



Off the Fence Trust
Fundraising Plan
from Individuals

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1. Executive Summary

This plan defines the objectives and means for Off the Fence (OtF) to maintain and increase support from individuals; in addition to current activity. In order to continue to meet the needs of its beneficiaries, OtF must stabilise planned income from individuals and implement an on-going programme of supporter recruitment and retention. The plan has been developed from the findings of a fundraising audit that was completed on OtF.

Summarised objectives;

- To raise additional funds of £52,500 in 12 months.
- To recruit 140 new supporters combined of single gift and monthly donors.
- To convert (or recruit) 100 supporters from single-gifts to regular, planned donors.
- To hire a new fundraiser.
- To develop an ongoing supporter recruitment programme
- To achieve an overall ROI of £0.54 in year 1.

The projected overall return on investment for the plan is £0.54 (in year 1) for every £1 invested (not including the investment), rising to £10 return in year seven (from year 1 recruits only). This plan does not detail the ongoing growth potential in subsequent years for methods employed but recommends a review and re-plan each year.

The plan will employ various approaches to recruit new supporters, both existing and new methods, and will be implemented over a 12-month period. The plan addresses current weaknesses in the organisation's fundraising and seeks to take advantage of recognised opportunities (See Appendix 1). The plan lays foundations for future growth for lowest reasonable risk.

The plan demonstrates the analysis undertaken to enact realistic strategies to meet OtF's fundraising objectives and presents a detailed budget and action plan by which to implement the strategies recommended.

To measure success, the plan will be monitored at regular intervals, recording new donors recruited and income generated.

2. Vision and Mission

- OtF's mission is to advance the Christian Gospel; to demonstrate the love of Jesus through evangelism and practical means, such as through relief of the poor, and care for the broken-hearted.
- OtF has a vision to see social and spiritual poverty eradicated in the City of Brighton and Hove and to see all of its residents living fulfilled lives.

This plan seeks to develop additional and regular income for OtF to fulfil its vision and mission.



3. Audit Information

A fundraising audit was completed on OtF to ascertain its 'where are we now' position the SWOT analysis (Sargeant & Jay, 2010) and conclusions are below. The full audit forms Appendix 1.

Strengths

Strength	Evidence	Impact
Proven long-term track record. Good reputation in the city.	(Young, Off the Fence Trust Business Plan 2012/13, 2012)	<ul style="list-style-type: none"> • Good 'investment' for donors. • Positive brand recognition • High level of trust.
Good financial policy with stringent monitoring.		<ul style="list-style-type: none"> • Safe 'investment' for donors.
Good networking amongst local agencies.	(Off the Fence Trust, 2012)	<ul style="list-style-type: none"> • Opportunities for collaborative service delivery and fundraising.
Provide a (training) service to other homeless organisations (including churches).		<ul style="list-style-type: none"> • Relied upon by a wider service delivery network. • Increased opportunity for funding.
Christian donors give more in recession	(CAF Charities Aid Foundation, 2012)	<ul style="list-style-type: none"> • Stronger funding base in depressed economy.

Weaknesses

Weakness	Evidence	Impact
Not enough daytime volunteers	(Young, Off the Fence Trust Business Plan 2012/13, 2012)	<ul style="list-style-type: none"> • Limited service capacity.
Lack of dedicated employed fundraiser		<ul style="list-style-type: none"> • Limited fundraising opportunity / income.
Communication internally and externally		<ul style="list-style-type: none"> • Inefficient operations. • Reduced fundraising opportunity. • Lower staff / volunteer morale.
Four charities in one		<ul style="list-style-type: none"> • Difficult to hire Staff, focus fundraising efforts • Central staff spread thin.
Homeless service area is more recognised than other areas		<ul style="list-style-type: none"> • Difficult to fund other areas of service delivery.



Opportunities

Opportunity	Evidence	Impact
Developing new and unique services.	(Young, Off the Fence Trust Business Plan 2012/13, 2012)	<ul style="list-style-type: none"> • Diversify income streams. • Unique funding opportunities for donors.
Develop and introduce more training programmes for staff and volunteers.		<ul style="list-style-type: none"> • Increased quality of service delivery. • Increased opportunity to receive funding.
Develop a more strategic individual fundraising plan to reach local people.	(Young, Chief Executive, Off the Fence Trust, 2012)	<ul style="list-style-type: none"> • Increase income. • Increase volunteer base.
Develop new fundraising products (including regular giving product)		<ul style="list-style-type: none"> • Increase regular, planned income.

Threats

Threat	Evidence	Impact
Paul Young to leave or become sick.		<ul style="list-style-type: none"> • Loss of CEO, founder, visionary, sole fundraiser. • Loss of income. • Low staff morale.
Long-term depressed economy.	(CAF Charities Aid Foundation, 2012) (Office for National Statistics, 2012)	<ul style="list-style-type: none"> • Reduced income from donors (especially secular)
Too reliant on current income streams.	(Young, Off the Fence Trust Business Plan 2012/13, 2012)	<ul style="list-style-type: none"> • Loss of income. • Lose ability to deliver services. • Lose reputation.
Tired community fundraising products		<ul style="list-style-type: none"> • Loss of donor interest. • Loss of income.
Growth of Competitor organisations		<ul style="list-style-type: none"> • Reduced pool of donors and funding sources.

SWOT analysis summary - highest impact

Strength: Loyal and committed giving of Christian donors.

Weakness: No dedicated fundraiser.

Opportunity: Strategic fundraising plan delivered by a dedicated fundraiser.

Threat: That the CEO is also the fundraiser and could become sick or leave.

4. Assumptions

OtF comprises four departments, each dealing with a specific area of social or spiritual poverty:

- Antifreeze – homelessness.
- Gateway – vulnerable women.
- Schoolwork – teaching healthy relationships and promoting the Christian Gospel message in schools.
- Ministry – preaching the Christian Gospel message and teaching organisations how to provide spiritual and social care / fight social and spiritual poverty.



5. Fundraising Objectives

A growth in the number of homeless persons, an increased demand for schoolwork and a waiting list of referrals for the Women's Centre are driving the need for OtF to increase fundraising income (Young, Off the Fence Business Plan 2013/14, 2013).

In order to maximise the income and return on investment, OtF's fundraising objectives seek to address the key weaknesses and take advantage of the organisation's key strengths as identified in the fundraising audit (see Appendix 1).

Objectives rationale

The rationale behind OtF's fundraising objectives is as follows:

- Meet the growing financial needs of the charity's growing mission objectives (as per the business plan). (Young, Off the Fence Business Plan 2013/14, 2013)
- Develop a more stable and predictable regular income (Sargeant & Jay, 2010) of unrestricted funds from individual donors.
- Increase the size of the donor base.

SMART Objectives

In order, to be measurable and achievable, the objectives have been qualified and quantified as S.M.A.R.T. (Sargeant & Jay, 2010)

- 1) To recruit 100 new single gift donors and 40 new committed (monthly donors) within 12 months with an activity ROI of 5.58.
- 2) To design and launch a supporter development programme within 6 months of plan approval.
- 3) To upgrade 100 of OtF's 405 single-gift donors into committed monthly donors within 12 months with an activity ROI of 5
- 4) To run four department-specific fundraising appeals, one for each of OtF's service areas within 12 months with a combined activity ROI of 0.98 in year one.
- 5) To grow the fundraising team by at least one member within 3 months of plan approval.
- 6) To achieve an ROI of .54 for all year 1 investment activities.



6. Strategy Development

This section details the rationale and supporting evidence upon which the strategies that follow are based.

The overall strategic direction will be determined by analysing OtF's existing methods for recruitment and fundraising from individuals (see Appendix 1) against potential methods and internal resource available to OtF. The potential methods are recognised techniques used by fundraisers as identified by Sargeant and Jay (Sargeant & Jay, 2010).

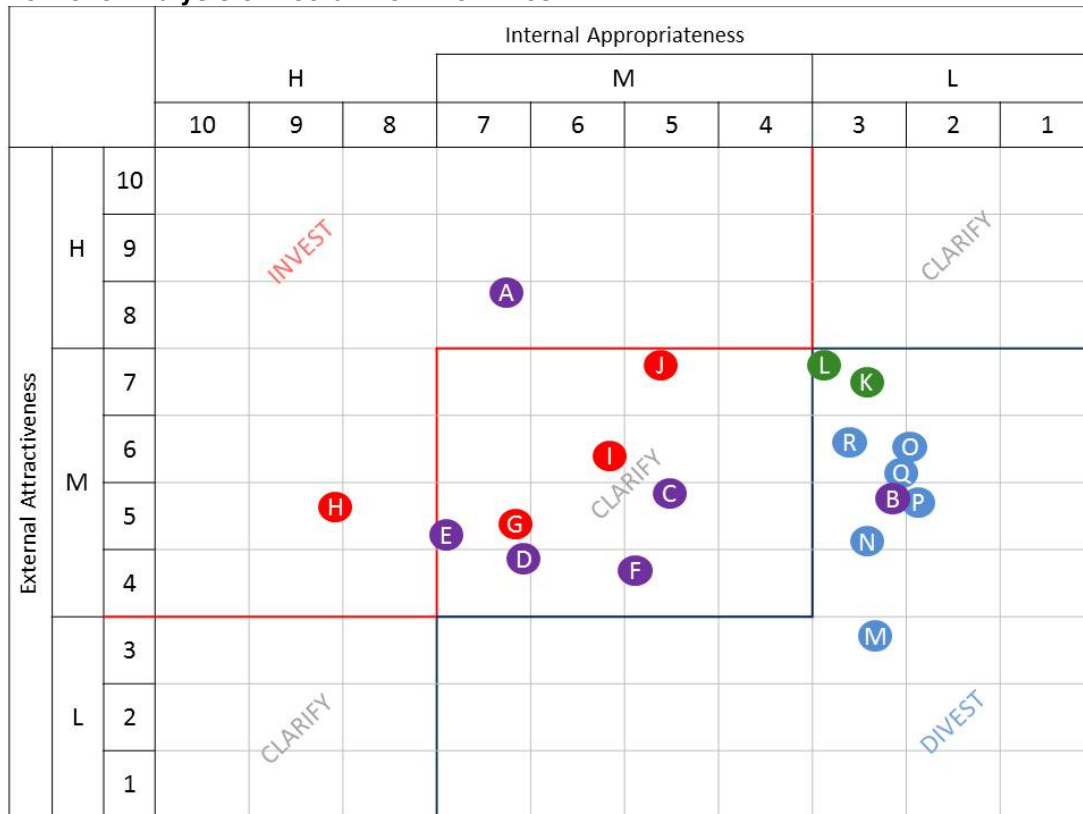


a. Recruitment of new individual donors

Ansoff Matrix of Recruitment Activities

		Recruitment Activities	
		Existing	New
Markets	Existing	Face to face (at local church services) (A) Online recruitment (via website) (B) Church leaflets (C) Community fundraising (D) Sponsored events (E) Functions (F)	Leaflets in schools (G) Church training events (H) Externally run (Christian) events (I) Internally run events (J)
		<i>Market Penetration (Low Risk)</i>	<i>Activity Development (Medium Risk)</i>
Markets	New	Face to recruitment at secular events (K) Face to face recruitment at school events (L)	Cold direct mail (M) Press ads (N) Street recruitment (O) Door to door (P) Via collaborator agency channels (Q) List swapping (R)
		<i>Market Development (Medium Risk)</i>	<i>Diversification (High Risk)</i>

Portfolio Analysis of Recruitment Activities



The adapted Ansoff matrix (Ansoff, 1968), above has been used to analyse existing recruitment activities within existing markets against potential new markets to extend into and new activities to undertake.

The Portfolio analysis (Sargeant & Jay, 2010) has been used to analyse the suitability of the existing and potential activities in the light of the internal appropriateness and external attractiveness of each activity.



Factors considered in the Portfolio analysis are:

<i>Internal Appropriateness</i>	<i>External Attractiveness</i>
Extent of staff / volunteer experience	Level of public concern about the beneficiary need
Extent of organisation past experience	Number of potential donors
Fundraising returns	Perceived impact on beneficiaries
Potential numbers recruited	Uniqueness of product
Ease of deliverability	Ease of participation

Analysis Conclusions

The recruitment activities which show the most likely best returns, with lowest risk and highest levels of internal appropriateness and external attractiveness are:

- **Invest** in: (A) Face to face at church services (speaking / preaching events). (H) At Church training events.
- **Clarify** existing activities: (C) Church leaflets, (D) Community fundraising, (E) Sponsored events and (F) Functions.

Existing activities should be **clarified** prior to engaging in new activities.

New activities in the '**Divest**' category should not be undertaken at this time and existing ones should be considered for stopping.

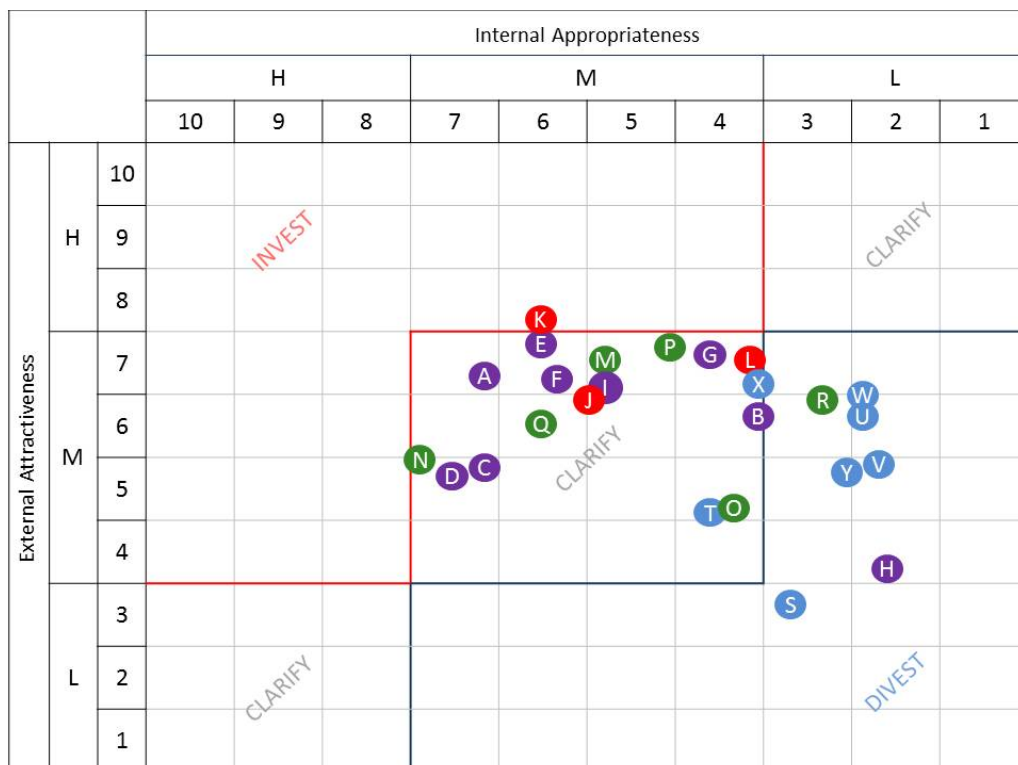


b. Fundraising activities to individual donors

Ansoff Matrix of Fundraising Activities to Individuals

		Fundraising Activities to Individuals	
		Existing	New
Markets	Existing	Face to face (offerings at local church services) (A) Online (website) (B) Church leaflets (C) Community fundraising (D) Sponsored events (E) Appeals. Xmas (F) Gateway (G) Functions (H) Monthly Giving (I)	Leaflets in schools (J) Department-specific appeals (K) Committed donation product (L)
	<i>Market Penetration (Low Risk)</i>		<i>Activity Development (Medium Risk)</i>
New	Donor Cultivation (M) New community fundraising (by geography) (N) Social Media (O) Email appeals (P) Major Donor (Q) Telephone appeals (R)	Cold direct mail appeals (S) Press ads (T) Street recruitment (U) Door to door (V) Via collaborator agency channels (W) List swapping (X) Secular Events (Y)	
<i>Market Development (Medium Risk)</i>		<i>Diversification (High Risk)</i>	

Portfolio Analysis of Fundraising Activities to Individuals



The adapted Ansoff matrix (Ansoff, 1968), above shows an analysis of existing fundraising activities within existing markets against potential new markets to reach into, and potential new activities to undertake.



The Portfolio analysis (Sargeant & Jay, 2010) shows an analysis of the suitability of existing and potential activities in the light of the internal appropriateness and external attractiveness of each activity.

Factors considered in the Portfolio analysis are:

<i>Internal Appropriateness</i>	<i>External Attractiveness</i>
Extent of staff / volunteer experience	Level of public concern about the beneficiary need
Extent of organisation past experience	Number of potential donors
Fundraising returns	Perceived impact on beneficiaries
Availability of resource (human, financial and other)	Uniqueness of product
Ease of deliverability	Ease of participation

Analysis Conclusions

The fundraising activities which show the most likely best returns, with lowest risk and highest levels of internal appropriateness and external attractiveness are:

- **Invest** in: (K) Department-specific appeals.
- **Clarify** existing activities: (A) Face to face at church services. (C) Church leaflets, (D) Community fundraising, (E) Sponsored events, (F) Xmas Appeal, (G) Gateway Appeal, Monthly Giving (I)

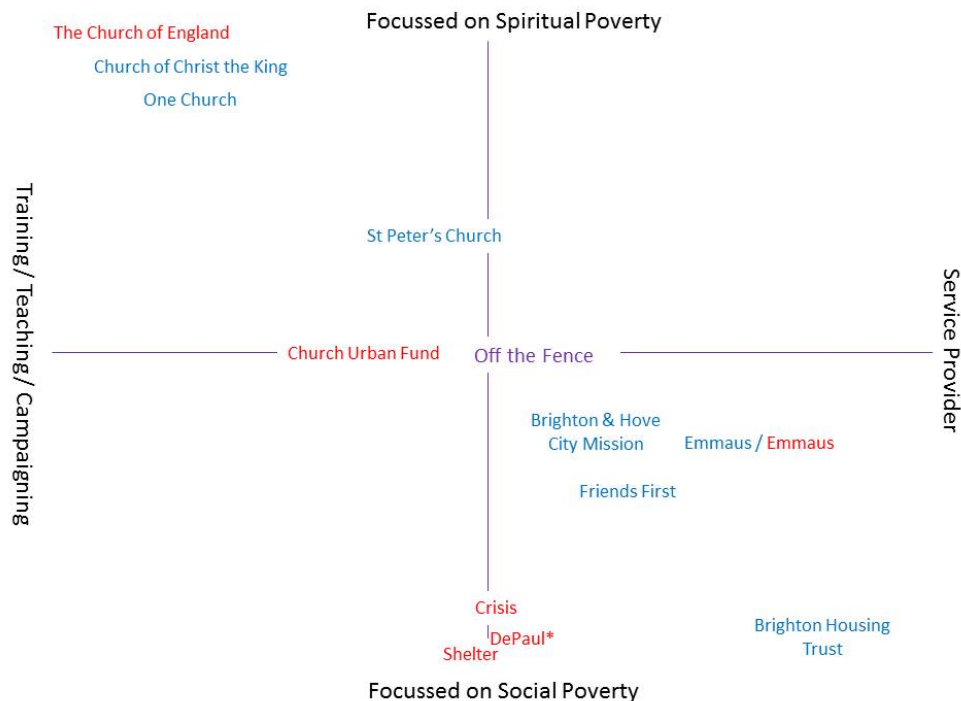
Without additional resource it is not prudent to clarify new activities, nor without first clarifying existing activities.

New activities in the '**Divest**' category should not be undertaken at this time and existing ones should be considered for dropping.



c. Positioning Strategy

OtF Positioning Map



Key:

* = Focuses on young people

Blue = Local organisations

Red = National organisations

The Positioning Map (Sargeant & Jay, 2010) above shows OtF's 'market' position relative to similar service providers.

As the map clearly shows, OtF's spread of services gives it the unique proposition of offering a holistic solution to reduce both Social and Spiritual Poverty with frontline services *and* training within Brighton and Hove.

Analysis Conclusions

From this analysis, the following positioning statement is derived:

"Off the Fence is the only organisation providing holistic, charitable services to improve the lives of people suffering from social and spiritual poverty in the City of Brighton and Hove. It is also the only organisation providing frontline services and training for other local organisations to assist with the cause."

This statement must be used when considering approaches to market (when qualifying audience groups most likely to connect with and support OtF.

This statement should become part of the foundations for producing all marketing and fundraising communications materials and for developing the case for support.



d. Segmentation Strategy

Ansoff Matrix of OtF Supporter Segments (Geo / Demographic)

		Geographic Segments	
		Existing	New
Demographic Segments	Existing	Christian Men in East & West Sussex* (A) Christian Women East & West Sussex* (B)	Christian Men in Brighton & Hove (C) Christian Women in Brighton & Hove (D)
	New	Secular Men in East & West Sussex (E) Secular Women in East & West Sussex (F)	Secular Men and Women in Brighton and Hove (G)
		<i>Demographic Penetration (Low Risk)</i>	<i>Geographic Development (Medium Risk)</i>
		<i>Demographic Development (Medium Risk)</i>	<i>Diversification (High Risk)</i>

*Within a 15 mile radius of the city boundaries of Brighton and Hove.

The segmentation matrix shows the primary segments of OtF's supporter audience on which segments OtF is focusing currently and where new opportunities may lie. OtF's existing and potential audience segments are simple and all sit within the general supporter profile identified in the fundraising audit (See Appendix 1).

Additionally, responses to OtF's general appeals vary, depending upon 'the ask' – i.e. some donors respond to 'asks' for the homeless services (Antifreeze); others to the women's centre. Whilst these numbers are small (See Appendix 1), a more in-depth analysis of the specific respondents over the last few years may show some behavioural segmentation based on the area of OtF they prefer to support.

Segmentation Criteria and Rationale

The following table shows a scored evaluation of the segments against Sergeant and Jay's criteria for selection, based on the information obtained during the fundraising audit (See Appendix 1). Each criterion is measured on a scale of 1-10, with 10 being the highest. E.g. A score of 10 for measurability = the most measurable.

Criteria	Segment						
	A	B	C	D	E	F	G
Measurable	7	7	7	7	7	7	7
Accessible	9	9	9	9	6	6	4
Substantial	7	7	9	9	9	9	7
Stable	8	8	8	8	5	5	6
Appropriate	7	7	10	10	7	7	5
Unique	7	7	8	8	5	5	5
Sustainable	8	8	8	8	6	6	4
TOTAL	53	53	59	59	45	45	38

Analysis Conclusions

Based on the analyses above, the best segments to recruit and fundraise from are:

- (C) Christian Men in Brighton and Hove.
- (D) Christian Women in Brighton and Hove.

Additionally, analysing the database of appeal respondents and some crude assumptions (based on the low quantities) may help create some behaviour-based segments for appeal targeting.

This information will drive activity targeting.

A and B could be considered as secondary targets. It is not considered to be worth focusing any of OtF's fundraising activity on segments (E), (F) or (G) at this time.



7. Fundraising Strategy Overview

Using the analyses above, the following strategies have been selected to achieve OtF's objectives of new recruits and fundraising income within a 12 month period from the approval of this plan.

Each strategy has been selected to be achievable and realistic, in terms of budget and feasibility, within reach of OtF's scope of resource and experience and with the lowest calculated risk. Each strategy serves to make the most of one or more strength and opportunity or cover an exposed weakness.

	Strategy	Rationale / Information	Income Info	Risk
1	Develop a planned recruitment programme at Church Speaking and Training Events Market Penetration Objective: Recruitment. Fundraising	Focuses on core segments. Reaches new geographical areas. Uses internal experience and knowledge. Focused activity with multiple outputs. Delivers intention and measurability.	Unrestricted funds	Low - Med
2	Introduce a supporter development programme Market Penetration Objective: Fundraising	Build relationships with donors to increase long-term income. Improve projected income & improve business planning.	Unrestricted funds	Low – Med
3	Introduce department-specific appeals Activity Development Objective: Fundraising	Improve response rate of appeals. Uses internal experience and knowledge. Enables departments to raise funds it needs.	Restricted funds	Low
4	Invest in a new fundraiser to work on individual giving Objective: Recruitment. Fundraising	Existing staff resource is at capacity and could not undertake new activity Covers a weakness of the CEO also being the sole fundraiser.	Both	Med
5	Improve fundraising and marketing literature Objective: Recruitment. Fundraising	Create more relevant communications with the varied segments of OtF's supporter (prospect) base. Improve positioning and brand recognition and message impact	Both	Low

Strategic Activities

OtF strategies will include the following activities, targeting the most likely prospects.

Strategy	Strategic Activities	Targeting Information
1	Create list of target churches	Primary target area = Brighton & Hove. Secondary target area = East & West Sussex within 15 miles of Brighton & Hove.
	Increase number of speaking engagements at local churches	
	Begin recruitment at church training events	
	Create specific recruitment materials	
	Channels to include: Direct Mail, telephone	
2	Design programme using proven methods of supporter development (i.e. relationship fundraising and upgrading) such as those espoused by Ken Burnett (Burnett, 2002) and Erica Waasdorp (Waasdorp, 2012)	Existing donor base / OtF contacts database.
	Implement programme with existing and new supporters	
	Programme will include: welcome pack, regular communications and planned asks	
3	Department-specific appeals – 1 for each area of the charity: Antifreeze, Gateway, Schools Ministry.	Based on historic response behaviour towards previous, specific campaign asks.
	Create specific materials. DM and email.	





Recruits from strategy / activity:

Strategy Activity	Recruitment Target	Funds Raised				
		Year 1	Year 1	Years 2 - 7	Totals	
Strategy 1 A) Church Speaking Events (1)	New Donors – single gift (4)	75	£750	£4,500	£5,250	
	New Donors - committed giving (5)	25	£7,500	£45,000	£52,500	
Strategy 1 B) Church Training Events (2)	New Donors – single gift (4)	30	£300	£1,800	£2,100	
	New Donors - committed giving (5)	10	£3,000	£18,000	£21,000	
Strategy 1: Sub Total		140	£11,550	£69,300	£80,850	
Strategy 2 Supporter Development Programme (3)	Upgraded Donors - committed giving (5)	100	£30,000	£180,000	£210,000	
Strategy 2: Sub Total			£30,000	£180,000	£210,000	
Strategy 3 Department-Specific Appeals	Antifreeze	N/A	N/A	£4,000	£30,000	£34,000
	Gateway			£2,500	£18,000	£20,500
	Schools			£1,500	£ 12,000	£ 13,500
	Ministry			£3,000	£ 18,000	£ 21,500
Strategy 3: Sub Total				£11,000	£78,000	£89,500
Totals			£52,550	£327,300	£380,850	

Notes / Assumptions:

- (1) Based on 25 church speaking events per year. Average recruits per event = 7 new contacts, of which 3 will give a single-gift and 1 will commit to regular giving.
- (2) Based on 10 church training events per year. Average recruits per event = 7 new contacts, of which 3 will give a single-gift and 1 will commit to regular giving.
- (3) Based on converting 25% of OtF's single-gift donors to committed regular donors.
- (4) Average single-gift = £10
- (5) Average monthly donation = £25 (£300 per annum)
- (6) OtF Donor lifetime value = Average Annual Donation x No. of Years of Support = £300 x 7 = £2,100

Source: Historical experience (Young, CEO and Founder, Off the Fence, 2012)

N.B these figures do not account for more recruits and converts ongoing year on year. Collateral benefit of supporter development programme should improve retention rate (currently unknown).



8. Case for Support

To connect supporters with the cause most close to their heart, OtF must refine its current general case for support and develop the fundraising case for support into one for each area of service delivery. Messaging can then be defined for each area and fundraising materials relevant to each department's work can be produced.

Tangible's Four Pillars model (Tangible, 2013) is useful to develop the fundraising proposition for OtF overall and for each area of service delivery.

	Vision	Enemy	Hero	Recipient
Off the Fence	To see social & spiritual poverty eradicated from Brighton & Hove.	Man's sinful heart; selfishness & cruelty. Lack of state provision for social & spiritual support.	Man's innate goodness / God's love & power empowering OtF	The socially & spiritually impoverished citizens of Brighton & Hove.
Antifreeze	To see everyone with food, clothing & shelter.	Financial and material poverty.	The antifreeze team & donors who provide resources (for food, clothing etc)	Homeless & poor people.
Gateway	To see all women living to their potential.	Personal insecurity, physical, mental & emotional abuse, unsafe living environments, fear.	The Gateway team.	Women, who are vulnerable, abused, lacking in self-confidence and hurting. That need support, who have nowhere else to go. Need rescuing.
Schools	To see young people having healthy relationships & knowing Jesus Christ.	Anti-Christian proponents. Secularisation. Unhealthy social influences such as peer pressure, social insecurity, fear	The schools team.	Schoolchildren.
Ministry	To see God's Kingdom come, with everyone knowing Jesus Christ.	Anti-Christian proponents. Secularisation. Sin. The devil.	Jesus Christ. The ministry team. OtF's donors and prayer warriors.	Schoolchildren.

From this, the Case for Support Hierarchy (Institute of Fundraising, 2012) can be produced, as per the example below:



Case Statement / Fundraising Proposition

Lives are being lost in Brighton & Hove each day.
Today with your help we can provide the practical and spiritual care needed to save them.

Generic Fundraising Case for Support

Information about the need: E.g homelessness numbers, street deaths, vulnerable women referrals etc.
Information about the solution: e.g. number of people housed, number of sleeping bags given out, number of women helped etc.
Amount of funds required.

Adapted written case for support:

For specific needs i.e. Antifreeze, Gateway, Schools, Ministry

Adapted verbal case for support:

For specific needs i.e. Antifreeze, Gateway, Schools, Ministry

Appeal letter

Website

Script

Presentation



9. Activity Schedule

Strategy	Strategic Activities	Months (March 2013 – February 2014)											
		M	A	M	J	J	A	S	O	N	D	J	F
Planned recruitment programme	Planning												
	Implementation												
	Monitoring												
	Evaluation												
	Develop and Refine or Drop												
Supporter development programme	Planning and development												
	Implementation - existing supporters												
	Implementation – new supporters												
	Monitoring												
	Evaluation												
Department-specific appeals	Planning												
	Gateway Appeal												
	Schools Appeal												
	Antifreeze												
	Ministry (March 2014)												
	Monitoring												
	Evaluation												
	Develop and Refine or Drop												
New fundraiser	Recruitment												
	In post												
	Monitoring												
	Evaluation												
	Develop and Refine or Drop												
Improve fundraising and marketing tools	Planning												
	Implementation												
	Monitoring												
	Evaluation												
	Development												

10. Budget Overview

Activity		Cost	
		£s	Staff Hours
1	Develop a planned recruitment programme	£1,755	839
2	Introduce a supporter development programme	£4,960	389
3	Introduce department-specific appeals	£5,530	698
4	Invest in a new fundraiser	£18,260	94
5	Improve fundraising and marketing tools	£3,500	190
TOTAL		£34,005	2,210



11. Fundraising ROI

The projected ROI of the plan is detailed below, based on the plan achieving its recruitment objectives and budgeted costs.

Strategic Activity	Cost of Activity	Income / Funds Raised		ROI*	
		Year 1	Total	Year 1	Total
1 Planned Recruitment	£1,755	£11,550	£80,850	£5.58	£45.07
2 Supporter Development	£4,960	£30,000	£210,000	£5.05	£41.33
3 Department Specific Appeals	£5,530	£11,000	£89,500	£0.98	£9.03
4 New Fundraiser	£18,260	**		N/A	N/A
5 New Fundraising Literature	£3,500	**		N/A	N/A
Costs Total	£34,005				
Income Totals		£52,550	£380,350		
Overall Average ROI				£0.54	£10.18

Notes:

* £s returned for every £ invested, excluding the investment itself.

** income is not directly attributable but is included in overall ROI as contribution cost.

Total ROI is based on Year 1 activity costs only, as OtF's donor lifetime is supported by existing activity and costs, outside of this plan.

It is recognised that additional staff hours are a cost contribution to true activity costs. Other than the new fundraiser, they are not factored in here, as they are already a fixed cost to OtF.

The ongoing role and ROI of a salaried fundraiser would be reviewed year on year.



12. Tactics and Action Plan

A breakdown of the tactics each strategy will employ and costs overview follows. Key personnel and Suppliers are identified below for ease of reference.

Name	Role / Title	Abbreviation
Paul Young	CEO / Head Fundraiser / Co-Founder	PY
Wendy Young	Founder and Head of Women's Ministry	WY
Charlie Olive	Apprentice CEO / Exec Asst.	CO
Lizzie Woodward	Web / Email marketing manager	LW
Sally Smith	Finance Manager	SS
(New Position)*	Assistant Fundraiser	FA
Kelvin Coomber	Chair of Trustees	KC
Andy Heald	Marketing Consultant (Volunteer)	AH
Yeomans	Design Agency	Yeo
Yeomans	Print & Production Agency	Yeo
* This position may be filled with a part-time staff member returning from maternity leave		



a. Strategy 1: Develop a planned recruitment programme

Overview: Offer to preach at, and to train churches within the target locations identified in the segmentation strategy. Create offer (proposition) and messaging and produce communications materials accordingly. Approach churches through DM, email and telecanvassing. Add supporting information to website. Create recruitment materials to use at speaking and training events. PY to preach. PY & WY to deliver training. Staff member to be present at each event to answer questions and recruit newsletter subscribers and supporters.

Actions List and Budget Breakdown

Month	Owner	Costs		M	A	M	J	J	A	S	O	N	D	J	F	
		£s	Hours													
STAGE / Activity																
PLANNING																
Create list of target churches from denomination and online directories	CO	-	2													
Define proposition and messaging from case for support and positioning	PY, CO, AH	-	15													
Create communications materials assets: Copy, script, collate photos / images	CO, AH	-	16													
Design communications materials letter, promotional leaflet, recruitment leaflet, event banner	Yeo	£1000	8													
Produce communications materials (500 promotional leaflets, 2000, recruitment leaflets *2x banners)	Yeo	£750	2													
Update website	LW	-	3													
IMPLEMENTATION																
Send letters to churches	CO, AF	-	48													
Follow up letter with phone call & email	CO, PY AF	-	48													
Book preaching engagements	CO, AF	-	25													
Book training engagements	CO, AF	-	10													
Preaching and training events take place	PY,WY, CO, AF	-	420													
Recruit at events	PY,WY, CO, AF	-	-													
Follow up recruits with welcome letter	CO, AF	£5	5													
Follow up recruits with supporter development programme (Separate costs below)	AF	-	135													
MONITORING																
Monitor progress with KPIs (see Section 13). Record No. of newsletter sign-ups and recruits from each event and funds raised from each new donor	CO, AF, SS	-	72													
EVALUATION																
Review activity against KPIs. Is it working? If so, how well?	PY, CO, AF	-	18													
DEVELOP & REFINE or DROP																
Plan any remedial action required	CO, AF	-	12													
TOTAL		£1,755	839													



b. Strategy 2: Supporter development programme

Overview: Supporter development programme that includes a welcome pack and regular contact with supporters by their preferred channel, delivering information about OtF's work that is of most interest to each. Build knowledge of supporter and encourage regular, monthly giving.

Actions List and Budget Breakdown

Month	Owner	Costs		M	A	M	J	J	A	S	O	N	D	J	F	
		£s	Hours													
PLANNING																
Identity existing monthly donors, single-gift donors and people on mailing list only	PY, CO, SS	-	16													
Research stages of supporter development e.g. 'UK donor pyramid' (Sargeant & Jay, 2010) and 'loyalty ladder' (Raphel & Considine, 1981)	PY, CO, AF, AH	-	40													
Design a development programme and contact schedule including regular letters and emails to committed supporters (e.g. monthly).	PY, CO, AF, AH	-	120													
Design a 'welcome' pack, with detailed information about OtF and departments. Invite response to determine area of most interest.	PY, AF, Yeo	£480	48													
Collate assets for welcome pack, newsletters / e-news and letters	AF	-	35													
Design a regular newsletter and e-news, with relevant information and monthly giving ask for those who don't already. Use refined departmental case for support and messaging.	AF, Yeo	£600	24													
Design a '3-month ask' letter for new, single-gift donors.	AF, Yeo	£120	8													
IMPLEMENTATION																
Produce and send 'welcome pack' to all single gift mailing list only contacts inc. new. Production and mailing costs, allowance for 1,000	AF, Yeo	£1,500	24													
Follow up each by phone to determine areas of interest.	AF	-	40													
Produce and send monthly news & e-news	AF, LW, Yeo	£2,450	232													
Send a new donor an ask letter within 3 months of their first gift. Allowance for 500	AF	£500	15													
MONITORING																
Monitor progress with KPIs (see Section 13).	PY, SS, AF	-	12													
EVALUATION																
Review activity against KPIs. Is it working? If so, how well?	PY, AF, AH	-	12													
DEVELOP & REFINE or DROP																
Plan any remedial action required	PY, AF, AH	-	12													
TOTAL		£5,530	698													



c. Strategy 3: Department specific appeals

Overview: 1x appeal per OtF department, each year, with targeted ask and improved messaging and case for support.

Actions List and Budget Breakdown

Month	Owner	Costs		M	A	M	J	J	A	S	O	N	D	J	F	
		£s	Hours													
PLANNING																
Review past appeals for 3 years. Review the ask, the amounts raised and who responded.	PY, CO, AF	-	24													
Review financial need for each department.	PY	-	16													
Review and develop case for support for each department (See Section 8)	PY, AH, AF	-	105													
Develop message and ask for each department / appeal	PY, AH, AF	-	24													
Gather communication assets: copy, images	PY, CO, AF	-	48													
Design appeal letters and emails	AF, Yeo	£960	32													
Add appeal information to website	LW	-	12													
IMPLEMENTATION				14												
Launch appeals.	AF, Yeo	-	-													
Gateway	AF, Yeo	£1,000	8													
Antifreeze	AF, Yeo	£1,000	8													
Schools	AF, Yeo	£1,000	8													
Ministry (2014)	AF, Yeo	£1,000	8	14												
MONITORING																
Monitor progress with KPIs (see Section 13). Record No. of responses and funds raised, per appeal.	CO, AF, SS	-	24													
EVALUATION																
Review activity against KPIs. Is it working? If so, how well?	PY, AF, SS	-	24													
DEVELOP & REFINE or DROP																
Plan any remedial action required	PY, AF	-	24													
TOTAL		£4,960	389													



d. Strategy 4: Invest in a new fundraiser

Overview: Recruit and train an Assistant Fundraiser, to work on individual giving.

Actions List and Budget Breakdown

Month	Owner	Costs		M	A	M	J	J	A	S	O	N	D	J	F
		£s	Hours												
RECRUITMENT															
Define role and person description	PY, KC	-	8												
Create job advert	PY, Yeo	£60	4												
Advertise through local networks e.g. churches	CO	£200	8												
Application period		-	-												
Candidate filtering	PY, KC	-	12												
Interview process	PY, KC	-	24												
Selection	PY, KC	-	6												
IN POST															
Works on all aspects of individual giving. (Salary, p.a.)	AF	£18,000	(1,680)												
MONITORING															
Monitor progress with KPIs (see Section 13).	PY, KC, AF		18												
EVALUATION															
Review activity against KPIs. Is it working? If so, how well?	PY, KC, AF		9												
DEVELOP & REFINE or DROP															
Plan any remedial action required	PY, KC, AF		6												
TOTAL		£18,260	94												



e. Strategy 5: Improve fundraising literature

Overview: Produce new fundraising literature. A new brochure for OtF and each department – all within same branding and OtF identity, with more compelling and relevant cases for support.

Actions List and Budget Breakdown

Month	Owner	Costs		M	A	M	J	J	A	S	O	N	D	J	F	
		£s	Hours													
PLANNING																
Review existing materials: OtF main brochure and department specific brochures	PY, AF, AH	-	30													
Develop case for support per department as per Section 8.	PY, AF, AH	-	30													
Develop new messaging and copy.	AF, AH	-	24													
Collate assets: copy, images / photos and information.	AF	-	34													
Design new brochure for OtF and one for each department	AF, Yeo	£2,000	40													
Print new brochure for OtF and one for each department. 1,000 each	AF, Yeo	£1,500	4													
IMPLEMENTATION																
Distribute accordingly with new and existing supporters.	AF	-	-													
MONITORING																
Monitor progress with KPIs (see Section 13).	AF	-	6													
EVALUATION																
Review activity against KPIs. Is it working? If so, how well?	PY, AF	-	10													
DEVELOPMENT																
Plan any remedial action required	PY,AF, AH	-	12													
TOTAL		£3,500	190													



13. Monitoring and Control

Strategy	Key Performance Indicators (KPIs)	Evaluation	Monitoring frequency
1 Recruitment Programme	No. of speaking events. No. of training events. No. of new recruits to mailing list. No. of new single-gift donors. No. of new monthly donors. Funds raised. Budget spend. ROI. <i>Activity report to be provided at each monitoring and evaluation point.</i>	Actual vs. projections. Milestones 25%, 50% and 75% of targets.	As per schedule above. Monthly monitoring. Quarterly evaluation
2 Supporter Development	No. of new monthly givers. Amount of average monthly gift. Total monthly giving. Budget spend. ROI. <i>Activity report to be provided at each monitoring and evaluation point.</i>		As per schedule above.
3 Department-specific Appeals	No. of responses to each appeal. Funds raised by each appeal. Increase over existing appeal income. Budget spend. ROI. <i>Activity report to be provided at each monitoring and evaluation point.</i>		As per schedule above.
4 New Fundraiser	Funds raised from individuals.		As per schedule above.
5 New Fundraising literature	Anecdotal feedback ref clear and compelling messaging. Budget spend		As per schedule above.

14. Contingencies

Here are some example contingencies should proposed activities fail (negative issue) or be overly successful (positive) issue:

Activity	Issue		Contingency Action
Strategy 1	Negative	Fewer churches than expected invite to preach.	Try other identified geographical areas.
Strategy 2	Positive	Many more people sign up than anticipated.	Hire additional staff to communicate with supporters.
Strategy 3	Positive	More restricted funds raised than budgeted	Roll funds into following budget year
Strategy 4	Negative	New fundraiser leaves position during activity schedule	Use existing job description to recruit new staff member

It is recognised that issues may be not be solely financial, but may affect other resources, such as manpower or infrastructure, or may be affected by time.



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16. Appendix 1

Off the Fence Fundraising Audit, November 2012

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1. Introduction

Off the Fence Trust (OtF) provides services to homeless people, vulnerable women, schoolwork and the promotion of the Christian Gospel; in the City of Brighton and Hove. I have worked as a volunteer for OtF since 2007 and am currently a Trustee.

OtF fundraises for the four areas of its operation and core costs. As OtF is a small charity (2011 income, £431,633) I have chosen to audit fundraising from individuals (excepting Legacies), the second largest source of income for the charity. It includes regular and one-off donations and encompasses fundraising from Direct Mail appeals, Events, face-to-face and functions.

2. STEEPLE Analysis

2.1 Social

Item	Evidence	Impact
Decrease in church attendance.	(Archbishops' Council, Research and Statistics, 2012)	<ul style="list-style-type: none"> • Potential reduction in core donor base.
Aging Christian community.	(Bloxham & Beckford, 2010)	<ul style="list-style-type: none"> • Potential reduction in core donor base.
Rising numbers of homeless people.	(National Housing Federation, 2012)	<ul style="list-style-type: none"> • Increased demands on charity's services.
Brighton is the gay capital of UK – marketed as such.	(London Evening Standard, 2004)	<ul style="list-style-type: none"> • Affects competition for local funding.
Fracturing of families.	(Grant, 2006)	<ul style="list-style-type: none"> • Increased need for services, Schoolwork, Gateway.

2.2 Technology

Item	Evidence	Impact
Growth in use of Social Media.	(Ofcom, 2012)	<ul style="list-style-type: none"> • Need to understand how fundraising works in social media context.
Increase in online / electronic donations & communications.	(The Daily Mail, 2012) (Wolfson, LeFevre, Ross, & Hoehling, 2012) (Ofcom, 2012)	<ul style="list-style-type: none"> • Need mechanism to accept online donations. • Donors communicating via new media. • Donors researching giving opportunities online.
Growth in mobile / smartphone usage for online access.	(Ofcom, 2012)	<ul style="list-style-type: none"> • Website at risk of not being mobile user-friendly – lose donations.

2.3 Economic

Item	Evidence	Impact
Economic downturn.	(CAF Charities Aid Foundation, 2012) (Office for National Statistics, 2012)	<ul style="list-style-type: none"> • Increase in homelessness. • Increases awareness of the homeless. • Decrease in donations. • Media interest in UK poverty stories increases, as opposed to Global. More local people give.
Higher unemployment.	(Office for National Statistics, 2012)	<ul style="list-style-type: none"> • Rising numbers of



		homeless people.
Increase in poverty.	(Department of Work and Pensions, 2012)	<ul style="list-style-type: none"> Rising numbers of homeless people.

2.4 Ethical

Item	Evidence	Impact
Christians give because their faith inspires it and their religion teaches it.	(Focus on the Family, 2005) (National Planning Group of Ronald Blue & Co, 2012)	<ul style="list-style-type: none"> Christians likely to keep on giving.
Reputation is damaged by association with another charity.	(Parsons, 2008) (Walker, 2011)	<ul style="list-style-type: none"> Perceived to have the same issues - lose trust and support of all supporter groups.
Reputation damaged by association with a public figure receiving negative press.	(Young, 2012) (Bingham, 2012) (BBC News, 2012)	<ul style="list-style-type: none"> Perceived to have the same issues - lose trust and support of all supporter groups.

2.5 Political

Item	Evidence	Impact
Housing benefit reduced	(Shelter, 2012) (Ramesh, 2012)	<ul style="list-style-type: none"> Homelessness to significantly increase.
Change in local government – Labour / Conservative / Green	(Jones, 2011)	<ul style="list-style-type: none"> Impact on statutory support. Public awareness. Change in media focus.
Anti-Christian council	(Bingham, 2012)	<ul style="list-style-type: none"> Could affect council support.
Politically correct capital of the UK – Council is proponent of Gay rights.	(The Argus, 2012)	<ul style="list-style-type: none"> Reduces money available for social welfare.

2.6 Legal

Item	Evidence	Impact
Pension contributions mandatory by 2015.	(Department for Work and Pensions, 2012)	<ul style="list-style-type: none"> Increased core costs.
Equal opportunities / must prove Genuine Occupational requirement for Christian employees.	(The National Archives, 2003)	<ul style="list-style-type: none"> Increase core costs for Human Resource support.
Constant changes in employment law.	(Advisory, Conciliation and Arbitration Service (ACAS), 2012)	<ul style="list-style-type: none"> Core costs increase. Takes money away from frontline services.



2.7 Environmental

Item	Evidence	Impact
Increase in inclement weather conditions (wetter / colder) – throughout the seasons.	(Gray, 2012)	<ul style="list-style-type: none"> • More sickness with street sleepers. • More homeless come to area as is warmer than other areas of UK.
Close to London, easily accessible transport links.	(National Express, 2012)	<ul style="list-style-type: none"> • Easy for people looking for work to access Brighton.
Seaside / areas of natural beauty - tourism business.	(Brighton and Hove City Council, 2012)	<ul style="list-style-type: none"> • Council have to keep people off the streets to keep it attractive to tourists.

2.8 STEEPLE Summary

The key factors that will impact OtF's fundraising to individuals are:

- Social: Decrease in volume of churchgoing donors and rise in homelessness.
- Technological: An increasing use of online technologies to communicate with donors and fundraise.
- Economic: Reduction in giving from secular sources and increase in homelessness.
- Ethical: Potential damage to reputation.
- Political: Change in government and social action policy.
- Legal: Human Resource legislation increases core costs.
- Environmental: Increased homeless population drives increased service need.



3. Competitor / Collaborator Analysis

3.1 Competitors

Competitor	Activities	Evidence	Impact
Brighton Housing Trust.	Grants. Statutory income. Community / individual fundraising. Housing benefit.	(Brighton Housing Trust, 2012)	<ul style="list-style-type: none"> • Competes for funds & services. • Receives bulk of statutory funding and support • Receives media attention • Secular alternative. • £9m income and showing growth.
Churches (local).	Offerings. Regular donations.	(The Stewardship Team, Archbishops' Council, 2012)	<ul style="list-style-type: none"> • Compete for funds & services. • Christian alternative.
Emmaus Brighton.	Grants. Statutory income. Housing benefit.	(Emmaus Brighton and Hove, 2012)	<ul style="list-style-type: none"> • Require income from other sources. • Emmaus = £800k, showing growth. • St Peters = Showing growth since opened in 2009. • BHCM = consistent income £150k.
Friends First (local).		(Friends First, 2011)	
St Peter's Brighton.	Individual / Community fundraising.	(St Peter's Brighton, 2012)	
Brighton and Hove City Mission.	Grants.	(Brighton and Hove City Mission, 2011)	
National charities Including direct competitors e.g. Shelter and DePaul.	All forms of fundraising.		<ul style="list-style-type: none"> • Compete for funds.

3.2 Collaborators

OtF recognises that similar agencies compete for funding sources but considers none to be a competitor in real terms (Young, 2012). Each of the charities above is considered to be (and indeed most are) collaborators, especially where they provide complementary services, e.g. OtF would refer clients to Brighton Housing Trust for accommodation.

OtF collaborates with 48 different agencies in the city in the production of its 'Street Sheet' (Off the Fence Trust, 2012).

OtF provides training for churches (e.g. St Peter's Brighton) and other agencies for the care of vulnerable adults (Young, 2012).



3.3 Competitors and Collaborators Summary

- A shrinking volume of funding sources and a growing number of service providers / similar agencies (St Peter's) could impact Off the Fence's income.
- The local homeless charities (in particular the Christian ones) share similar visions and values and there is scope to explore more joint projects and funding opportunities (Young, 2012).



4. Market Analysis

The donor market for OtF currently comprises of people who connect with the work the charity does and who have a Christian faith (Young, 2012), (Young, Off the Fence Trust Business Plan 2012/13, 2012).

Donors are largely recruited from church congregations, in the local counties of East and West Sussex, which border the City of Brighton and Hove. However, a significant proportion of donors do not subscribe to a religion (Young, Chief Executive, Off the Fence Trust, 2012).

OtF currently has connections with 33 local churches (Young, Off the Fence Trust Business Plan 2012/13, 2012).

There are 84 places of Christian worship in Mid-Sussex alone (Wikipedia, 2012) and 64 Anglican churches in Brighton and Hove (SussexParishChurches.org, 2012).

Following is a series of key statistics about the local and national donor market that reflect the donor market of OtF.

Proportion of people likely to give

55% (28.4 million) of UK Adult population. 58% of women donate to charity monthly, 52% of men (CAF Charities Aid Foundation, 2012)

Donor profile – people most likely to donate

	Demographic	Median Gift £ p.c.m.*	Occupation	Other	Source
UK General	Women Aged 45-64 & 65+	£15			(CAF Charities Aid Foundation, 2012)
UK General		£17	Managerial / Professional		
Evangelical Christians	Men Aged 55-64	£250 (per household, of which approx £75 given to Christian charities)	Full time employed Household income £30-£40K	Evangelical Christian University Graduate Married Living in South East	(Kolaneci, 2011) (Lattimer, 2005)
OtF Profile (Typical donor)	Men Aged 40-60	Regular One-off	Managerial / Professional	Christian Social conscience Unaffected by recession Country-dweller	(Young, Chief Executive, Off the Fence Trust, 2012)

* Per Calendar Month



Resident population information of core donor recruitment areas for Off the Fence

Area	2001 Resident Population	Gender		Age No.			Source
		% Males	% Females	25-44	45-64	65+	
Brighton & Hove	247,817	48.4	51.6	103,025	51,507	40,450	(2001 Census Briefing, 2012)
Mid-Sussex	127,378	48.4%	51.6%	35,208	68,909	21,156	(Office for National Statistics, 2001)

Socio-economic classification - all people age 16-74 – of core donor recruitment areas for OtF

Area	Brighton & Hove	Mid-Sussex	Source
Classification			
Large employers and higher managerial occupations	5,894	4,936	(Office for National Statistics, 2001)
Higher Professional Occupations	12,402	6,585	
Lower Managerial & Professional Occupations	41,324	22,415	
TOTAL	59,620	33,936	

Religion of people within core donor recruitment areas of Off the Fence

Religion	Brighton & Hove	Mid-Sussex	Source
Christian	146,466	96,620	(Office for National Statistics, 2001)
No Religion	66,955	19,544	
Not Stated	22,013	8,651	

People who are most likely to give to charity

Gender	Age	% of group that give	Median gift amount per calendar month	Source
Women	45-64	62%	£15	(CAF Charities Aid Foundation, 2012)
Women	65+	62%	Data not available	
Women	25-44	60%	£13	(NCVO National Council of Voluntary Organisations)
Men	45-64	62%	£10	
Men	25-44	55%	£10	
Men	65+	52%	£10	

Proportion of (total UK) donors giving to cause

Cause	Proportion of Donors	Proportion of Total Amount Donated	Source
Religious	14%	17%	(CAF Charities Aid Foundation, 2012)
Homeless	8%	3%	
Schools	7%	4%	



Methods of Giving – Proportion of People giving by method

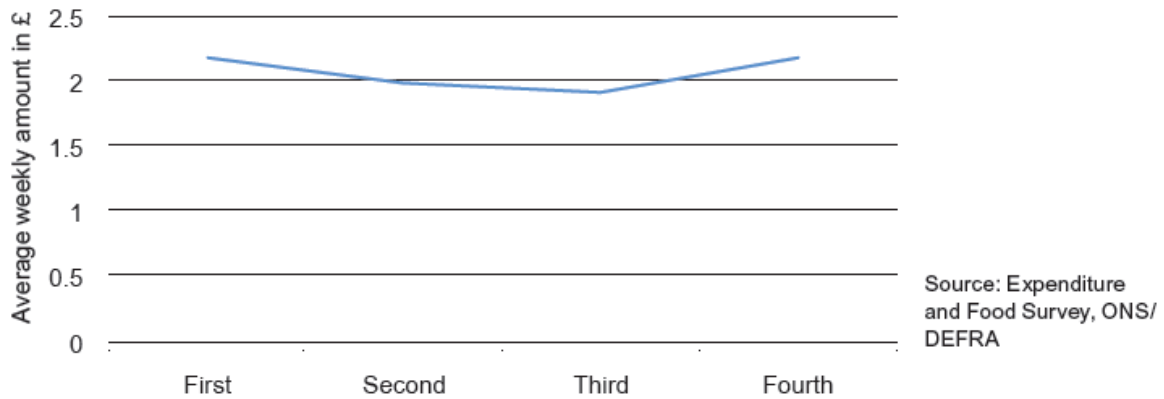
Method	Frequency	Median Gift £	% change from 2008/9	Source
Cash	50	£5	6.4 % +	(CAF Charities Aid Foundation, 2012)
Direct Debit	31	£10	7% +	
Cheque / Card	12	£20	20% -	
Online	7	No figures Available	75%	
Phone	1		100%	
Text	1		100%	

Regional giving

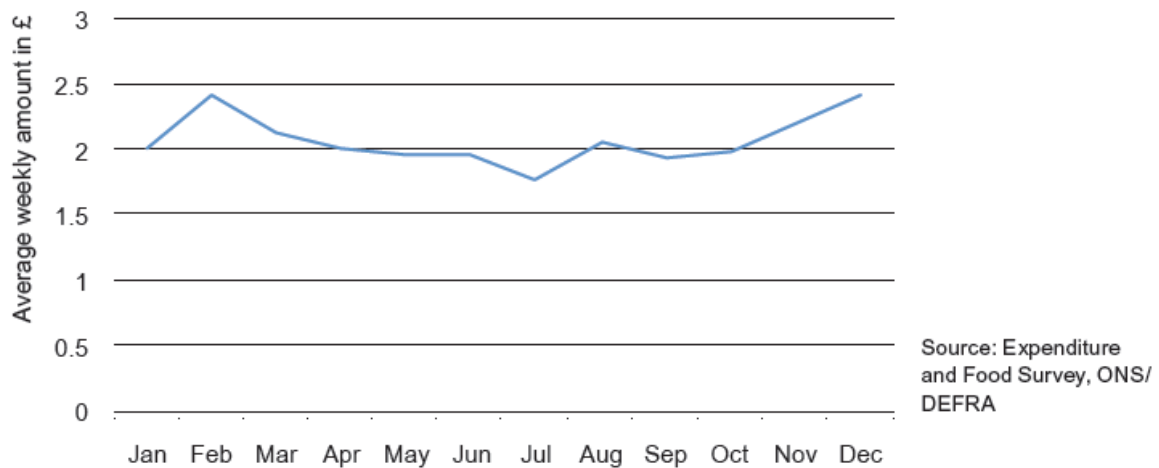
The number of donor households in the UK has risen over time. (McKenzie & Pharoah, 2010)UK Household Giving – New results in regional trends.)

Seasonal giving by UK households

Donations by quarter

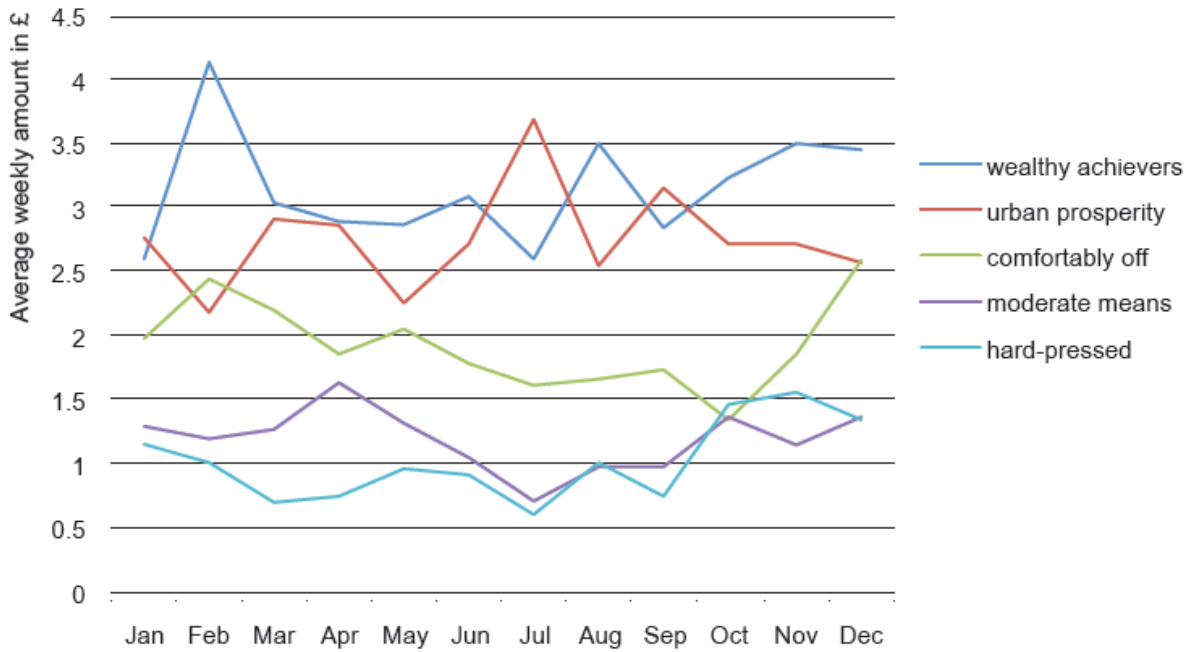


Donations by month





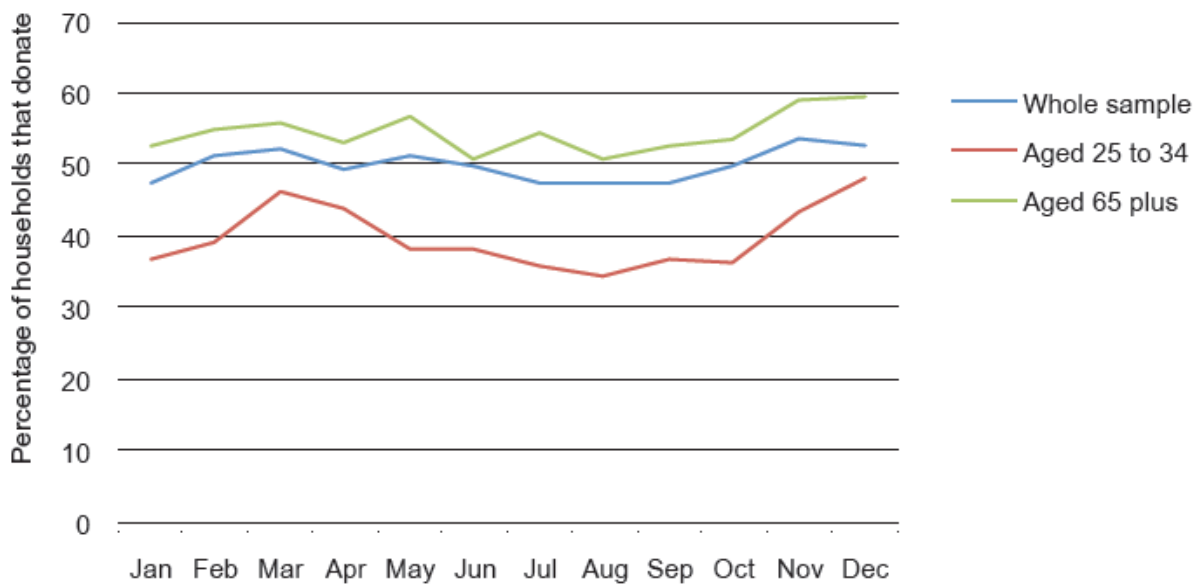
Donations by socio-economic group



Source: (McKenzie & Pharoah, Seasonal patterns in household giving in the UK, 2010)

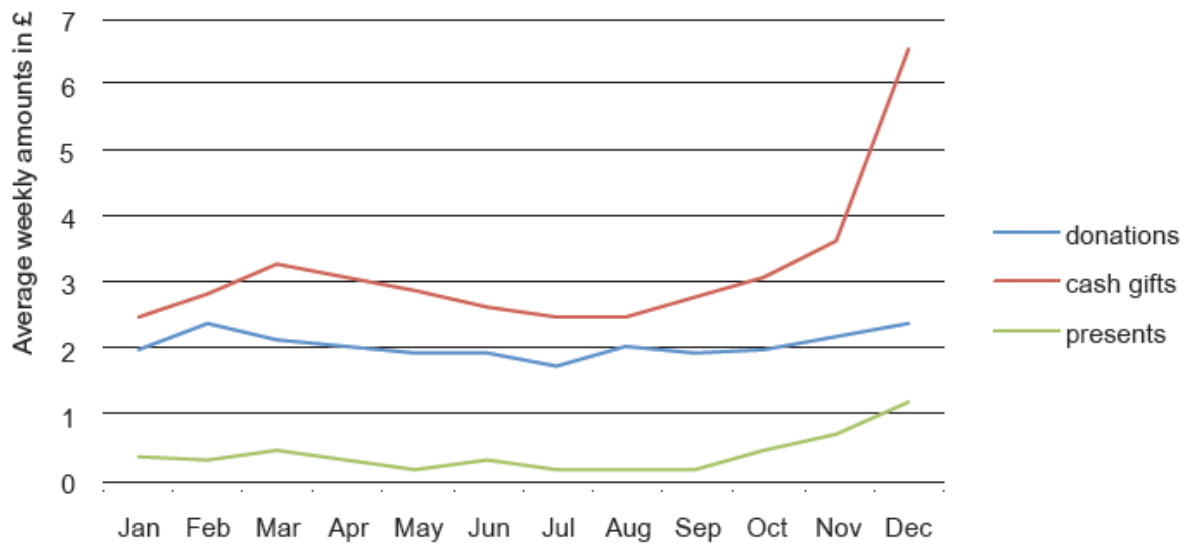
Charitable giving by UK households at Christmas

Seasonal charity by young and old





Giving by UK households



Source: (McKenzie & Pharoah, Charitable giving by UK households at Christmas, 2009)

4.1 Market Analysis Summary

The local demographic and socio-economic profiles of the local population indicate that potential donors exist within all groups likely to give to the causes that OtF services.

Both Christian and non-religious donor markets appear to have money to give and the propensity to do so.

New territories exist within unreached churches and additional opportunities may exist to tap into seasonal giving patterns.



5. Internal Analysis

5.1 Financial Overview

Individual giving is the second largest source of income for Off the Fence, delivering a total of £102,130 in 2011/12, 23.9% of total income* (Young, Off the Fence Trust Business Plan 2012/13, 2012).

The individual giving portfolio is comprised of four sources:

	Income Source	£ Income 2011	% of Individual Giving	Source
1	Direct, individual, one-off donations.	£59,077	57.8%	(Young, Off the Fence Trust Business Plan 2012/13, 2012)
2	Standing Orders (Regular giving).	£22,438	21.9%	
3	Sponsored events (centrally organised)	£17,642	17.2%	
4	Functions.	£2,973	2.9%	
TOTAL		£102,130		

*Excluding gift aid.

5.2 Fundraising Activities for individuals

- 1) **One-off donations.** These include direct mail appeals, 2-3 per year and donations from individuals who self-fundraise (e.g. sponsored bike ride). Donations are stimulated by a series of ongoing communications with supporters, including face-to-face meetings with Paul Young, personal letters and email and use of social media. (Young, Chief Executive, Off the Fence Trust, 2012)

402 individuals made a one-off donation in the past year. Average donation = £146.96. This does not include legacies, but does include major gifts from individuals. (Smith, 2012)

Appeals usually contain a seasonal message (e.g. the cold of winter killing homeless people), are unsegmented, do not always have a specified financial ask and are generally purposed to raise unrestricted funds (Young, Chief Executive, Off the Fence Trust, 2012).

Communications schedule

Month	Communications / Fundraising Activity	Source
Feb	e-News bulletin	(Young, Off the Fence Mailing Schedule, 2012)
April	e-News bulletin	
May	Invitation to Birthday Celebrations	
	Legacy Letter	
September	Impact report	
	Winter appeal	
	e-News bulletin	
Nov	e-News bulletin	
	Christmas appeal	
	Gateway Christmas appeal	



2) Standing Orders.

Regular Donors	No.	Med Gift	Source
End October 2012	98	£25	(Smith, 2012)
End 2011	87	£26.50	

3) Sponsored Events

Sponsored Events	Total	£17,642	Source
Brighton Half-Marathon	Average per event	£5,880.67	(Young, Off the Fence Trust Business Plan 2012/13, 2012)
Brighton Marathon			
Sleep-Out			

- 4) **Functions.** Includes business and society dinners and some speaking engagements, where donations are made.

5.3 Fundraising Performance

An identified weakness in the charity's fundraising is the recording of data, and it is difficult to accurately attribute some of the donations to appeals. Nonetheless, here is a sample of accurately attributed responses:

Appeal	Qty Mailed	£s Raised	No. Responses	Average Gift	Largest Gift	% Response	Source
Summer Appeal 2012	400	£1,327	22	£60.32	£500	5.5%	(Smith, 2012)
Easter Appeal 2011	400	£2,540	39	£65.13	£1,000	9.8%	
Christmas Appeal 2010	400	£2,340	14	£167.14	£500	3.5%	

From 2011-2012 there is an overall increase in income from individual giving of 8.81%. This is largely due to increased income from sponsored events: £10,738 in 2011 - £17,642 in 2012. (Off the Fence Trust, 2011), (Young, Off the Fence Trust Business Plan 2012/13, 2012).

5.4 Organisational Processes

A fundraising plan exists within the Business Plan and a marketing plan exists alongside it. However, fundraising from individuals is secondary to Trust fundraising and with the current lack of a dedicated fundraiser the approach is limited to the 2-3 appeals and the light communications schedule listed on the previous page.

Donations are largely received as cash or cheque and are processed by administration and finance staff. Responses to donations (i.e. thank you letters) are prioritised and processed by administration staff and the Chief Executive.

5.5 Organisational Structure

The Chief Executive is the sole employed fundraiser. He writes the fundraising and marketing plans and most of the fundraising communications. The sponsored events are organised by a committed volunteer.



5.6 Recruitment / Acquisition

Recruitment largely comes from the Chief Executive preaching and presenting at events, including church meetings, school presentations, clubs and society meetings, networking event (such as business breakfasts). Donors are also recruited by word of mouth and participation in sponsored events.

5.7 Retention

There is no particular retention programme in place. However, donors are promptly thanked following a donation, every donor is sent a handwritten thank you letter by the Chief Executive each year and the Chief Executive maintains personal relationships with donors at events, community gatherings and individual meetings throughout the year.

5.8 Internal Analysis Summary

The plan and programme are lightweight and there is no supporter development process, to move one-off donors to regular givers. Appeals have a below average response rate, perhaps because of lack of connection with individual donors. There is little communication throughout the year and the programme lacks a dedicated fundraiser. Sponsored events show an increasing return but are reliant on a volunteer organiser.



6. SWOT Analysis

6.1 Strengths

Strength	Evidence	Impact
Proven long-term track record. Good reputation in the city.	(Young, Off the Fence Trust Business Plan 2012/13, 2012)	<ul style="list-style-type: none"> • Good 'investment' for donors. • Positive brand recognition • High level of trust.
Good financial policy with stringent monitoring.		<ul style="list-style-type: none"> • Safe 'investment' for donors.
Good networking amongst local agencies.	(Off the Fence Trust, 2012)	<ul style="list-style-type: none"> • Opportunities for collaborative service delivery and fundraising.
Provide a (training) service to other homeless organisations (including churches).		<ul style="list-style-type: none"> • Relied upon by a wider service delivery network. • Increased opportunity for funding.
Christian donors give more in recession	(CAF Charities Aid Foundation, 2012)	<ul style="list-style-type: none"> • Stronger funding base in depressed economy.

6.2 Weaknesses

Weakness	Evidence	Impact
Not enough daytime volunteers	(Young, Off the Fence Trust Business Plan 2012/13, 2012)	<ul style="list-style-type: none"> • Limited service capacity.
Lack of dedicated employed fundraiser		<ul style="list-style-type: none"> • Limited fundraising opportunity / income.
Communication internally and externally		<ul style="list-style-type: none"> • Inefficient operations. • Reduced fundraising opportunity. • Lower staff / volunteer morale.
Four charities in one		<ul style="list-style-type: none"> • Difficult to hire Staff, focus fundraising efforts • Central staff spread thin.
Homeless service area is more recognised than other areas		<ul style="list-style-type: none"> • Difficult to fund other areas of service delivery.



6.3 Opportunities

Opportunity	Evidence	Impact
Developing new and unique services.	(Young, Off the Fence Trust Business Plan 2012/13, 2012)	<ul style="list-style-type: none"> • Diversify income streams. • Unique funding opportunities for donors.
Develop and introduce more training programmes for staff and volunteers.		<ul style="list-style-type: none"> • Increased quality of service delivery. • Increased opportunity to receive funding.
Develop a more strategic individual fundraising plan to reach local people.	(Young, Chief Executive, Off the Fence Trust, 2012)	<ul style="list-style-type: none"> • Increase income. • Increase volunteer base.
Develop new fundraising products (including regular giving product)		<ul style="list-style-type: none"> • Increase regular, planned income.

6.4 Threats

Threat	Evidence	Impact
Paul Young to leave or become sick.		<ul style="list-style-type: none"> • Loss of CEO, founder, visionary, sole fundraiser. • Loss of income. • Low staff morale.
Long-term depressed economy.	(CAF Charities Aid Foundation, 2012) (Office for National Statistics, 2012)	<ul style="list-style-type: none"> • Reduced income from donors (especially secular)
Too reliant on current income streams.	(Young, Off the Fence Trust Business Plan 2012/13, 2012)	<ul style="list-style-type: none"> • Loss of income. • Lose ability to deliver services. • Lose reputation.
Tired community fundraising products		<ul style="list-style-type: none"> • Loss of donor interest. • Loss of income.
Growth of Competitor organisations		<ul style="list-style-type: none"> • Reduced pool of donors and funding sources.

6.5 SWOT Analysis Summary

Highest impact:

- Strength: Loyal and committed giving of Christian donors.
- Weakness: No dedicated fundraiser.
- Opportunity: Strategic fundraising plan delivered by a dedicated fundraiser.
- Threat: That the CEO is also the fundraiser and could become sick or leave.



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