

Workshop Description

Heritage Fundraising Planning Masterclass- Putting your Strategy Into Practice

About This Workshop

This masterclass level workshop builds on the Fundraising Planning workshop already run during the Giving to Heritage programme. It is designed to help delegates develop the tools and techniques needed when planning and implementing fundraising activities from the top down. Crucially, how to apply key fundraising strategies within heritage organisations, achieve buy-in from important stakeholders and refine and develop thinking and plans in line with macro-environmental trends such as Brexit and the new fundraising regulatory landscape.

Time: 10:00-16.45 (arrival from 09:45)

Who Should Take This Workshop?

This advanced workshop is designed for more experienced fundraisers as well as previous attendees of the Giving to Heritage Fundraising Planning workshop. It is also ideal for those who have developed fundraising plans and are looking to develop or adapt these, or are finding it challenging to implement them practically.

Pre-workshop Activity

Delegates should come having formulated a few thoughts on the overall trends in Heritage Fundraising to feed into a mini-audit. Delegates may also find it useful to come with an example of a fundraising plan they have put together.

Learning Outcomes

On completion of this workshop, it is expected that learners will be able to:

- Further develop knowledge on key fundraising strategies
- Apply key fundraising strategy tools to their organisation / situation
- Achieve buy-in for their plan amongst key organisational stakeholders
- Refine their thinking in the light of macro-environmental trends including Brexit and the new fundraising regulatory environment.

Outline of Content

The core topics are:

- Brief recap of overarching fundraising strategies
- Competitor analysis and case studies of good practice
- Fundraising Portfolio and Portfolio Analysis Models
- Strategic Planning Tools – ANSOFF, segmentation, targeting, positioning and branding
- Getting organizational buy-in and influencing stakeholders
- Developing a fundraising culture within your organisation
- Future proofing your fundraising
- Alternative sources of income – aligning fundraising with social investment sources
- Introducing flexibility and resilience into your planning including adapting fundraising plans dependent on macro-environmental factors such as Brexit and the changing fundraising regulatory landscape

Learning Methods

The workshop will use a range of methods including:

- Trainer directed presentation
- Learner personal reflection
- Whole group discussion
- Small group case study work
- Practical tasks in pairs
- Use and discussion of Case Studies