted role. Balancing HR, finance, strategy, legal, innovation, culture, and managing trustees, staff, and beneficiaries can be overwhelming.

Which is why we are launching our Founders forums in which you can look forward to:

- **Connect:** Network with fellow founders, share challenges, and celebrate successes.
  - **Share:** Learn from peers and gain insights into fundraising, operations, and program development.
  - **Inspire:** Join a supportive community that drives positive change.
  - **Teach:** Help us understand how we can support you and other founders to create impactful change.
- 
- 26 March 2025 - London (full)
  - **14 May 2025 - Manchester**
  - **12 November 2025 – London**

To register your interest please email [fundraising@benefactgroup.com](mailto:fundraising@benefactgroup.com) with the subject 'Founders Forum'

## 4. For Impact: The Charity Podcast

### Episode 4: The funding freeze: What's going on?

The funding environment is in dire straits. With chronic underfunding for years, the sector is turning to the grants and trusts world only to be faced with record numbers of grant funders pausing, closing early or even spending out. What's going on, why is this happening and how are we going to survive it?

Available on your favourite podcast platform or on our charity support hub – just scan the QR code.



## 5. Join our Movement for Good network

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*“The Movement for Good Network brings together a group of special charities to learn, share feedback and gain access to extra opportunities and support. We want to get to know your fantastic organisations better and do more to support you!”*



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# Contact details



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GROUP**

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Focus | Strategy | Fundraising

**Richard Sved - [www.3rdsectormissioncontrol.co.uk](http://www.3rdsectormissioncontrol.co.uk)**  
**<https://www.linkedin.com/in/rsved/>**

# Thank you for listening

