

# Building a Fundraising Strategy

FUNDRAISING HOW TO TRACK

Leila Davis MFIA

Taronga Conservation Society Australia



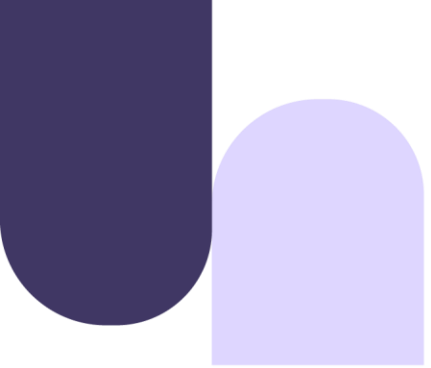
Fundraising How To Track  
Sponsored By:











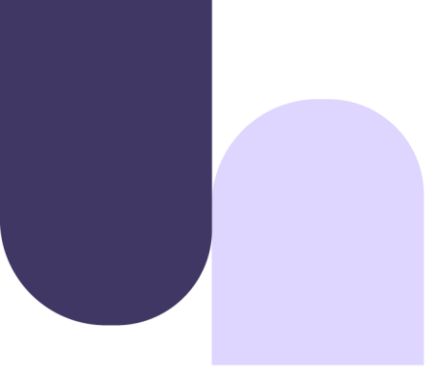
A step-by-step guide to build a fundraising strategy plan on a page document that helps you identify what you need to raise and for what purpose, undertake critical research and market analysis, build a diversified portfolio of revenue streams and develop a sound road map to get you there.



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**What did  
we say  
on the  
tin?**



# Heads or Tails





A photograph of three monkeys on a thick, braided rope. One monkey is in the foreground, looking towards the camera. Another monkey is behind it, and a third is to the right, looking down. The background is a blurred natural setting with green foliage.

Who's  
who in  
the room?

The logo for FIA, consisting of the letters 'FIA' in white on a dark blue rectangular background with a thin orange vertical line to its right.

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Michael Porter

Competitive  
Strategy

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"The essence of strategy  
is choosing what not to do."



# Taronga's IRL Strategic Plan



## Securing a shared future for wildlife and people

Our Vision

## Save wildlife. Inspire people. Drive change.

Our Purpose

### Strategic Priorities



#### Impact through Education and Experience

Offer inspiring and fun experiences that connect people to wildlife, shaping wildlife friendly attitudes, beliefs and behaviours



#### Environmental Leadership

Lead environmental sustainability and climate change action



#### Wildlife Care and Welfare

Global industry leader in wildlife care and continuous improvement in welfare



#### Commitment to Country

Commit to and embed a way of working that respects and includes Indigenous peoples, cultures and place



#### Conservation Action

Deliver world leading conservation action, recovery and science



#### Organisational Strength

Enhance our reputation, financial position and organisational effectiveness

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# Connecting the Dots





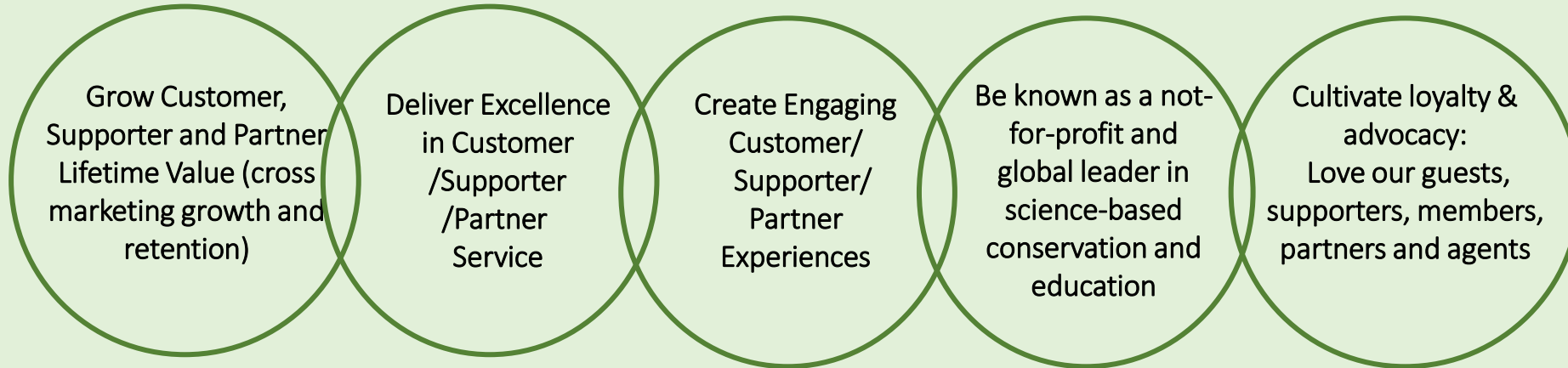
MCF OBJECTIVES

**GROW REVENUE**  
 across the Taronga Ecosystem:  
*visit, donate, shop, stay, learn*

**INCREASE BRAND AFFINITY  
 & CONSIDERATION**  
 providing a reason for our audiences to  
 connect to the Taronga Brand

**IMPROVE CUSTOMER  
 VALUE FOR MONEY**  
 (Brand attribute)

STRATEGIC PRIORITIES



ENABLERS

Single View of the Customer (CRM)	Taronga Ecosystem Brand Strategy & Architecture	Enhanced Digital Ecommerce Capabilities	Access to internal and external peer and corporate networks
Cross Functional Consumer Experience Calendar	Agility through Data: Reports, segmentation, optimisation	Seamless Digital Customer Experience	Thriving content ecosystem across all pillars
Consumer Journey Mapping	Cultivation of Conservation Proof Points & Thought Leadership		
Collaboration across Taronga divisions: Shared KPIs across MCF and other Taronga teams			



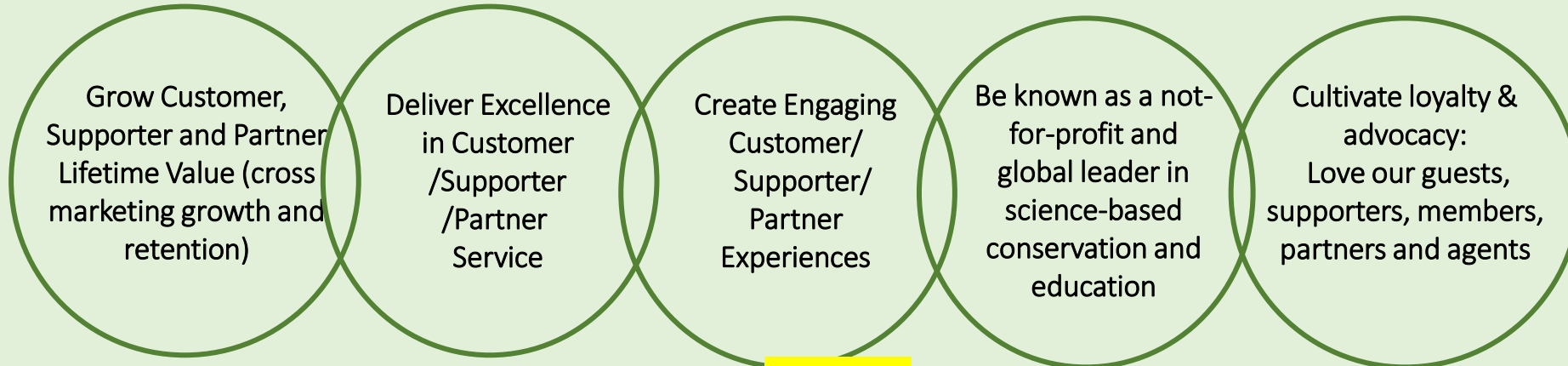
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STRATEGIC PRIORITIES



2022

ENABLERS

Single View of the Customer (CRM) <del>X</del>	Taronga Ecosystem Brand Strategy & Architecture <del>X</del>	Enhanced Digital Ecommerce Capabilities <del>X</del>	Access to internal and external peer and corporate networks <del>X</del>
Cross Functional Consumer Experience Calendar <del>X</del>	Agility through Data: Reports, segmentation, optimisation <del>X</del>	Seamless Digital Customer Experience <del>X</del>	Thriving content ecosystem across all pillars <del>X</del>
Consumer Journey Mapping <del>X</del>	Cultivation of Conservation Proof Points & Thought Leadership <del>X</del>		
Collaboration across Taronga divisions: Shared KPIs across MCF and other Taronga teams <del>X</del>			

# Project Initiation Brief

Project Name:

Author:

Project Name	X
Responsible Divisional Director/Director	X
Project Manager(s)	X
Relevant 2021-2025 Strategic Plan Priorities and Actions	<ul style="list-style-type: none"> <li>X</li> <li>X</li> </ul> <p>Refer to Taronga's Strategic Plan 2021-2025 via the <a href="#">Taronga Knowledge Library</a> and Divisional Plans.</p>
Project Summary	<ul style="list-style-type: none"> <li>X</li> </ul>
Problem Statement	<ul style="list-style-type: none"> <li>X</li> </ul>
Project Specific Goals (Maximum 5)	<ul style="list-style-type: none"> <li>X</li> <li>X</li> <li>X</li> <li>X</li> <li>X</li> </ul>
Key Deliverables	<ul style="list-style-type: none"> <li>X</li> <li>X</li> <li>X</li> <li>X</li> <li>X</li> </ul>
What will we stop doing?	<ul style="list-style-type: none"> <li>X</li> </ul>
Measurable Benefits	<ul style="list-style-type: none"> <li>X</li> <li>X</li> <li>X</li> </ul>
Significant Risks	<ul style="list-style-type: none"> <li>X</li> <li>X</li> </ul>
Action to address Climate Change / Taronga Sustainability Objectives	<ul style="list-style-type: none"> <li>X</li> </ul> <p>Does the preferred option result in action that will address climate change, as outlined in the <a href="#">Climate Change (Net Zero Future) Act 2023 (the Act)</a>? <a href="#">Refer to the NSW Climate and Energy Action website for further details.</a></p> <p>As per the Act, action to address climate change includes either:</p> <p>(a) action to mitigate climate change by reducing —</p> <p>(i) greenhouse gas emissions, and</p> <p>(ii) greenhouse gases in the atmosphere, for example, through sequestration or sinks, or</p>

What can we stop doing?

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# Project Initiation Brief

Project Name:

Author:

	<p>(b) action to adapt to a changing climate and to address the change.</p> <p>Does it align with <a href="#">Taronga's Sustainability Strategy 2021-2025</a> support, impact or conflict?</p>
Timetable – Key Milestones	<ul style="list-style-type: none"> <li>X</li> <li>X</li> <li>X</li> </ul>
Impacts Register – Commence <a href="#">documentation</a> e.g. Impacts and considerations on Animal Welfare, Guest Experience and Asset Management	<ul style="list-style-type: none"> <li>X</li> <li>X</li> <li>X</li> </ul>
Financial Analysis	<b>Complete the Financial Analysis Summary below.</b>
Funding Notes e.g. Source – Other Savings/Foundation	<ul style="list-style-type: none"> <li>X</li> </ul>
Stakeholder Consultation	<ul style="list-style-type: none"> <li>X</li> </ul> <p><b>Note:</b> The relevant Manager/s impacted by this proposal must also be consulted.</p>





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STEP 1 -  
Go hunting





# Internal Research

Data, data, DATA!

Historical Data within your CRM and finance systems

Power Bi/ CRM reports from each revenue line/activity in the fundraising program



# Data – The \$\$ raised

Income	15/16	16/17	17/18	18/19	19/20	20/21	21/22	22/23
Program 1	\$ 3,209,073	\$ 2,636,629	\$ 2,565,884	\$ 3,641,125	\$ 4,256,251	\$ 4,562,323	\$ 4,526,532	\$ 4,785,852
Program 2	\$ 2,736,629	\$ 2,121,445	\$ 963,899	\$ 3,148,195	\$ 1,740,939	\$ 1,422,223	\$ 1,410,000	\$ 1,410,000
Program 3	\$ 369,311	\$ 253,499	\$ 335,907	\$ 326,996	\$ 614,754	\$ 418,605	\$ 496,500	\$ 418,605
Program 4		\$ 21,633		\$ 39,803	\$ 42,077	\$ 81,002	\$ 210,000	\$ 205,000
Program 5			\$ 158,554	\$ 207,018	\$ 3,100	\$ -	\$ -	
Program 6	\$ 911,856	\$ 927,574	\$ 2,196,413	\$ 1,063,788	\$ 838,197	\$ 963,967	\$ 2,250,000	\$ 1,066,000
Program 7			\$ 725,000	\$ 15,000	\$ 75,142	\$ 758,200	\$ 120,000	\$ 1,184,000
Program 8				\$ 3,500,000	\$ 6,400,000	\$ 8,705,000	\$ 11,205,000	\$ 9,852,653
Program 9					\$ 1,176,002	\$ 1,120,384	\$ 1,528,731	\$ 1,160,606
Program 10	\$ 647,454	\$ 589,129	\$ 347,761	\$ 767,991	\$ 717,820	\$ 443,816	\$ 592,000	\$ 750,636
Program 11	\$ 472,040	\$ 456,726	\$ 448,805	\$ 430,769	\$ 471,522	\$ 604,225	\$ 430,000	\$ 392,817
Program 12	\$ 230,896	\$ 375,451	\$ 577,860	\$ 841,183	\$ 204,020	\$ 201,974	\$ 301,000	\$ 450,232
Program 13		\$ 5,488	\$ 3,705	\$ 16,749	\$ 5,629	\$ 7,880	\$ 7,000	\$ 12,000
Program 14							\$ 150,000	
<b>TOTAL Income</b>	<b>\$ 8,577,259</b>	<b>\$ 7,387,574</b>	<b>\$ 8,323,788</b>	<b>\$ 13,998,617</b>	<b>\$ 16,545,453</b>	<b>\$ 19,289,599</b>	<b>\$ 23,226,763</b>	<b>\$ 21,688,401</b>

# Data – The \$\$ spent

Expenditure	15/16	16/17	17/18	18/19	19/20	20/21	21/22	22/23
Program 1 - Mkting	\$ 219,881	\$ 196,960	\$ 170,632	\$ 284,460	\$ 292,582	\$ 302,365	\$ 345,888	\$ 341,011
S&W	\$ 636,075	\$ 628,262	\$ 631,451	\$ 479,830	\$ 527,091	\$ 404,087	\$ 573,498	\$ 522,283
Other								
<b>TOTAL EXP</b>	<b>\$ 855,956</b>	<b>\$ 825,221</b>	<b>\$ 802,083</b>	<b>\$ 764,290</b>	<b>\$ 819,673</b>	<b>\$ 706,452</b>	<b>\$ 919,386</b>	<b>\$ 863,294</b>
Program 2 - Mkting	\$ 14,817	\$ 23,057	\$ 11,745	\$ 9,077	\$ 19,712	\$ 27,000		
S&W	\$ 66,921	\$ 80,355	\$ 51,866	\$ 113,441	\$ 128,484	\$ 126,766	\$ 55,476	\$ 47,532
Other	\$ 11,150	\$ 1,562	\$ 13,933	\$ 6,613	\$ 12,012	\$ 27,500	\$ 62,150	\$ 57,150
<b>TOTAL EXP</b>	<b>\$ 92,888</b>	<b>\$ 104,974</b>	<b>\$ 77,544</b>	<b>\$ 129,131</b>	<b>\$ 160,208</b>	<b>\$ 181,266</b>	<b>\$ 117,626</b>	<b>\$ 104,682</b>
Ops		\$ 228,385	\$ 113,979	\$ 158,252	\$ 18,737	\$ 44,223	\$ 364,000	\$ 203,000
S&W		\$ 51,958		\$ -	\$ -	\$ -	\$ -	
Other	\$ 400,522	\$ 10,771	\$ 15,538	\$ 13,513	\$ 384,108	\$ 323,276		
<b>TOTAL EXP</b>	<b>\$ 400,522</b>	<b>\$ 291,114</b>	<b>\$ 129,517</b>	<b>\$ 171,765</b>	<b>\$ 402,845</b>	<b>\$ 367,499</b>	<b>\$ 364,000</b>	<b>\$ 203,000</b>
Project					\$ 218,686	\$ 236,482.00	\$ 100,000	
ops			\$ 31,793	\$ 58,677	\$ 23,069	0		
S&W							\$ 143,020	\$ 128,000
Other			\$ 12,454	\$ 5,500				\$ 80,000
<b>TOTAL EXP</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 44,247</b>	<b>\$ 64,177</b>	<b>\$ 23,069</b>	<b>\$ -</b>	<b>\$ 243,020</b>	<b>\$ 208,000</b>
Operational	\$ 23,369	\$ 65,796	\$ 28,822	\$ 25,136	\$ 24,900	\$ 50,000	\$ 196,900	\$ 176,000
S&W	\$ 116,898		\$ 182,118	\$ 299,440	\$ 337,378	\$ 533,788	\$ 577,343	\$ 656,615
Other	\$ 25,785	\$ 7,683	\$ 38,465	\$ 79,893	\$ 45,458	\$ 28,750		
<b>TOTAL EXP</b>	<b>\$ 166,052</b>	<b>\$ 73,479</b>	<b>\$ 249,405</b>	<b>\$ 404,469</b>	<b>\$ 407,736</b>	<b>\$ 612,538</b>	<b>\$ 774,243</b>	<b>\$ 832,615</b>
Project				\$ 90,264	\$ 125,486			
Project			\$ 125	\$ -	\$ 633	\$ 40		
S&W			\$ 41,719	\$ 57,540	\$ 54,829	\$ 53,295		
Other			\$ 185	\$ 89	\$ 44	\$ 1,200		
<b>TOTAL EXP</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 42,029</b>	<b>\$ 57,629</b>	<b>\$ 55,506</b>	<b>\$ 54,535</b>		
Ops					\$ 1,578,430	\$ 993,708	\$ 1,303,250	\$ 661,231
S&W					\$ 58,649		\$ 110,378	\$ 103,526
<b>TOTAL EXP</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 1,637,079</b>	<b>\$ 993,708</b>	<b>\$ 1,413,628</b>	<b>\$ 764,757</b>
ops	\$ 98,935	\$ 151,929	\$ 21,833	\$ 61,916	\$ 53,334	\$ 35,000		
S&W	\$ 375,974	\$ 331,981	\$ 363,630	\$ 452,302	\$ 384,197	\$ 379,369	\$ 393,619	\$ 328,371
Other	\$ 183,530	\$ 173,323	\$ 206,135	\$ 274,378	\$ 306,678	\$ 364,600	\$ 590,599	\$ 460,600
<b>TOTAL EXP</b>	<b>\$ 658,439</b>	<b>\$ 657,233</b>	<b>\$ 591,598</b>	<b>\$ 788,596</b>	<b>\$ 744,209</b>	<b>\$ 778,969</b>	<b>\$ 984,218</b>	<b>\$ 788,971</b>
Fundraising operations								
<b>TOTAL Expenditure</b>	<b>\$ 2,173,856</b>	<b>\$ 1,952,021</b>	<b>\$ 1,936,423</b>	<b>\$ 2,380,057</b>	<b>\$ 4,250,325</b>	<b>\$ 3,694,967</b>	<b>\$ 4,816,121</b>	<b>\$ 3,765,319</b>
<b>TOTAL Net Income</b>	<b>\$ 6,403,403</b>	<b>\$ 5,435,553</b>	<b>\$ 6,387,365</b>	<b>\$ 11,618,560</b>	<b>\$ 12,295,128</b>	<b>\$ 15,594,632</b>	<b>\$ 18,410,642</b>	<b>\$ 17,923,082</b>



# Data – The net return

NET INCOME BY PRODUCT	16/17	17/18	18/19	19/20	20/21	21/22	22/23
Program 1	\$ 1,811,408	\$ 1,763,801	\$ 2,876,835	\$ 3,436,578	\$ 3,855,871	\$ 3,607,146	\$ 3,922,558
Program 2	\$ 2,016,471	\$ 886,355	\$ 3,019,064	\$ 1,580,731	\$ 1,240,957	\$ 1,292,374	\$ 1,305,318
Program 3	-\$ 37,615	\$ 206,390	\$ 155,231	\$ 211,909	\$ 51,106	\$ 132,500	\$ 215,605
Program 4	\$ 21,633	\$ 114,307	\$ 182,644	\$ 22,108	\$ 81,002	\$ 116,980	-\$ 3,000
Program 5	\$ -	-\$ 31,793	\$ 99,877	\$ 183,949	\$ 3,100	\$ -	\$ -
Program 6	\$ 854,095	\$ 1,947,008	\$ 659,319	\$ 430,461	\$ 351,429	\$ 1,475,757	\$ 233,385
Program 7					-\$ 758,200	-\$ 120,000	\$ 1,184,000
Program 8	\$ -	-\$ 42,029	\$ 3,442,371	\$ 6,344,494	\$ 8,650,465	\$ 11,205,000	\$ 9,852,653
Program 9	\$ 5,488	\$ 3,705	\$ 16,749	-\$ 455,448	\$ 134,556	\$ 122,103	\$ 407,849
Program 10	\$ 764,073	\$ 782,828	\$ 1,251,347	\$ 649,153	\$ 471,046	\$ 338,782	\$ 804,714
Program 11							\$ 1,335,179
	\$ 5,435,553	\$ 5,630,572	\$ 11,703,437	\$ 12,403,935	\$ 14,081,332	\$ 18,170,642	\$ 19,258,261

By product / program line

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# How's your pyramid stacking up?



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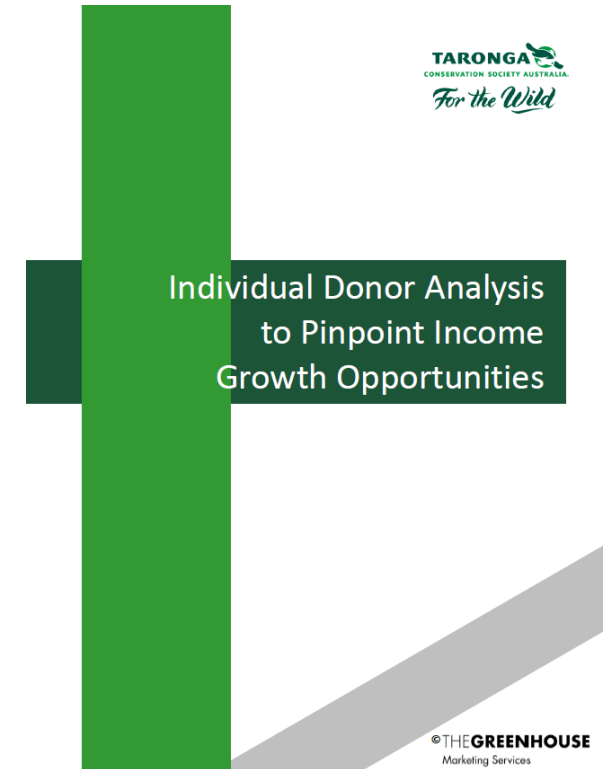
# STEP 2 - Seek partners or forage around yourself



# STEP 2 - PARTNERS

Benchmarking across the industry – More Strategic - now the Benchmarking Project

Greenhouse marketing services – in depth review of the fundraising program



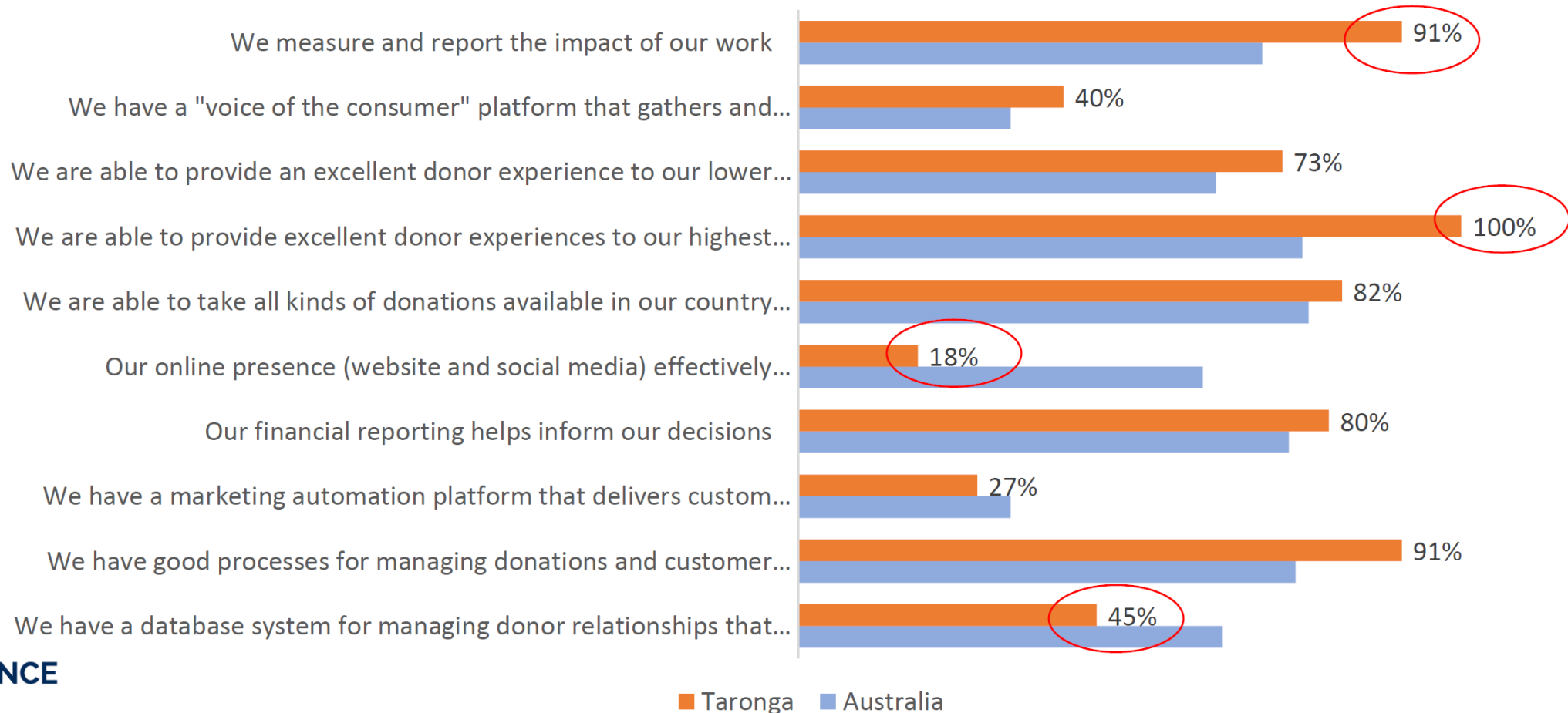
Individual Donor Analysis  
to Pinpoint Income  
Growth Opportunities

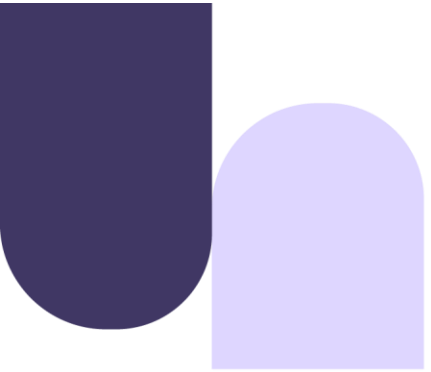




# Be prepared to hear things that you might not like..

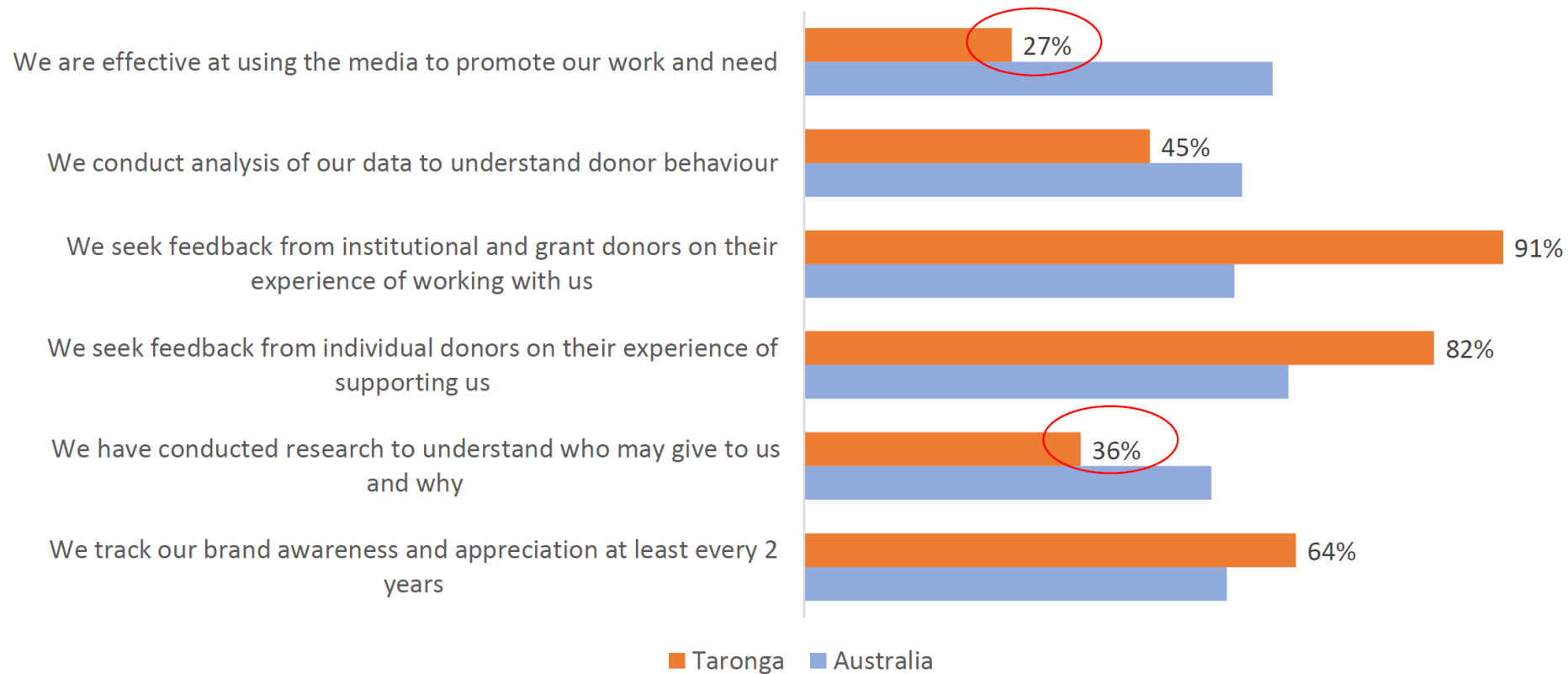
## Systems and reporting





Be open to hearing what your results are telling you

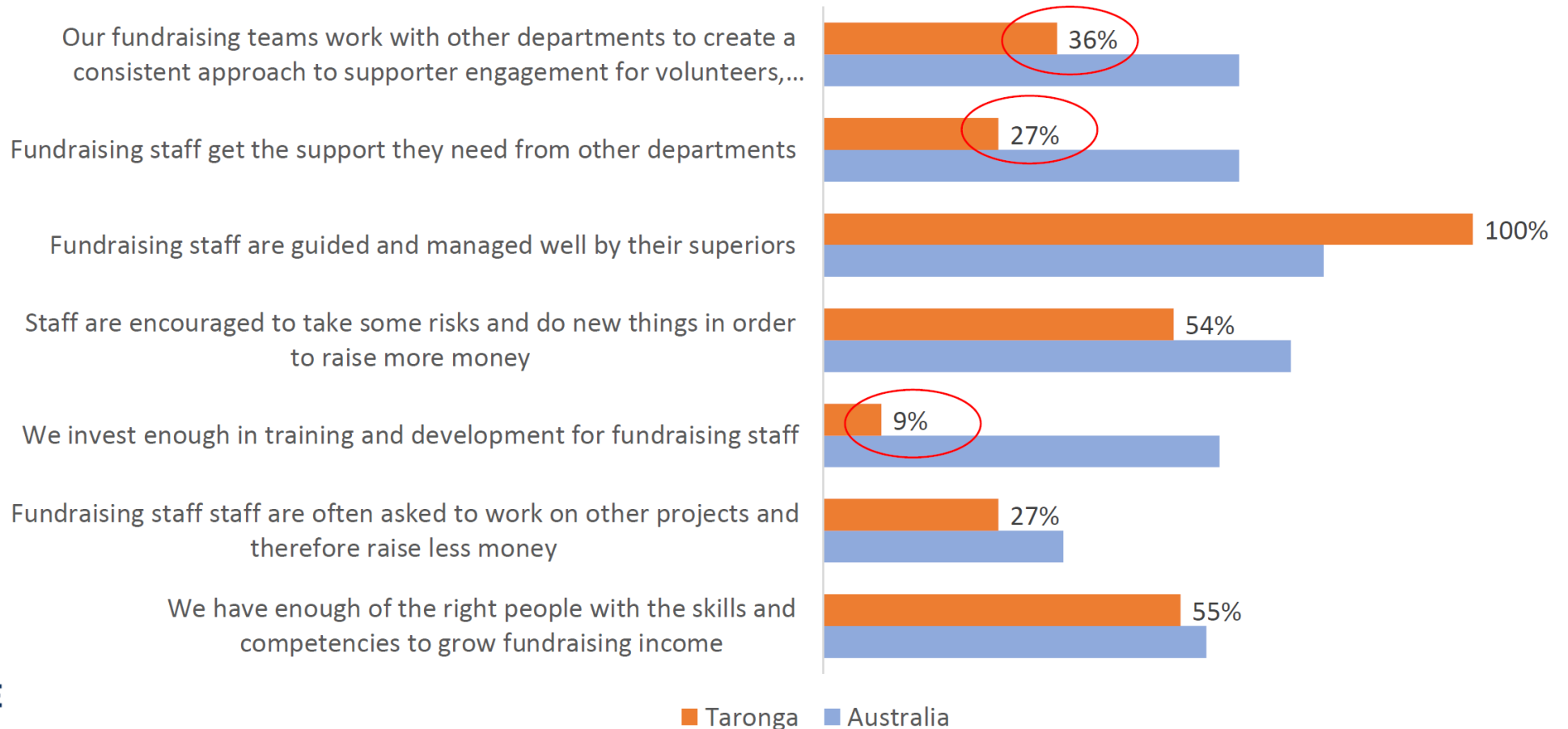
## Brand Management

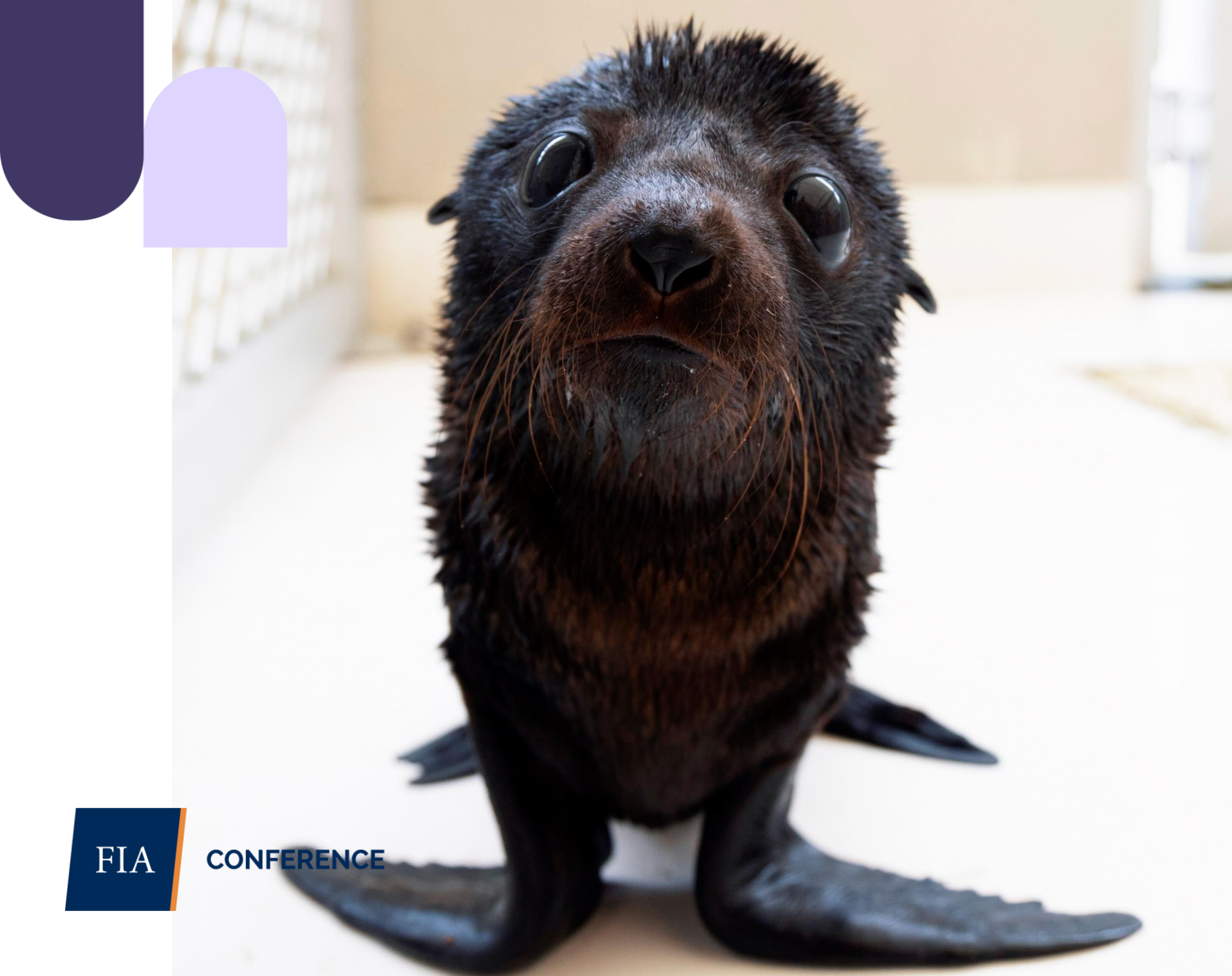




# Ensure that your strategy sets out to right the wrongs

## Staffing





What  
should I  
be  
looking  
for in the  
data?

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# Here's our list – feel free to take a pic!

## CASH + RG + IG

What channels are you acquiring donors in?

At what cost?

How many are being acquired?

What level of gift are your new donors donating at?

How many of your donors are giving to more than one product?

Eg RG + Cash

What is your second-year retention rate?

How many donors attrite each year?

What is the lifetime value of your donors?

What is the average gift for each program?

What is your reactivation rate for Cash + RG?

What is the cost of reactivation?

# High Value + Lots of nurture

## MAJORS

Are donors giving to tied or untied projects?

Are donors giving multi year gifts?

Are donors upgrading/downgrading – why?

What does the length of tenure of your donors look like across your value bands?

## CORPORATES

What is the retention rate of partners each year?

What is the cost of partnership to deliver benefits or return for each partner?

What has changed over time?

## GIWS

# of enquirers, confirms and notifications

5 year rolling average

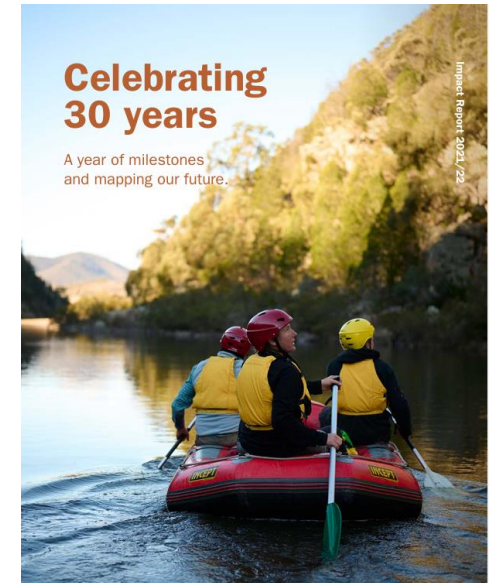
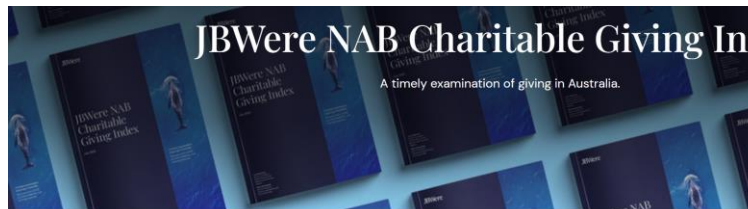
# External Research – DIY!



November 2023

## Future foundations for giving

Draft report  
Overview



### JBWere NAB Charitable Giving Index – August 2023

The JBWere NAB Charitable Giving Index provides timely insight on fundraising, exploring emerging trends across locations and cause areas. The analysis is derived from transaction data on funds going to the for purpose sector from families and individuals. This latest report covers the most up to date giving data (to July 2023) in Australia.

This insight into how philanthropy is evolving in real time gives an excellent view of current giving trends in Australia, particularly by mass market and recurrent donors.

Highlights of the report include:

- the value of potential giving lost over the last three years
- how 'mass market' giving is faring compared to HNW and Corporate Community Investment
- the difference between the States and Territories, and
- the cause areas that are attracting the donations.

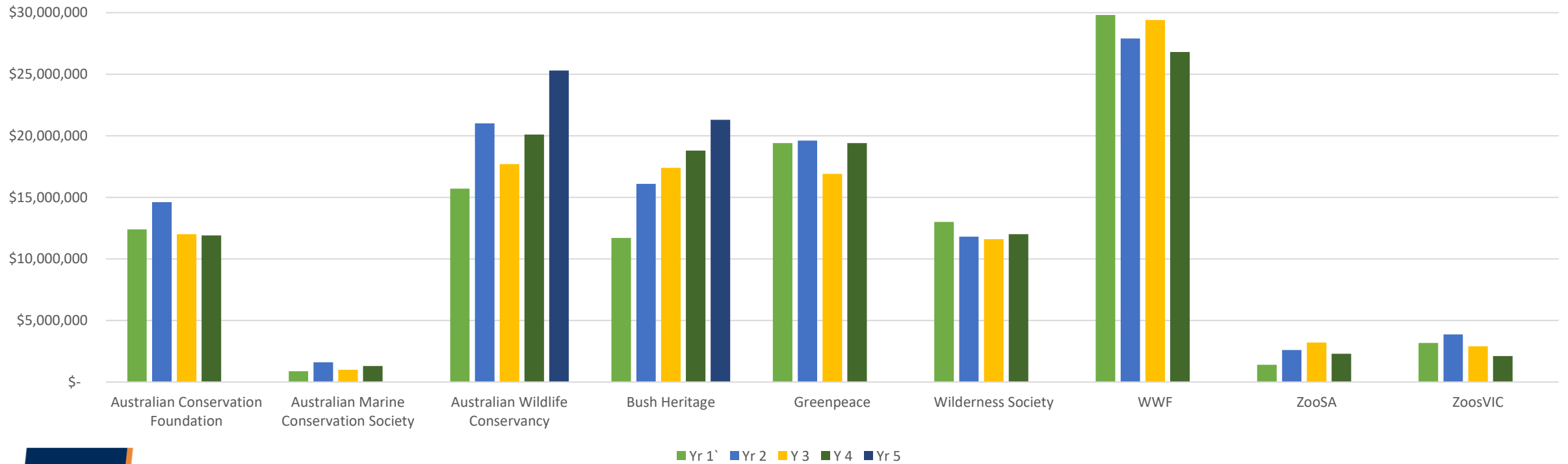
[Download the full report](#)

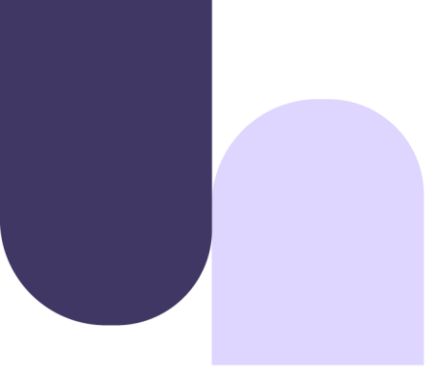




# How do you compare – DIY!

Competitor Income Trends





# STEP 3 – Build your tribe



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# Workshops with your programs teams

Ask these questions:

Are we meeting all of the current needs of our clients / benefactors?

If not, are there strategies or plans in place to achieve that?

What are your ambitions for the future that fundraising can support?

What would be innovative for our clients?

Be ambitious – if money could fix a problem, what would it fix?



# Talk it out with your Fundraising tribe

What opportunities are there in your business units?

As SME's in fundraising what do you think is our point of difference in the market?

Any surprises in the data?

What should we stop doing?

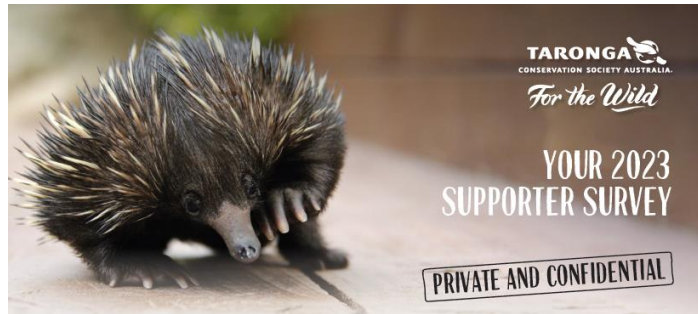
What would you do differently if we were starting again?

What have you seen other organisations do really well?

What keeps you up at night?



# What are our donors telling us?



Dear <Personalised>,

Thank you for being such a valued Taronga supporter and for giving your time to complete this survey. I know you share our belief that we all have a responsibility to protect our precious wildlife, not just in our lifetimes, but for the generations of the future.

You are an important part of Taronga's community and your responses will help us get to know you better. I can't wait to hear what matters to you most.

<Personalised>, I would be so grateful if you could please complete this survey and send it back in the enclosed reply paid envelope by <date>.

Warmest thanks and regards,

**Cameron Kerr AO**  
Chief Executive  
Taronga Conservation Society Australia

## YOUR VIEWS AND VALUES

### 1. What inspires your support of Taronga's conservation work?

(You may tick more than one box)

- I believe in protecting endangered animals.
- I think it's important to play our part in the conservation of species to stop them from going extinct.
- I have enjoyed visiting Taronga Zoo and seeing the animals.
- I want my grandchildren to be able to see animals.
- Taronga is an organisation I know and trust.
- I believe it is important to support animal conservation.
- All of the above.



Chloe the Common Wombat



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# TARONGA



CONSERVATION SOCIETY AUSTRALIA





# Document your insights

Step	Insights- What are they?	Opportunities - 5-7 Short/Med/LT	Action	Deliver - Results/ KPI	Y1	Y2	Y3	Themes
1. Own Data	Delivered \$XM over the past 5 years	What could income growth look like	With the creation of the right structures, data and projects can increase the income by X%	Deliver \$XM in the next 3 years			X	GROWTH
2. Partner Research	Acquisition is only F2F - need to diversify to reduce cost per acquisition	Diversify the acquisition streams to grow other areas	Diversification of the Acquisition strategy (community campaigns, website) / Develop the brand and the website and social media advertising	Deliver XX new RG's from digital, Deliver XX from website	X			ENABLERS
2. Desktop research	Area of growth in the next 20 years	Building relationships with the Managed funds companies such as Australian Philanthropic services, Perpetual, etc...	Build into KPI's of Trusts and Foundations team member to attend events and develop relationships	Increase applications 100%	X	X	X	GROWTH
3. Workshops Internal	Concept could be refreshed or reviewed	Given the audiences, how does it compare to other organisations products in this space?	Work with marketing to review and test with donors	Refreshed product and branding suite	X			ENABLERS
4. Workshops with donors/partners	Appreciate the diversified offering, benefits around ESG, TZ Sydney, brand and communications	Increase value for all partners across the offering	Review how many partners are accessing benefits across the pillars available	Increase upsell of partners by X%	X			GROWTH



# STEP 4 – Getting it down

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## STEP 4 – Let your fingers do the talking

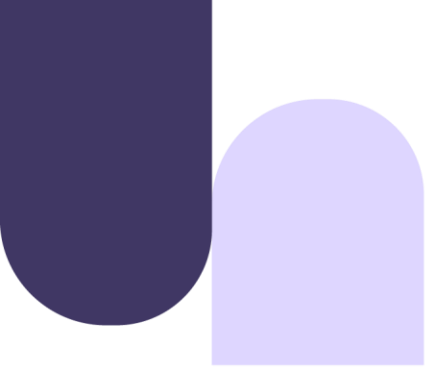
What are your strategic objectives? (What do you want to be famous for?)

What are your priorities?

What are your enablers (What do you need to be able to get there?)

Use our template if you like it!?





# STEP 5 – Don't keep it to yourself



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# Up, sideways and down

Fundraising + Marketing Team

Programs Team

CEO / Executive

Board + Committees

Donors + Partners

FIA

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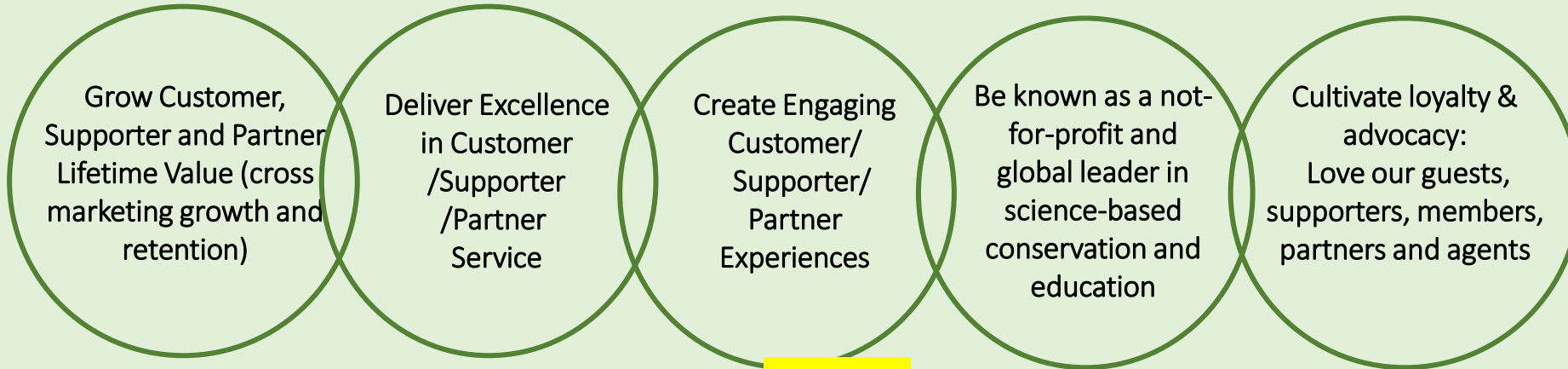
MCF OBJECTIVES

**GROW REVENUE**  
 across the Taronga Ecosystem:  
*visit, donate, shop, stay, learn*

**INCREASE BRAND AFFINITY  
 & CONSIDERATION**  
 providing a reason for our audiences to  
 connect to the Taronga Brand

**IMPROVE CUSTOMER  
 VALUE FOR MONEY**  
 (Brand attribute)

STRATEGIC PRIORITIES



2024

ENABLERS

Single View of the Customer (CRM) ✓	Taronga Ecosystem Brand Strategy & Architecture ✓	Enhanced Digital Ecommerce Capabilities ✓	Access to internal and external peer and corporate networks ✓
Cross Functional Consumer Experience Calendar ✓	Agility through Data: Reports, segmentation, optimisation ✓	Seamless Digital Customer Experience ✓	Thriving content ecosystem across all pillars ✓
Consumer Journey Mapping ✓	Cultivation of Conservation Proof Points & Thought Leadership ✓		
Collaboration across Taronga divisions: Shared KPIs across MCF and other Taronga teams			✓



**TARONGA**



*For the Wild*

TARONGA  
WESTERN PLAINS

500.  
2000

mission Ticket





Strategy without tactics is the  
slowest route to victory.  
Tactics without strategy is the  
noise before defeat

Sun Tzu





**STEP 6 –  
The Road  
Map**



	Priorities	Dependencies	Measures of Success
<p><b>Priority 1</b>  <b>SINGLE CASH GIFTS</b>                      Deliver \$X via cash appeals and grow % in new donors via acquisition channels.</p>	<ul style="list-style-type: none"> <li>Maintain warm donor appeals and newsletters as part of the direct mail appeal cycle.</li> <li>Support the public campaign for WLH to amplify need and raise funds.</li> <li>Develop an acquisition direct mail pack for testing and ongoing growth in the cash donor file.</li> <li>Grow mid value segment (non relationship managed) to nurture and increase untied income.</li> <li>Drive retention activities to improve donor loyalty and lifetime value.</li> <li>Review the tap to donate locations and the ones that are most efficient to drive donations</li> <li>Maintain tracking of pins and incentives at key donation points</li> </ul>	<ul style="list-style-type: none"> <li>DM Team/CRM Team</li> <li>Suppliers: Creative agency/Mail house/ Data supplier</li> <li>Digital Marketing Team</li> <li>Conservation Teams</li> <li>Content team</li> <li>Finance</li> <li>Keepers- Bird Show &amp; Seal Show</li> </ul>	<ul style="list-style-type: none"> <li>Grow X% (X+ new donors)</li> <li>Develop a banker acquisition pack</li> <li>X second gift rates from new acquisition donors</li> <li>Drive X% of mid value donors to contribute X% of appeal income</li> <li>Ensure major events have tap to donate machines</li> </ul>
<p><b>Priority 2</b>  <b>REGULAR GIVING</b>                      Raise \$XM in regular giving income, testing new lead sources and improve retention rates.</p>	<ul style="list-style-type: none"> <li>Test new tactics for lead generation to drive consistent growth of regular givers.</li> <li>Review and finesse RG product proposition and messaging to drive stronger conversions.</li> <li>Develop donor journey and multi channel retention touch points to reduce monthly attrition and improve yearly retention rates.</li> </ul>	<ul style="list-style-type: none"> <li>DM Team/CRM Team</li> <li>Suppliers: Telemarketing agencies, Fundraising agency, Data supplier</li> <li>Digital Marketing team</li> <li>Content team</li> </ul>	<ul style="list-style-type: none"> <li>Deliver \$XM income and X new regular givers</li> <li>Drive x retention rate at 1 year mark</li> <li>Develop a successful 2 step tactic for lead generation that can be used throughout the FY.</li> </ul>
<p><b>Priority 3</b>  <b>ZOO PARENTS</b>                      Generate \$X income and acquire X new zoo parents</p>	<ul style="list-style-type: none"> <li>Focus on improving the digital paid campaign to improve results and meet targets</li> <li>Review product offerings and structure behind the scenes experiences for better loyalty and repeat purchase</li> <li>Review online adoption flow and finesse for better user experience</li> </ul>	<ul style="list-style-type: none"> <li>DM Team/CRM Team</li> <li>Digital Agency</li> <li>Creative Agency</li> <li>Digital marketing team</li> <li>Keepers for BTS</li> <li>Content team /design team</li> </ul>	<ul style="list-style-type: none"> <li>Raise \$X revenue</li> <li>Acquire X new adoptions</li> </ul>
<p><b>Priority 4</b>  <b>GIFTS IN WILLS</b>                      Build pipeline for Gifts in Wills donors</p>	<ul style="list-style-type: none"> <li>Mail second cohort of donors for wave Gifts in Wills conversion mailing</li> <li>Drive telemarketing campaign for thanking and verification of leads</li> <li>Identify opportunities to depict X% messaging in other communication</li> <li>Drive communication during Include a Charity week to promote online wills</li> <li>Develop structured supporter journey for donors in the pipeline</li> </ul>	<ul style="list-style-type: none"> <li>DM Team/CRM Team/ Exec</li> <li>Suppliers: Creative agency/Mail house/ Data supplier</li> <li>Digital Marketing Team</li> <li>Conservation Teams for content</li> </ul>	<ul style="list-style-type: none"> <li>Increased numbers in pipeline</li> <li>Normalise talking about legacy giving across other donor communication</li> </ul>
<p><b>Priority 5</b>  <b>SUPPORTER CARE</b>                      Drive excellent donor care and support for all donor enquiries</p>	<ul style="list-style-type: none"> <li>Main point of contact for donor queries and donor care.</li> <li>Manage receipting and fulfilment for cash appeals, zoo Parent adoptions, Renewals and Wild Life defender packs</li> <li>Develop SLA document for critical business processes</li> </ul>	<ul style="list-style-type: none"> <li>DM Team</li> <li>All of Foundation</li> <li>Finance/IT/Data</li> <li>External suppliers – Secure Pay</li> </ul>	<ul style="list-style-type: none"> <li>Handle 80% of calls to the Foundation</li> <li>Manage all emails to inbox within 24-48 hours.</li> </ul>

	Priorities	Dependencies	Measures of Success
<p><b>Priority 1</b>  <b>CORE FUNDING</b>                      To deliver core income of \$X from new and existing donors</p>	<ul style="list-style-type: none"> <li>• Securing X% of donors giving through multi-year funding</li> <li>• Developing tailored proposals for donors supporting the Taronga strategy and funding requirements</li> <li>• Further engaging existing donors to continue and increase their giving and deepen loyalty and connections, with immersive experiences, networking and programs such as X</li> <li>• Asking every donor on pipeline for a gift in 23/24</li> <li>• Secure donors to host an event at their house</li> </ul>	<ul style="list-style-type: none"> <li>• CEO + Exec + Board Support and leadership team;</li> <li>• Cases for support with multi-year projects,</li> <li>• Life Sciences, Science team, Education, keepers, media etc</li> <li>• Advocacy and brand awareness of Taronga’s conservation leadership</li> </ul>	<ul style="list-style-type: none"> <li>• X of donors agree to secured multi-year funding annually</li> <li>• Donors move up pipeline, X% upgrade their gift, 100% donors asked.</li> <li>• Deliver income target \$XM</li> <li>• Donors are informed and engaged attending events, accepting meetings, introducing ideas and networks.</li> </ul>
<p><b>Priority 2</b>  <b>PROSPECTS</b>                      Identify, engage and secure gifts from prospective donors and Foundations</p>	<ul style="list-style-type: none"> <li>• Relationship managers securing F2F meetings/touch points with new donor prospects, using tools such as linkedin etc</li> <li>• Dedicating time for researching prospects</li> <li>• Using peer to peer contacts to engage new donors</li> <li>• Identify opportunities p.a. for funding from International Foundations and individuals.</li> <li>• Identify unique Taronga program opportunities such as Hatch, Education etc to leverage donor/prospective interests and expertise as a way to introduce to Taronga’s work and the Foundation</li> <li>• Utilising Foundation Chair, board, and suitable event opportunities to engage prospective donors, participate in asks where suitable.</li> </ul>	<ul style="list-style-type: none"> <li>• CEO/Exec/Board/Chair Support;</li> <li>• Resources for prospecting, wealthscan, T&amp;F access, newspapers and other resources</li> <li>• Keepers/Science team/vets</li> </ul>	<ul style="list-style-type: none"> <li>• X% of team time dedicated to prospecting new donors</li> <li>• No of meetings with prospects</li> <li>• Gifts secured from new donors</li> </ul>
<p><b>Priority 3</b>  <b>CAPITAL CAMPAIGN</b>                      To deliver \$XM income for the Wildlife Hospital in 23/24. Securing the required \$xM commitment from new and existing donors</p>	<ul style="list-style-type: none"> <li>• Focus on donors and prospects that have capacity for transformational gifts of \$xM+</li> <li>• Tailor ask strategy specific TZ for each donor</li> <li>• Building on TWH donor recognition plan, stewardship of committed donors including regular updates including newsletter (work with existing donors to establish recognition)</li> <li>• Peer to peer fundraising through lead donors, Foundation Chair, WLH Task force and TCSA Board</li> <li>• Hosting Chairman/CEO events to provide immersive experience and opportunity to engage new prospects</li> <li>• Host a launch event of the new precinct with key lead donors</li> <li>• Support the public fundraising campaign, opportunities to upgrade major and middle donors</li> <li>• Investigate crowd funding/pitching event opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Exec/Board/Chairman Support;</li> <li>• WLH task force</li> <li>• Capital works for build development</li> <li>• Wildlife Hospital staff</li> <li>• Media and marketing team</li> </ul>	<ul style="list-style-type: none"> <li>• Secure \$xM in 23/24</li> <li>• Secure commitment of the remaining \$X funding gap for WLH</li> <li>• Asking all existing donors that have capacity to give at \$XM+</li> <li>• Number of new prospects asked to support</li> </ul>

	Priorities	Dependencies	Measures of Success
<p><b>Priority 1</b>  <b>Renewals</b>                      Ensure existing business is renewed to support the \$XM F/Y target</p>	<ul style="list-style-type: none"> <li>Over \$Xk:                             <ul style="list-style-type: none"> <li>Partner 1 (June 24)</li> <li>Partner 2 (Dec 23)</li> <li>Partner 3 (June 23)</li> <li>Partner 4 (Sep 23) (Tender)</li> <li>Partner 5 (Nov 23)</li> </ul> </li> <li>\$Xk+cash/\$Xk+contra</li> <li>CPI increase in X% contracts</li> <li>Finalise Qrtly/Annual meeting templates</li> <li>Adopting Salesforce</li> </ul>	<ul style="list-style-type: none"> <li>Marketing incl Digi Marketing–reporting/data</li> <li>Access to Leila/Directors</li> <li>Procurement</li> <li>Commercial</li> </ul>	<ul style="list-style-type: none"> <li>X% success rate</li> <li>Accurate renewal projections 6 months prior to end of contract</li> <li>100% of quarterly meetings/100% of annual meetings scheduled/attended</li> <li>Inclusion of multiple levels/departments across high level (Xk+) partnerships</li> <li>Clear understanding of why partners don't renew</li> <li>CPI increase in X% of contracts</li> </ul>
<p><b>Priority 2</b>  <b>Existing Business</b>                      Support straightforward renewals by providing best in class partnership offerings with a focus on high level cash partners</p>	<ul style="list-style-type: none"> <li>X Zoo Month (April 24)</li> <li>X Vol days (Sep 23)</li> <li>X Koala partnership (April 24)</li> <li>Cold Bev implementation (Oct 23)</li> <li>Accessibility partnership (May 24)</li> <li>XX Zoo Month/activities (July 23/Sep-Oct school hols)</li> <li>Moving data into Salesforce</li> <li>Hosting opportunities/engagement – Vivid Preview, Twilight, ARC Launch, ad hoc, etc</li> </ul>	<ul style="list-style-type: none"> <li>WCS</li> <li>Major Events (Commercial)</li> <li>Design and Guest Learning</li> <li>Marketing incl Digi Marketing–reporting/data</li> <li>Media – content</li> <li>Commercial/TWG</li> <li>Guest Experience</li> <li>Data/Justin/Kris</li> <li>Tourism</li> <li>Conservation team support/planning</li> </ul>	<ul style="list-style-type: none"> <li>Successful renewals for partners listed</li> <li>Successful implementation; agreed KPIs ahead of activities with clear reporting</li> <li>Gaining feedback from internal stakeholders on campaign</li> <li>Forward planning and holding partners accountable to deadlines/enforcing deadlines for partners</li> <li>GANTT chart the year and present to Design/Guest Learning/Guest Experience the plan for the year on activities (6 months at a time)</li> <li>All partners (contacts, businesses) and benefits in Salesforce</li> </ul>
<p><b>Priority 3</b>  <b>New Business - Core</b>                      Secure a minimum of \$Xk in new business across the financial year</p>	<ul style="list-style-type: none"> <li>New corp membership – target X</li> <li>Data into Salesforce</li> <li>Outbound strategy confirmed (Grocery, Tech, key categories)</li> <li>\$Xk secured new business (core)</li> <li>X New Bus Strategy</li> <li>Lead opportunities through XXXX</li> <li>Activating across events and other new in-grounds properties</li> <li>Refreshing collateral to allow to further incorporate Taronga's priorities and ensure meeting partners' objectives</li> <li>Sizzle Reel complete and used in 50%+ new business meetings</li> </ul>	<ul style="list-style-type: none"> <li>Procurement</li> <li>WCS</li> <li>Exec</li> <li>Sustainability</li> <li>Guest Learning</li> <li>Commercial (Major Events)</li> </ul>	<ul style="list-style-type: none"> <li>X% of contracts for multiyear</li> <li>Putting CPI in new business proposals and contracts</li> <li>Secured new business (core) \$Xk by EOY</li> <li>100% inbound contacted within 3 business days and input into Salesforce</li> <li>At least one new outbound conversation per month</li> <li>Leila speaker strategy</li> </ul>
<p><b>Priority 4</b>  <b>New Business – Capital campaign</b>                      Set the campaign fundraising up for success through a well thought out strategy and framework creation</p>	<ul style="list-style-type: none"> <li>Collaborate on feasibility study in order to formulate the go to market strategy for X</li> <li>Understand, articulate and socialise the key messages and unique selling points/value proposition</li> <li>Secure a minimum of \$Xk within the F/Y for X</li> </ul>	<ul style="list-style-type: none"> <li>WCS</li> <li>Exec</li> <li>Sustainability</li> <li>X Champions team</li> </ul>	<ul style="list-style-type: none"> <li>X Feasibility Study complete</li> <li>Go to market strategy approved</li> <li>Secured \$Xk new business X by end of F/Y</li> </ul>



Over to you!



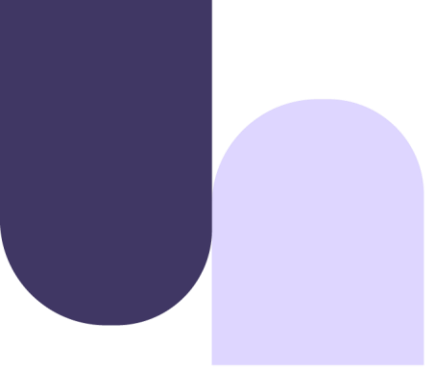
In groups write a high level strategy.

Build a plan on a page for one of your fundraising programs.

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**What are  
some of the  
objections  
you might  
hear?**

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# Communicate, convince, convert!

Why should we invest?

How do you know it's going work?

Can it be achieved in the timeframe?

I don't like it personally, why are we doing it?





# Ensure it lives on – day to day

Performance Plans

1-1 with your SMEs

Stand Ups / Team meetings

Management meetings

Department meetings

# Ensure it lives on.. MARCO

## 6.3. Taronga's Foundation grows significantly to enable the expansion of our conservation work.

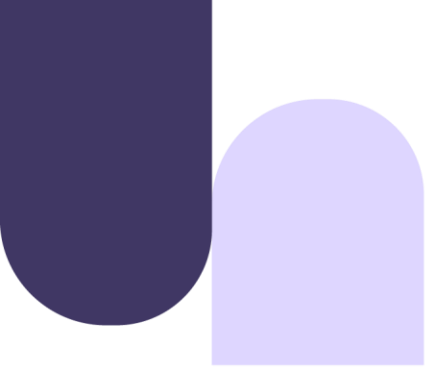
<input type="checkbox"/>	Item	Spons...	Contributor	Progress Level	Impact Level	Completion	Summary	Timeline
<input type="checkbox"/>	6.3.a. Create Taronga advocates and toolkit to increase pipeli...			On Track	Low Medium	20%	Bequest strategy development in progress	30 Jun
<input type="checkbox"/>	6.3.b. CRM testing implemented with journeys to increase fu...			On Track	Medium High	40%	The Foundation will be fully operational on Sa...	1 Feb - 30 Jun
<input type="checkbox"/>	6.3.c. Remaining pledges received for the Wildlife Hospital.			Delayed	High	30%	The journey continues, current balance is now ...	Dec 1, '23 - Ju...
<input type="checkbox"/>	> 6.3.d. Develop, plan and launch of the public capital camp... 1			On Track	Medium High	30%	A pro bono research project has been underta...	-
<input type="checkbox"/>	6.3.e. Create and implement Woodlands feasibility study and...			Complete	High	100%		-
<input type="checkbox"/>	6.3.f. Develop international fundraising strategy to support k...			On Track	Medium	50%	Meetings have been held with International Fo...	-
<input type="checkbox"/>	6.3.g. Review corporate partner offering to ensure opportuni...			On Track	Medium	50%		-
<input type="checkbox"/>	+ Add item							



## RECAP OF THE STEPS

- 1 – Research internally – get the data
- 2 – Research externally – find partners or desktop! Reach out to other fundraisers, seek out overseas orgs in the same space
- 3 – Workshops / Focus groups internally and externally
- 4 – Get writing!
- 5 – Socialise it
- 6 – Back it up with the HOW you will deliver on it
- 7 – Keep it alive





**‘You don’t have to be  
great to start, but you  
have to start to be great’**

**Zig Ziglar**



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## Some links that might be helpful

Always happy to chat: Leila Davis <https://www.linkedin.com/in/leilamitchell/>

The Benchmarking project  
<https://www.benchmarkingproject.org/>

BDA Marketing Planning – produce consumer sentiment and brand tracking research  
<https://bdamarketing.com.au/>

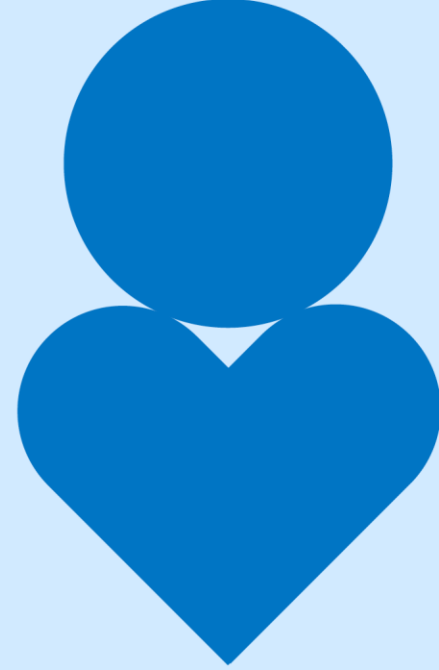
Future Foundations for giving, Productivity Commission draft report  
<https://www.pc.gov.au/inquiries/current/philanthropy/draft>

JBWere NAB Charitable Giving Index  
<https://www.jbwere.com.au/campaigns/jbwere-nab-charitable-giving-index->

Philanthropy Australia Giving Trends and Opportunities  
<https://philanthropy.org.au/about-us/publications/giving-trends-and-opportunities-report-2022/>

If one of your strategies is major donors, then I highly recommend Fundraising Research and Consulting to ensure you are focusing your energy on the right donors with the right ask  
<https://www.fundraisingresearch.com.au/>

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**Thank you**



Fundraising How To Track  
Sponsored By:

