

## Shaping the future of fundraising: Our strategy 2023-25

**Our vision: excellent fundraising for a better world**

**Our purpose: to support and champion professional fundraising so our members flourish**

### Our strategic objectives for 2023-25

The passion and commitment of our members to learn, share, and deliver for their causes raises billions of pounds a year through skilled and ethical fundraising. Our ambition for this strategy is to ensure that our members can navigate the challenges and opportunities that lie ahead with success. We know that when fundraisers achieve, everyone benefits from the supporter who is inspired and fulfilled through the act of giving a donation, through to the person who is able to access the support a charity can offer because of the income a fundraiser has brought in.

### Our priorities

<p><b>Champion the fundraising profession – representing the values of our members, amplifying their voices, and highlighting the value of professional fundraising</b></p>	<p><b>Support fundraisers – with the tools, learning, networking, and events they want so they can improve, achieve and thrive</b></p>	<p><b>Advocate for and advance Equity, Diversity, and Inclusion – across the sector, as a membership organisation, and as an employer.</b></p>
<p><b>We will:</b></p> <ul style="list-style-type: none"> <li>• Produce sector-leading guidance, research, and resources which provide insight, confidence, and thought-leadership</li> <li>• Be an influential voice for members that represents and champions their views and values to government, media, regulators, and other external audiences</li> <li>• Lead campaigns to champion and promote giving and fundraising, including Remember A Charity, Giving Tuesday, and RAISE.</li> <li>• Celebrate and share stories from our members</li> </ul>	<p><b>We will:</b></p> <ul style="list-style-type: none"> <li>• Ensure that our members receive value for money through their membership and all our training and services</li> <li>• Facilitate and support a UK-wide network of volunteers that provides support and makes connections with fundraisers in whatever role or sector they are in</li> <li>• Provide high quality education, training, and qualifications offer which is the cornerstone of continued professional development for fundraisers across the UK</li> </ul>	<p><b>We will:</b></p> <ul style="list-style-type: none"> <li>• Work with our members to champion, challenge, and improve EDI across the fundraising community</li> <li>• Lead sector-wide initiatives which improves the culture of fundraising and promotes fundraising as a career</li> <li>• Put the safety and experience of our members at the paramount, ensuring they are free from discrimination and abuse of any kind.</li> </ul>

that showcases the value of professional fundraising and the difference they make		
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## Our pledge to our members – how we will work together

- **Honesty, transparent, and accountable:** we will be straightforward and clear about the decisions we make and their impact, explaining our rationale and objectives, seeking feedback and views from you throughout the delivery of this strategy
- **Putting you first:** our work and priorities will be guided through consultation and engagement with you to embed it in your needs and priorities, and ensure it has your interests and values at heart
- **Fair and inclusive:** we will proactively engage our full membership and the wider fundraising community to ensure our work represents all fundraising professionals across the UK and is delivered in an inclusive way for all
- **Respectful:** of your views and listen to what you tell us. The fundraising community is a large and passionate one, and not everyone has the same priorities, but all are deserving of respect and consideration
- **Proud and ambitious** of you, your work, and the difference you make. We will represent and champion you, your values, and your profession.

## What we will do to deliver on these plans

- 1) We will be well run with a sound business plan and good governance that focuses on delivering against audience needs in way that is sustainable, including making decisions to pause or not do things if they are not financially viable. Our aim is to ensure that through this strategy we are financially strong and secure to achieve our objectives. Where we make a surplus, we will reinvest to be able to robustly support the fundraising community.
- 2) We will have the right people, skills, and infrastructure to underpin all work. This will include engaging staff and volunteers by involving them in decisions and throughout the delivery of this strategy for 2023-2025. It will also focus on ensuring decisions are rooted in data, insight, and evidence by realising the benefits offered by previous investments in new CRM and organisational infrastructure.
- 3) Our members are at the heart of our organisation and fundamental to our collective success. Throughout the course of this strategy, we will review and enhance our member proposition – ensuring that we are accessible and inclusive to all fundraisers across the UK – and that our membership proposition and services deliver value for money.

## **Our organisational journey so far and ambitions for the future of fundraising Key organisational priorities and plans that will underpin this strategy**

### **1. Innovation**

All activities to be evaluated using a transparent business case scorecard that will analyse tests for innovativeness, ability to meet audience needs, potential ROI, time to breakeven, level of confidence in the revenue modelling etc.

### **2. People, resources, and infrastructure**

We can only make a difference to fundraisers if we have an organisation that is operating on a sound financial basis, with the right infrastructure to deliver an excellent customer experience, and people with the skills and support needed to thrive.

Following on from significant investment in a new CRM system, website development, and rebrand, we will be focusing on our people plan through this strategy, which ensures our staff's wellbeing, training needs, and preferences in flexible working are embedded in our organisational culture.

### **3. EDI**

Our work on EDI must also be reflected in our approach to our people, staff and volunteers, we aim to be an exemplar to our members and the wider community in how we work, recruit, support, and communicate.

### **4. Improving professional conduct and keeping fundraisers safe from discrimination and abuse of any kind**

In the two years prior to this strategy, we have made specific investment in improving our organisational processes and policies and undertaken a programme of work around the professional conduct of fundraising. (We will update this section once Jedi has provided us with the independent t report)

### **5. Volunteering plan**

Our UK-wide volunteer population facilitate activities which benefit members within the resources available to us. We will partner with them by drawing on feedback to co-design a volunteer engagement plan. We will revamp volunteer relations, empower and enable them and fully harness their support.

## **Who we work with – our key stakeholders and partners**

### **How we developed these plans – and what we've done so far**

We will produce an infographic for the AGM which explain the process of developing the strategy and the involvement of members – a 'you said, we did' including feedback from member roundtables and other research.

### **Objectives and KPIs – what we'll measure and how we'll know that we're making progress**

We will measure our success throughout the three years of this strategy, and report back on what we have achieved. Our key objectives are to:

- **Grow our individual, organisational and corporate membership, successfully retaining our existing members and recruiting new individuals and organisations from a diverse range of causes and communities**
- **Ensure that our members feel that they receive value for money through all our different services and offerings, and**
- **Be an organisation that our members feel represents their values and effectively champions fundraising**
- **To help grow charitable giving by identifying new opportunities to make it more easy, attractive, social and timely for the public to give to their favourite causes**
- **In addition to the focus on our members, we also have an objective to be a trusted voice of guidance and best practice, alongside a high-quality provider of education and training, which charities and professionals across the sector engages with through our range of activities and services**

We will measure these through:

- **Membership recruitment and retention data**
- **Membership engagement data, segmented across fundraising special interest, cause and size**
- **Member surveys to measure % of members that feel we offer value for money, and represent their values**
- **Behaviour change consumer benchmark surveys on charitable giving**
- **Bookings to our courses, events, and qualifications**
- **Website analytics and data insight on engagement with our content and resources**
- **Net Promoter Score**
- **Determining and reporting on our progress to make fundraising more equitable, diverse, and inclusive**

## 6. Governance

**Our strategy will be underpinned by good governance, and this will be fundamental to our success.**

**We will be best placed to achieve our ambitions and aims with effective governance and the right leadership structures. Good governance enables and supports compliance with relevant legislation and regulation. It also promotes attitudes and a culture to deliver fulfilling our vision. We will adhere to the seven principles of the Charity Governance Code and undertake an annual review against the Charity Governance Code and recommended best practise.**

**We owe it to our beneficiaries, stakeholders, and supporters to demonstrate exemplary leadership and governance.**