

## FUNDRAISING STRATEGY UPDATE

### Basic Information

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Status of Paper	Final
<b>Action Required</b>	Decision
<b>Draft Resolution</b>	The Methodist Council endorses the conclusions of this paper (paragraphs 34-43) in the context of the Fundraising Strategy, subject to further work with TMCP and appropriate legal advice to ensure compliance with data protection legislation and money-laundering regulations.
<b>Alternative Options to Consider, if Any</b>	None – alternatives were considered during the September Council.

### Summary of Content

<b>Subject and Aims</b>	This paper comprises a report on the fundraising consultation requested by the Methodist Council (09/09) and recommends changes to the Fundraising Strategy.
<b>Main Points</b>	It is proposed (1) that Conduit funding ceases, but project and general fundraising continues, (2) direct communication with members is implemented and (3) an informal fundraising forum is set up.
<b>Background Context and Relevant Documents (with function)</b>	Fundraising Strategy (MC/09/72): this is attached for convenience as Annex 1. Request for consultation (Council Minute 09.3.8 refers).
<b>Consultations</b>	District Chairs and Administrators, Methodist Homes for the Aged, Methodist Relief and Development Fund, Action for Children, Christian Aid, Methodist Children & Youth, Heritage.

### Summary of Impact

<b>Standing Orders</b>	None
<b>Faith and Order</b>	None
<b>Financial</b>	Changes in ways of working to accommodate more detailed and frequent reporting of Mission Funds income and project expenditure
<b>Personnel</b>	None
<b>Legal</b>	The Charities Act, Data Protection Act, Money Laundering Regulations
<b>Wider Connexional</b>	Facilitating direct communication between members and the team.
<b>External (e.g. ecumenical)</b>	Facilitating cooperation and liaison concerning fundraising with partner organisations within Methodism.
<b>Risk</b>	If fundraising approaches are not communicated effectively members will not adopt them and their effectiveness will be diminished. There are legal compliance issues if conduit funding is maintained. Uncoordinated messages presented to Methodist Church members has the potential to damage giving to all organisations concerned.

# FUNDRAISING STRATEGY UPDATE

## Background

1. At the September 2009 meeting of the Council the draft Fundraising Strategy was presented. The Council agreed to the following three areas for consultation with Districts, arising from the discussion and requested that proposals for revisions to the Fundraising Strategy be presented to the Council. The areas for consultation were:

*i.* Project Funding:

Giving to specific projects is preferred by some Methodists and is seen as an easier way to raise funds, but it causes problems for less popular but equally important programmes and takes away the decision making about priorities from our partner Churches: *How can we make giving to the Funds attractive and inspiring, while discouraging the 'tying' of gifts to causes selected by the donors?*

*ii.* Direct Communication:

The strategy is partly based around communicating directly with individual Methodists and moving towards a culture of regular giving to the mission funds: *Which controls do we want to see in place as we communicate more directly with our membership?*

*iii.* Partnership Working:

There are a number of separate charities who address the same Methodist audience in their fundraising, such as Action for Children and the Methodist Relief and Development Fund: *Should we implement an informal consultation process with our partner charities on fundraising campaigns and strategies and, if so, which charities?*

2. The Council requested feedback from Districts in relation to the three areas set out above and in particular for an assessment of the extent to which holding information about donors to the Methodist Church centrally is supported.

3. These issues were further discussed at the World Mission Forum on 10<sup>th</sup> October 2009, where support was shown for a piloting of direct communication with individual members of the Methodist Church.

## Consultation Process

4. All District Chairs and Circuit Superintendants were contacted by email in October 2009, summarising the feedback requested and restating the questions. Responses from 20 people were obtained and the content of replies was categorised and evaluated.

5. During conversations it was found necessary to clarify that it was not being suggested that churches cease to support projects of their own choosing in cases where those projects were not supported by the Mission Funds. It was only being suggested that funds could no longer be channelled through the World Mission Fund or Mission in Britain Fund to these projects. Churches and Circuits were free to make their own arrangements to transfer donations directly to those projects.

6. Project Funding responses fell into four broad categories: support for projects only, support for projects and general mission funds, support for general mission funds only, and support for the continuation of conduit funding.

7. Responses to the direct communications question fell into three categories – support for direct communication based on centrally held information, no direct communication, and support for holding information centrally but not canvassing for donations.

8. Some Connexional Team members were also consulted informally and informal discussions were held with delegates of the World Mission Forum.

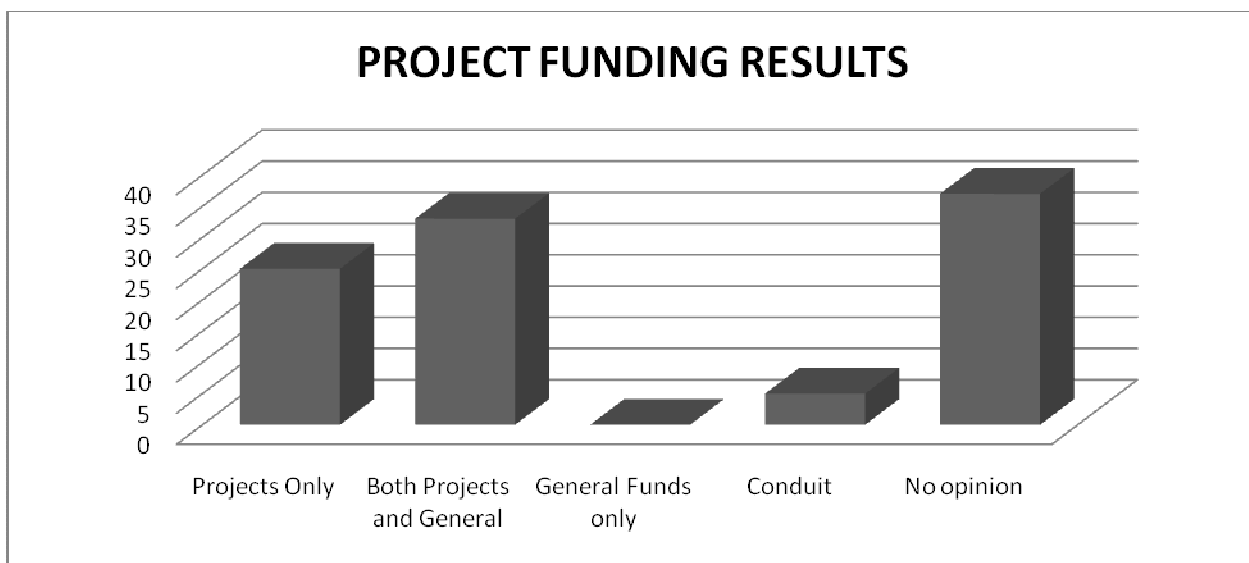
### Consultation Feedback

9. Consultation response showed general support for the overarching Fundraising Strategy.

### Project Funding

10. Accepted fundraising practice involves the promotion of specific projects, or parts of projects - a practice adopted by some of our partner organisations. However, this has been found to work against raising funds for less popular but equally important work as identified by the Conference, the Connexional Grants Committee and the Connexional Team.

11. The approach outlined in the Fundraising Strategy, as presented to The Council in September 2009, is to generate unrestricted income for each of the Mission Funds wherever possible, so that they may make grants available to support activities of “Connexional significance”, to partner churches and to appropriate areas and projects as determined by the Connexional Grants Committee.



12. The graph shows the following results obtained from respondents to project funding:

- i. 25% said they would support appeals for projects alone and not general mission funds.
- ii. 33% said they would support appeals for both projects and general mission funds.
- iii. Nobody wanted to support appeals for general mission funds alone.
- iv. 5% wished to raise funds for their own projects independently of the programmes supported by the mission funds.
- v. 37% expressed no opinion in any of the above categories.

13. In summary, the results suggest that we should continue with project funding (projects supported by the central Connexional procedures); discontinue conduit funding (i.e. projects not supported by the central Connexional procedures and where the mission funds are used merely as a conduit for donations

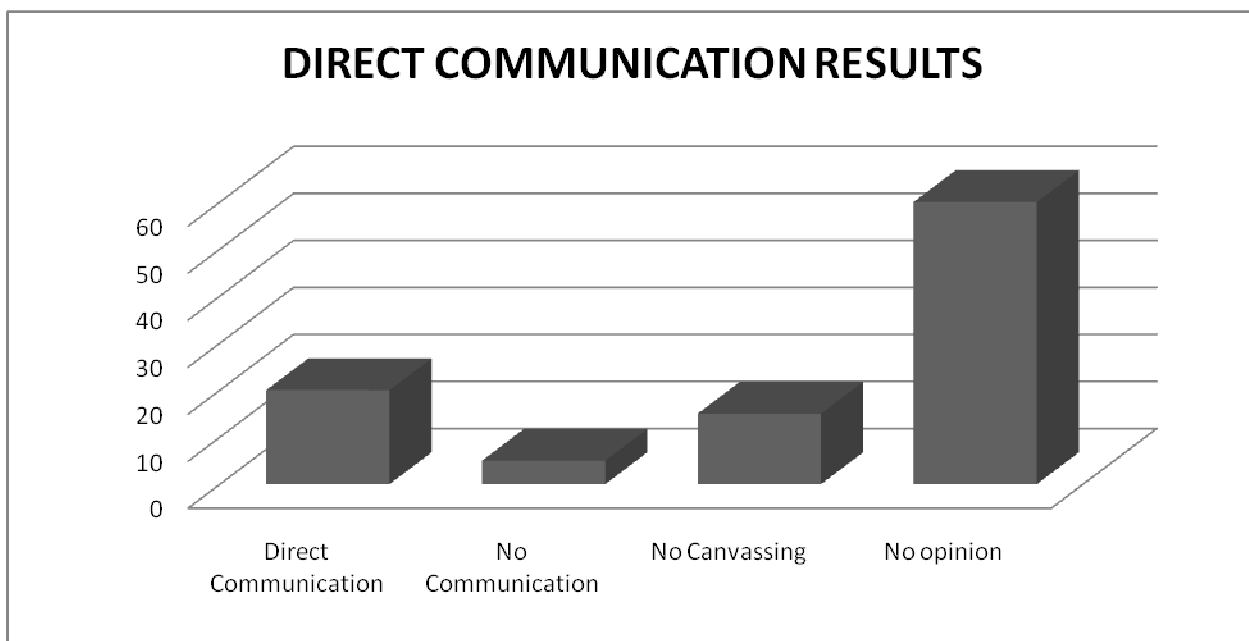
from churches or individuals); and ensure that the approach enables giving both to defined projects supported by the central Connexional procedures and into general funds.

### Direct Communications

14. Common fundraising practice amongst our partner organisations involves direct communication with potential donors by a variety of means. In order to do this efficiently, data on individuals has to be held by the Connexional Team and records kept of their preferences so that they are not sent irrelevant communications.

15. Undertaking direct communication with donors, and holding information about them, means we must be compliant with the Data Protection Act.

16. Current practice in the Methodist Church is for Districts or Circuits to distribute such communications as they see fit to the members. Owing to the workload or lack of volunteers, communication by this means does not allow us to realise the full potential of fundraising activities.



17. The graph shows the following results obtained from respondents on the theme of direct communications:

- i. 20% were happy for us to hold data on individuals, in order to communicate with them directly for appeals.
- ii. 5% did not want us to communicate with individuals directly at all.
- iii. 15% were happy for us to communicate directly with individuals but not to make any requests for donations from them.
- iv. 60% did not express an opinion in any of the above categories.

17. In summary, the results suggest that there was a general acceptance of the need for direct communications, but questions were raised on the type of communication envisaged. There was a significant minority who accepted direct communication but on a limited basis, i.e. information and thanking only and not requests for donations. A small proportion did not want any direct communication at all.

### Partnership Working

18. A strategy has not previously been in place for fundraising for the Methodist Church Funds. Concerns were raised by Action for Children in particular as to the negative effect this might have on overall giving by church members, owing to a multiplicity of uncoordinated requests made for donations from different organisations.

19. The proposal in the Fundraising Strategy is to set up a forum of such organisations to encourage cooperation and liaison with regard to fundraising activity directed at church members.

20. Respondents considered that this was not an issue for churches but for the fundraising organisations themselves. It was also assumed that such cooperation was already taking place.

21. The issue is therefore one of selecting the most appropriate organisations based on two criteria: (a) that the organisation is Methodist in origin and continues to embrace the principles and ethos of Methodism; and (b) the members of the Methodist Church are one of their most significant donor bases.

22. Based on consultations primarily with Connexional Staff, the following organisations were approached to determine whether they would participate in such a forum:

- Action for Children
- Methodist Relief and Development Fund
- Methodist Homes for the Aged
- Christian Aid

23. The following items have arisen which are of significance to the proposals made in this paper.

### **Additional Considerations**

#### Legal Issues re Conduit Funding

24. Conversations with Her Majesty's Revenue and Customs and the Charity Commission have raised queries about the legality of conduit funding under charity law and under the money laundering regulations. This will be explored further but may prove another reason to be cautious about continuing the provision of such a service from the Connexional Team.

#### Connexional Grants

25. Links and procedures are being defined with the Connexional grants process which will enable a clear and transparent connection between donations and the work they have funded. This necessarily involves the Finance section of the Connexional Team, but owing to the review and reorganisation of this department at this point in time the procedures are still under development.

26. This process is necessary to ensure that where funds are donated to project work supported by the Methodist Church, the donations can be accounted for and assurances made that the funds were used for the purpose for which they were given.

#### Connexional Database

27. It has become apparent that a significant proportion of the information held on the Connexional Database is out of date or contains details of individuals who were not aware that their details were held by the Church in this way. Furthermore, a number of separate databases (i.e. spreadsheets) exist in parts of the Connexion which are used independently of the Connexional Database (e.g. Women's Network

details, donors to disaster appeals). Data is also held at Peterborough on customers and people who have ordered materials from Methodist Publishing.

28. Work is underway to coordinate these databases used in different parts of the Connexion and to enhance and update database policies formulated before Team Focus and the creation of posts (including fundraising) within the Team, all of which now need to make more extensive use of the database.

29. The purpose of this exercise, with particular regard to direct communication with members, is that accurate up-to-date records need to be maintained on individuals.

#### Data Protection legislation

30. It has become apparent during the consultation period that there is a need for coordination and responsibility across the Connexion in the use of personal data held on the Connexional and other databases. In some cases we have not sought permission to hold personal details, or permission has only been given for details to be held for specified purposes and not for general mailing purposes. Holding this data alone might constitute a contravention of the relevant sections of the Data Protection Act and particularly if we were to use it to communicate with them directly.

31. In order to facilitate direct communication with members, we need to obtain their permission to hold their personal data. There are exceptions including where a contract exists between the Church and the individual when they purchase materials from Methodist Publishing. Work is underway which will involve the Trustees for Methodist Church Purposes through which we are seeking to identify:

- what personal data we already hold and where
- what personal data can legally hold
- for what purposes it can be used
- the most appropriate and non-threatening way to obtain personal data.

#### Partnership Working

32. An informal group has been set up comprising fundraising personnel from each of the organisations listed in paragraph 22 above. The purpose is to keep all partners aware of campaigns and events planned, to coordinate if necessary and to ensure where possible that they do not compete, overlap or otherwise risk confusion by our main donor base, i.e. members of the Methodist Church.

33. Direct fundraising activity is also carried out within the Methodist Church in three areas outside the Mission Funds. In the case of Children and Youth and Heritage below this activity has commenced since the Fundraising Strategy was submitted to The Council in September 2009.

**Methodist Children & Youth** is developing fundraising activities to support their own projects. Their source of income is restricted to Grant Making Trusts and Foundations, including the Joseph Rank Trust but it is not inconceivable that members of the Methodist Church will want to support this work directly.

**Methodist Heritage** is developing fundraising activities to support their own projects. Their source of income is both from individuals, including but not only members of the Methodist Church, and from Grant Making Trusts and Foundations.

The **Property Office** has for some time carried out fundraising on behalf of church building projects and make extensive use of Grant Making Trusts, Foundations and Statutory Funding. Funds received relate to the Fund for Property.

## **Conclusions**

34. Based on the consultation feedback and further work carried out detailed above, the following recommendations are made to The Council.

### Project Funding

35. The majority of feedback indicates that to dispense with project funding altogether would be unpopular and may result in churches supporting more of their own projects at the expense, in particular, of giving to the World Mission Fund.

36. It is proposed that alongside fundraising for general funds, it will only be possible for the Mission Funds to receive donations for specific projects if those projects are supported by the Connexional Grants Committee. No donations will be accepted by the Mission Funds where they are specified by the donor to be forwarded through these funds to projects, individuals or churches, where such projects are not either (1) supported by the Connexional Grants Committee; or (2) already in existence and supported by the relevant members of the Connexional Team.

37. It is proposed that fundraising for specific projects may be initiated by the Connexional Team and coordinated by the Fundraising Coordinator from time to time in consultation with Connexional Grants Committee officers, including specific disaster appeals (such as the Cumbria flood appeal and the Haiti earthquake appeal).

### Direct Communications

38. The majority of feedback indicates that a limited approach to direct communications would be acceptable.

39. It is proposed that a direct communication pilot is conducted in three districts (two circuits in each district), limited to thank you letters and acknowledgements, Gift Aid communications and statements and distribution of advocacy material (e.g. world church bulletins). No telephone canvassing to be carried out, although in cases where the donation justifies it, personal calls may be made to individual donors to thank them.

### Partnership Working

40. The Consultation indicates that working in an informal consultation process with our partner charities is welcomed and it is proposed to establish a fundraising forum.

### Addition to the Fundraising Strategy – Disaster Appeals

41. Following the unprecedented response to the Methodist Church Haiti Earthquake appeal, which has raised £645,000 by the date of this paper, and the Cumbria Flood appeal, which has raised £80,000, the following issues have become highlighted:

- The need to establish clear criteria by which we will launch an emergency appeal;
- Resourcing the additional work which such appeals generate;
- Funding the supervision and associated expenses such as travel required to ensure that donations are being used efficiently and for the purposes for which they were raised at the point of delivery.

42. It is proposed that the Methodist Church's expenses incurred in the supervision of expenditure by the beneficiaries, including travel and accommodation, are met directly from the funds raised by the

appeal through an amount not exceeding 9% of the income to the appeal which is set aside. Any balance remaining after accurate costs for expenses have been deducted will be returned to the appeal fund.

43. It is proposed that the Fundraising Coordinator develops and publishes the criteria which must be met before the Methodist Church launches a disaster appeal.

#### **RESOLUTION**

**The Methodist Council endorses the conclusions (paragraphs 34-43) of this paper in the context of the Fundraising Strategy, subject to further work with TMCP and appropriate legal advice to ensure compliance with data protection legislation and money-laundering regulations**

## ANNEX 1

### FUNDRAISING STRATEGY

#### 1. Summary of the Issues

**1.1. Research:** An extensive review of existing fundraising activities and the needs of the Mission Funds was undertaken during the Connexional year 2008/09: the Funds of principal interest in this context are the Mission in Britain Fund (formerly the Fund for Home Mission) and the World Mission Fund (formerly the Fund for World Mission). In addition, partners including Action for Children, MHA, MRDF and USPG were consulted while meetings with other related charities such as CMS, Tear Fund and Christian Aid added to our understanding of the issues of Christian Fundraising. This document also benefits from extensive personal discussion and consultation with FICO – Fundraising in Christian Organisations, a part of the Institute of Fundraising.

**1.2. Internal Factors:** Income to the funds is declining. Furthermore we do not yet have an advocacy mechanism, the management information systems in place or customer support structures to enable effective fundraising.

**1.3. External Factors:** In addition, the economy is likely to remain in recession with a deleterious effect on individual giving, a drop in investment income and from grant making Trusts, and increased competition from other charities. It is important to take action as soon as possible to secure our existing levels of income.

**1.4. Summary:** A full report detailing each of the issues is available on request. These are:

- Preventing Donor Attrition:
- Need for a campaign based strategy which has a clear “ask”. Historically, giving to the Easter Offering and JMA giving may have held up for this reason.
  - Refining existing fundraising campaigns
  - Developing new campaigns
- Developing a Legacy strategy (which includes family members).
- Capturing detailed information on our donors at first point of contact
- Getting accurate financial information on:
  - who has given what
  - to which fund
  - when they gave.
- Implementing a fundraising and advocacy database based on this information.
- Communicating directly and developing a relationship with:
  - individual donors
  - Church, Circuit and District officers.
  - Balanced advocacy for different mission funding needs
- Developing effective advocacy as a distinct function of fundraising
  - Using and supporting our advocates at Circuit level effectively (e.g. Mission Officers).
  - Drawing together the resources available in the Connexional team
  - Creating effective advocacy material.
- Understanding how we meet the needs of mission in the community, nation and the world through effective communications with the relevant offices and bodies
- More effective use of media and publications, internet and as many other routes for advocacy as we can use with our membership

- Project funding (including Conduit Funding)
  - See 1.1.5. below..
- Keeping our partners (e.g. MRDF, Action for Children) comfortable as we raise the profile of fundraising in the Methodist Church in Britain
- Use of external funding for mission;
  - Searching tools for use by Circuits/churches.

### **1.5. Conduit funding and restricted funds**

1.5.1. Some donors strongly desire to know that their gift is being used for a specific need. Because of historic legacies, the World Mission Fund includes a range of restricted funds (funds which must be applied to specified causes or geographical areas). Sometimes it is possible therefore to ensure that a specific need is addressed with a specific gift.

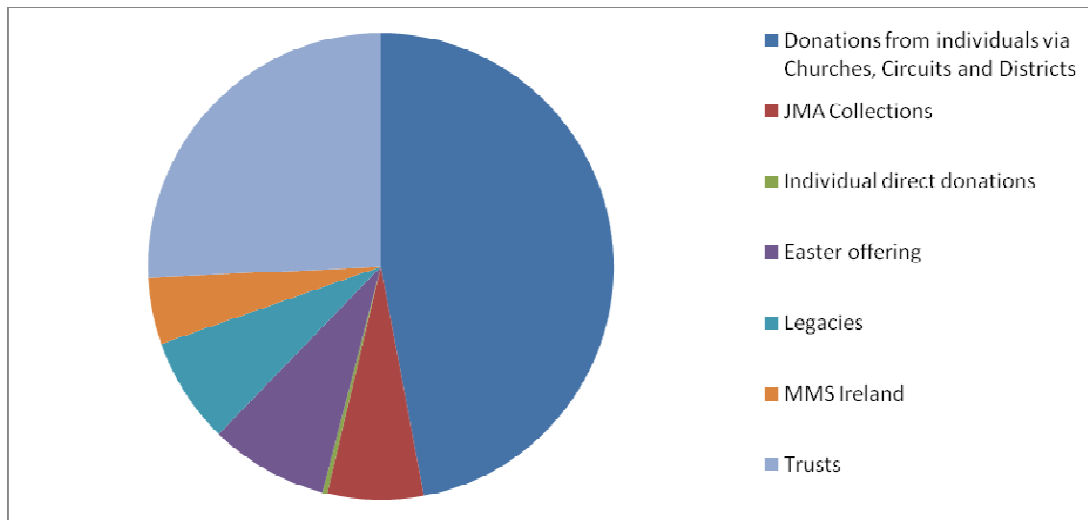
1.5.2. However, we would wish to encourage giving that is not 'tied' in this way, as this enables the Church to determine the most important current priorities for expenditure of funds. Conference has approved an overall mechanism for delivering these priorities through the Connexional Grants Committee.

1.5.3. Conduit funding is when donors, whether individuals or groups, give money with a request that it goes to a particular project which they themselves have identified, but for which they would like to use the Connexional Team as a 'conduit.' Conduit funding is increasingly popular with donors as it allows them to feel that they are supporting "their" project and it transfers the administrative complexities of sending money abroad to the staff in the Connexional Team. However, it is the policy of the World Church Relationships office to discourage it.

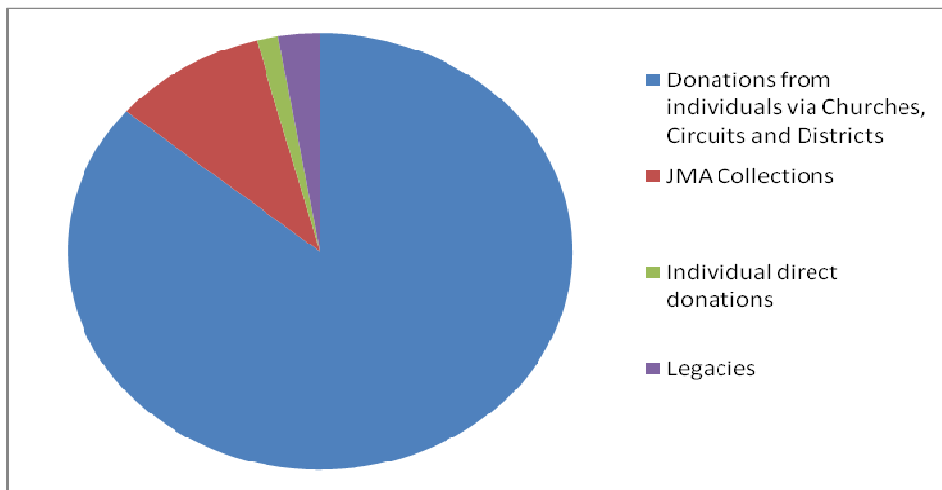
1.5.4. The fundamental issue with conduit funding is that it goes against the Church's agreed principles of partnership with our partner churches worldwide. The Methodist understanding is one of equal partnership, in which we support each other in different ways, and which trusts that those in leadership positions in a partner church who seek help know best what they need in order to continue their mission. Our partners know best what support they need to carry out effectively their "home" mission, and therefore World Mission Fund money is transferred to partner churches for the support of work which they have identified as a priority. Conduit funding, whilst offered with the best intentions, instead assumes that the donor church or individual knows best, and this is contrary to the understanding of partnership in the 2007 report *Partnerships: Purpose and Practice*.

1.5.5. Conduit funding also ties our hands in relation to changing needs, whereas unrestricted giving, or to one of the broadly scoped restricted funds, allows for necessary flexibility. It also needs to be understood that any funds being transferred through the World Mission Fund to an explicitly specified recipient (other than helping to fund programmes already supported by the Fund) cannot be Gift Aided.

## 1.6. The relative size of existing income streams



World Mission Fund 2007-8: total income £4.2m



Mission in Britain 2007-8: total income £0.7m

## 1.7. Trends and Priorities

- If the current trend for individual giving continues, we will see a decrease of up to 7% or £209,000 in 2008/09.
- In implementing this strategy during 2009/10, the agreed budget sets the challenge of turning the income decline into a small increase in giving in the ensuing years.

## 2. Proposed solution

Seven (the Hebrew number of perfection) fundraising strategies that incorporate our existing initiatives are suggested below. These can be summarised as:

### ***There's no time like the P R E S E N T -***

- Personal connection and donor development\*
- Regular monthly giving to mission\*
- Encouraging Circuits' and Churches' own fundraising activities\*

- Supporting and increasing existing initiatives
- Emergency Appeals
- New project coordination and support\*
- Timely Campaigns – e.g. Advent\*, Easter Offering

*\*these are new initiatives*

## **2.1. “P” - Personal Connection and Donor Development**

At present, fundraising activity is isolated from direct connection with our donor base. Contact is generally through their mission officers.

- We develop a means of targeting and communicating with individual members. This means obtaining, holding and analysing comprehensive data so that we can target our donors, thank individuals and plan campaigns effectively. Implementing a donor communications system is only part of the story – we need to get the data in the first place.
- We devise a means of getting information on potential donors. The large charities (and commercial organisations for that matter) spend millions just getting information on us.
- The challenge will be (a) whether we can and if so, (b) how much more data we can get other than a name and address at present and (c) how we can obtain such data.

Facilitating a direct connection between the individual and Church House is something we may have to work towards, rather than attempting to change overnight. However, it is an important aspect of the fundraising strategy:-

- In **Legacy development**: People will often respond directly to a personal invitation, as changing a Will requires some effort by the potential legator. This is particularly urgent with the increasing age of our membership (see 2.4.4. below)
- In **increasing our giving**: The response to general appeals made through advertisements and publicity is greatly enhanced by personal invitation (see 3.1 below).
- In **gratitude**: It’s nice to thank people for their donation! (see 3.3. below).

### **2.1.1. Gift Aid**

There is an issue with Gift Aid reclaims, in that some Circuits may be claiming Gift Aid on donations given to WMF or MiBF.

- We need to make it easier for donors to sign up to Gift Aid and for Higher Rate taxpayers to make further claims.
- Finance do not hold the addresses or any other details on Gift Aid which means we will have to start from scratch.

### **2.1.2.Database**

The Fundraising database is a vitally important tool in fundraising.

- The existing database cannot provide facilities required for fundraising function
- There are specialist database systems available which meet our requirements

## **2.2. "R" - Regular Monthly Giving to Mission**

A planned monthly giving campaign is proposed. The intention is to encourage people to give regularly. This would run all year round. The Salvation Army, for example, have undertaken extensive research and their new "Give to Grow" campaign is run along these lines. Our title is yet to be confirmed, provisionally "Every Life Worth Living" (ELWL)

- In our Community (Methodist Church Fund)
- In our Country (MiBF)
- In the World (FWM)

### **2.2.1.Outline**

- Two aspects to mission: (1) "daily bread", maintaining the existing work, and (2) expanding the work of mission, new initiatives
- Other campaigns such as the Easter Offering are over and above regular giving.

### **2.2.2.Basis of the strategy**

- Make mission giving more coherent
- Bring idea of mission to community as a whole, nation and world together
- Current perception of funds is that they are disparate and virtually compete with one another
- Offers choice – people can still support (e.g.) World Mission exclusively
- Simplicity – people do not necessarily have to choose between funds
- Emphasises the urgent need for mission at home as well as abroad, making it one message:
  - "Community" strand means mission work locally or support for the Church infrastructure throughout the UK. Funds directed to the general Methodist Church Fund
  - "Nation" strand means supporting work of significance in Britain such as Venture FX. Funds directed to MiBF.
  - "World" strand is money directed to WMF.
- ELWL does not replace or get in the way of giving to individual church initiatives or locally inspired and run causes
- ELWL is about keeping the cause and the work of mission going throughout the world wide body that is Methodism
- Need to produce "volunteer packs" for use by advocates in the local churches

### **2.2.3.Format**

- Use of Pledge Cards (gets name and address details to us)
- Direct Debit forms part of Pledge Card
- 3 year commitment
  - Asked to support one of three areas: WMF, MiBF or MCF
- It is not proposed to include the Fund for Property in this initiative
- Home mission stressed as much as overseas
- DVD and internet based campaign
- Special packs given out

### **2.2.4.Implementation**

- It would be sensible to pilot the scheme in a few chosen Circuits across a couple of Districts.
- Pilot areas chosen in order to create a representative mix of demographics.
- Feedback used to refine the campaign prior to full implementation across the UK.

### **2.3. "E" - Encouraging Circuits' and Churches' own fundraising activities**

**2.3.1.**The proposal is to develop a support structure for local church and Circuit fundraising. This will enable us to coordinate local initiatives where the members prefer to support their own.

- Visit District Synods to keep them updated on fundraising, techniques and advice as well as advocacy
- Engage with the Circuits/individual churches with the objective of supporting lay discipleship development
- Providing fundraising resources (guides, books, on line training)
- Advice and assistance with local campaigns

#### **2.3.2.Helping with external grant applications**

Some of this work is already carried out by the Resourcing Mission Office with regard to fundraising for property developments. It is proposed to work closely with the RMO in our joint use of existing resources and developing new ones such as Trusts and Grant database searching.

One possible alternative to the existing Directory of Social Change service would:

- Enable individual churches to do their own searches
- Keep us informed centrally of details of which churches are looking at what projects and what they are applying for.
- Provide grant information from all sources including the EU, NGOs, local initiatives, thus expanding our ability to use external funding for mission projects rather than just property

#### **2.3.3.Developing a new publication on Giving as part of the Campaign:**

- Inspirational rather than procedural
- Aimed at church members, provided particularly to new members
- Theological position to involve Faith and Order

#### **2.3.4.Advocacy**

The proposal is to recruit and encourage more advocates at a local level for the Mission Funds, for example Circuit/District Mission Officers, or Women's Network Secretaries. It is proposed to help:

- Coordinate the activity of these often disparate groups and encourage them to work together
- Resource and train them to be better advocates for mission.
- Develop a more direct link between the advocacy and fundraising work done at a local level with the work facilitated by WMF or MiBF.

### **2.4. "S" - Supporting and increasing existing initiatives**

Two significant fundraising streams have been running in the Church for a number of years: The Easter Offering, up until recently managed by various staff of the Connexional Team and Women's Network, and JMA, which is now a part of Children and Young People.

**2.4.1.The Easter Offering:** raised £348,000 in 2007/08 (provisional figures).

- The intention is to revitalize the Easter Offering for 2009/10.

**2.4.2.JMA Collections:** raised £354,000 in 2007/08 (provisional figures).

- JMA's primary purpose is "to learn, pray and serve with the worldwide Church of Jesus Christ." Although fundraising has been one part of this, it is not the reason JMA exists.
- This strategy does not presume fundraising as a part of JMA in the future, but will work with the Children and Young People team as requested.

#### **2.4.3.A much larger income stream is from existing Charitable Trusts and Foundations.**

These raised just over £1m in 2007-8 for the World Mission Fund.

- We need to continue to keep a close working relationship with the Trustees and executives of the existing Trusts
- We will look to develop income from other Trusts and Foundations for two purposes:
  - Specific mission projects by Circuits/Districts
  - Mission Projects supported by the WMF or MiBF.

#### **2.4.4. Legacy Development**

This is a long term investment which requires a consistent and regular message to be delivered to our membership.

- Legacies have suffered from an inconsistency of approach
- We are developing a relationship with WillAid to help members to draw up wills simply and inexpensively.

### **2.5. "E" - Emergency Appeals**

**2.5.1.** Emergency Appeals are an important part of the mission of the church (they embody our Christian duty of justice and mercy). They are necessarily high profile (or should be) and have the potential to generate good publicity. For this reason the proposal is to do be more proactive in generating appeals.

**2.5.2.** We need to develop a framework which will:

- Formalise the decision making process on whether to "adopt" the cause
- Allow us to respond quickly and effectively to situations as they arise
- Consider other ways of supporting a cause (e.g. through the Disasters Emergency Committee, or supporting other charities already involved)
- Identify the target donor base
- Measure the success or otherwise of the appeal
- Fundraising is an integral part of this process.

### **2.6. "N" – New project coordination and support**

**2.6.1.** Gifts earmarked for a particular project known to the donor will now be discouraged as noted in 1.5. above. But the message is not currently getting across, in part because we do not have direct communications with our donors.

**2.6.2.** Retaining the goodwill of the donor is a considerable challenge in these situations. Some churches have been vociferous in their objections to our position on Conduit funding in the recent past.

- It is a strategic aim to address these objections sensitively but to make such a compelling argument for supporting centralised funding that the donor churches continue to give but in a less restrictive way.

**2.6.3.** Within this context we can still continue to attract funding from Grant Making Trusts and other external funding sources for new projects such as Venture FX or Inspire.

**2.6.4.** New projects will continue to be promoted - but used as examples of the work that unrestricted giving makes possible rather than as the focus of funding requests in their own right.

## **2.7. "T" - Timely campaigns**

**2.7.1.** This concerns campaigns running at specific times of the year. The Easter Offering mentioned in 2.4.1. above is an example.

**2.7.2.** The intention is to develop and run three time-based campaigns in addition to monthly giving:

- Lent (the existing Easter Offering running in the Spring)
  - Focus is World mission
- Harvest (a new campaign to run in late Summer/early Autumn)
  - Focus is Home mission
- Advent (a new campaign)
  - Focus on mission in general
  - "The Colours of Advent" - 4 Sundays, themed on each of our four Callings
  - Christmas Day not included as this is traditionally used by Action for Children for their fundraising

**2.7.3.** This is the area where we are most likely to have to coordinate activity with our partners (e.g. MRDF, Action for Children and Christian Aid).

## **3. Significant Aspects of Implementation of the Strategy**

### **3.1. The Methodist Church Donor Relationship Management System**

- A thorough appraisal and costing of alternatives concludes that The Raisers Edge is the most suitable
- Enables us to know exactly the state of each fund
- Enables us to profile every single donor
- Details are provided on request
- Likely costs have been negotiated down to between £10,000 and £15,000 from the £40,000 originally quoted. The purchase and implementation of this is in the Connexional Team budget agreed by the Conference.
- Expertise and experience already exists in both IT and Finance.

### **3.2. Development of Advocacy resources**

- Collect and write up the numerous stories from the work of mission partners and churches, both at home and overseas
- Design an advocacy web site and keep it updated

- Develop relationships with the Circuit and District mission officers and those who can advocate for both MiBF and WMF
- Use of a part time person already within the budget

### **3.3. Use of Administrative Assistance**

- Collecting and collating Gift Aid details (actual reclaims still with Finance)
- Writing and sending Thank You letters, acknowledgements and receipts for gifts
- Keeping the Raiser's Edge data up to date
- Coordinating updating of the Connexional Database from the former (a further benefit)
- Administration of resources, mailings and other information needed for conducting fundraising campaigns
- Use of administrative resources already available in the team.

### **3.4. Provision of a centralised grant funding search resource**

- Extend use of grant search and selection into external mission funding
- Possible use of GrantNet as alternative to Directory of Social Change system already in place
- Provides additional resource to churches without increasing burden on Connexional team
- Service cost (approx £2,500) already in budget
- Work still needs to be completed on the most appropriate system

### **3.5. Development of Customer Services**

- Allows us to take card and on line donations without use of expensive third parties
- Enables donors and donor related queries (e.g. from Circuits) to be dealt with immediately and accurately
- Allows us to develop donor contacts and relationships
- Liaises with Helpdesk, dedicated 0800 number and giving pages on web site
- Allows us to be proactive in fundraising, e.g. asking for donations with book sales, contacting donors with known interests for appeals etc.
- First point of contact delivering a consistent message to our donor base.

## **4. Requested feedback**

The Council's response to this paper would be welcomed. A number of issues have arisen during the formulation of this draft strategy, on which the Council's guidance would be particularly appreciated:

### **4.1. Project Funding**

Giving to specific projects is preferred by some Methodists and is seen as an easier way to raise funds, but it causes problems for less popular but equally needy programmes and takes away the decision making about priorities from our partner Churches:

- How can we make giving to the Funds attractive and inspiring, while discouraging the 'tying' of gifts to causes selected by the donors?

### **4.2 Direct Communication**

The strategy is partly based around communicating directly with individual Methodists and moving towards a culture of regular giving to the mission funds:

- Which controls do we want to see in place as we communicate more directly with our membership?

#### **4.3 Partnership Working**

There are a number of separate charities who address the same audience – Methodists - in their fundraising. Action for Children and the Methodist Relief and Development Fund are of particular note:

- Should we implement an informal consultation process with our partner charities on fundraising campaigns and strategies and, if so, which charities?