

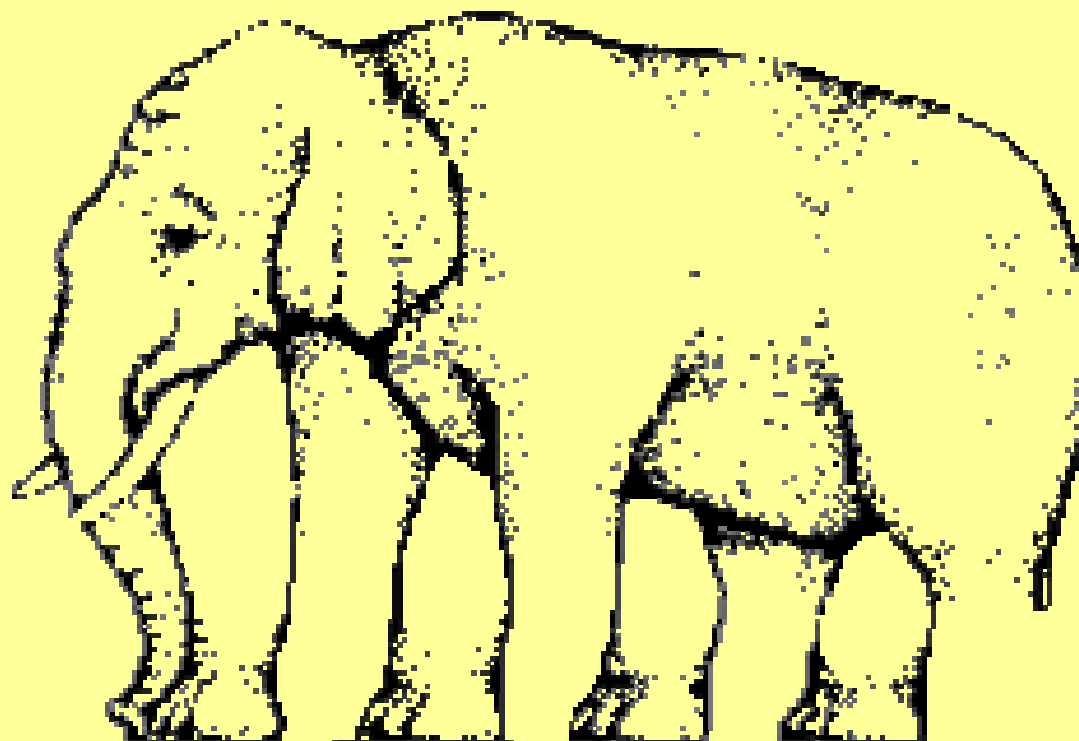
How to Create a Fundraising and Marketing Strategy

Part Two: Presented by Mal Warwick
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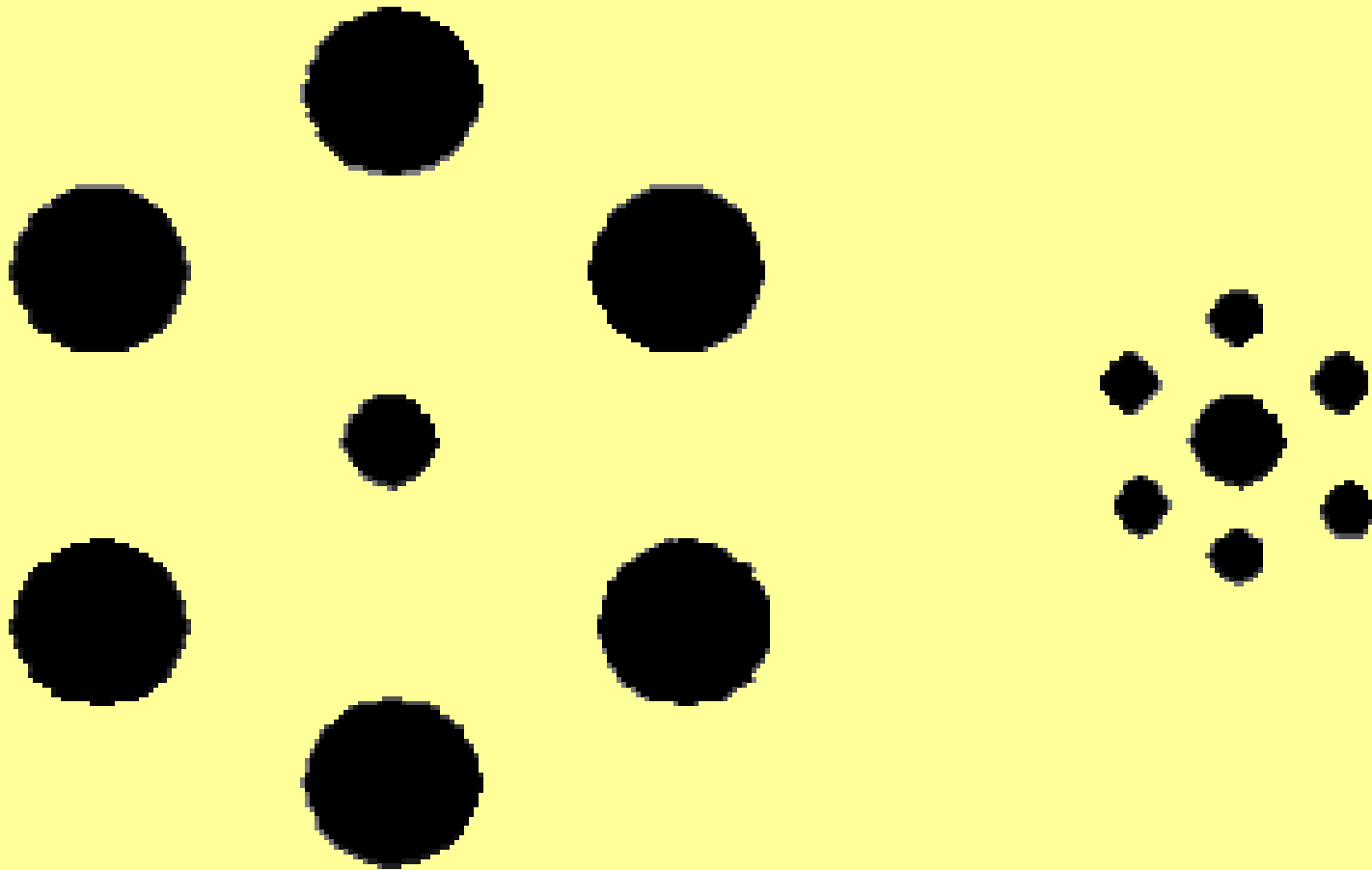


How many legs does this elephant have?



International Workshop on Resource Mobilisation, 05-06

Which of the central circles is bigger?



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**

3) Positioning

Before you write any appeals

- **Clarify vision and mission**
- **Review organisational identity**
- **Position the organisation**
- **Write the case for giving**

People respond to vision and mission

- **Vision:** How will the world be different if you receive all the resources you need to fulfill your vision?
- **Mission:** What is the essence of your work to advance toward your vision?

Exercise

“What is your vision?”

“What is your mission?”

Review your organizational identity

- **Your organization's name**
- **Your logo, typeface, graphic “look,” imagery**
- **Your tagline or strapline**
- **Your Unique Competitive Advantage**
- **“The elevator rap”**

Exercise

“The elevator rap”

Writing the case for giving

- Describe how you will fulfill your mission and advance your vision if you receive the necessary funds
- Describe how the gifts you receive will help you achieve the specific objectives of your campaign
- In other words, establish and link between your **donors** and your **beneficiaries**

Elements in the case for giving

- Prepared for each fundraising campaign
- And for each major donor
- Contents ought to include the following:
 - Both general and specific information
 - The budget, either for the particular campaign or for the organization
 - Description of the sources of funds
 - Timeline for completion of the work involved
 - A specific Ask (or at least a range of Asks)
 - Information about donor benefits, including recognition

Exercise

When you get back to the office . . .

Write YOUR case for giving

4) Planning & budgeting

Planning & budgeting

- **Assess available resources**
- **Target market opportunities**
- **Select fundraising techniques**
- **Determine resource needs**
 - **Training**
 - **Staffing**
 - **Capital**

Fleshing out the plan

- **Set three- or five-year goals**
- **Set annual objectives**
- **Match objectives with techniques**
- **Assign responsibilities**
- **Establish benchmarks**
- **Agree on evaluation criteria**

5) Implementing the plan

Implementing the plan

- **Leadership buy-in: board and staff**
- **Internal and external messaging**
- **Senior staff participation**
- **Program and support staff**
- **Training in fundraising**
- **Patience and persistence**

6) Evaluating progress

Monitoring your progress

- **Reporting benchmarks monthly**
- **Reviewing progress semiannually**
- **Evaluating performance annually**
- **Correcting course as necessary**

Two fundamental numbers

- **Acquisition Cost**
- Recruiting new donors usually costs money
- Average net cost to recruit one new donor
- **Long-Term Value**
- Many donors give again and again
- Average net value over 3, 5, or 10 years

Pop Quiz!

You have mailed recruitment (acquisition) letters at a cost of \$10,000. 200 people responded, sending gifts averaging \$40. All were new donors. What was your Acquisition Cost?

Pop Quiz!

Over 5 years, those 200 donors contributed an average of 3 times per year. Their gifts averaged \$60. The cost of securing these gifts was \$300. What is the Long-Term Value of those donors over 5 years?

Keep in mind . . .

“If you don’t know where you’re going, you could end up somewhere else.”

—Yogi Berra, American philosopher

Time for questions now!

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