Developing a Fundraising Strategy You Can Actually Use

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Apollo Fundraising

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museum development
south east

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Without a strategy, fundraising can be:

- Reactive rather than proactive
- Unpredictable
- Static or declining rather than growing
- Mission distracting rather than Mission-enabling

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A savvy gambler looks at:

- The Course
- The Field
- The Conditions
- Recent form
- Comparable Events
- Risk versus Reward
- Not too many, not too few

A savvy fundraiser looks at:

- ~~The Course~~ The project/activity
- ~~The Field~~ The funding streams
- The Conditions
- Recent form
- Comparable Events
- Risk versus Reward
- Not too many, not too few

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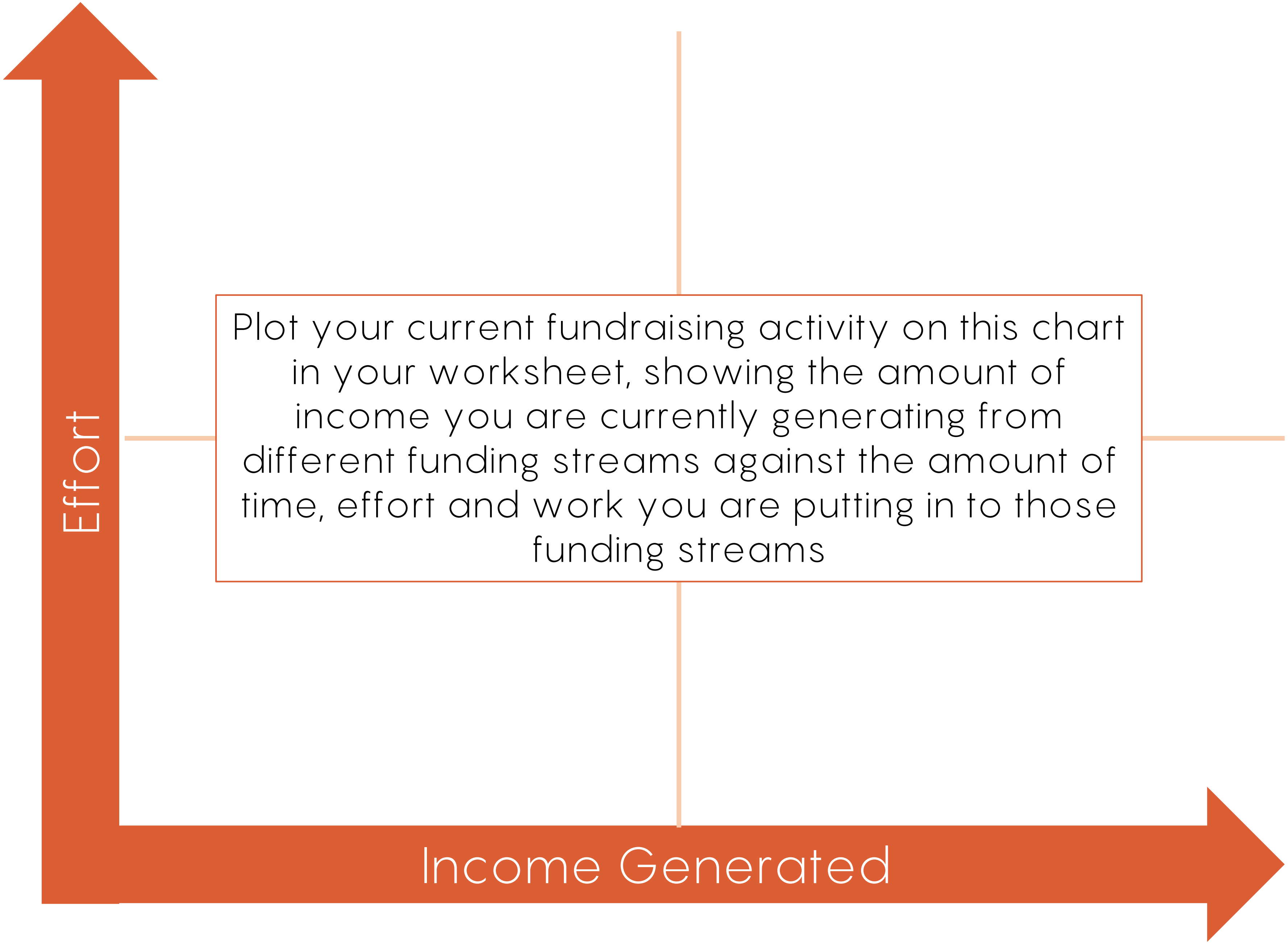
Where are you now?



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Understanding "The Course"

Why do you need the money?

Unhelpful target setting – Type 1

Expenditure	£762,358
Minus Income	£521,372
Fundraising Target	£241,166

Unhelpful target setting – Type 2

2025/26 Income	£521,372
Add 5%	£26,069
Fundraising Target	£547,441

What are you fundraising for?

- What work is committed?
- What work is planned?
- What work is aspirational?
- What are the priorities/risks?
- How much does each activity cost?
- What is already funded?
- What unrestricted income is expected?
- When is D-Day for each project?

Why do you need the money?

What Work/ Project/Activity requires funding?	Amount needed?	Deadline/ Decision Date?

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Let's Get Granular

Stacking the Deck

- We might have to make difficult choices
- Can core costs be allocated to specific projects? (Full cost recovery)
- What "unsexy" costs can be covered by unrestricted income?
- Are multiple projects trying to achieve similar aims? Do they align with a similar motivation or donor interest? If so, can they be packaged together?

Anytown Museum

	2026/27	2027/28	2028/29	Total
Exhibitions	£75,000	£80,000	£85,000	£240,000
Conservation	£35,000	£37,500	£40,000	£112,500
Education & Outreach	£40,000	£42,500	£45,000	£127,500
Staff and Overhead	£150,000	£175,000	£200,000	£525,000
TOTAL	£300,000	£335,000	£370,000	£1,005,000

Anytown Museum

	2026/27	2027/28	2028/29
Exhibitions	Turner - £25,000 Saxons - £40,000 Community - £10,000	Rembrandt - £45,000 Tudors - £25,000 Community - £10,000	Parker - £40,000 Bronze Age - £35,000 Community - £10k
Conservation	Paintings - £10,000 Furniture - £10,000 Ceramics - £15,000	Paintings - £10,500 Furniture - £10,500 Ceramics - £16,500	Paintings - £11,000 Furniture - £11,000 Ceramics - £18,000
Education & Outreach	Dementia Group - £10,000 School Projects - £30,000	Dementia Group - £11,000 School Projects - £31,500	Dementia Group - £12,000 School Projects - £33,000
Staff and Overheads	Salaries - £110,000 Overheads - £40,000	Salaries - £125,000 Overheads - £50,000	Salaries - £140,000 Overheads - £60,000

Anytown Museum

	2026/27	2027/28	2028/29
Exhibitions	Art - £110,000		
	History - £100,000		
	Community - £30,000		
Conservation	Paintings - £31,500		
	Furniture - £31,500		
	Ceramics - £49,500		
Education & Outreach	Dementia Group — £33,000		
	Schools Project - £94,500		
Staff and Overheads	Salaries - £375,000		
	Overheads - £150,000		

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What are you bringing to the table?

The Muggle Question:

What?

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I'm just so passionate about paying for new Collections Management Systems!

Said no donor, ever

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The Better Question:

Why?

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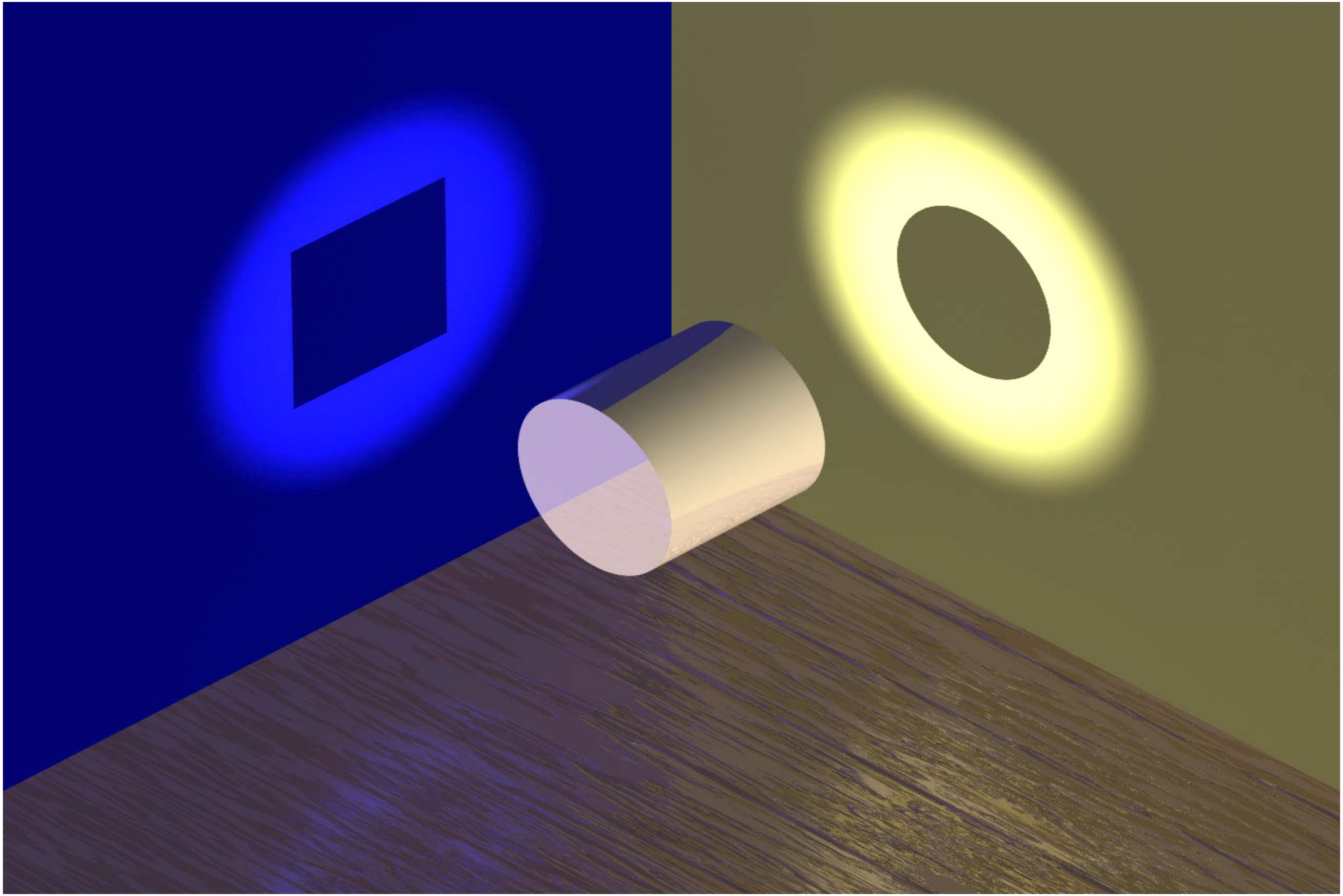
Your Case for Support

- Why is your project needed?
- What problem(s) does it solve?
- Why now?
- POSITIVE consequences for heritage/people if done?
- NEGATIVE consequences for heritage/people if not done?



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Preservation of Heritage?

Public Engagement with Heritage?

Physical Health?

Mental Health?

Education?

Environmental?

Young people?

Older People?

Community Cohesion?

Regeneration?

Social Welfare?

Supporting specific groups /communities?

Why do you need the money?

What Work/ Project/Activity requires funding?	Amount needed?	Deadline/ Decision Date?	Philanthropic Need (aka Case for Support)

What else are you bringing to the table?

Propositions

- Your invitation to a potential donor – the thing you're asking them to support/invest in/join/buy in to
- Aligns your fundraising needs with the donor's motivations and capacity to give
- Can be philanthropic or transactional (benefits-driven)

Transactional or Philanthropic?

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What else can you offer?

- Access to a specific audience/community?
- Access to tickets?
- Access to exclusive spaces/experiences?
- Access to discounts/savings?
- Access to news/PR opportunities?
- Access to events?
- Access to hospitality and entertaining opportunities?
- Access to your skills and expertise?
- Access to volunteering opportunities?
- Access to a platform to showcase a product, service, skill set?
- Access to your brand?

Why do you need the money?

What Work/ Project/ Activity requires funding?	Amount needed?	Deadline/ Decision Date?	Philanthropic Need (aka Case for Support)	Other Assets

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Introducing the main Funding Streams

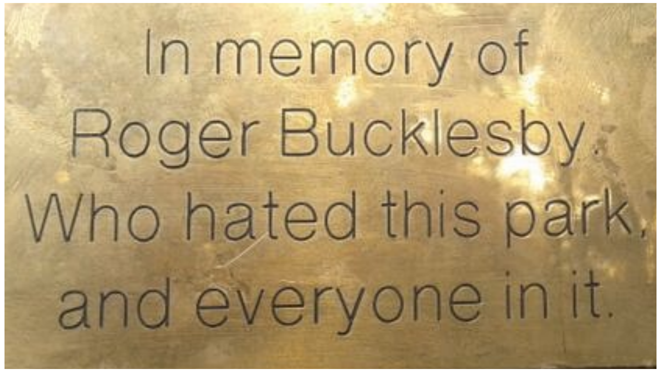
Main Funding Streams

Trusts & Foundations

Corporates

Major Donors

Mass Giving



Legacies

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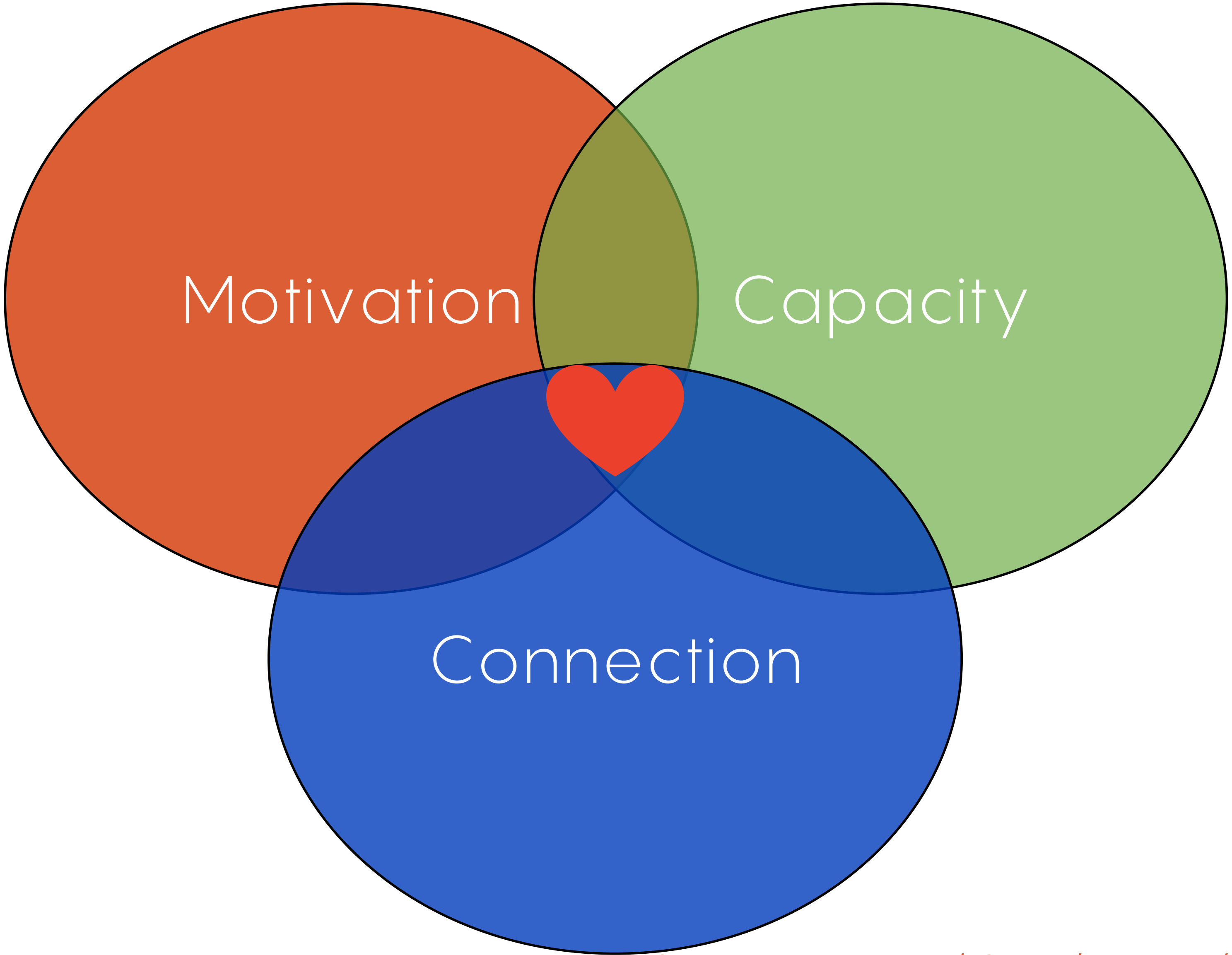
We're looking for...



Assessing funding streams — key factors

	Fit for your work/ activity?	Enough potential donors to be viable?	Timeframe?	Current trends — your org	Current trends - sector
Trusts					
Corporates					
Mass Giving					
Major Gifts					
Legacies					

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Is Trust Fundraising right for you?

Are you a Charity?

Are you fundraising for work with a start and end date?

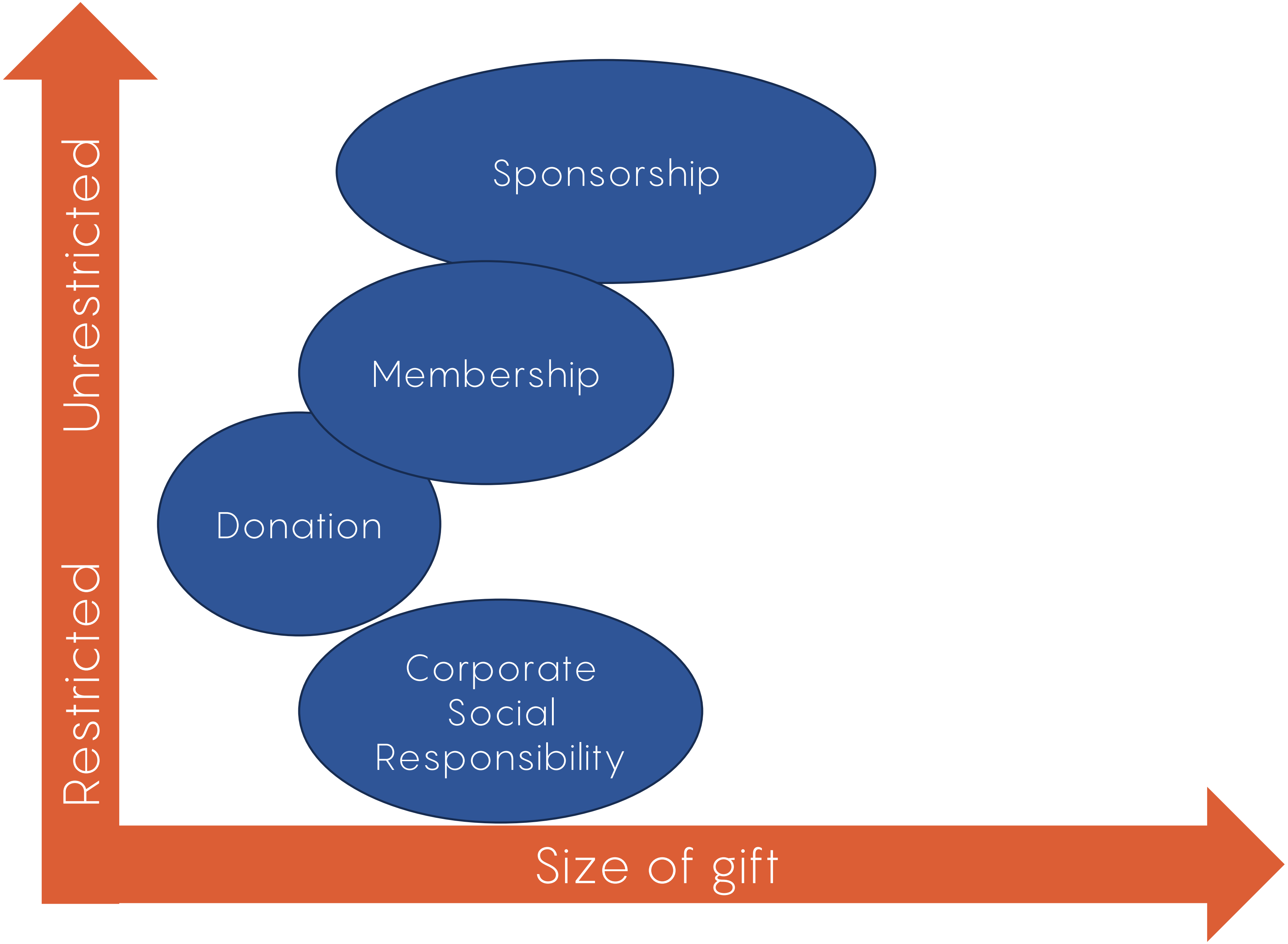
Does your work include:
Preserving heritage?
Marginalised audiences?
Education/Young People?
Health and wellbeing?
Environmental?

Is your work new or innovative? Step change for org?

Is your work taking place outside of London?

Trusts tend to prefer…

- Time-limited projects
- Projects with a benefit beyond “arts for arts sake”
- Innovative work/new approaches - Risky projects?
- Transformational projects - legacy
- Projects with learning opportunities for other orgs
- Projects run by Charities!
- Funding = restricted


Unrestricted
Restricted
Sponsorship
Membership
Donation
Corporate
Social
Responsibility
Size of gift

Is Corporate Fundraising right for you?

Is your work taking place in an area with a large business community?

Do you have peer-to-peer links with the business community?

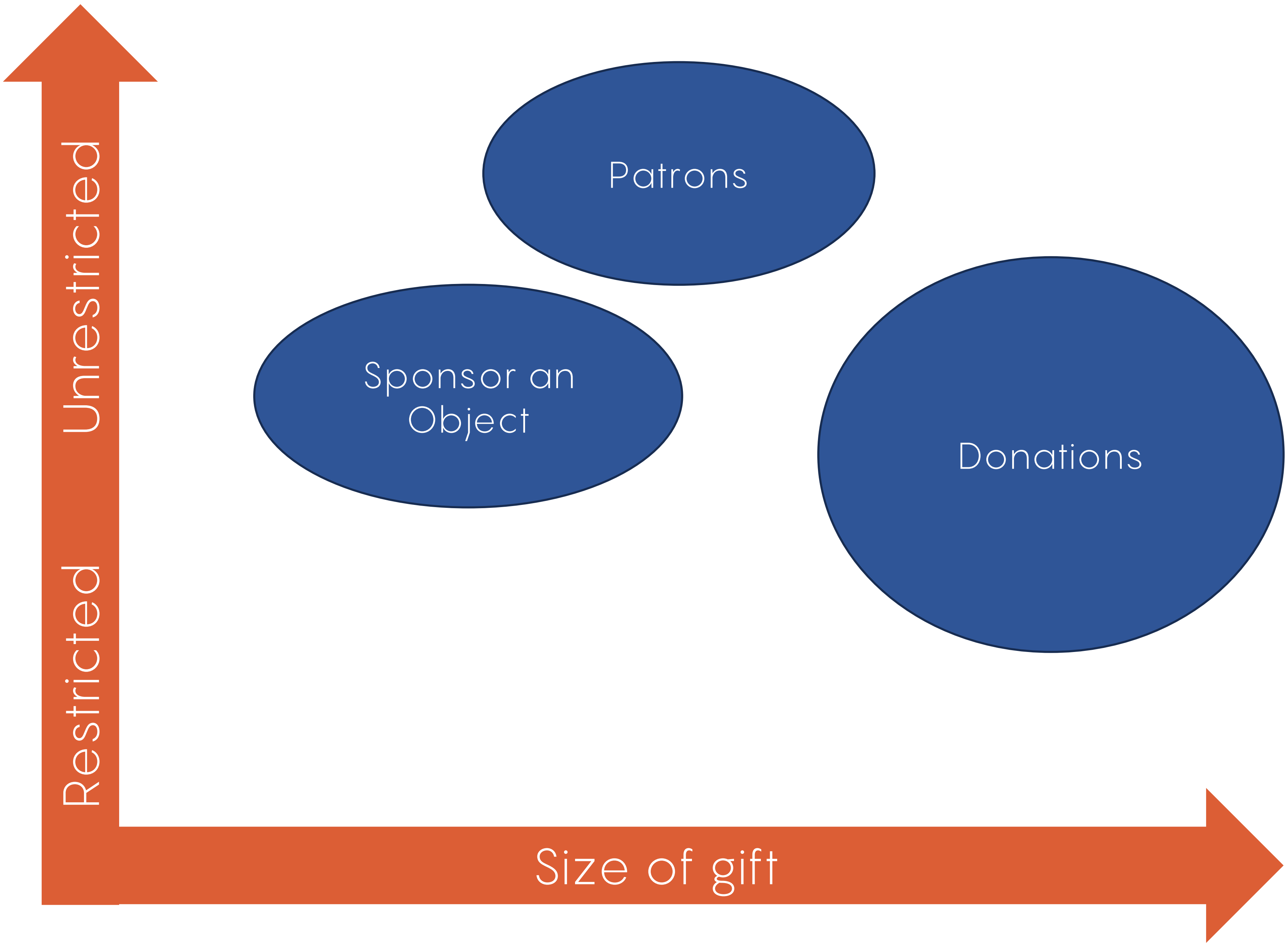
Does your work attract local, regional or national press?

Can you offer:
Tickets?
Hospitality & entertaining opportunities?
Venue Hire?
Access to your audience?
Volunteering opportunities?

Does your work include:
Environmental themes?
Well-being?
STEM?
Local connection?
Community cohesion?

Corporates tend to prefer…

- Projects that offer opportunities for marketing or increase brand/product awareness
- Projects that offer hospitality for existing/new/potential customers
- Projects that improve the local area
- Common CSR themes – environment, health, STEM, community cohesion
- Funding = often unrestricted



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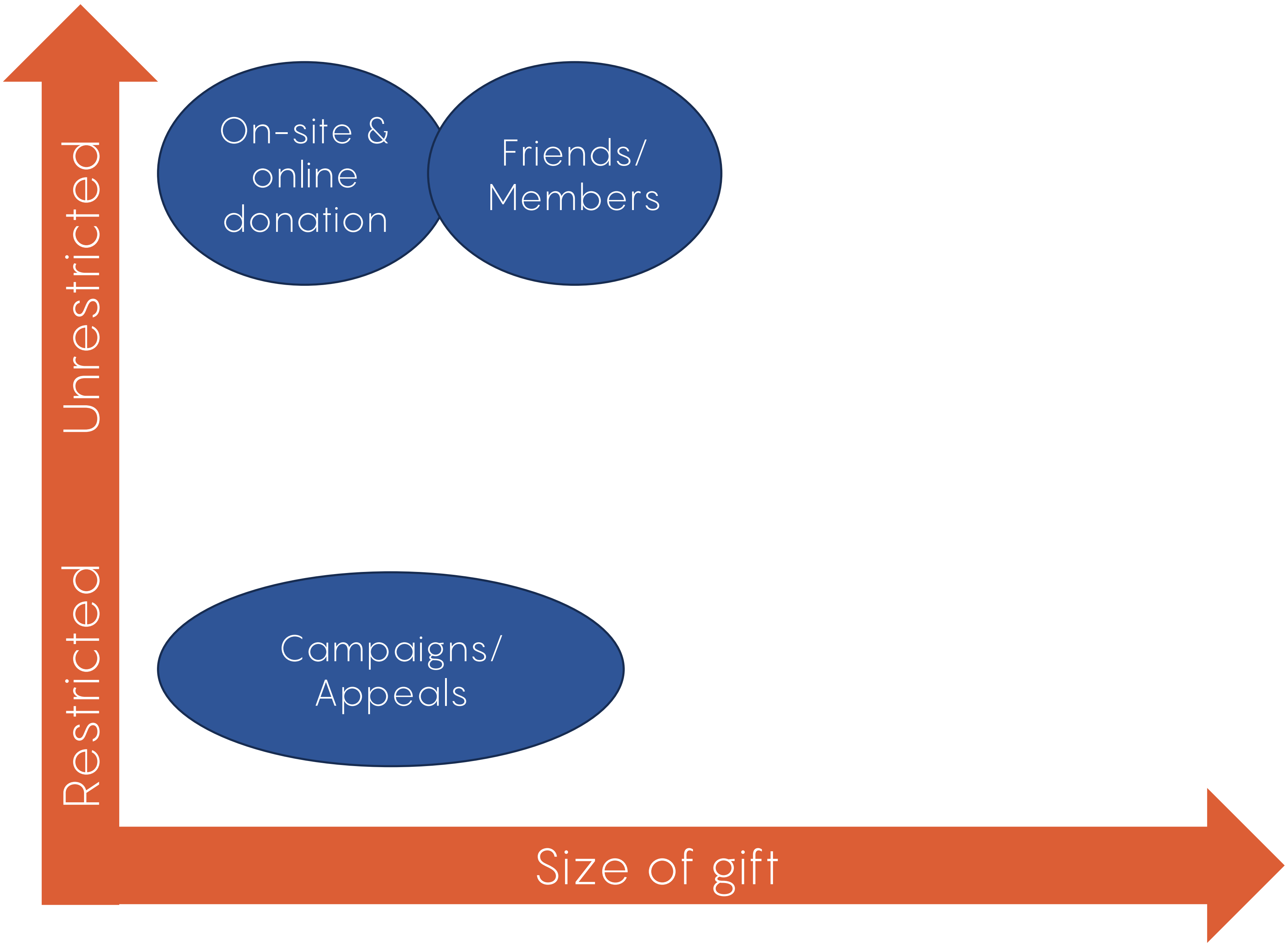
Is Major Donor Fundraising right for you?

Do you have an existing pool of individual donors?

Do you have tangible projects with tangible impact?

Major Donors tend to prefer…

- Transformational and/or aspirational projects
- Tangible "projects" with a tangible impact
- Projects matching the passions, motivations and interests of the individual – causes they care deeply about
- Leadership and visibility?
- Funding = restricted (but could include core costs)


On-site & online donation
Friends/ Members
Campaigns/ Appeals
Unrestricted
Restricted
Size of gift

Is Mass Giving right for you?

Do you have a community that loves you?

Does your project/ work have mass appeal?

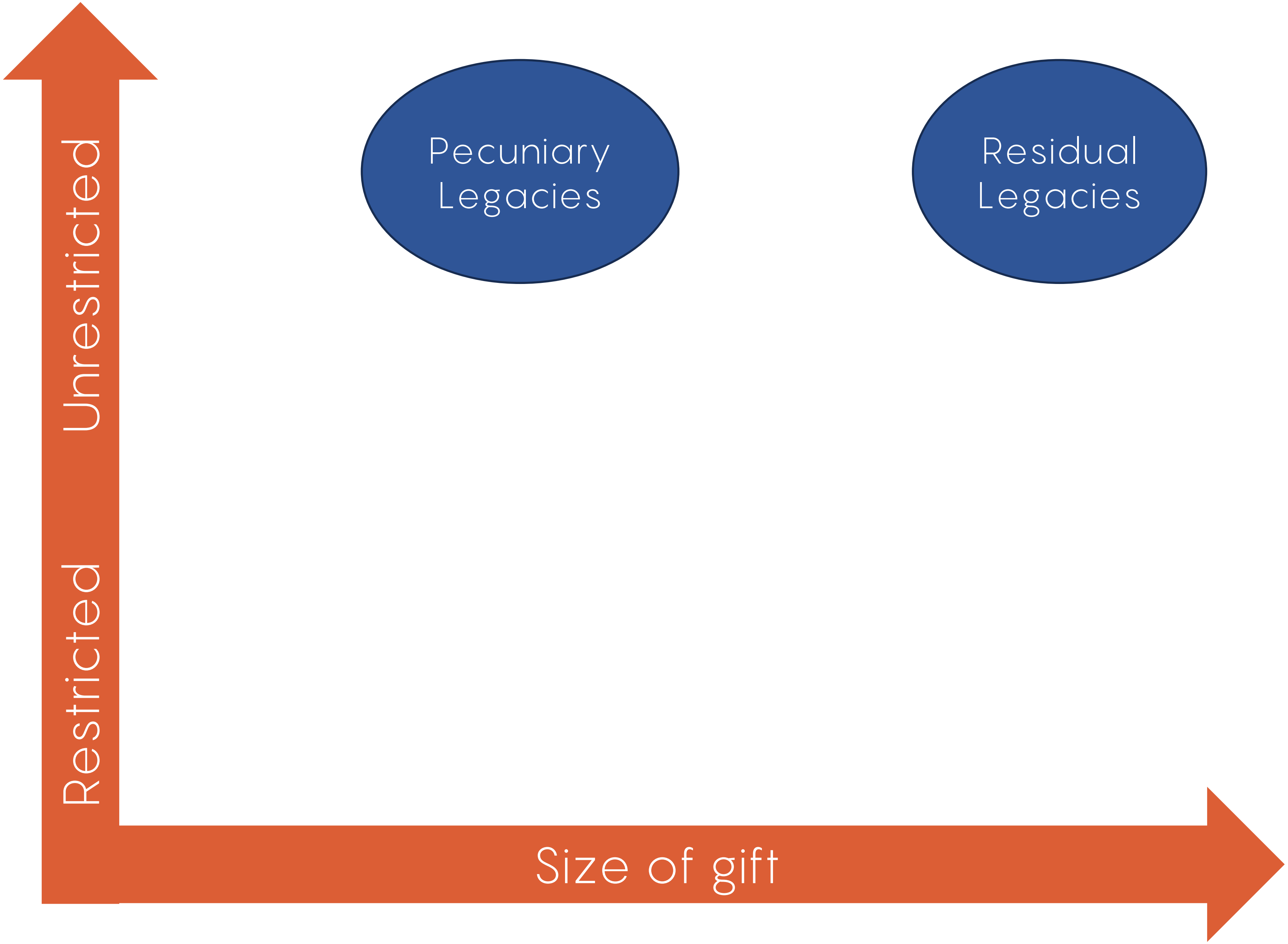
Do you have a package of benefits you can offer?

Do you have a base of regular visitors?

Do you know what motivates/ interests them?

Mass Giving works well for…

- Projects with an emotive story
- Projects or work that match the interests of your existing audience/network
- Projects with a set target and deadline
- Campaigns that offer a transactional reward/package of benefits
- Projects where they can see the tangible impact of their gift
- Funding = unrestricted or restricted



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Is Legacy Fundraising right for you?

Do you have a committed audience who loves you?

Do they trust you'll be around in 30 years?

Legacy Giving works well for…

- Long-term visions
- Aspects of your work that align with the interests, values and motivations of your most committed audience
- Organisations with a loyal base that trusts them
- Funding = unrestricted or restricted

Other key factors

Funder Top Trumps!

Trusts

Gift Size	7
Unrestrictedness	3
Timeframe	7
Initial Investment	8
Maintenance	6
Long-term Retention	3

Funder Top Trumps!

Corporates

Gift Size	5
Unrestrictedness	7
Timeframe	5
Initial Investment	5
Maintenance	2
Long-term Retention	5

Funder Top Trumps!

Major Donors

Gift Size	8
Unrestrictedness	6
Timeframe	4
Initial Investment	3
Maintenance	2
Long-term Retention	7

Funder Top Trumps!

Mass Giving

Gift Size	2
Unrestrictedness	8
Timeframe	9
Initial Investment	6
Maintenance	6
Long-term Retention	8

Funder Top Trumps!

Legacies

Gift Size	**7**
Unrestricted	**9**
Timeframe	**2**
Initial Investment	**7**
Maintenance	**8**
Long-term Retention	**2**

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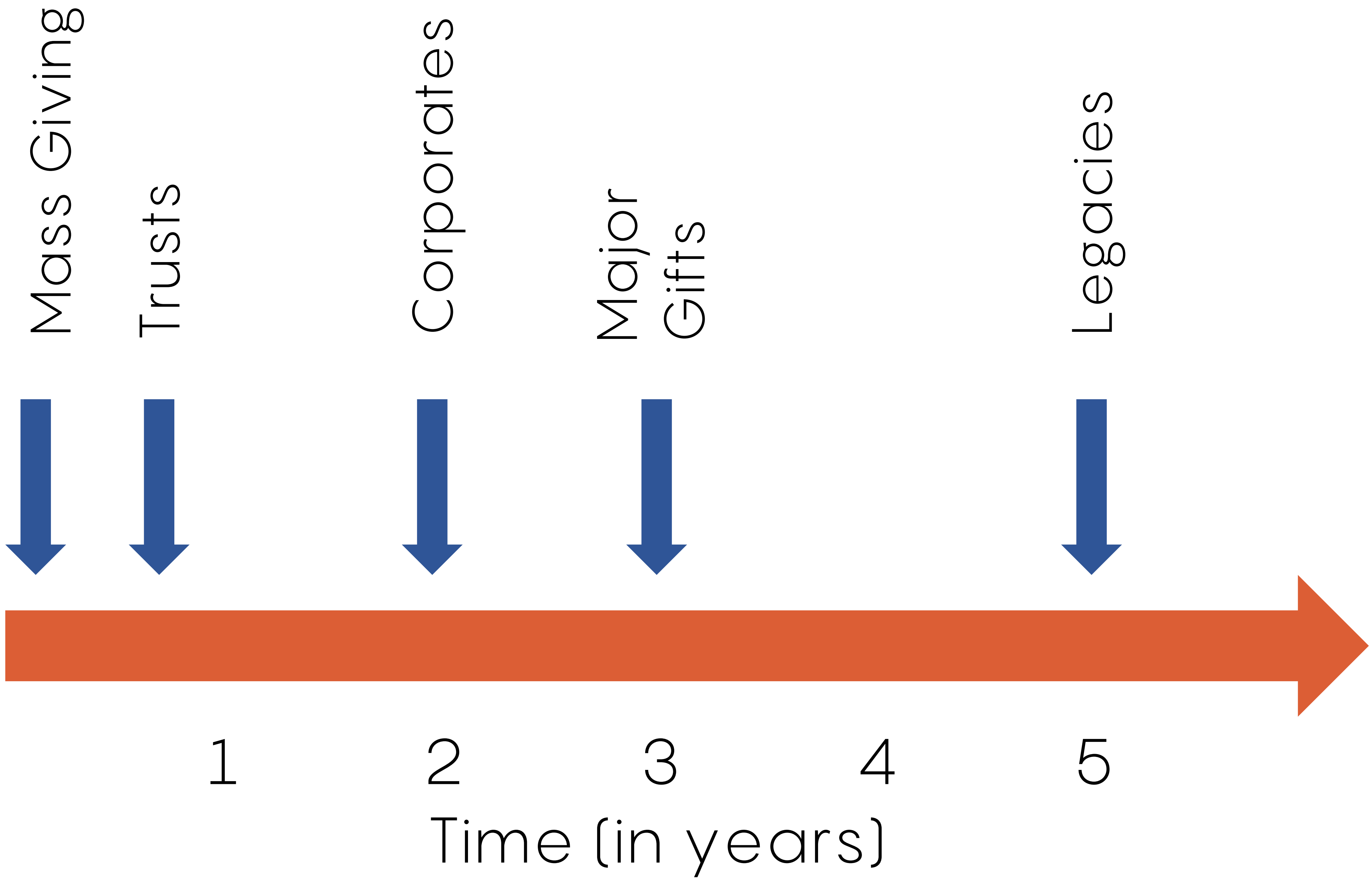
Two key considerations



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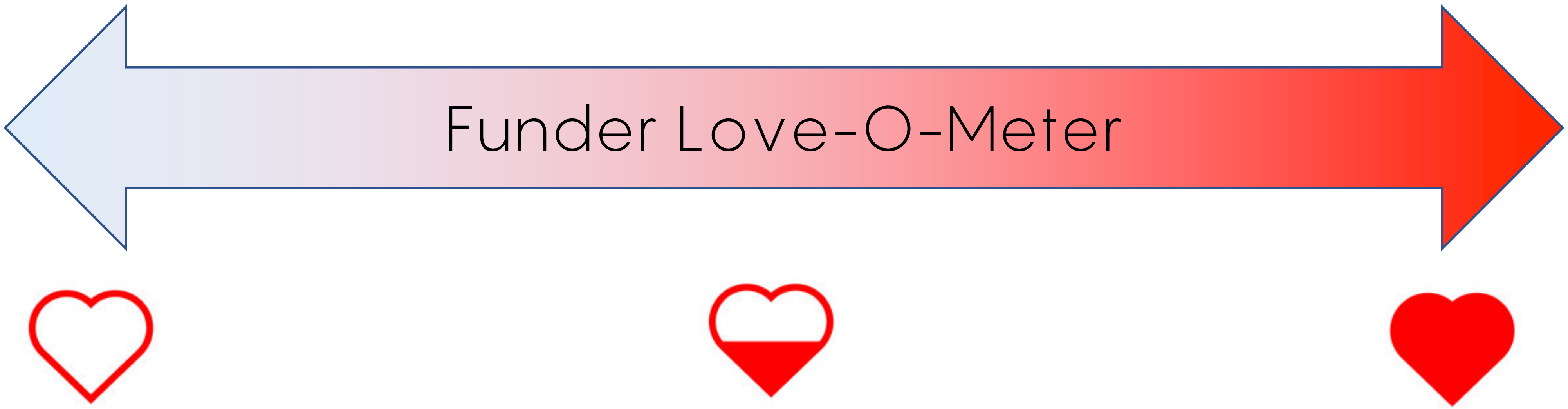
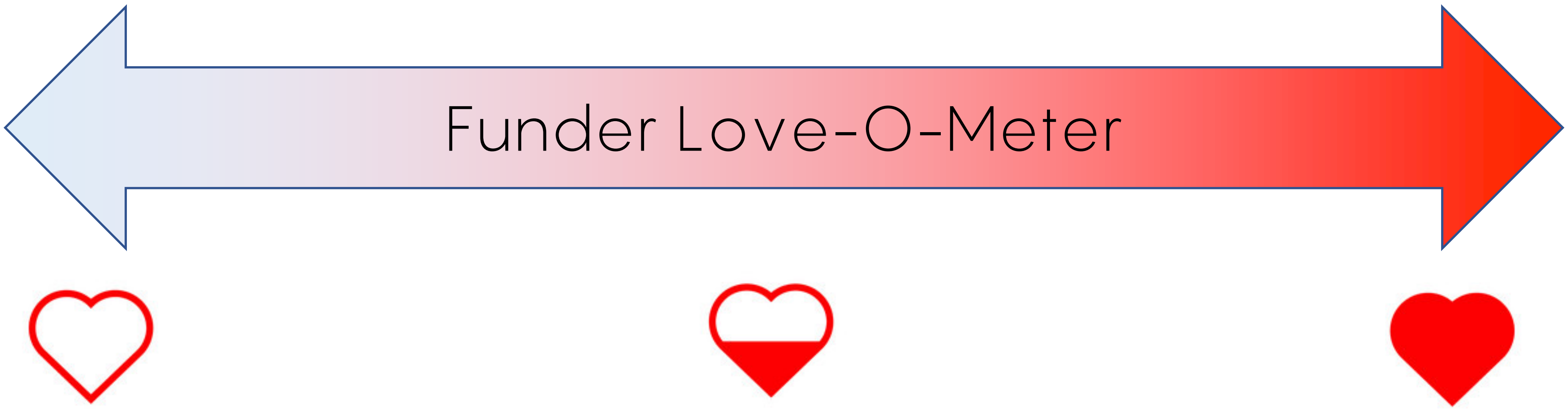
A Gross Simplification



Staff costs
Overheads
Legal obligations
Maintenance
Infrastructure

Capital projects
Outreach work
Acquisitions
Restoration
Conservation

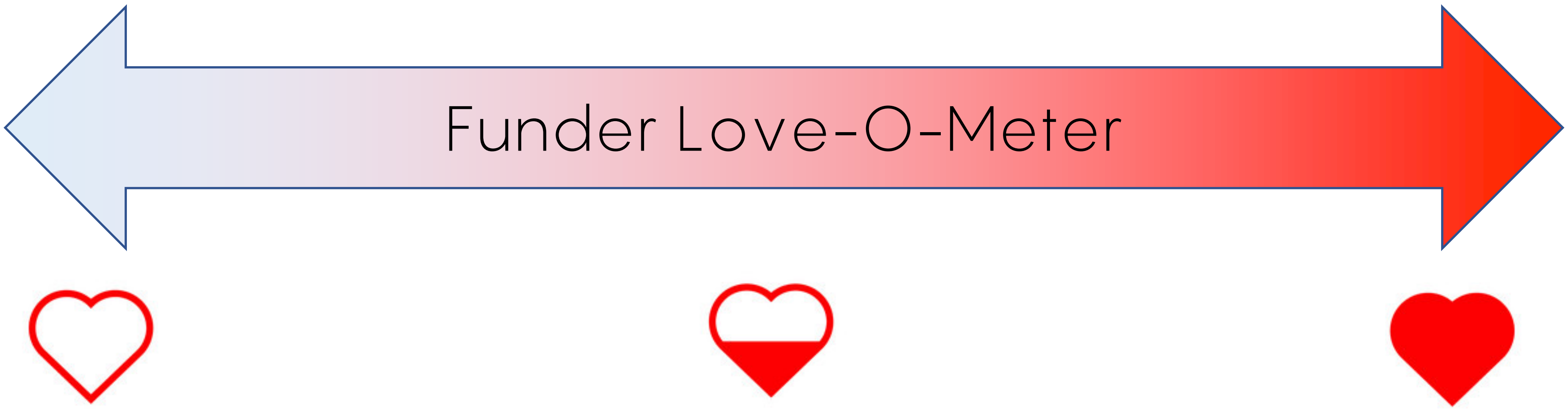
A Gross Simplification



Restricted and unrestricted funding:
Grants
Major Gifts
Campaigns/Appeals

Capital projects
Outreach work
Acquisitions
Restoration
Conservation

A Gross Simplification



Staff costs
Overheads
Legal obligations
Maintenance
Infrastructure

Unrestricted Funding
Commercial Income
Subsidy
Full Cost Recovery

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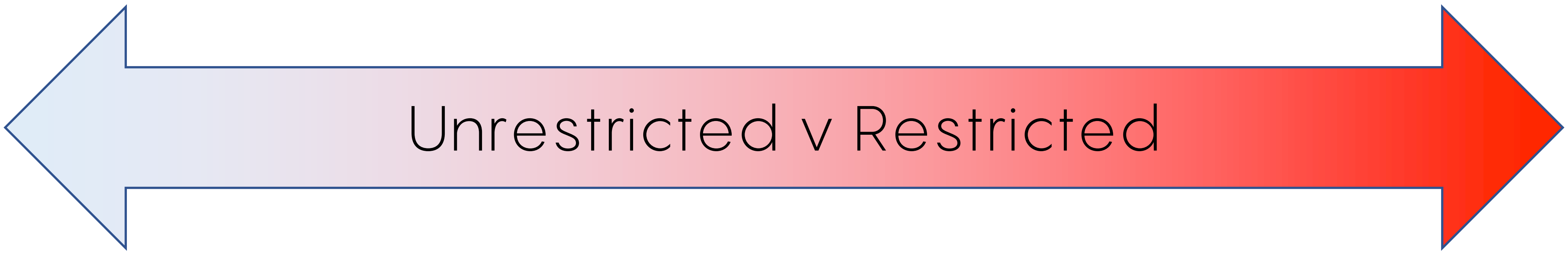
A Gross Simplification



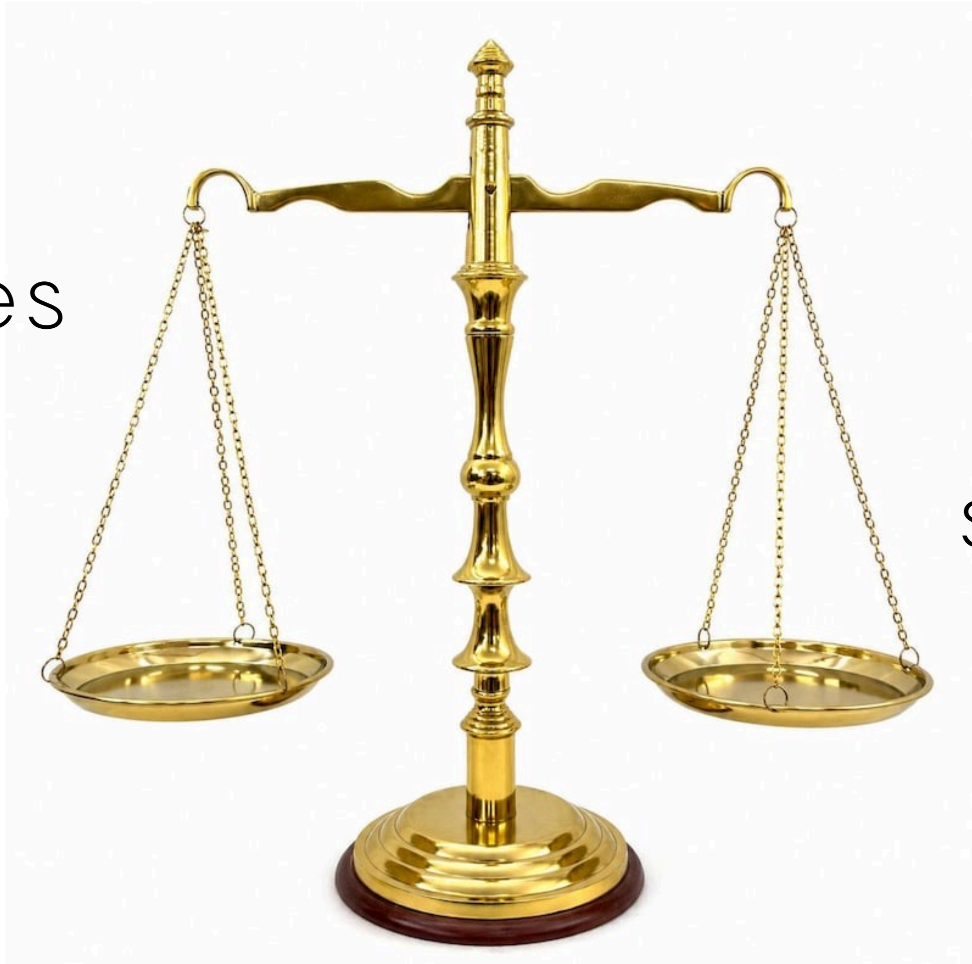
Legacies
Regular Giving schemes
Friends/Membership
Patrons
Corporate Sponsorship
Donation Boxes
Major Gift Asks*

Trusts / Grants
Major Gift Asks*
Campaigns/Appeals
Corporate CSR/Donations

From Restricted to Unrestricted

- Restricted is quicker to get, BUT…
- Harder to maintain / build momentum
- Growth linked to expenditure
- Lacks flexibility
- Not all costs fit
- Can lead to mission drift

Investing in approaches to secure short-term targets/ objectives



Investing in building up more sustainable funding sources

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From initial impression to strategic decision

Purpose for New Streams

- Are there enough potential donors within our reach?
- What are their motivations/interests?
- Do we have an attractive and competitive proposition?
- Do we have the skills and experience to deliver this?
- Do we have the staff/volunteer capacity?
- Is this a short or long-term opportunity?

Purpose for Existing Streams

- How are our existing propositions performing?
- Where are the strengths and weaknesses in our current offer?
- Where are the opportunities for growth/ diversification?
- Where are the strengths and weaknesses in our pipeline?
    - Are we identifying enough potential donors?
    - Are we converting enough prospects to donors?
    - Are we retaining donors?
- How could our efforts be made more efficient?

Research and Analysis

SWOT Analysis based on:

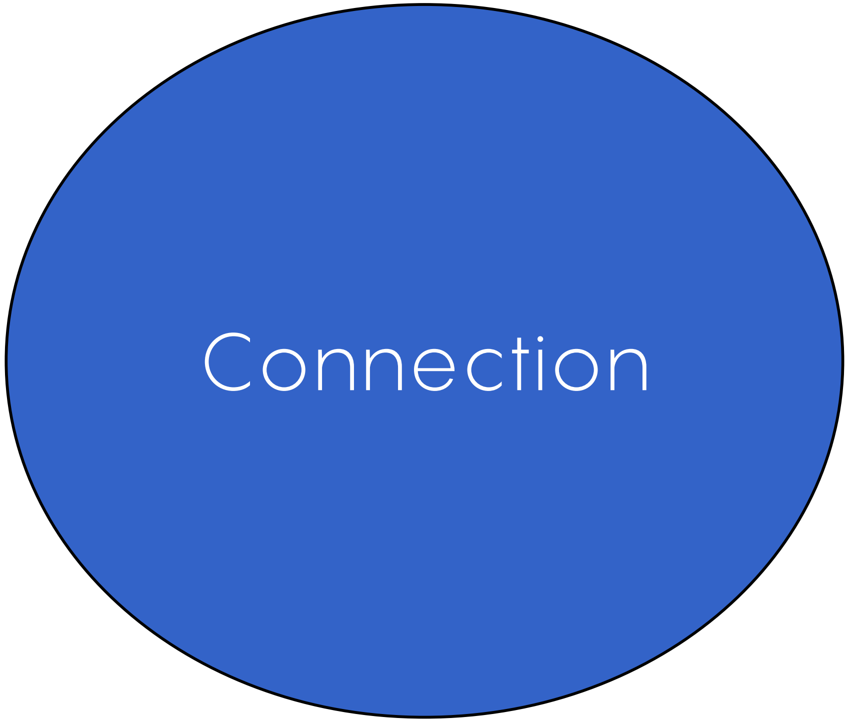
- Prospect Research
- Your Recent Trends
- Stakeholder interviews and surveys
- Comparator Analysis and Benchmarking
- Internal Assessment
- External Factors (PEST Analysis)

SWOT Analysis

Strengths Internal factors that could help your fundraising	**Weaknesses** Internal factors that could hinder your fundraising
Opportunities External factors that might help your fundraising	**Threats** External factors that might hinder your fundraising

Prospect Research

Who is within your reach?



Who do you already know?

Who can you get to know?

What do you know about their interests / motivation?

Assessing the Trust Market

- Funder databases? (Funds Online, Charity Excellence Framework etc)
- Sector newsletters?
- Council newsletters?
- Acknowledgement Boards?
- External Support?

Assessing the Corporate Market

- How big is the business community in your area?
  - Number of businesses
  - Size of businesses
- Who do you already have links to?
  - Previous supporters?
  - Neighbours?
  - Suppliers?
  - Employers of volunteers/donors?
- How many businesses have a problem that you can fix?

Assessing the Individual Market

- How many people engage with your work?
- How many people have a deep engagement?
- How important are you to them, and why?
- What are the motivations, interests, passions, values?
- Do they understand your need for funding?
- How many already donate?

Your Track Record

Over the last 3 to 5 years (all by funding stream)

- Total income
- Number of donors
- Average and largest gift
- Retention (% giving again in 18 month period)
- Lifetime Value
- Recruitment (number of new donors)
- Success rates (% of successful asks)

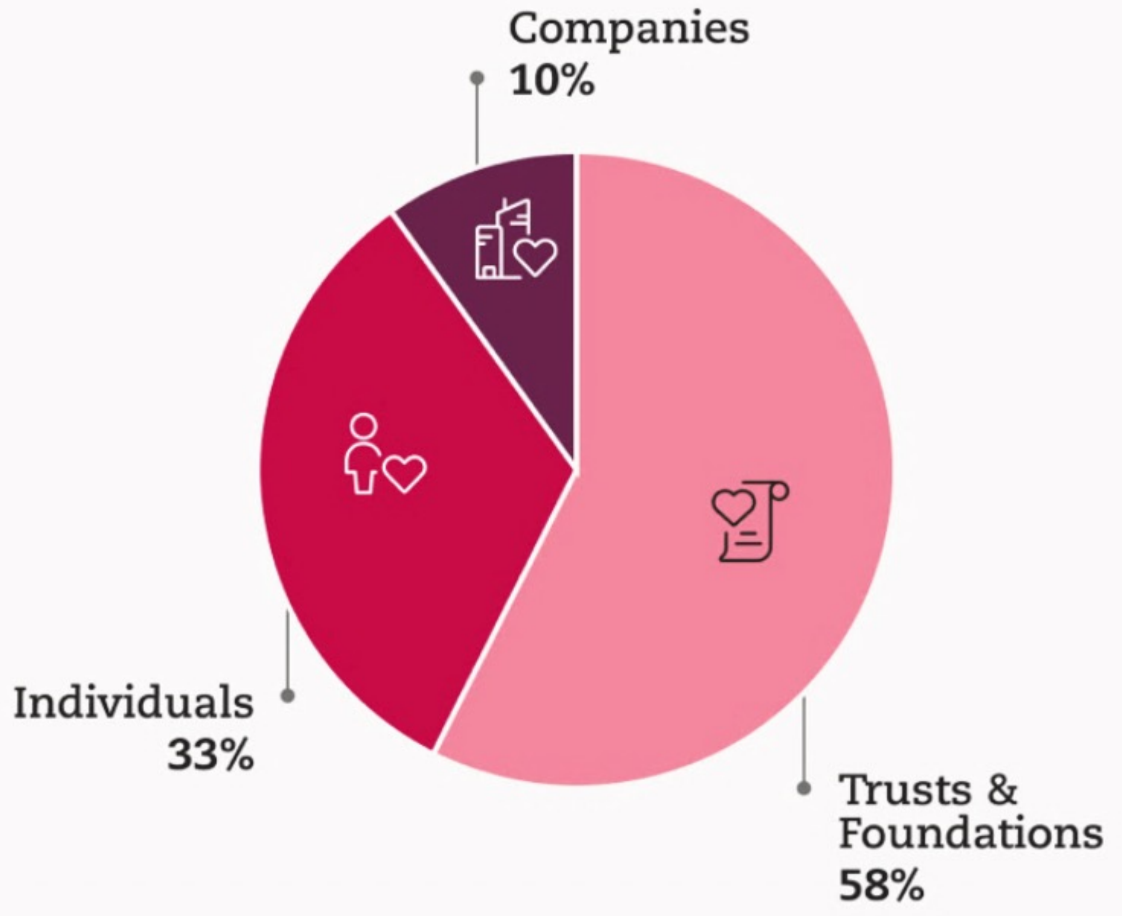
Sector Trends, Comparator Research & Bench-marking

the audience agency

ARTS COUNCIL ENGLAND

Private Investment in Culture Survey 2025

Breakdown of contributed income by source 2023/24



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Comparator Analysis

- Who is doing/has done a similar thing to you?
- How much do/did they raise?
- Where does it come from? (% by stream)
- What schemes/programmes do they run?
- How big are their biggest gifts?
- How much resource do they allocate to fundraising?
- What trends are they seeing?
- What works for them? What doesn't work?
- What challenges have they faced?
- What do they wish they had done differently?
- What advice would they give you?

Internal Assessment

- Fundraising knowledge and experience?
- Fundraising resources? (Time, staff members)
- Management and Leadership?
- Reputation and brand perception?
- Committed audience/supporters?
- Strength of supporter experience?

External Assessment

- Political
- Economic
- Social
- Technological
- Competition

SWOT Analysis

Strengths	Weaknesses
Internal factors that could help your fundraising	Internal factors that could hinder your fundraising
Opportunities	**Threats**
External factors that might help your fundraising	External factors that might hinder your fundraising

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What does it mean?

The external trend is lowering success rates from Trusts and Foundations

...which means we can't rely on new donors, and/or might need to identify a larger number of prospects to hit our goal

Our membership scheme has seen diminishing numbers over the last 5 years

...which means we need to prioritise recruitment, or consider introducing a new proposition

We have very few businesses in our local area

...which means we will either need to find a proposition that appeals to more distant companies, or de-prioritise corporate giving

You should now have…

- A shortlist of potential funding streams
- An understanding of where you are now
- An understanding of the opportunities that will help you
- An understanding of the weaknesses and challenges that need to be overcome

Strategy and Plan

How much time do you have?

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How much time do you have?

1 x Full Time staff = c. 225 working days

Minus:

- Non-fundraising work?
- Management/line-managing?
- Writing newsletters?
- Internal meetings?
- Internal reports?
- Child care? Caring responsibilities?

What should your strategy look like?

You should now have…

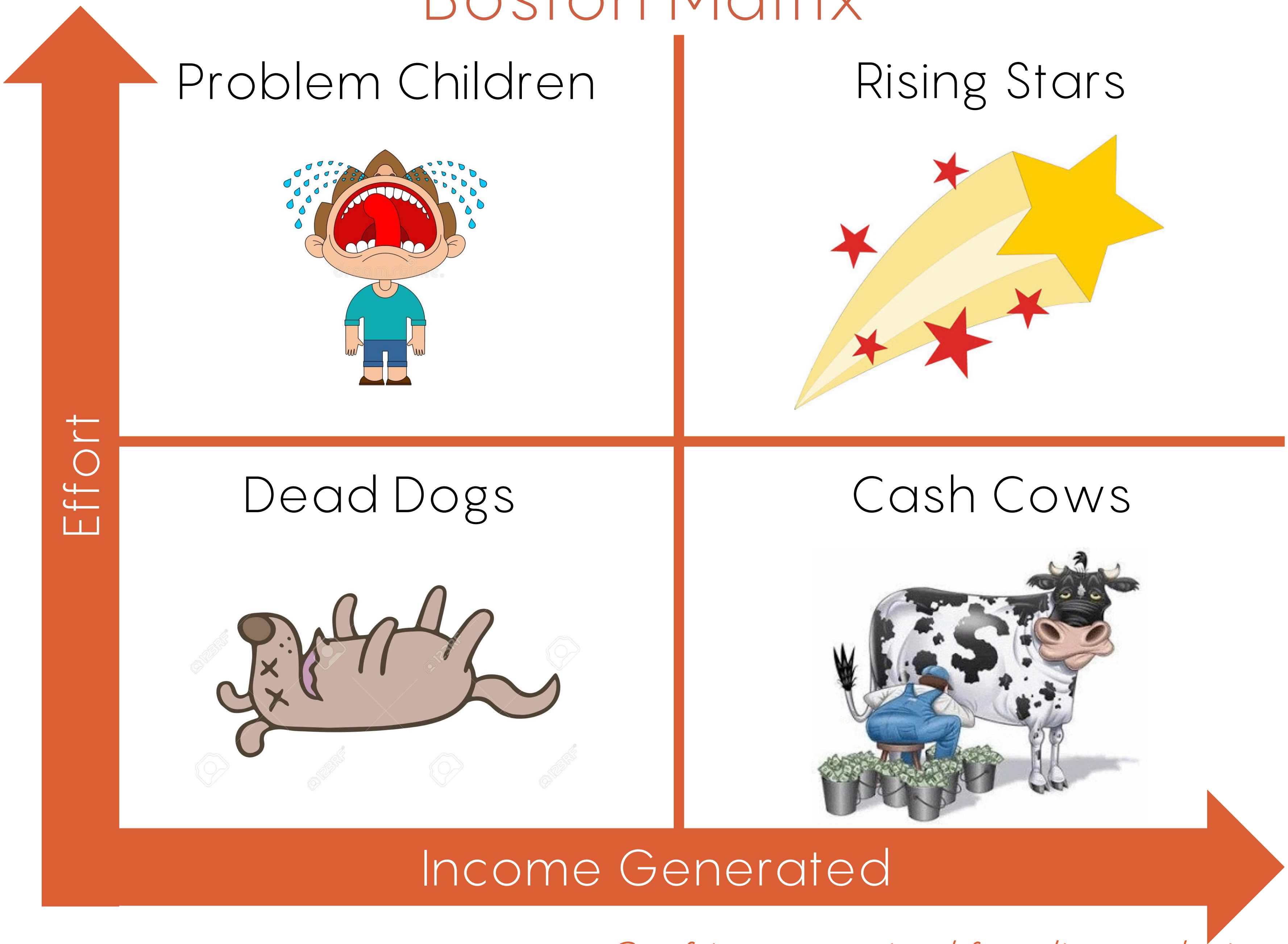
- A summary of 3-5 strategic priorities and associated objectives
- The analysis that underpins your decisions
- More detailed breakdown of day-to-day tasks

	Strategic Priority	To achieve this, we must:
1	Secure 75% of our 2026-28 targets from grants	Increase number of identified prospects, with a focus on multi-year donors
		Improve pre-application cultivation approaches
		Improve post-grant stewardship and relationship building
2	Grow the number and value of regular givers	Define our regular giving proposition
		Ensure first time donors are thanked and engaged
		Develop new supporter journeys to promote regular giving
3	Develop and scale a major gift proposition for exhibitions	Identify 10 to 15 prospects from our existing network
		Develop and implement cultivation plans
		Continue to build our prospect pipeline
4	Launch a legacy giving programme	Define and promote our legacy proposition
		Deliver targeted promotion of legacy proposition to existing supporters
		Steward legacy pledgers

6 Summary of Action Plan and Responsibilities

	Short Term *(0 – 6 months)*	Medium Term *(6 – 18 months)*	Long Term *(18 months +)*
Trusts and Foundations	1. Establish an independent Development Trust as a vehicle through which you can manage your fundraising activity (***SMT, BHCC***) 2. Provide training for all project managers on how to fundraise from private trusts, with a focus on writing compelling funding bids (***SMT, PMs, FRL, Apollo***) 3. Subscribe to an online research database, such as TrustFunding.org.uk (***FRL***) 4. Identify specific projects to be delivered over the next two years, develop project budgets and consider what interests/needs they might address (***SMT, PMs & FRL***) 5. Research prospects based on the identified motivations and projects, and identify your priority prospects (***PMs & FRL***)	7. Submit applications to your priority prospects (***PMs & FRL***) 8. Continue to identify new projects which might have potential to appeal to private funders, and identify the different interests each project might meet (***PMs & FRL***)	9. Report back on time to funders and seek to strengthen the relationship where possible (***PMs & FRL***) 10. Continue to review and update the list of prospects based on new projects and changing trust priorities (***FRL***)

Boston Matrix



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First
Protect your Cash Cow(s)!

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Protecting your Cash Cows

Prioritise tasks that enable you to:

- Deliver on agreed partnership
- Provide touchpoints to keep donors feeling valued/respected/engaged
- Report back on the partnership
- Reapply/Renew support for future years
- Maintain and grow a pipeline of potential donors

How much time do you have left?

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Then
Build on Existing Momentum

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Where are your opportunities to grow?

More people giving more often

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More people giving more often

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More people giving more often

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More people giving more often

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Ansoff Matrix		Products, Services and Assets	
		Existing	New
Markets and Audiences	Existing	Market Penetration: How do we encourage more people to give?	Product Development: What else can we offer existing supporters to get them to give more?
	New	Audience Development: Who else might find value in our existing offer?	Diversification: What other audiences are out there? What motivations do they have? What offer is right for them?

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Example for a Museum Friends/ Membership scheme		Products, Services and Assets	
		Existing	New
Markets and Audiences	Existing	• Increase marketing to maximise reach of regular visitors • Improve renewal process to increase retention	• Introduce new tier to attract larger donations • Introduce annual campaign to attract mid-year donations
	New	• Corporate partners? • Non-visitors? • Community partners?	• Introduce philanthropic scheme for those not motivated by benefits

A note on Problem Children and Dead Dogs

Not necessarily bad, but can you justify the time and effort?

- Can your Problem Children become Rising Stars/Cash Cows?
  - If so, what do you need to do?
  - If not, do they serve another strategic purpose?
- Are they inhibiting growth in other areas?
- Is it time to cut them loose?

How much time do you have left?

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Then
Consider New Propositions

- Business case for recruitment?
- Volunteer/trustee support?
- Short-term consultancy support?
- Reduce your plans/strategic priorities?

Objectives

Where are the weaknesses?

	Knowledge of audience motivations?	Identifying prospects?	Converting to Donors?	Retaining Donors?
Trusts	5	4	2	2
Corporates	2	3	5	4
Mass Giving	1	5	3	2
Major Gifts	3	2	3	5
Legacies	2	?	?	N/A

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Objectives

- Maintain
- Scale/Grow/Improve
- Diversify/Change

- Market knowledge
- Proposition/offer
- Knowledge and skills
- Processes and Systems
- Identify prospects
- Relationship building
- Asks
- Stewardship and Retention

Who needs to be involved?

Responsible – takes the lead. Responsible for ensuring each task gets done

Approve/Authorise – needs to approve/sign-off tasks

Consult – can provide useful insight during the decision making process

Support – can provide additional support (Usually third party)

Involve/Inform – needs to be informed about decisions

RACSI for writing a Case for Support

Responsible – Fundraising Manager

Approve/Authorise – SMT & Board

Consult – Existing supporters, SMT, Fundraising Staff, Frontline Staff

Support – Apollo Fundraising

Involve/Inform – All staff and board involved in talking to visitors/potential supporters

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