

What a year it's been for our network!

From our inaugural session in November 2022, the Fundraising Leadership Assembly has grown, connections multiplied and momentum continues to gather. All in no small part down to the contributions, engagement and referrals within the network. And thanks to continued support from our sponsors, both virtual and in-person events continue to be free to attend.

Our members now represent, not just larger nonprofits, but also thought leaders across organisations of different shapes and sizes. Just some of the many things our members have in common is curiosity, honesty, an appetite for professional and sectoral development and appreciation for the value of peer support. And of course that special brand of resilience that - albeit tested - has seen fundraising leaders through challenging and often tumultuous times over the past few years.



As we gathered back at the Bloomsbury Hotel before Christmas, I reflected on our journey over the course of the year - our amazing speakers, the depth of conversations, the openness of the exchange. I feel immensely privileged to be in a position to draw together leaders from all corners of the sector and offer a safe space for robust strategic discussion.

It's been a whirlwind of events over the past year!



As our 2024 programme of quarterly events is being finalised, it's an opportune time to recap over the tremendous insights from our members throughout our sessions to date. So I thought, why not put them all in one place to allow for strategic reflection as fundraising leaders charge into another year...

November 2022 Virtual Session - Cost of Living Crisis

Casting our minds back to the initial wave of concern as we entered the cost of living crisis, it felt like fundraising leaders had barely finished licking pandemic wounds, only to face another macro challenge. Our virtual soft launch was an unstructured discussion, where new members sounded out peers as to how the media hype was playing out in their bottom line. My Top Ten Takeaways from this session:

1. The majority hadn't felt the **impact of the crisis** but were apprehensive about Christmas performance which was to be a key indicator for the sector.
2. Expenditure was increasingly under pressure from the board down. Lean budgets and rising costs drove a **scenario approach to planning** in the face of uncertainty.
3. **Staff wellbeing & financial welfare** were top priority emerging from the pandemic; financial welfare was increasingly salient and particular members leading the charge shared their experience.

4. Fundraising ambition prevailed but many leaders were feeling overwhelmed post furlough and were still grappling with **balancing remote working and nurturing a sense** of team.
5. There was a strong desire to continue to invest in media, marketing & people in context of rising demands but **business casing was under increasing scrutiny**
6. That familiar feeling of **building the aeroplane while flying** it with limited resources as leaders balanced fundraising transformation with continuing BAU.
7. There was some early **mixed performance** of community/ DIY fundraising & some forecasting down in Individual Giving, but impact was far from universal.
8. Door to Door and DRTV income **channels** generally appeared to be performing well, although Direct Mail was under pressure, particularly average gift size.
9. Many leaders were turning focus to **development of 'warm' supporters** on their database who had too long been neglected with the focus on acquisition.
10. The value was very clear of having a **space to bounce experiences off peers** in the context of another wave of challenge and media negativity.

January 2023 Executive Dinner - People Matters

Our first in-person gathering was an Executive Dinner session at the Bloomsbury Hotel in London last January. Over each course we delved into three meaty member-driven themes, led by reflections from three super members who opened up the conversation.

Evolving Org Chart, Roles & Skill Sets

Richard Lee, Fundraising Director at Marie Curie



Recruitment and Retention of Staffing

Gabriella Director of Fundraising at Parkinson's UK



PARKINSON'S UK

Staff Well-being and Financial Welfare

Lucy Squance, Director of Supporter Led Fundraising at Alzheimer's Research UK



ALZHEIMER'S RESEARCH UK **FOR A CURE**

Our insights from the day were expertly doodled to reflect the group therapy taking place throughout our round table session, thanks to our partners Scriberia:



Over the coming weeks I will be posting detailed notes from this session and more that our speakers have kindly agreed to share. Join our [LinkedIn group](#) and get involved - click here to continue the conversation between sessions if you haven't already.

March 2023 Global Virtual Session - Radical Connection



In March, the FLA joined forces with our stateside peers of the CDO Council for a fireside Q&A session with best selling authors Brian Crimmins and Nathan Chapell following the release of their book, *The Generosity Crisis*. The session emphasised how insight, affinity and marrying digital and analogy activities cultivates deep, sustaining relationships by fostering Radical Connection.

Discussion captured nuances on both sides of the Atlantic of the sector big picture:

- With global evidence we're relying on **fewer people to give more money**, true engagement and emotional proximity are fundamentally important.
- With a trust crisis layered on top of the generosity one, **active participation** models and mass mobilisation engage, while empowering civic responsibility.
- Society's reliance on individuals' **generosity for delivery of essential services** is poorly understood, and misleading competency perceptions are perpetuated.
- **Competition for connection** and the clamour for attention lies across sectors - set against decreasing attention spans and rising consumer expectations
- **Social impact lines are blurring** - across public sector, corporations, social enterprise and nonprofits. We need to rethink traditional paradigms and broaden ideas for partnerships for collaboration that drive real social change.

May 2023 Supporter Experience Breakfast Session

In May we were at the Salesforce Tower in London for our interactive breakfast seminar Supporter Experience - Where Efficiency Meets Affinity. We had invaluable contributions from our speakers with a robust interactive Q&A session.



Strategy: Elements for success & reflecting lived experience
Debbie Miller, Director of Customer Experience RNIB



Structure: Challenge silos & drive cultural change
Clare Moore, Director Product & Portfolio Strategy CRUK



Technology: Agility, engagement & scale - what does it take?
Jane Trenaman, Strategic Advisor, Salesforce.org

With this a topic close to my own heart, I shared my own thoughts at this one! My top take-aways from the morning were:

- **Silos are a fundamental obstacle** to overcome when driving an SX strategy - even collaborative culture won't drive success if it lacks challenge.
- **Careful language** is critical for buy-in, particularly in driving income generation principles cross-functionally. Boards focus on the **bottom line**.
- Seek & celebrate **quick wins (& failures!)** early on and earn permission to challenge accepted beliefs about supporters - especially for journeys.
- Executive sponsorship is fundamental, with clear KPIs/ OKRs, roadmap, **reporting and governance** to get you where you want to be in the short term, but also to achieve longer term Big Hairy Audacious Goals
- View the strategy as a **continuous change process & matrix way of working**, rather than a project with a beginning, middle and end: supporter journeys will continue to evolve and be remapped
- **'Business' stakeholders** need to be closely aligned with data strategy and platform requirements - literacy (not necessarily fluency) in these areas will drive successful collaboration with IT colleagues.
- **Integration of platforms** is fundamental to a seamless donor journey - start with priority segments & associated platforms and progress to automation when you have a solid data foundation

Although this was my last session with my official Salesforce hat on, I've been thrilled with their ongoing partnership and support of this valuable network.

June 2023 Future Proofing Revenue and Engagement

Before the summer break we had another international meeting of minds - this time on both sides of the Irish Sea, We joined forces with Charities Institute Ireland Fundraising Director's Network for a vibrant session on future-proofing revenue & engagement strategies.

As always, lots of peer-to-peer sharing, golden nuggets of insight and more than a little group therapy as many organisations were emerging from a series of fire-fights to embark on strategic planning. My Top Ten Takeaways from this session:

1. **Longer term planning horizons** becoming the focus again after a series of fire-fights in recent years driving annual or even monthly planning cycles.
2. **Balancing risk & return profile** across the fundraising portfolio will help to plant the seeds for innovation while establishing the core programme.

3. Building **confidence & trust** with key stakeholders is at the core of the business-casing process. Start with the SLT, then specific board members before building wider buy-in.
4. **Staged buy-in** for new initiatives with awareness & gestation before detail can soften barriers, as can framing **priorities as key obstacles** rather than 'nice' opportunities.
5. The **imperative for change & a grounding in stakeholder needs**, creates a fundraising story to cut through complexity, pre-empt concerns & drive investment.
6. Capacity building around **planning, reporting, tracking KPIs** and evidence-based decision making will ultimately drive results, confidence & positive growth.
7. Insight is key, particularly when business casing from a weak starting point, or making a case for investment in the context of a budget deficit. **Pilot & prove.**
8. Meet peers where they are but also stretch them - **challenge mindsets** of pride in low fundraising spend & create a culture with **psychological safety to fail.**
9. **Donor cross-sell** across income streams requires departmental goals that transcend traditional management reporting that regularly deepens silos within fundraising teams.
10. Ultimately **income generation must be an organisational commitment.** Siloed fundraising strategy development will limit access to growth & opportunities.

The graphic features a central map of the United Kingdom with three blue arrows forming a clockwise cycle. Surrounding the map are the logos and names of the speakers and organizers. At the top left is the Charities Institute Ireland logo. At the top center is the Fundraising Leadership Assembly logo. On the left side, the text 'FUTURE PROOFING REVENUE & ENGAGEMENT STRATEGIES' and '14TH JUNE 2023' is displayed. Below this is a circular portrait of Jane Trenaman, Chair. On the right side, there are three circular portraits of speakers: Luke Mallett (Director of Income & Engagement at Young Lives vs Cancer), Nicola Gunn (Director of Development Brand & Engagement at Scottish SPCA), and Mark Mellett (Director of Fundraising & Marketing at Oxfam Ireland).

CHARITIES INSTITUTE IRELAND

Fundraising LEADERSHIP ASSEMBLY

FUTURE PROOFING REVENUE & ENGAGEMENT STRATEGIES
14TH JUNE 2023

Jane Trenaman
Chair

Luke Mallett
Director of Income & Engagement
YOUNG LIVES vs CANCER

Nicola Gunn
Director of Development Brand & Engagement
SCOTTISH SPCA

Mark Mellett
Director of Fundraising & Marketing
OXFAM Ireland

December 2023 Fundraising Teams of the Future

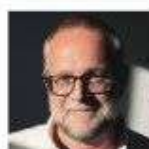
Back to the Bloomsbury! This time for a sell-out session on real life implications for leaders of accelerated digitisation, data driven fundraising and artificial intelligence. Another fantastic panel with member-led reflections:



Deniz Hassan, Strategic Digital Advisor, World Food Programme
The practical application of data & AI to help to resolve key sector pain points



Lucy Squance, Director of Fundraising, ARUK
The cultural challenges of driving change with teams - what we've learned



Thomas Schultz Jagow, Global Director of Engagement & Fundraising, World Animal Protection
From strategy to practice - structure & skill to leverage digital & data acceleration

It's always hard to do justice to the incredibly open and insightful sharing on the day, but my Top Ten Takeouts below:

1. In the wake of pandemic acceleration followed by AI hype, many leaders are still grappling with **where exactly to start**. Better to focus on practical use cases for proof of concept over getting bogged down in THE big debate over the future of civilisation.
2. **Key roles** that champion data driven approaches are rising to the fore: Chief Information Officers, Chief Technology Officers. Chief Data Officers - but how can we ensure the business requirements are represented from a fundraising perspective? Too often the champions are at junior levels who have the voice without the seniority.
3. But leadership goes way beyond job titles - it means challenging **entrenched practices and historic bureaucracy**. It means tackling unhelpful behaviours head on and driving use of tech that is aligned to core values.

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4. **Leadership** needs to come from the top, with CEO sponsorship but, attention must also turn to the make-up of nonprofit boards. Are there enough trustees with tech skillsets and aptitude to apply appropriately in the sector?
 5. There can be enthusiasm and pockets of **understanding with champions** at all levels, but if leadership doesn't understand the opportunities or is closed to investing in digital acceleration (as opposed to individual technologies), this won't make a dent. It also ultimately **drives employee turnover**, often driving frustrated talent out of the sector.
 6. There is a difference between risk aversion and the temptation to stick **heads in the sand** when overwhelmed - the latter is incredibly risky. Without leadership or the necessary guardrails, a bottom-up organic use of this data will percolate.
 7. There is much debate about the best **organisational structure**, with organisations moving from centralised to distributed digital expertise, from hub to spoke and back again. Ultimately the appropriate organisational approach requires consistent leadership and cascades from holistic strategy.
 8. **Digital & data have seeped into the most traditional** of fundraising income streams. We strive towards a state where we don't need to explicitly name digital efforts or roles at all - 'analog' should be the exception, not the rule.
 9. Siloed data and infrastructure is merely a symptom of **deeper siloes** often driven by governance and deepened through culture. **Data strategy** needs to be aligned, or better still, embedded in organisational strategy for impact.
 10. An **innovation culture** encourages curiosity, agility, continuous learning and experimentation - organisations must assess, name & fulfil their risk appetite as a conscious choice. **Standing still is also a choice - an ill-advised one.**



A huge shout-out to our sponsors who made our 2023 sessions possible.



And that's a wrap! What a year.

A massive thank you to all our members for engaging so openly in our sessions and to our speakers in particular who have given us much food for thought throughout the year.

*"Great sessions
and lots of useful
insight"*

*"It's so nice to feel you're hearing from
people who know what they're talking
about without being preached to!"*



What
Next?

Watch this space for details of our quarterly sessions for 2024! We will have more exciting collaborations with international networks for virtual sessions and engaging & interactive in-person workshops.

Lots of you have already fed into potential topics through last year's survey and our ongoing conversations. Do **reach out if you have a hot topic** that would benefit from being thrashed out with your peers. And also let me know if there is something you feel particularly passionate about where you would **like to be a speaker** and share your own reflections. This network continues to be member-led and the more I hear from you, the more value you will continue to draw from our sessions.



In the meantime, do continue the conversation and [join our LinkedIn group](#) if you haven't done so already. I will be sharing resources & more detailed notes from our 2023 sessions over the coming weeks.



**Jane Trenaman, Chair FLA
MD, The HX Consultancy**

*Thank
You!*