

How to Create a Fundraising and Marketing Strategy

Part One: Presented by Mal Warwick
International Workshop on Resource Mobilisation
Bangkok, May 6-7, 2006

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Warning!

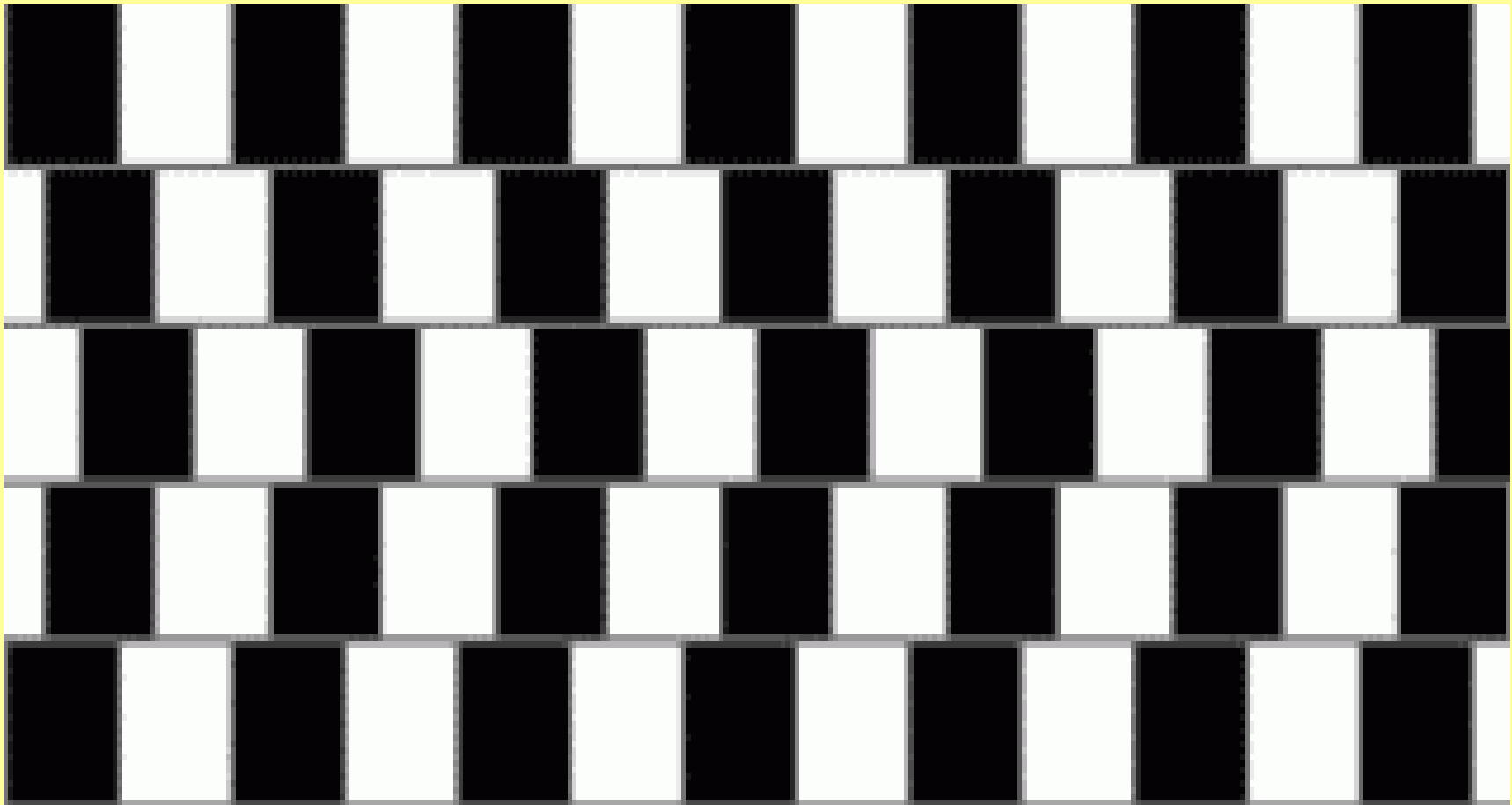
Fundraising and marketing are full of surprises. Things aren't always what they seem. The processes don't always work in expected ways. So, get ready for a counterintuitive experience.

Is the blue wall behind, or on the side?



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Are the parallel lines horizontal?



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So, are you ready now to dive into fundraising and marketing strategy without preconceived ideas?

What strategy is not

- Not how to meet your funding target
- Not just “a way to do things”
- Not techniques such as advertising, direct mail, special events
- Techniques are *tactics*

What strategy is

- **Strategy vs. tactics**
 - Strategy = “win the war”
 - Tactics = “win the battle”
 - No strategy = muddle
- **The concern of the commander-in-chief, not captains and majors**
- **How to deploy all your resources**
- **The Big Picture, not the small stuff**

A 6-phase process

- 1) Research and analysis**
- 2) Setting strategy**
- 3) Positioning**
- 4) Planning and budgeting**
- 5) Implementing the plan**
- 6) Evaluating, correcting course**

1) Research and analysis

Research and analysis

- **Market research**
- **SWOT Analysis**
- **Feasibility study**
- **Unique Competitive Advantage**

Market research

- **Formal**
 - **Surveys**
 - **Focus groups**
 - **Interviews**
- **Informal**
 - **Random surveys**
 - **Questionnaires**
 - **Donor consultation groups**

SWOT Analysis

Strengths	Weaknesses
Opportunities	Threats

Exercise

SWOT Analysis

Feasibility study

- **Ideally, conducted before each campaign**
- **To investigate the capacity and willingness of potential donors**
- **To set a realistic campaign goal**
- **Worthwhile for its own sake, because donors feel involved, flattered**

Unique Competitive Advantage

- What is the one thing your organization does better than every other organization in the world?
 - As defined by something you **do**?
 - **Where** you do it?
 - For **whom** you do it?
 - How **much** of it you do?
 - **How** you do it?
 - **How well** you do it?

Exercise

What is unique about your organization?

2) Setting strategy

Setting strategy

- **Growth** – build the donor base
- **Involvement** – make donors active
- **Visibility** – raise public profile
- **Efficiency** – lower the fundraising ratio
- **Stability** – ensure long-term survival
- **G + I + V + E + S = GIVES**

The Six Gifts

Money

Time

Goods

Information

voice

Influence

Five Strategies

- **Select one primary strategy**
- **One secondary strategy**
- **You cannot pursue all five simultaneously**
- **Some strategies are mutually exclusive**

Growth

- **Dynamic**
- **Audacious goals, bold leadership**
- **Low entry-level gift**
- **Direct mail acquisition is common**
- **Environmental groups, animal rights organizations, anything new**
- **Broad reach, substantial impact**

Involvement

- **Rewarding**
- **Concerts, exhibitions, volunteer programs, grassroots lobbying**
- **Membership, telephone fundraising, donor newsletters, welcome packages**
- **Museums, performing arts organizations, public policy groups**
- **Public participation**

Visibility

- **Familiar**
- **Public opinion, many stakeholders**
- **Brand identification**
- **TV/radio, special events, cause-related marketing, publications**
- **Medical research organizations, emergency relief charities**
- **Broad public awareness, widespread name recognition**

Efficiency

- **Resourceful**
- **Cost-conscious, well-established**
- **Legacies, major gifts, foundations, corporations, monthly giving, workplace giving, government grants**
- **Human service agencies, hospitals**
- **Frugal management**

Stability

- **Enduring**
- **Unchanging values, unending needs, broad financial base**
- **Endowment, diversified fundraising, monthly giving**
- **Universities and colleges, residential care facilities**
- **Sound finances, cash reserves, long-term perspective**

The **GIVES** model . . .

- **An approach, not a formula**
- **A systematic method of analysis**
- **A way to allocate resources**
- **Most of all, a way to devise the right strategy to match your **unique** mission, goals, resources, opportunities . . . at this stage of your development**

Exercise

**“What is the right fundraising strategy
for your organisation?”**

Exercise

“Selecting a secondary strategy ”

Time for questions now!

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