



Planning a Successful Fundraising Campaign

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Apollo Fundraising





Fundraising Campaigns

- ④ Feasibility
- ④ Planning
- ④ Private Phase
- ④ Public Phase
- ④ Close/Transition

Feasibility — is it possible?

Tells you:

- ④ if there's enough money within your reach
- ④ If not, what a more achievable total might look like
- ④ what would need to change to improve your chances of success

Planning — how should you do it?

Tells you:

- ⊗ How many gifts are needed
- ⊗ The order in which to ask potential donors
- ⊗ How long it will take
- ⊗ Who else needs to be involved
- ⊗ Any other tools/resources you might need



Step 1:

Define what
you are
fundraising
for and why

What are you fundraising for?

- ⊗ What work/activity will take place?
- ⊗ What will it look/sound/feel like?
- ⊗ What are the different options?
- ⊗ Who is involved?
- ⊗ Where will it take place?
- ⊗ How much does it cost?
- ⊗ What's the timeframe?
- ⊗ How much has been raised/identified?
- ⊗ When is D-Day?
- ⊗ What happens next?



The Muggle Question:

What?



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I'm just so
passionate about
paying for new lifts!

Said no donor, ever



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The Better Question:

Why?



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Your Case for Support

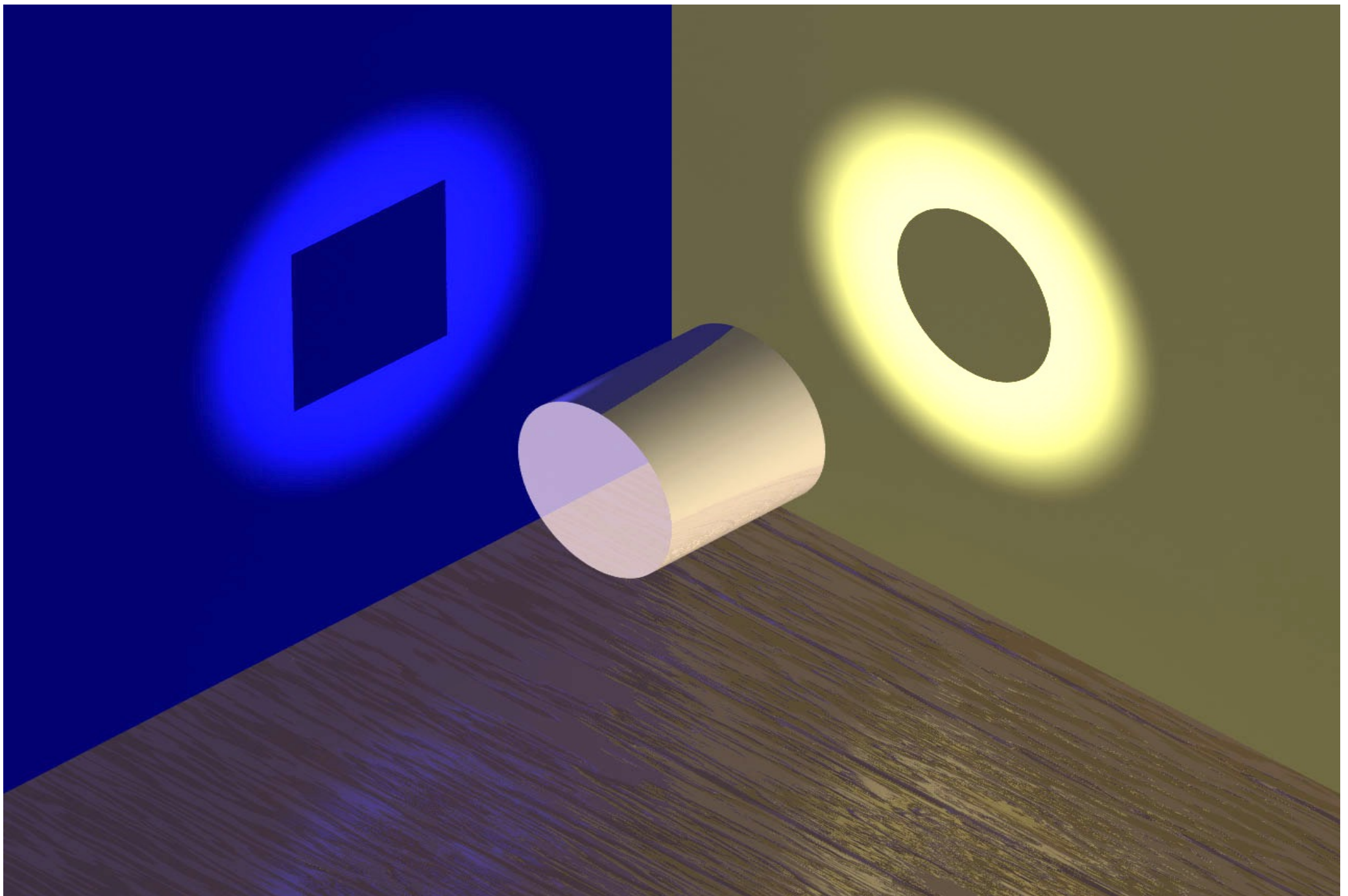
What is a Case for Support?

- ④ Your argument for why people should care enough about your project to support it
- ④ Process — helps you identify who is most likely to care — and how much
- ④ Output — written messaging that can inform/underpin campaign copy

Why is your project needed?

- ④ What problem(s) does it solve?
- ④ What evidence do you have?
- ④ Why now?
- ④ **POSITIVE** consequences for heritage/people if done?
- ④ **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?



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Step 2:

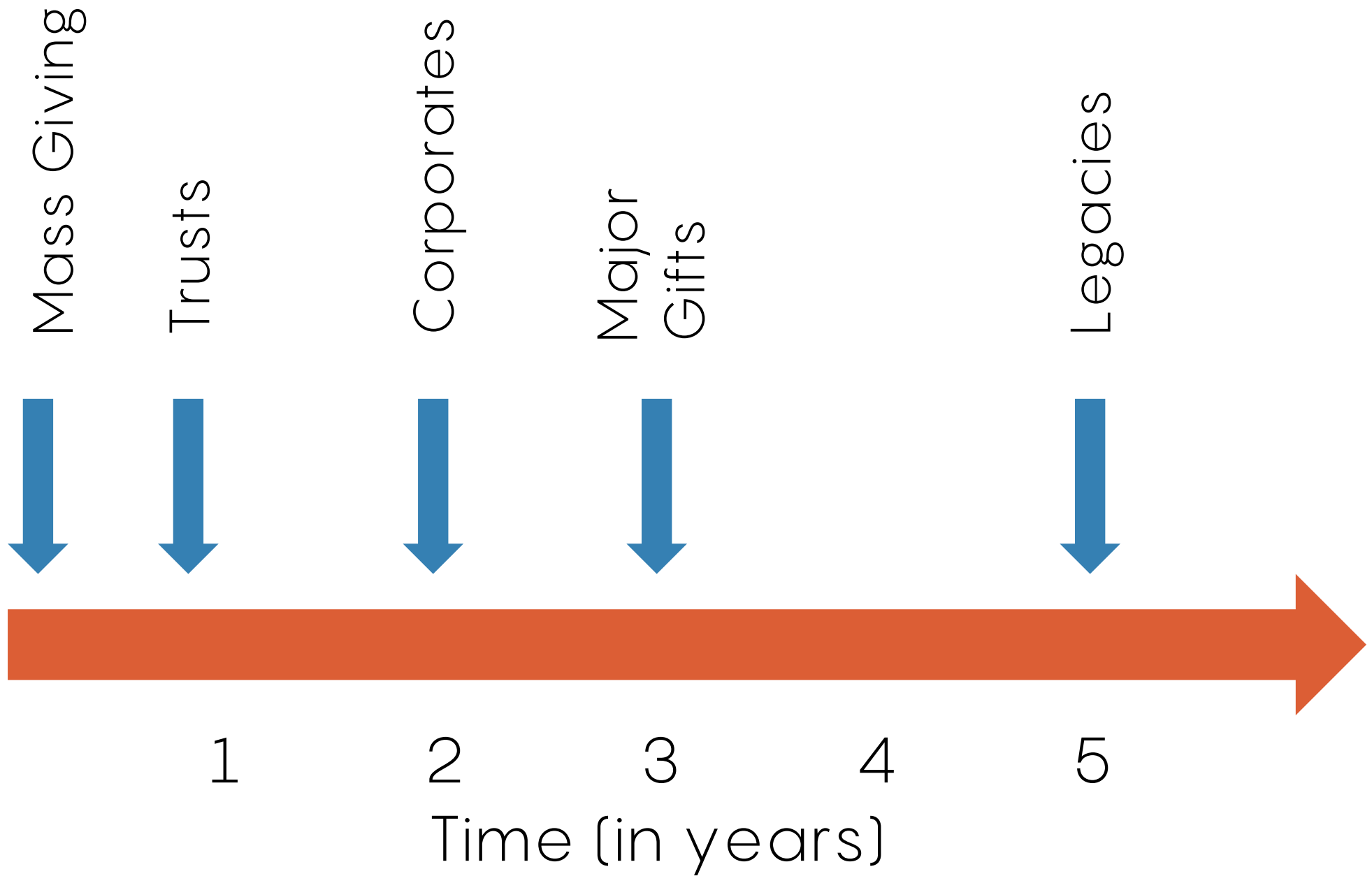
Identify who
is most likely
to care

How long have you got?



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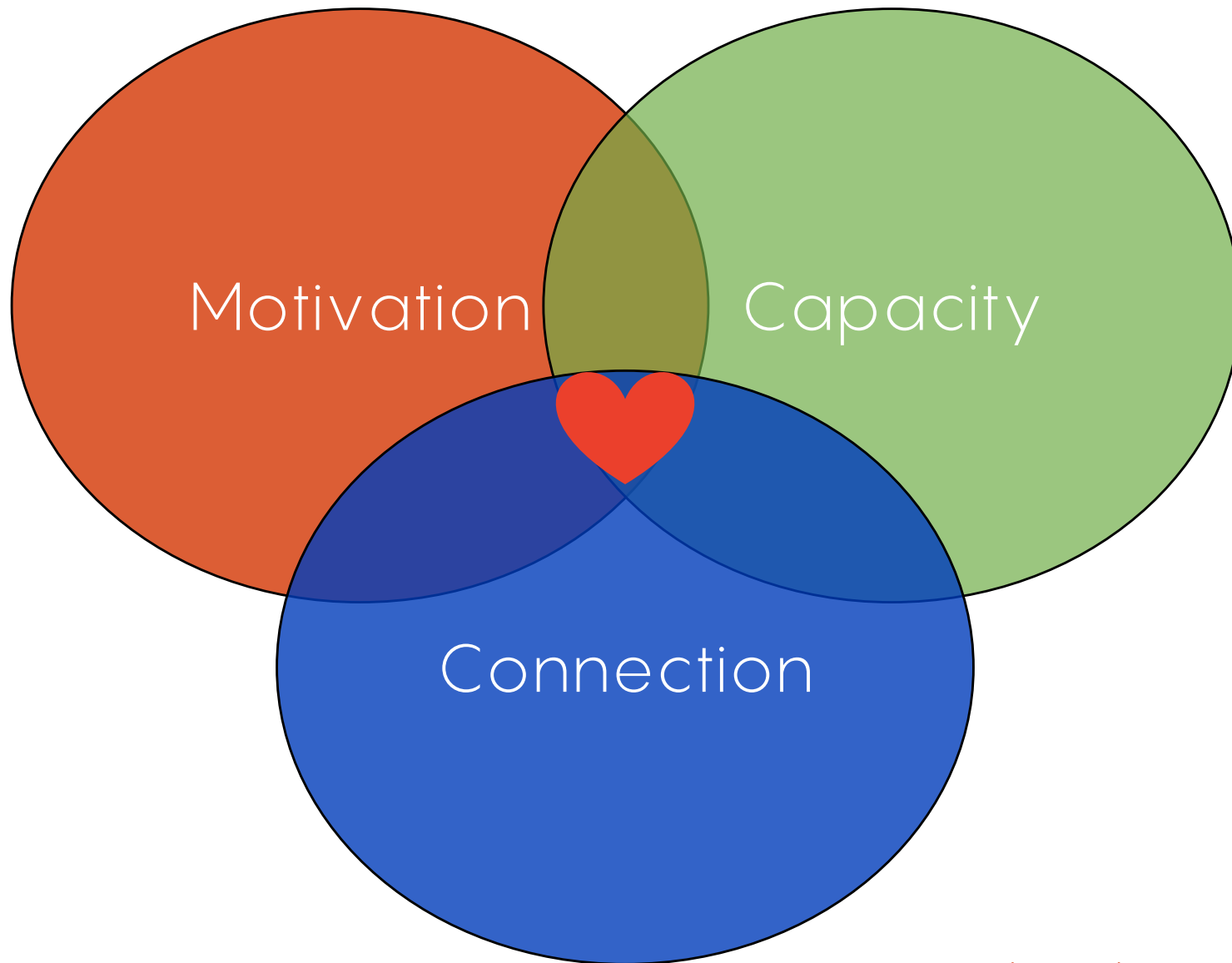
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We're looking for...



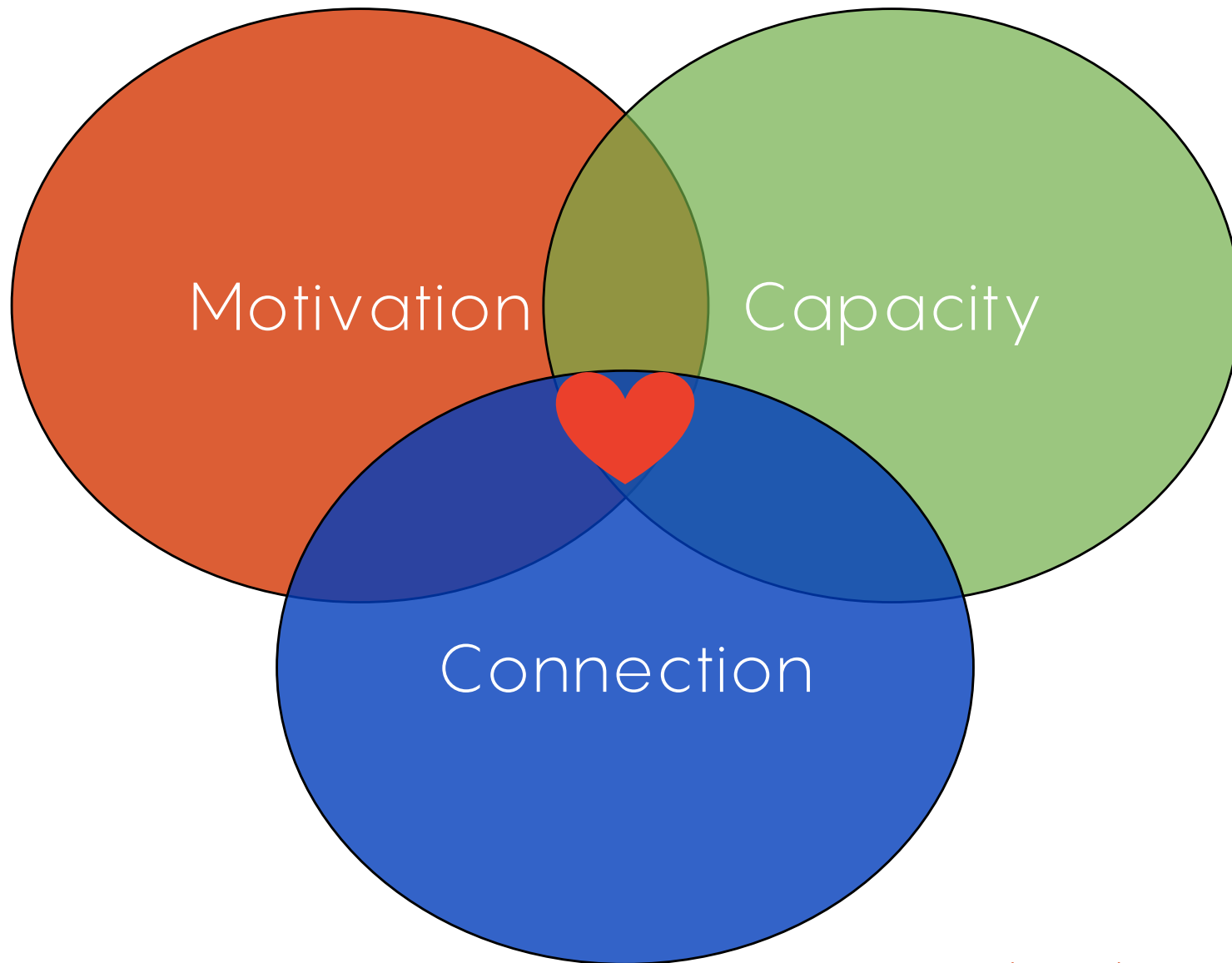
A large, stylized white circular graphic is positioned on the left side of the image. It consists of several concentric arcs and a central floral-like shape, all rendered in white against the solid blue background.

Start with
those closest
to you



Then look
further afield

We're looking for...



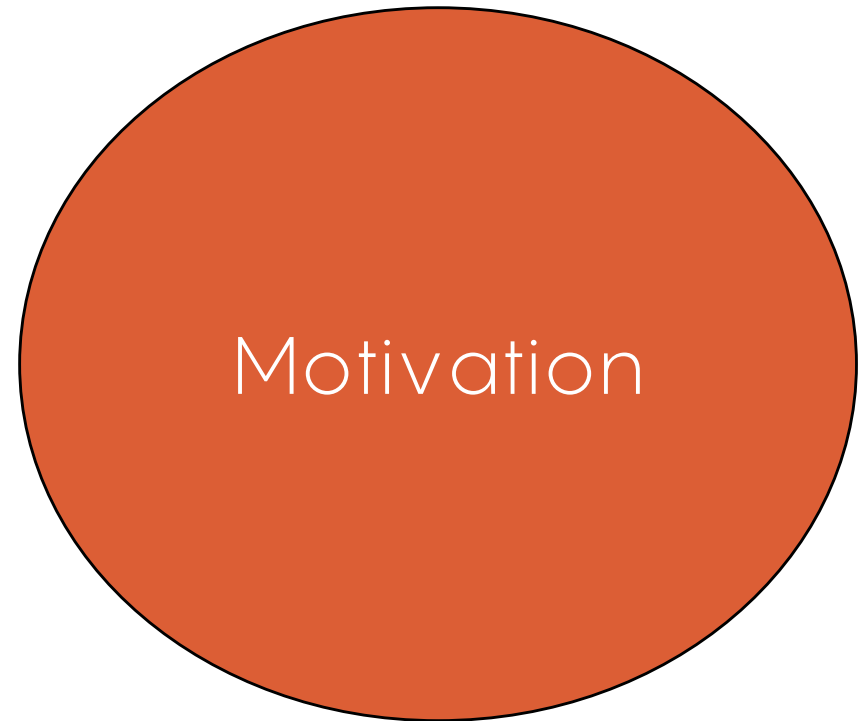
Motivation

- ⊗ Connection to cause/organisation
- ⊗ Desire to make a big difference
- ⊗ Give something back
- ⊗ Peer pressure/social connection
- ⊗ Sense of duty — status/tradition
- ⊗ Religious belief
- ⊗ Personal identity
- ⊗ Local pride
- ⊗ Add meaning/purpose to life
- ⊗ Recognition/Be remembered
- ⊗ Tangible benefits — transactional
- ⊗ Tax benefits
- ⊗ Spite/Guilt/Rage
- ⊗ Avoid/Overtake negative PR
- ⊗ Enjoyment



Motivation

- ⑥ Supported similar projects?
- ⑥ Supported orgs solving similar problems?
- ⑥ Expressed interest that could overlap with your problem?



Who gave to similar projects?

New Museum Founding Partners



The
GOLDSMITHS'
Company Charity

THE
LINBURY
TRUST



Their website and/or
supporter lists

MUSEUM OF LONDON

Charity number: 1139250

✓ Charity reporting is up to date (on time)

[Charity overview](#)
[What, who, how, where](#)
[Governance](#)
[Trustees](#)
[Financial history](#)
[Assets and liabilities](#)
[Accounts and annual](#)

This table shows the charity's record of submitting annual returns, accounts and trustees' annual report (TAR) for the last five financial periods.

Title	Reporting year	Date received	Received	Download
Annual return	31 March 2023	15 January 2024	On time	
Accounts and TAR	31 March 2023	15 January 2024	On time	Download

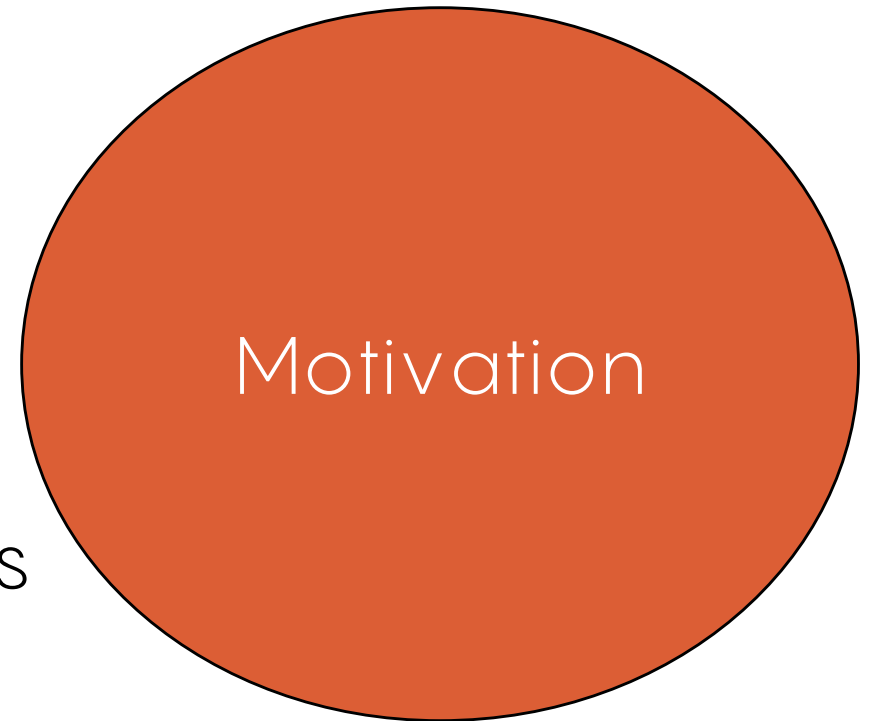
Their Annual Accounts (via
Charity Commission)



Speak to them!

Where to look

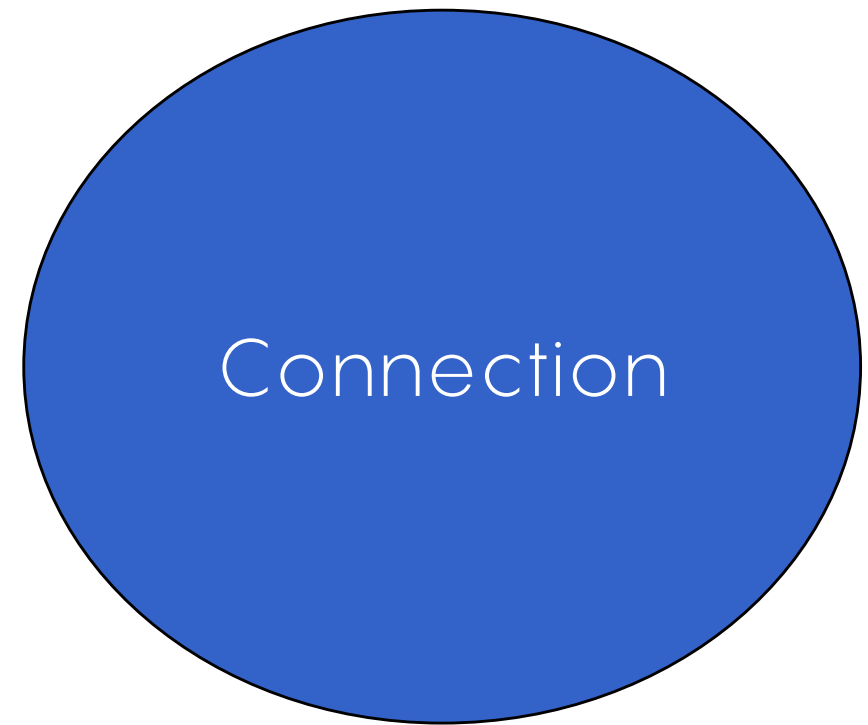
- ④ Prospect research databases
- ④ Accounts/websites of comparable orgs
- ④ Local business directories
- ④ Commissioned research



Connection

Inner circle:

- ⊗ Current donors
- ⊗ Previous donors
- ⊗ Regular visitors
- ⊗ Volunteers
- ⊗ Board
- ⊗ Other stakeholders
- ⊗ Partners



Then degrees of separation

Network Mapping



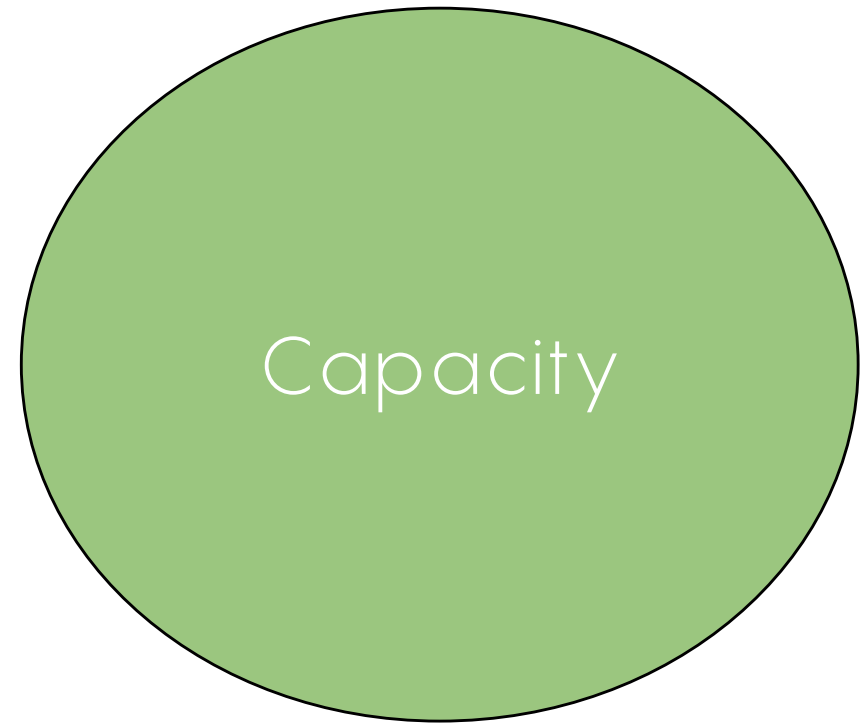
Who does your existing network know that might:

- ⊗ Care about solving your problem?
- ⊗ Care about your organization?
- ⊗ Have a high capacity to give?

What other networks are your 'inner circle' connected to?

Capacity

- ⑥ Local rich lists
- ⑥ Business leaders
- ⑥ Major donors to you/other orgs
- ⑥ Wealth screening



Commissioning Research

Advantages:

- ⊗ Access to expertise you might not have in-house
- ⊗ Access to information/datasets you might not have
- ⊗ Help uncover people you might not have considered
- ⊗ Enables you to prioritise and approach with an appropriate proposition

Disadvantages:

- ⊗ Not an exact science
- ⊗ Only based on publicly available information — so some missing pieces to the puzzle
- ⊗ More expensive than doing in-house
- ⊗ Data protection

Funder	Motivation	Capacity	Connection	Target Gift	Likelihood
	- How closely does your project align with the funder's stated aims? - Do they have any time-limited strategic aims? - Have they funded similar organisations/ projects before? - What do you know about their future plans? - Does their previous grant-giving show signs of flexibility?	- How does your proposed ask amount compare to their average grant? - If higher, how does your project compare to those to previously receive larger grants? - What % of grants go to new projects/ orgs each year? - Are they likely to have more or less money to give this year?	- Do you match all of the eligibility criteria? - Are they open to unsolicited applications? - Do you have an existing relationship? - Do you have a personal connection to any of the decision makers? - Does the timeframe for a decision align with the timeframe for your project?		
	Score / 5	Score / 5	Score / 5		

Scores:

0 to 7	Weak prospect (success rate likely to exceed 10:1)
8 to 11	Medium prospect (success rate likely to be around 7:1)
12 to 15	Strong prospect (success rate likely to be around 4:1)



Step 2b:

Identify who
is most likely
to be your
lead donor

Who are some of the big players?



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- ⊗ £10,000 to £250,000 or £250,000 to £10m
- ⊗ Projects that “value, care for and sustain heritage for everyone across the UK, now and in the future”
- ⊗ Capital, acquisition costs, professional fees, staff/volunteer costs
- ⊗ Impact against 4 investment principles:
 - ⊗ Saving Heritage
 - ⊗ Protecting Environment
 - ⊗ Inclusion, access and participation
 - ⊗ Organisational stability
- ⊗ Up to 90% of the project cost
- ⊗ Charities, councils, CICs, churches, private owners



Development Phase:

- ⊗ Funding available to develop plans to RIBA 2
- ⊗ Architects/design plans
- ⊗ Also activity plan, business plan, interpretation, evaluation, conservation, fundraising...
- ⊗ Up to two years to complete

Delivery Phase:

- ⊗ Work on-site
- ⊗ Up to five years to complete



Key Considerations

- ⦿ Timescales — Development and Delivery
- ⦿ Hands-on



Museum and Estate Development Fund

- ⊗ Between £50,000 and £5million
- ⊗ Non-national accredited museums and local authorities
- ⊗ Funding to “undertake vital infrastructure improvements and urgent maintenance backlog work beyond the scope of day-to-day maintenance budgets”
- ⊗ Annual application round
- ⊗ Three years to complete the work
- ⊗ Up to 95% of project costs for grants under £1m, 90% for grants over £1m



- ⦿ No fixed limits, but typically £1,000 to £500,000
 - ⦿ Repair, conserve, care for historic places
 - ⦿ Engagement Projects
 - ⦿ Research activities
 - ⦿ Heritage at Risk
 - ⦿ Community Grants
- ⦿ Capital - Grade I or II* (II in conservation area)
- ⦿ Project Development, Capital work, Standalone Maintenance, Adaptive reuse, Acquisition, Interpretation
- ⦿ Not for new builds, routine maintenance, exhibits/mobile assets



- ⊗ Heritage Revival — grants to rescue & repurpose neglected heritage buildings
 - ⊗ (Viability (£20k), Development (£50k) & Capital Grants (£500,000))
- ⊗ General Fund — loans to invest in heritage-led projects, such as purchase, renovation and new services
 - ⊗ Up to £500,000, typical rate - 6.5% - 8% fixed
- ⊗ Heritage Impact Fund — loans for “projects looking to make a positive social impact by acquiring, reusing, or redeveloping buildings of historic or architectural importance”

The Wolfson* Foundation

- ⊗ Usual grant range - £50,000 to £500,000
- ⊗ Museums & Galleries - New build, refurbishment & equipment to improve display & interpretation of nationally significant collections (accredited museums/local authorities)
 - ⊗ Improved interpretation/conservation, engagement, visitor numbers and/or org sustainability
- ⊗ Historic Buildings - Conservation and restoration work to sites of outstanding historic, architectural and cultural significance (Charities or Councils with Grade I or II* buildings)

Other options

- ⊗ Major individual philanthropist?
- ⊗ Local authority/Council?
- ⊗ DCMS/Government?
- ⊗ Notified legacy gift?

A large, stylized white circular graphic is positioned on the left side of the image. It features concentric arcs and a central floral-like shape, creating a modern, abstract design.

Step 3:

Start drafting
your Case
for Support

Writing Your Case for Support

- ⑥ Written with a specific target audience in mind
- ⑥ Focuses on a problem they care about solving
- ⑥ Frames the problem in a way they can understand and (emotionally) connect to
- ⑥ Provides a clear solution to the problem
- ⑥ Gives them a clear invitation to act
- ⑥ Shows how their action helps to solve the problem

Your Case for Support is an invitation...

...to change
something

...to fight for
something

...to fix
something

...to create
something

...to believe in
something

...to be part of
something

...to stand for
something

...to save
something

...to join
something

...to be
something

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Ipswich

Museum



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The IPSWICH Case

168 years ago the people of Ipswich came together to give their museum a bright future. Now, we are asking you to do the same.

Today, when you think of Ipswich Museum you probably think of the giraffe, rhinoceros and mammoth. After all, the stuffed animals in the Natural History gallery have been welcoming visitors to the museum since the early 1900s.

You possibly remember the Victorian décor – the dark, imposing wooden display cases and dioramas that transport you back in time and lend the museum an austere feel.

You might remember your first visit to the museum as a child and how it felt to enter the Natural History gallery for the first time. You might find yourself reflecting that it doesn't look much different today.

And that's the problem.

The IPSWICH Case (extracts)

Ipswich Museum – creating a museum to make Ipswich proud again

With your support, and the help of our community, we want to revitalise Ipswich Museum, creating a place that fills modern-day visitors with a feeling of **wonder, excitement and discovery** – the same feeling that the first visitors to Ipswich Museum would have experienced.

Will you help breathe new life into your museum?

Do you believe that Ipswich deserves to have a high quality museum? A place to explore new ideas, to support the education of people of all ages and to tell our story?

If so, please join us today to create a museum that current and future residents of Ipswich can be proud of.

The MUSEUM Case

How did a giraffe and a rhino end up in Ipswich Museum?

If you ask people in Ipswich what they remember about their first visit to Ipswich Museum it is a fair bet they will tell you about a giraffe and a rhinoceros.

For decades, a giraffe from Somaliland and a rhinoceros from India have welcomed visitors to Ipswich Museum. They have amazed, delighted (and sometimes scared) visitors of all ages, standing proudly in the centre of our Victorian Natural History gallery.

But how did they get here?

We know that the giraffe came on a train from London. He had to be tilted at an angle in order to get through a low bridge. We also know that an inspector was supposed to ride on the giraffe's next during the train journey but successfully argued that his age, weight and lack of training meant this was not a good idea.

We know that the rhino came from the Natural History Museum, in exchange for a pig. We also know she arrived in a horse drawn removal van and couldn't be put in her intended position because she was too heavy to move.

But that's only part of the story. So how did they REALLY get here?

Today, we must confront the fact that many of our collections are inextricably linked to Britain's colonial past and the way we display these objects is rooted in an imperialist view of the world.

In 2021 we have an opportunity to reimagine Ipswich Museum and the way we engage our visitors with our collections. We need to use this opportunity to address the role the British Empire played, both in the history of Ipswich and our museum. We owe it to the people of Ipswich and the communities and cultures whose stories we tell to fill the gaps in our knowledge and to tell the whole story.

But we can't do it without you.

Will you help us tell the whole story of our past?

Events in 2020 have shown how important it is for all of us to confront our past, the impact we've had on other cultures and communities and how that legacy still impacts our lives today.

Museums are well placed to lead this conversation – especially museums so inextricably linked to that history.

Today, we have an opportunity to take a major step forward in how we tell a more accurate story of our past, how we reduce the impact our work continues to have on the oppression of other cultures and communities, and how we use our platform to engage current and future generations with this important issue.

The MUSEUM Case

Do you agree that an important part of preserving heritage is ensuring that its story is accurately recorded, interpreted and shared?

Do you agree that we owe it to the communities and cultures we represent to share their stories accurately and with integrity?

Do you agree that now is the time to rid museums of their colonialist biases and to show our collections in a more revealing light?

If so, please join us today to create a more equitable and relevant Ipswich Museum for everybody.



Step 4:

Work out a
realistic gift
ladder

How many gifts does it take
to raise £2.5million?

$1 \times £2,500,000?$

$2,500,000 \times £1?$



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One possible solution

Number of Gifts	Size of Gift	Total Value
1	£500,000	£500,000
2	£250,000	£500,000
4	£100,000	£400,000
8	£50,000	£400,000
16	£25,000	£400,000
30	£10,000	£300,000
61		£2,500,000



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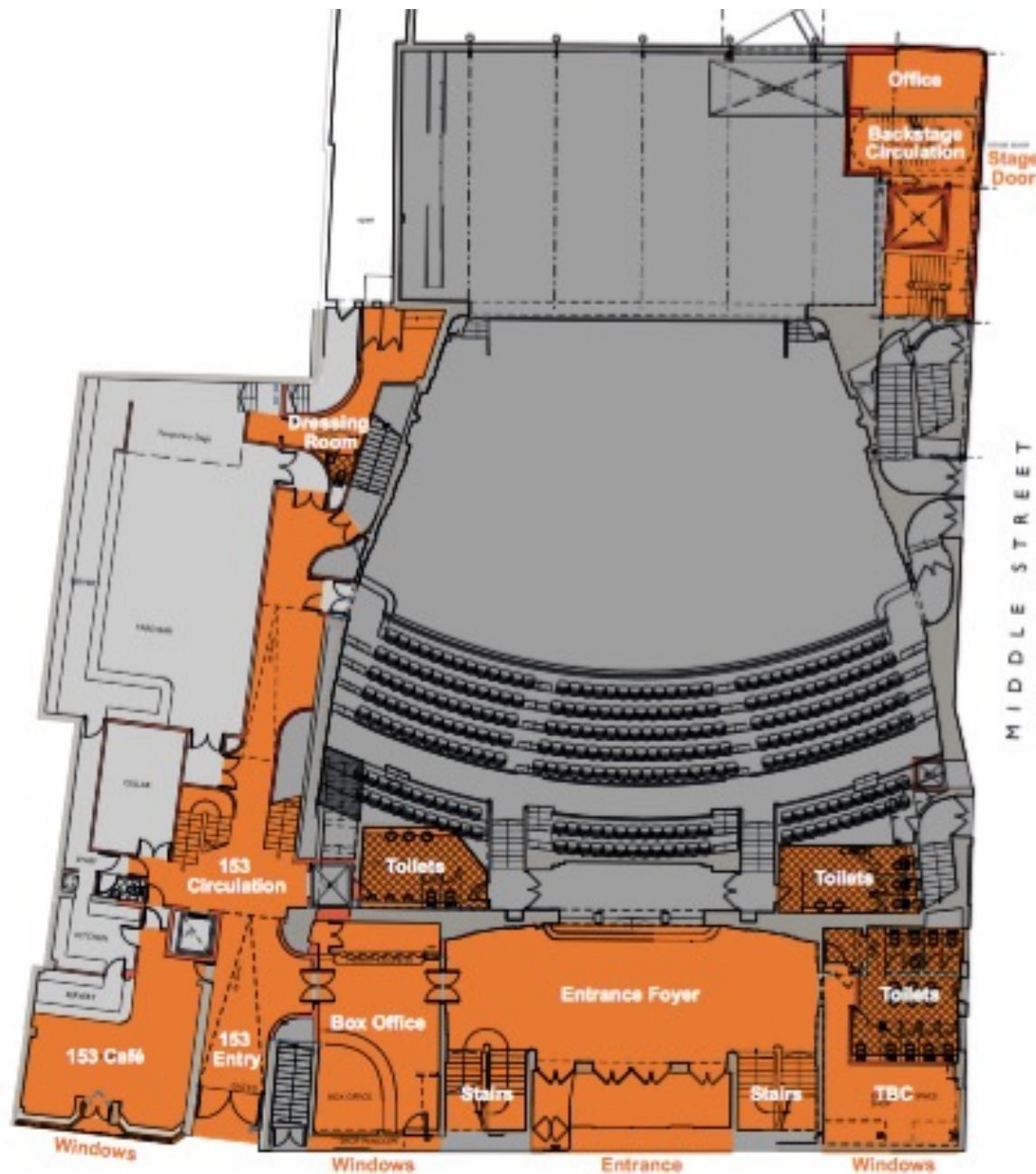
Questions to ask

- ④ What is a realistic lead gift?
- ④ How many potential funders are within reach?
- ④ How many “sponsorable elements” are available?
- ④ How attractive are those propositions?
- ④ Can you create additional propositions?

Power of the lead gift

Number of Gifts	Size of Gift	Total Value
1	£1,000,000	£1,000,000
2	£250,000	£500,000
4	£100,000	£400,000
8	£50,000	£400,000
8	£25,000	£200,000
23		£2,500,000

Number of Gifts	Size of Gift	Total Value
1	£250,000	£250,000
5	£100,000	£500,000
10	£50,000	£500,000
20	£25,000	£500,000
30	£10,000	£300,000
50	£5,000	£250,000
100	£1,000	£100,000
200	£500	£100,000
416		£2,500,000



£1million target:

1 auditorium
 1 entry foyer
 1 Green Room
 1 box office
 1 Projection room
 4 company
 offices
 2 cafes/bars
 14 toilets
 7 dressing rooms
 c.1,000 seats

Anytown Theatre – £1m

Number of Gifts	Size of Gift	Total Value
1	£250,000	£250,000
2	£100,000	£200,000
3	£50,000	£150,000
7	£25,000	£175,000
25	£10,000	£250,000
100	£1,000	£100,000
138		£1,125,000



Pareto Principle – 80/20

Number of Gifts	Size of Gift	Total Value
26	£9000k	
112	£225k	



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How many people do you need to ask?

Gift Level	Number of Gifts Needed	Number of Warm Prospects Needed	Number of Cold Prospects Needed
£250,000	1	4	9
£100,000	2	8	18
£50,000	3	12	27
£25,000	7	28	63
£10,000	25	75	150
£1,000	100	300	500
TOTAL	138	427	902

It's a start...

...but we can do better!



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Step 5:

Review the
internal and
external
context

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



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How to assess the internal and external context

- ④ Stakeholder Interviews
- ④ Comparator Interviews
- ④ Internal Assessment
- ④ PEST Analysis

Stakeholder Interviews

Representatives of:

- ⊗ Current donors (incl. highest level)
- ⊗ Previous donors
- ⊗ Current board members
- ⊗ Previous board members
- ⊗ Identified prospects outside of current network
- ⊗ Community leaders and influencers

Stakeholder Interviews

- ⑥ Gauge interest/excitement for the Case
- ⑥ Understand likely gift levels
- ⑥ Understand motivations for different gifts
- ⑥ Gauge how your org & leadership is perceived
- ⑥ Understand current relationship/experience
- ⑥ Identify concerns or challenges (both internal and external)
- ⑥ Identify potential leaders
- ⑥ Identify other prospects or networks

Comparator Analysis

- ⑥ Who has done a similar thing recently?
- ⑥ How much did they raise?
- ⑥ Where did the money come from? (% by stream)
- ⑥ What was their lead gift and where did it come from?
- ⑥ How much resource did they allocate to fundraising?
- ⑥ What success rates did they achieve?
- ⑥ What worked for them? What didn't work?
- ⑥ What challenges did they face?
- ⑥ What do they wish they had done differently?
- ⑥ What advice would they give you?



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Internal Assessment

- ⦿ What fundraising resource do you have?
- ⦿ What fundraising skills/experience do you have?
- ⦿ Do you have other things you need to fundraise for alongside the campaign?
- ⦿ Are the Board/Senior Leadership team bought into the project?
- ⦿ Do you have the necessary systems and processes in place?

External Assessment

- ⊗ Political
- ⊗ Economic
- ⊗ Social
- ⊗ Technological
- ⊗ Competition

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



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What does it mean?

We have to continue achieving our revenue fundraising goal at the same time...

Recent comparable campaigns have reported increased competition for grants

We didn't thank donors after our last campaign

...which means we are likely to have fewer prospects we can ask for the capital project. We are also likely to need to bring in additional fundraising capacity. This will increase the cost of the campaign.

...which means we will need to assume a less-favourable success rate. This means we need to identify more prospects.

...which means we will need to factor in longer relationship-building time and should expect a less-favourable success rate.

Do you need to adjust?

Gift Level	Number of Gifts Needed	Number of Warm Prospects Needed	Number of Cold Prospects Needed
£250,000	1	4	9
£100,000	2	8	18
£50,000	3	12	27
£25,000	7	28	63
£10,000	25	75	150
£1,000	100	300	500
TOTAL	138	427	902

Decision Time — Do the numbers add up?

A Little Short?

- ④ Find more prospects?
 - ④ Network Mapping
 - ④ Commission research
 - ④ Identify connectors
- ④ Change the timeframe?
 - ④ Other funding streams
 - ④ Convert cold to warm
- ④ Diversify funding mix?
 - ④ Loans?
 - ④ Investment?
 - ④ Reserves?
- ④ Accept the risk?





Step 6:

Structure
your
campaign

One possible solution

Number of Gifts	Size of Gift	Total Value
1	£500,000	£500,000
2	£250,000	£500,000
4	£100,000	£400,000
8	£50,000	£400,000
16	£25,000	£400,000
30	£10,000	£300,000
61		£2,500,000



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A hand in a dark suit jacket is reaching towards a pyramid of champagne glasses. The pyramid is composed of four tiers of glasses, each filled with a golden liquid. The background is dark, making the glasses and the hand stand out.

Start
at
the
top!

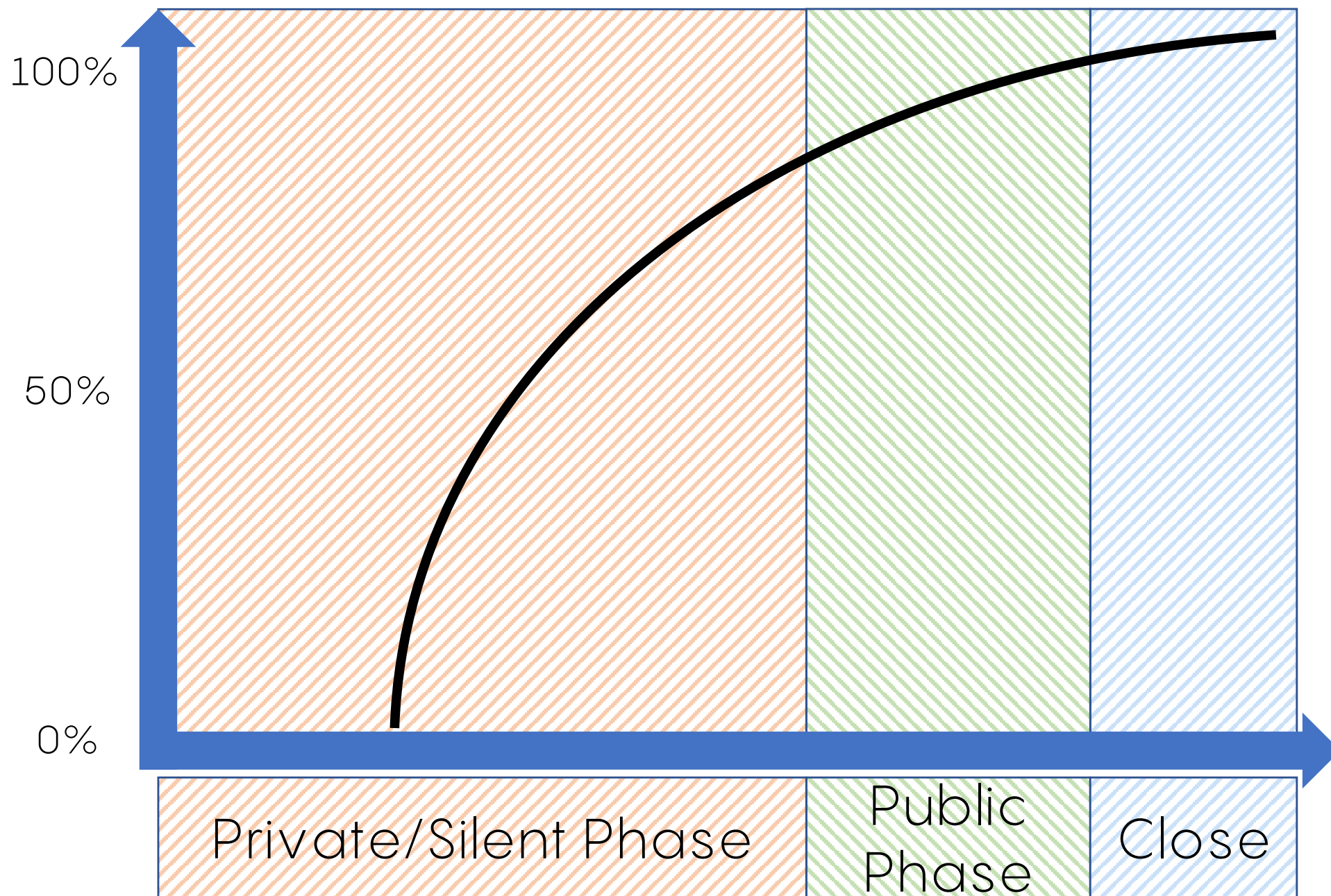


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Work from top to bottom

- ⦿ Success depends on the larger gifts
- ⦿ Larger gifts often take longer to secure
- ⦿ Can adapt plans if lead gift changes
- ⦿ Builds momentum quickly
- ⦿ Committed supporters can show leadership
- ⦿ Prospects can “trickle down” gift levels
- ⦿ “Smaller” donors put off by risk



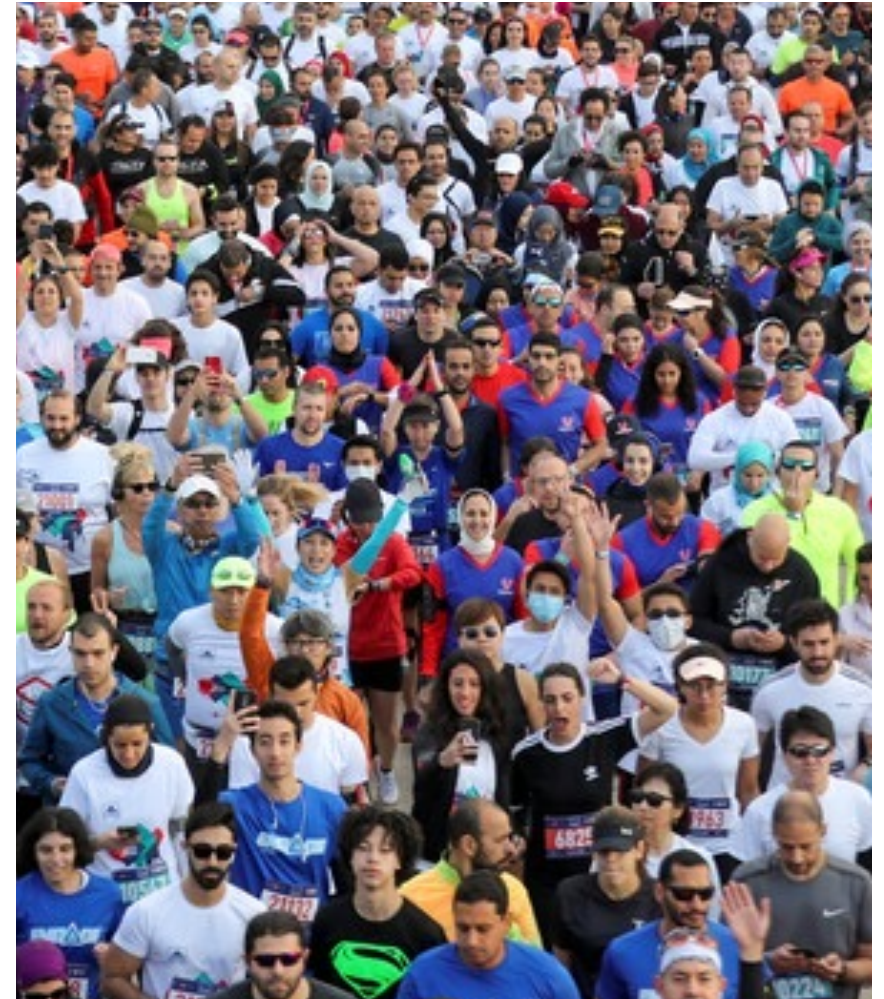
Private Phase

- ⊗ c.70% of target
- ⊗ Biggest gifts first
- ⊗ Small number of donors
- ⊗ Establish leadership
- ⊗ Build momentum



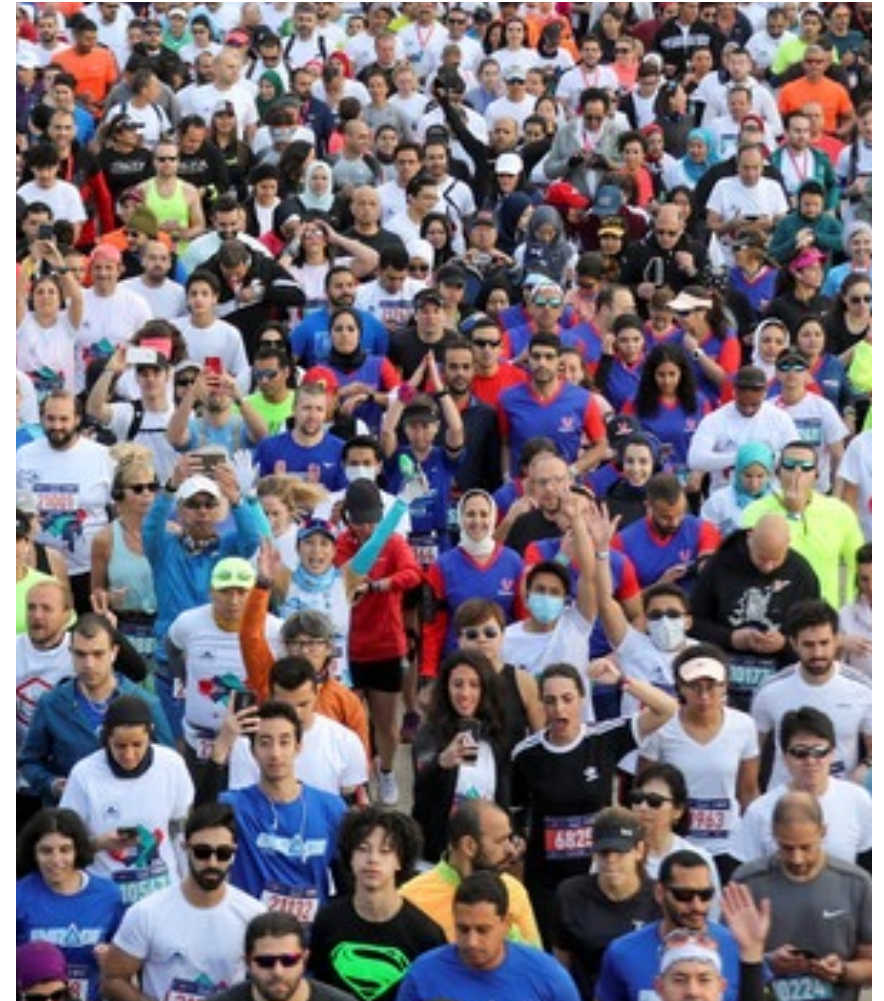
Public Phase

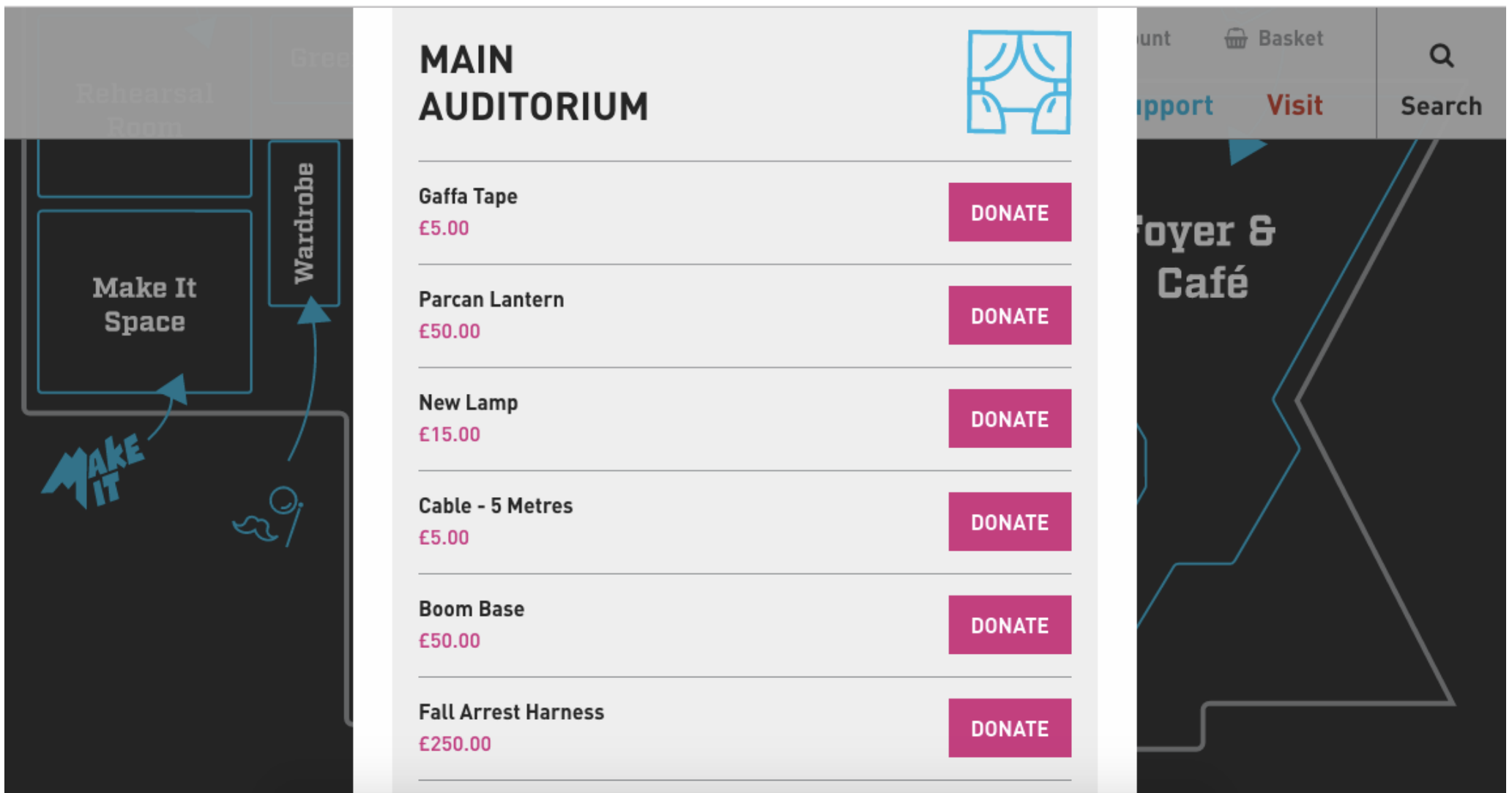
- ④ Final 20-30% of target
- ④ Smaller gifts
- ④ Bring in networks
- ④ Grow momentum



Other benefits

- ⑥ Build excitement ahead of reopening
- ⑥ Give a sense of public ownership
- ⑥ Identify people with interest in supporting future fundraising activity







Step 7:

Plan your
moves

What do you need to do?

Pre-launch:

- ⊗ To improve any internal weaknesses before you begin?
- ⊗ To create new propositions?
- ⊗ To implement systems/processes
- ⊗ To build strong relationships with lead/high value prospects?

What do you need to do?

Private Phase:

- ⊗ To build strong relationships with top 20%?
- ⊗ To ensure asks/proposals are submitted on time?
- ⊗ To identify new prospects and expand your network?
- ⊗ To thank and engage supporters?

Public Phase:

- ⊗ To launch a public campaign
- ⊗ To raise awareness/build momentum



Step 8:

Resource
your
campaign

Who do you need on your team?



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Your Team

- ⊗ Board
- ⊗ Senior Management Team
- ⊗ Fundraising Manager (plus support?)
- ⊗ Marketing and Comms
- ⊗ Frontline staff
- ⊗ Project Manager?

Who is going to deliver the plan?

Your
Fundraiser(s)?

Campaign
Fundraiser(s)?

Volunteer(s)?

Consultant?

Committee?



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What external support is available?



Prospect
Research



Strategic
Consultants



Bid Writers

What are you short of?

Prospects:

- ⊗ Prospect research consultant/company?
- ⊗ Campaign board?
- ⊗ Fixed-term researcher?

Capacity

- ⊗ Fixed-term fundraisers?
- ⊗ Volunteers?
- ⊗ Bid-writing consultant?

What are you short of?

Specialist skills:

- ⊗ Consultant/freelancer?
- ⊗ Fixed-term fundraiser?
- ⊗ Training?

Direction:

- ⊗ Strategic consultant?
- ⊗ Fixed-term fundraiser?
- ⊗ Mentor/Critical Friend?

Your resource needs will (probably) change



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Campaign Leaders

- ⊗ Provide access to networks
- ⊗ Bring clout of peer-to-peer engagement
- ⊗ Provide early (large) donation to build momentum
- ⊗ Offer credibility and assurance
- ⊗ Provide leadership to other volunteers



- ⑥ Passionate interest in work/project
- ⑥ Take responsibility for achieving target
- ⑥ Status & influence (business, political community, social)
- ⑥ Willing to give a gift
- ⑥ Willing to ask for a gift
- ⑥ Willing to act as advocate
- ⑥ Willing to engage networks
- ⑥ Experience of fundraising/campaigns
- ⑥ Be prepared to work!
- ⑥ Probably already has some link to your org

Finding Campaign Leaders

- ⑥ Explore your networks
- ⑥ Take time to find the right person/people
- ⑥ Don't rush — cultivate the relationship
- ⑥ Be prepared to answer difficult questions
- ⑥ Be clear what the expectations are, and what support they'll get



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Gift Acceptance Policies

Code of Fundraising Practice (especially section 2.2)

<https://www.fundraisingregulator.org.uk/code>

<https://www.fundraisingregulator.org.uk/about-fundraising/resources/due-diligence-and-fundraising>

Chartered Institute of Fundraising — Creating a Donations Acceptance and Refusal Policy

<https://ciof.org.uk/library/resources/creating-a-donations-acceptance-and-refusal-policy/>

Charity Commission — Accepting, Refusing and Returning Donations

<https://www.gov.uk/guidance/accepting-refusing-and-returning-donations-to-your-charity>