

# Managing the fundraising function

A one-day workshop for chief executives, finance directors and fundraising directors.

For dates and locations please visit [www.actionplanning.co.uk/managingfundraising](http://www.actionplanning.co.uk/managingfundraising)



*"Attending this course has been an excellent investment. It is one of the best courses I have been on for a long time."* Mike Wilkerson, Head of Fundraising and Support Services, St Wilfred's Hospice

*"The session on how to select and manage a Fundraising Director was particularly instructive."* Terry Huxtable, Chief Executive, Dr Hadwen Trust

*"Excellent and so useful."* Carol Stone, Chief Executive, EllenorLions Hospice

'Managing the Fundraising Function' is a senior-level masterclass designed principally for chief executives, finance directors and recently appointed fundraising directors who do not have a specialist background in fundraising.



This is an intensive and interactive masterclass, limited to thirty participants. It is led by David Saint, the Chairman of Action Planning, who has helped many of Britain's leading charities to generate more income from a wider range of sources - a priority in the current circumstances when the returns from many forms of fundraising are declining.

The masterclass will help you acquire the knowledge and skills required to direct the fundraising function effectively, including an appreciation of the full range of fundraising disciplines.

We examine how to develop a fundraising strategy, decide which forms of fundraising are best suited to your organisation and build and lead a successful team, with the right skills.

The masterclass will also help you review the level of investment which you should commit to each type of fundraising, the returns which you should be achieving and the key questions which you should be asking your team.

Whether you are establishing a new fundraising function, or working to increase your capital and revenue funding from a range of sources, 'Managing the Fundraising Function' should help you ensure that your organisation can fund its work, even in challenging times.

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strategy and fundraising consultants

## REGISTRATION FORM

You can book in four ways:

1. Enter your details online at [www.actionplanning.co.uk/managingfundraising](http://www.actionplanning.co.uk/managingfundraising) (you will then have a choice of either requesting an invoice, or paying online)
2. or email [anne@actionplanning.co.uk](mailto:anne@actionplanning.co.uk)
3. or fax (020 8770 2090) or post this form to **Action Planning**, Waymark House, 19 Cedar Road, Sutton, Surrey SM2 5DA
4. or phone Anne on 0208 661 8060

Please register the following delegates (**BLOCK CAPITALS PLEASE**)

**1** Mr/Mrs/Miss/Dr: First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Position: \_\_\_\_\_  
E-mail: \_\_\_\_\_

Mr/Mrs/Miss/Dr: First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Position: \_\_\_\_\_  
E-mail: \_\_\_\_\_

**2** Name of Charity/Organisation: \_\_\_\_\_  
Address: \_\_\_\_\_  
Postcode: \_\_\_\_\_  
Tel: \_\_\_\_\_

**3** Please indicate your preferred workshop date below:  
\_\_\_\_\_

**4** Please tick appropriate box:  
 I enclose my cheque for \_\_\_\_\_ (payable to Action Planning)

Attendance fee: £225 per delegate, including VAT, lunch and all presentation materials.

Please register me/us and send me a VAT invoice. (Unless you specify otherwise, the invoice will be made out to your organisation).

I wish to pay by credit card (complete details below)

Visa  Mastercard  Switch/Maestro  Delta

Card Number

\_\_\_\_\_  
Valid from \_\_\_\_\_ Expiry Date \_\_\_\_\_

Issue No. \_\_\_\_\_ Security Code \_\_\_\_\_

Switch/Maestro users only

This is the 3 or 4 digit code on the back of your card

**5** Please indicate any special needs or dietary requirements:  
\_\_\_\_\_

**6** Please tick the relevant box if you would like a free discussion with Action Planning about our services in any of the following fields:

Major Donor Fundraising  Research (e.g. into major donors or trusts)  Revenue Fundraising  
 Recruitment  Strategic Consultancy  Market Research  
 Capital Fundraising  Wealth Screening  
(Please write below how much you need to raise and for what purpose) \_\_\_\_\_

### DATA PROTECTION

We would like to retain your address to send you invitations to future events and information on our work. Should you not wish to receive such communications, please tick here.

We would like to include your name, title and organisation (but not your address) on the delegate list. Should you not wish us to do this, please tick here.

### CANCELLATION AND REFUND POLICY

All delegate fees must be paid in advance of the conference. Your fee is fully refundable, provided you cancel in writing more than seven working days before the conference. No refunds are available for cancellations within seven working days of the event, though substitutions can be made at any time.

### PROGRAMME

Action Planning reserves the right to vary the published programme of speakers and the timing of the sessions.

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Attendance fee: £225 per person including VAT, presentation materials and lunch.

## Managing the Fundraising Function

Managing the Fundraising Function' is an intensive one-day masterclass specifically designed for chief executives, finance directors and new fundraising directors who do not have a specialist background in fundraising.

The masterclass is led by David Saint, Chairman of Action Planning, and limited to thirty places. It will examine:

- how to develop a **fundraising strategy** which meshes with your organisational strategy
- how to ensure you **have the right people**, doing the right things
- what to expect of those in each fundraising role and **the key questions to ask** in order to assess performance
- the principles involved in **fundraising from all sources** including major donors, communities, statutory sources, trusts and foundations, lottery distributors and companies
- how to assess and develop **the opportunity to generate earned income**
- what **level of investment** you should commit to each type of fundraising, and what return you should expect
- your role in **managing relationships** with key funders
- how to **motivate your trustees** and other key supporters to help you secure major gifts

## Action Planning

Action Planning is a leading UK consultancy to the not-for-profit sector. It offers an unparalleled combination of fundraising and strategic consultancy, research, recruitment and 'hands on' fundraising to help organisations grow their income and fund major capital projects.

An initial discussion with Action Planning is without commitment. Please tick section 6 opposite or contact Vicky Porritt ([vporritt@actionplanning.co.uk](mailto:vporritt@actionplanning.co.uk) or 020 8642 4122) if you would like to talk to us about your needs.