

# The UK Fundraising Management Survey

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In association with

PROFESSIONAL  
**Fundraising**

**Frances Hurst**

Charity consultant and researcher

8 Sibthorpe Road  
North Mymms  
Herts AL9 7PH

01707 882958

[frances@franceshurst.com](mailto:frances@franceshurst.com)

# UK Fundraising Management Survey

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## Introduction

If I asked what makes good fundraising management, I wonder what your answer would be? There's certainly no set formula. But one thing is for sure, and patently clear to anyone working in the sector, some charities do it better than others.

Sadly, in 2006, some charities are still in the Dark Ages when it comes to management. They haven't seen the light and realised that treating your people like human beings is essential if you are to have any chance of creating a sustainable and successful organisation. Thankfully, others are way down the road in this area and are implementing innovative management practices, in much the same way that they would plan and deliver a new fundraising initiative.

We wanted to find out who is doing good fundraising management work - unseen and unsung. So we posed a series of questions to *Professional Fundraising* readers in a wide-ranging Fundraising Management survey. We wanted to find out where fundraisers think their charities excel – and where they feel there is distinct room for improvement. We wanted to know if managers and fundraisers have different views on what success looks like. And if they do, explore what that might mean for the future of fundraising.

We had responses from over 100 charities and this special report provides us with a few answers - and perhaps a few new questions. Safe to say, aggressive management practices, such as those epitomised by Alan Sugar in *The Apprentice*, might make good TV, but thankfully have no place in the charities featured here.

Good management is not about achieving perfection. Even the organisational innovators in the corporate world such as First Direct, Hewlett Packard and Pret a Manger - to name but a few - find it hard to sustain best practice, year in, year out. However strong a management team is, there will always be unique combinations of people and situations to be faced, creating new challenges - and opportunities. People certainly don't move into management for an easy life.

The charities featured in this report would be the first to admit that they are far from perfect. And it is that organisational self-awareness that makes a new, vibrant kind of fundraising management possible. What stands good fundraising management apart is its ability to listen to people, to be big enough to admit "we could do better here" and to work consistently to improve the way that people work together.

Everyday, in fundraising departments across the UK, fundraisers are achieving extraordinary things, because good managers are creating environments in which they can flourish. So this is a good news story. The news is that management in the voluntary sector is coming of age - and we want to celebrate it here.



**Frances Hurst**  
Charity consultant & researcher

## Process

During December 2005, fundraisers were asked to complete an on-line survey covering 34 aspects of fundraising management.

For each aspect of management, fundraisers were firstly asked **how important** they considered it to be. Secondly, they were asked whether they thought it was **handled well** in their own fundraising department.

The data received was analysed collectively and by 'manager' and 'non-manager' groupings.

Following the quantitative analysis, we visited the most highly regarded charities to find out what makes them special.

## Key Findings

### *Budget Management*

When asked to identify the top priority for fundraising management, fundraisers have their feet firmly on the ground. As far as they are concerned, the most important thing that management can do is to ensure that **fundraising budgets are spent effectively**. This was the highest scoring issue for the fundraisers responding to the survey and, encouragingly, 82% of respondents also thought that their charity did this well.

### *The way that work gets done*

The factors considered to be next in importance to fundraisers were issues concerning **the way that work gets done** – in particular whether individuals were involved in target setting, felt listened to and were empowered to make decisions, as well as how effectively fundraising activities were integrated with those of other departments.

**People management** issues such as involvement and empowerment were scored highly, with 85% and 77% respectively of fundraisers agreeing that this was done well in their department. But, perhaps unsurprisingly, the level of **integration** of fundraising's activities with other parts of the charity scored less favourably, and was very nearly the worst performing area in the entire survey. Managers were the most concerned about this, with only 42% feeling that their charity was good at cross-departmental working, compared with 61% of non-managerial fundraisers.

However, the wooden spoon for the least effective aspect of fundraising management was taken by charities' **inability to deal with poor performance**. Only 47% of managers and non-managers alike felt that this important area of management was handled effectively in their charity.

There is some good dialogue going on between managers and staff, however, as 72% of non-managers and 66% of managers feel that they get useful feedback on how they are performing. And trust levels appear to be excellent within fundraising departments with 93% of non-managers and 86% of managers feeling that they are trusted to do a good job.

### *Strategy and innovation*

**Strategy and innovation** came next in importance, with respondents believing that is critical that as much emphasis is placed on long-term objectives as on short-term targets. Over three-quarters of fundraisers feel that their management team is good at working strategically and a similar proportion believe that their charity is good at innovation - getting new fundraising initiatives off the ground. Perhaps the fact that 75% of respondents believe that "mistakes are seen as learning opportunities" at their charity, helps fundraisers to feel confident in trying new approaches.

### *Communication and team working*

The next most important issues centre on **communication** – being kept informed about what's happening within the charity and having open and honest communication with managers. A little surprisingly non-managers seem to feel better informed about what's going on in their organisation than managers do, but both groups appear to have very healthy communications with their bosses, recording positive responses of over 86% all round.

**Team working** in fundraising departments is felt to be encouraged by 82% of respondents, although only 57% believe that their department's systems and procedures support a team-working approach. 82% of managers believe that they could point to tangible improvements in team working in the past year, but only 70% of non-managers feel the same way.

### *Training & Development*

Significantly, issues of **career development** – and even being fairly rewarded for their work – are seen as less important, comparatively, to respondents. Although less than half of respondents are clear about how they can develop their career at their charity, this is not seen as a priority for fundraising management. Perhaps the response to the next question provides some insight into why this might be the case: only 37% of non-managerial fundraisers expect to be working for their current charity in three years time. (This figure rises to 55% for managers.) This is despite the fact that non-managers feel more fairly rewarded – 72% of them agree that they are – compared to managers – where only 65% agree. Is the expectation of career development within a single organisation a thing of the past?

The level of **training** provided by charities is appreciated by fundraisers, with 75% feeling that they have had sufficient training in the past year to do their job well. Having said that, only 60% of those surveyed feel that their skills are used to the full in their present job and that there are good opportunities for personal development at their charity. So charities are clearly missing out on potential talent in their midst.

### *Culture and Environment*

Middle ranked in terms of importance to respondents, departmental **culture and environment** issues were also explored in the survey. Encouragingly, in often highly stressful roles, 75% of fundraisers feel that management encourages them to balance their work and personal lives. When asked whether they felt the results expected of them were realistic, 86% of non-managers felt they were, compared with only 73% of managers. However, both groups feel similarly supported, with perhaps a lower than ideal 69% believing that they get the support they need to do their job well.

While 60% of respondents consider the morale in their department to be high, there is a difference of opinion as to how fundraising is viewed by colleagues in other departments. 67% of non-managerial staff feel that fundraising is held in high regard internally, but only 51% of fundraising managers do.

Although they were deemed to be less important factors as far as management is concerned, nearly all the fundraising departments represented in the survey scored highly for being friendly places to work – 90% – and for having employees who are committed to doing good work – 93%.

While issues of diversity are considered to be important, they do not rank highly as concerns when compared with the other areas covered in the survey. Charities are felt to be performing reasonably well in this area, with 72% of respondents considering that diversity is valued within the department.

## The Numbers

### ***Which aspects of fundraising management responsibility are most important to fundraisers:***

*(In order of level of importance. Where 3.0 = very important, 2.0 = important, 1.0 = not very important)*

- Level 1** Fundraising budgets are spent effectively (2.8)
- Level 2** Being involved in target setting (2.7)  
Effective communication within the team (2.7)  
Views are listened to and valued (2.7)  
Feeling empowered to make decisions (2.7)
- Level 3** Long-term objectives are seen as important as short-term targets (2.6)  
Fundraising activities are well integrated with those of other departments (2.6)  
Easily being able to find information (2.6)  
Being kept well informed about what happening in the charity (2.6)  
Communication from fundraising management is open and honest (2.6)  
Being able to be open and honest with fundraising management (2.6)  
Getting the support needed to do the job well (2.6)
- Level 4** The department is effective at developing new fundraising initiatives (2.5)  
Fundraising management trusts people to do a good job (2.5)  
Results expected are realistic (2.5)  
Getting useful feedback on performance (2.5)  
A supportive team-working approach is encouraged (2.5)  
Morale in the department is high (2.5)  
The department is a friendly place to work (2.5)  
Fundraising is held in high regard internally (2.5)  
Fundraising colleagues are committed to doing good work (2.5)  
People are encouraged to balance their work and personal lives (2.5)
- Level 5** Poor performance within the team is dealt with effectively (2.4)  
Sufficient training received during the past year to do the job well (2.4)  
Individuals' skills are used to the full (2.4)  
There are good opportunities for personal development (2.4)  
The department looks to improve how it works together, as well as what it does (2.4)
- Level 6** Being fairly rewarded (2.3)  
Departmental systems and procedures support a team-working approach (2.3)  
Able to identify tangible improvements in team working in past year (2.3)  
Mistakes seen as learning opportunities (2.3)
- Level 7** Being clear about how to develop a career (2.2)  
Diversity is valued (2.2)
- Level 8** Planning to be working for this charity in 3 year's time (1.9)

## Which aspects of Fundraising Management responsibility are most successfully delivered 'at my charity' - in order of percentage level of agreement:

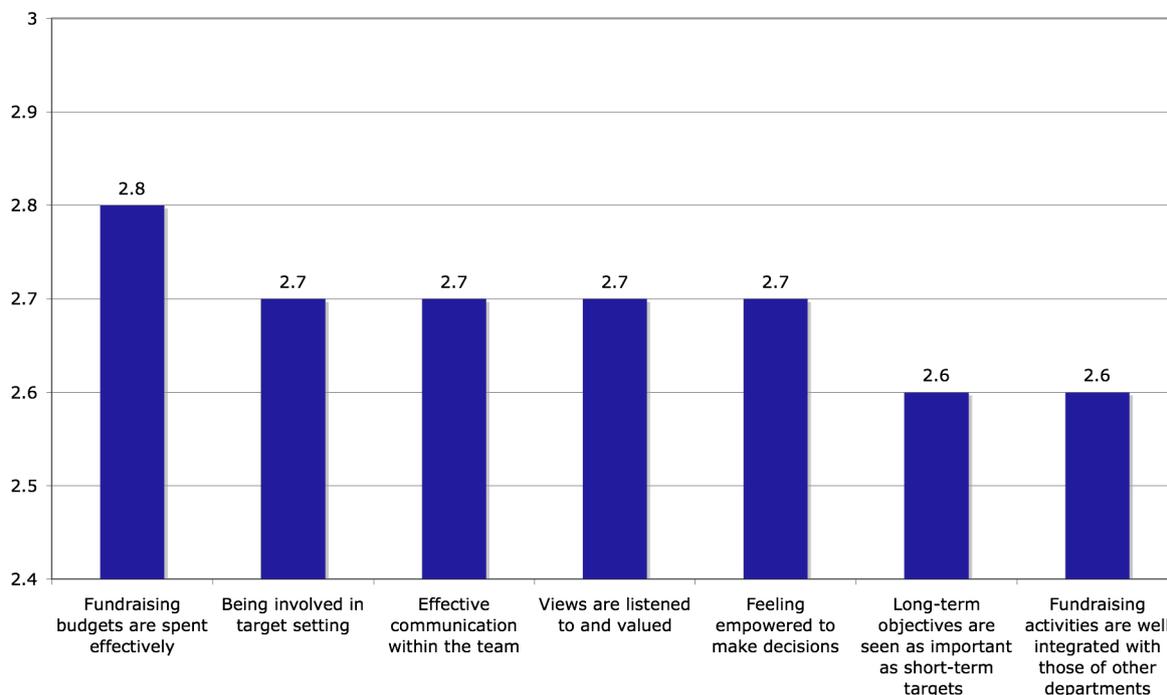
(Level of importance in brackets)

1. Fundraising colleagues are committed to doing good work (4) - **93%**
2. The department is a friendly place to work (4) - **90%**
- = 3. Fundraising management trusts people to do a good job (4) - **88%**
- = 3. Communication from fundraising management is open and honest (3) - **88%**
5. Being able to be open and honest with fundraising management (3) - **87%**
6. Being involved in target setting (2) - **85%**
7. Views are listened to and valued (2) - **83%**
- = 8. A supportive team-working approach is encouraged (4) - **82%**
- = 8. Fundraising budgets are spent effectively (1) - **82%**
- =10. Long-term objectives are seen as important as short-term targets (3) - **78%**
- =10. Able to identify tangible improvements in team working in past year (6) - **78%**
- =12. Being kept well informed about what happening in the charity (3) - **77%**
- =12. Results expected are realistic (4) - **77%**
- =12. Feeling empowered to make decisions (2) - **77%**
- =15. People are encouraged to balance their work and personal lives (4) - **75%**
- =15. Sufficient training received during the past year to do the job well (5) - **75%**
- =15. Mistakes seen as learning opportunities (6) - **75%**
- =18. Effective communication within the team (2) - **73%**
- =18. The department looks to improve how it works together, as well as what it does (5) - **73%**
- =20. The department is effective at developing new fundraising initiatives (4) - **72%**
- =20. Diversity is valued (7) - **72%**
22. Getting the support needed to do the job well (3) - **69%**
- =23. Easily being able to find information (3) - **68%**
- =23. Getting useful feedback on performance (4) - **68%**
25. Being fairly rewarded (6) - **67%**
26. Morale in the department is high (4) - **61%**
- =27. Individuals' skills are used to the full (5) - **60%**
- =27. There are good opportunities for personal development (5) - **60%**
- =29. Fundraising is held in high regard internally (4) - **57%**
- =29. Departmental systems and procedures support a team-working approach (6) - **57%**
- =31. Being clear about how to develop a career (7) - **49%**
- =31. Planning to be working for this charity in 3 year's time (8) - **49%**
33. Fundraising activities are well integrated with those of other departments (3) - **48%**
34. Poor performance within the team is dealt with effectively (5) - **47%**

## The Graphs

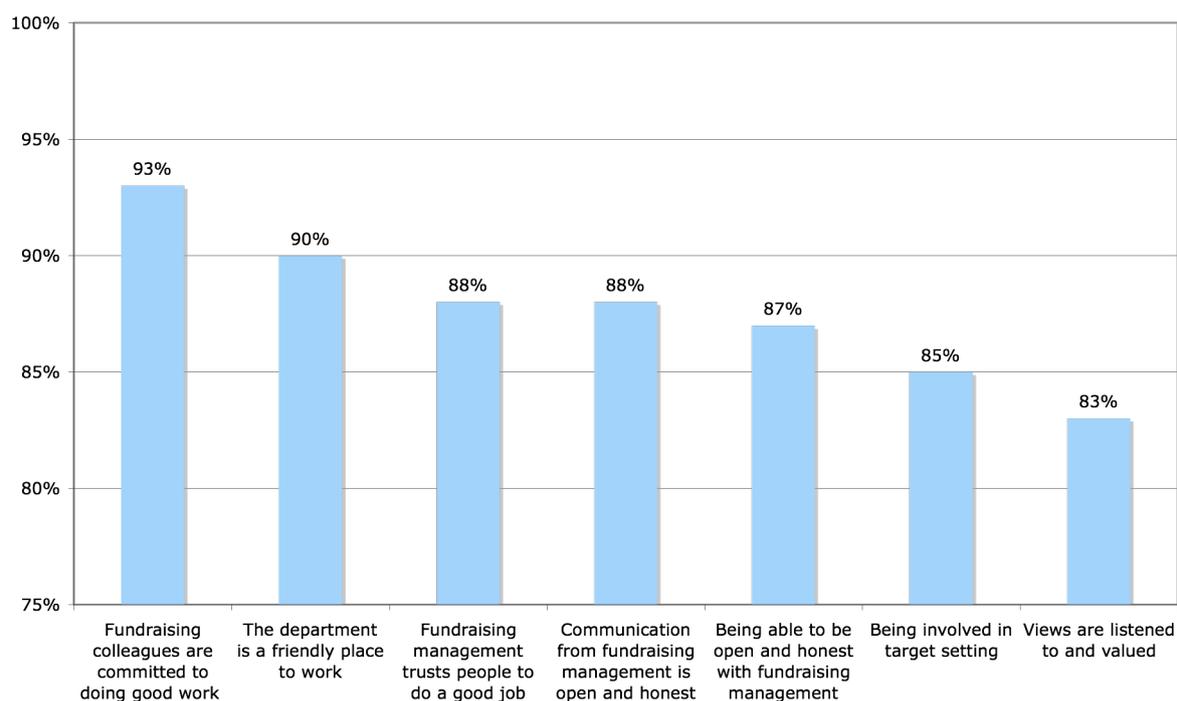
### 1. The most important aspects of Fundraising Management

This graph shows the aspects of fundraising management considered to be the most important by fundraisers. (3.0 = very important, 2.0 = important, 1.0 = not very important)



### 2. Aspects of Fundraising Management most successfully delivered

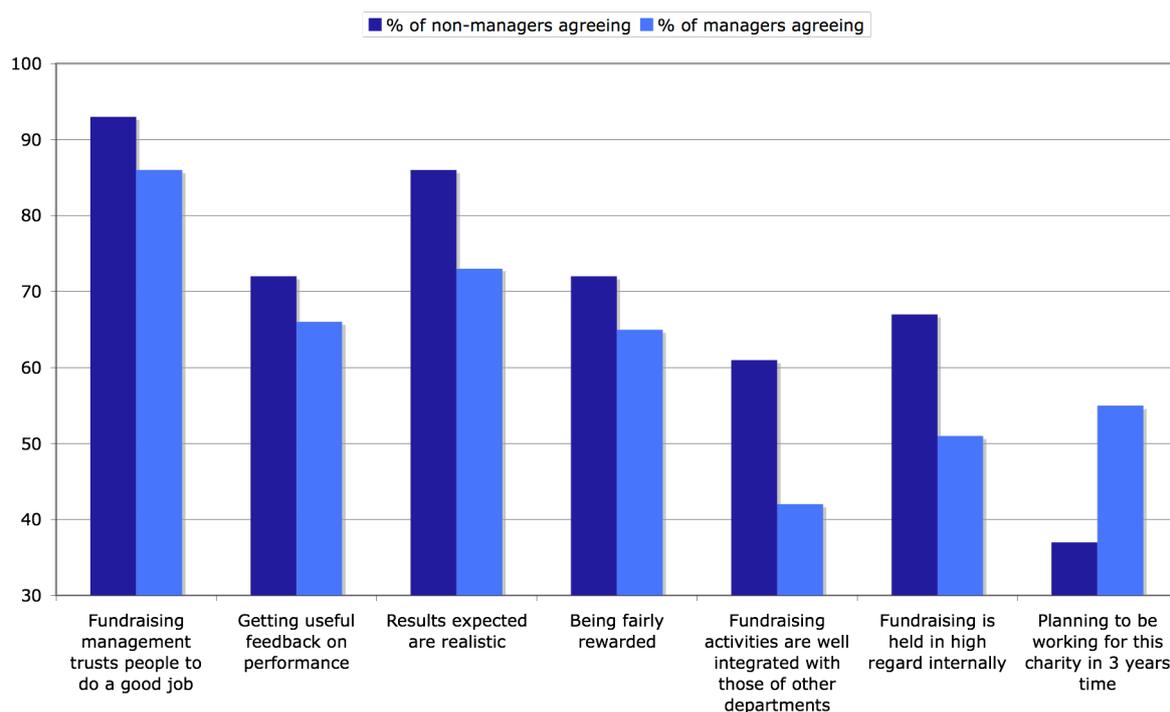
This graph shows the areas where charities do best - in reality - as judged by the fundraisers who took part in the survey. The percentage figures represent the number of respondents agreeing with each statement.



### 3. The most significant differences in opinion between managerial and non-managerial fundraisers

This graph focuses on the aspects of fundraising management, which reveal the biggest differences between manager and non-manager opinions.

It is interesting to note that although managers rate all of these aspects of management less positively than their non-managerial colleagues; managers are 50% more likely than non-managers to be planning to be working for their current charity in three years time.



## Featured Charities

Thirteen charities, where the fundraising management was particularly highly regarded, were interviewed for the second stage of the survey process during February 2006. The interviews – with fundraising directors and fundraisers - provide deeper insight into the main themes emerging from the survey.

The charities interviewed were:

- ***Alzheimers Society***
- ***Breakthrough Breast Cancer***
- ***Cancer Research UK***
- ***Crisis***
- ***Help the Hospices***
- ***Kidney Research UK***
- ***Macmillan Cancer Support***
- ***NDCS***
- ***Practical Action***
- ***Stroke Association***
- ***VSO***
- ***Woodland Trust***
- ***WWF***

## The Themes

So, what does good management look like? And how are the fundraising management teams that were most highly regarded by fundraisers tackling some of the major themes arising from the survey:

### People Management

According to the fundraisers at the Alzheimers Society, good people management is about being *“hands-on without being hands-in”* and Director of Fundraising & Marketing Jo Swinhoe is described as being just that. Jo is still relatively new to the charity, but has wasted no time in providing a clear structure for 1-1 meetings in the department of 46 fundraisers. Drawing on her experience in a social work context, she has introduced clear supervision standards which are providing staff with a framework to discuss personal as well as business issues when they meet with their manager. When she joined the charity, Jo made it clear she wanted a healthy dialogue with her team. She told them that *“I don’t know everything. If I’m wrong, tell me.”* This approach is helping fundraisers to feel that their views are listened to and that management are open to new ideas.

The Woodland Trust is exploring innovative approaches to people management with their team of 35 based in Grantham. Director of Fundraising Karl Mitchell has been encouraging the team to focus on skills and behaviours, rather than results and outputs. When they have a success, they look at how it was achieved and what they can learn from that for the future. As Karl puts it: *“where did individuals really make a difference”* – versus what was just down to luck. They are currently refreshing their appraisal process to tie in with this approach. Karl feels that they could still be better at measuring performance – particularly the non-financial aspects. For example the awareness raising value of corporate promotions. He believes it shouldn’t just be about the ROIs.

Judy Beard, Director of Communications and Fundraising at Macmillan Cancer Support, agrees. She believes that one of the next big challenges for fundraising management is about how you reward performance. Personal success is more than just achieving targets – it’s about good team-working and spotting opportunities for colleagues. She is clear that: *“if you want to make the donor experience seamless, fundraisers need to work in a seamless way too”*.

### Integration

One of the biggest challenges facing all of the charities that took part in the survey is how to better integrate different aspects of fundraising – and fundraising as a whole with different departments or functions within the charity. Charities such as Macmillan and The Stroke Association have set up Fundraising Management Teams to provide a cross-departmental forum. At Macmillan the UK-wide team have worked together for many years and can be *“very open and frank with each other”*. *“Alcohol and eating together”* are Judy’s secret ingredients for successful management. She believes that: *“getting people out of their roles and seeing people as people does more than anything else to build mutual respect”*. The Macmillan Fundraising Management Team try to get together the night before a meeting. Judy feels that this approach has enabled Macmillan to make huge strides forward in being able to work consistently across the UK – so that donors gets the same care whether they contact the charity in London, Cardiff or the Highlands of Scotland.

At the Stroke Association, as well as a Fundraising Management Team, which takes collective responsibility for delivering the fundraising strategy, Director of Fundraising Derek Wyeth has also set up a Working Together Group involving representatives from different departments. The purpose of the group is to facilitate new ways of working across the charity, for example, exploring how understanding between Fundraising and Community Services can be improved.

Derek is convinced that the key to a charity's success is *"how well you can work together and developing mutual trust"*.

WWF is one of the few charities that has taken the step of restructuring their organisation to help improve cross-functional working. Two years ago WWF restructured to follow what is broadly a commercial sector model. This makes WWF's fundraising and communications structures very different from most charities. Their new set-up is organised in such a way that integrated working is essential. They split 'sales' teams from 'product' teams, so that cross-team working is a necessity to get any new initiative out of the door. They also have a Product Development Team that works across the department. This team's job is to work at improving existing fundraising and campaigning products, as well being responsible for developing new ones. The team members are expert at understanding their audiences – as well as what the competition are up to. They are not, however, responsible for 'selling' the products they work on. Director of Supporter Relations, Nicky Bishop is responsible for every aspect of fundraising and campaigning for WWF – so all of the targets in these areas are within her remit. This means that once priorities are agreed with the trustees and other directors, Nicky's team have the responsibility of delivering them.

### **Strategy & Planning**

If there were a set of criteria for grown-up fundraising management, one of them would have to be the ability to understand what strategy means in your organisation - to take a long-term view and to be able to deliver on that plan. And a charity that exemplifies this is Breakthrough Breast Cancer. For such a relatively young charity, the maturity of its fundraising strategy and planning is impressive. Peter Reynolds, out-going Director of Fundraising at Breakthrough, quite rightly sees this as a real strength. Breakthrough has an ambitious agenda for growth and two-year rolling plans to deliver it. Focus is placed on new areas for investment and the process is designed to avoid the incremental approach to budgeting. There is real belief that the organisation still has huge potential to grow - but also that there is no point in being unrealistic. Everyone in fundraising is involved in the planning process with the aim of getting people thinking about how the targets can be delivered. Peter adds *"I have always believed in the power of an effective team to achieve excellent results"*. Breakthrough's fundraisers feel that the charity's fundraising management is incredibly good at budget forecasting, keeping costs low and the stringent evaluation of projects.

Justine Williams, Head of Public Fundraising at Practical Action, highlights the way in which plans are developed at the international development charity as an area where the fundraising management team excel. All the fundraisers are involved in the process and they employ a specialist Data Analyst in the team to undertake extensive modelling of every activity. They agree detailed criteria with the trustees and report back on performance quarterly. This approach has helped them to earn the trustees confidence as well as increase their understanding of fundraising. When a project fails, the trustees understand why. The team is target focussed and includes key milestones in its plans. Fundraisers at Practical Action feel that they have freedom to develop their own work areas - and to take risks to achieve their objectives. They feel listened to, for example having the opportunity to revise income projections.

Fundraisers at Macmillan are very supportive of the way that their fundraising strategy was revised recently. 100 fundraising staff took part in an Awayday, working together on what they wanted to achieve over the next 5 years. Amanda Bringans, the newly appointed Deputy Director, Fundraising, believes that it was particularly successful because it included an overnight stay - and that having a good time together was part of the process.

## Innovation

When you think about innovation in fundraising, one of the first names that leaps to mind is Breakthrough Breast Cancer. They certainly come through strongly in this survey, but so do a number of other charities. So what are they doing differently? Income at Breakthrough is doubling every three years and Peter Reynolds has no reason to believe that that will change in the future. He believes the key to Breakthrough's success has been their ability to invest in fundraising – and to support people in innovating. *“If you do what was agreed and it doesn't work, we don't blame, we learn from it.”* explains Peter. He also believes that leaders have another vital role to play – to inspire their teams – to support the ambition and belief that you can achieve amazing things together. The fundraisers at Breakthrough clearly have a lot of respect for their leader; Peter is described as a role model who inspires confidence and is calm and in control. So Breakthrough is not up in the clouds with its approach. They have clear plans and areas of risk are identified and managed accordingly.

Crisis is another innovative charity with an inspirational leader. Director of Fundraising Chris Askew, who has now moved on to other things, is described by one of his team as “one of the most inspirational managers I've ever worked for”. The 'Crisis Christmas Pudding' is a good example of their recent innovation and is credited with being one of the first 'virtual gifts'. When someone bought a 'Crisis Christmas Pudding' they not only got a Harrods pudding to enjoy with their family, they also covered the cost of Christmas dinner for a homeless person. Chris puts their success down to having supportive trustees who are, like Breakthrough's, prepared to put their money where their mouths are and invest in fundraising. Of course, innovation outside needs innovation on the inside and Crisis have also invested in their database, which has included integrating it with their website. This enables them to be very agile and quick to respond to changing circumstances. The fundraisers we spoke to back up Chris' views, feeling that there is a real culture of innovation at Crisis. They believe that this has developed because new ideas are taken very seriously and innovation is built in to plans and targets. As with Breakthrough, you get a clear picture of innovation being a serious business.

At the National Deaf Children's Society, Director of Fundraising and Communications, Tobin Aldrich, feels that they also have a positive attitude to innovation and are not afraid to try new things. This approach is helped at NDCS by a relatively flat management structure within which individuals are given responsibility and are supported in developing new initiatives. The fundraisers there agree, feeling that they have the freedom to trial new ideas and are supported in taking risks. This approach makes them feel trusted and valued by the charity.

So what about some of bigger charities. Who is leading the way there? Despite bigger budgets and more staff, new initiatives can be harder to deliver as an organisation grows, with delicate new ideas at risk of being consumed by bureaucratic approval processes or stifling Board committees. Two of our biggest charities, however, are determined not to fall into these traps.

Cancer Research UK is investing in innovation training for its fundraisers and has set up a stand-alone innovation unit. In addition, each area of fundraising has its own business development manager with the specific brief to develop new ideas. But new ideas are not the sole preserve of these individuals, a separate fund is held centrally to support innovative projects and anyone can put forward an idea for a 'grant' from the fund to trial it. CRUK fundraisers really value this facility – and also the “Fresh perspectives” programme. This is an on-going series of talks from external speakers, including a Mount Everest climber and a cancer survivor, designed to help fundraisers think beyond their usual areas of work. Inspiration again being the theme. The subject of innovation was certainly highly visible on the day I visited, with a notice board in the department encouraging fundraisers to write up their favourite innovation.

Macmillan Cancer Support is following a similar path having recently appointed an Innovations Manager. Their role is to act as a catalyst across the organisation – or “help us to whirl around” as Judy Beard aptly puts it. She believes that innovation needs to be part of everything that Macmillan does and that sometimes it is just a question of seeing the potential – perhaps of a small local fundraising activity that could be multiplied across the UK.

Both of these fundraising giants admit to being risk-averse in the past and are determined to try and change their ways in the future. Having a culture that gives people the freedom to fail is seen as essential.

### **Internal Communication**

This is an area that even some of our most successful charities find challenging at times. Not least because new technology is multiplying the quantity of information available and also the speed by which it can be disseminated. This raises expectations about the spread of information, yet can result in fundraisers drowning in information, unable to find that vital piece of information they actually need.

Fundraisers at the Woodland Trust, however, do rate their internal communications highly and a lot of the credit for this is given to Director of Fundraising, Karl Mitchell, who is described as a good communicator – with both staff and funders. He is also felt to be passionate about the Woodland Trust’s cause and is considered to be very approachable and helpful to members of the team. With a number of fundraisers working remotely around the UK, good communication is seen as essential to keep everyone feeling part of the team.

Internal communication is an area of management that receives its fair share of attention at Help The Hospices. Director of Income Generation, David Burland, is pleased that the fundraising department has a good relationship with services. They value this greatly and recently assigned a fundraiser to each aspect of services, to help to further develop relationships and understanding. They have also initiated “Friendly Fridays” across the charity, when you are not allowed to send an internal email and have to go and talk to colleagues. Despite all the effort, as elsewhere, fundraisers feel that communication and information sharing within the department and other areas could still be better, especially as fundraising is now split across two floors. But the fundraisers are also keenly aware of needing to differentiate “what you *need* to know from what it is *nice* to know”.

Fundraisers at Cancer Research UK are also in two minds over this issue. On the one hand, they appreciate the many fora in place to involve them in what’s going on at the charity. These include regular team meetings where they can share ideas and knowledge - and have the chance to input to wider issues - and teams having ‘tea and cakes’ afternoons, inviting others to drop by and find out what they’re up to. Other teams have Awaydays and everyone is encouraged to get involved in CRUK’s many events - as “a team-building thing”. Co-Executive Directors of Fundraising and Marketing Sarah Lyness and Richard Taylor hold regular meetings with groups of six fundraisers at a time, to “take the temperature of what’s going on”, to chat and answer questions. Some managers also have ‘open-phone’ afternoons. Outside of the department, fundraising staff are also encouraged to go on laboratory tours, to help them to keep close to the cause. All these activities help to make the fundraisers feel valued and listened to. However, with a fundraising team as large as CRUK’s - now over 400 people - it is no surprise that internal communication was also raised as the main area for improvement. The amount of information – particularly the volume of emails – can be difficult to cope with. Fundraisers receive staff bulletins, newsletters and have an intranet, but still find it difficult to keep in touch with colleagues, particularly those in the field. Individuals here, as elsewhere, feel that have to be proactive to keep up-to-date with what’s going on.

## People development

In many smaller charities, people development is a real challenge. Just how do you give individuals opportunities to develop, when you have a small staff group? Chris Askew, outgoing Director of Fundraising at Crisis, believes that we should not underestimate the broader experience individuals can gain of different aspects of fundraising in a smaller organisation, because roles are less specialised. That said, and with a fundraising staff of just 14, Chris feels that they could still do more to help people develop. Crisis attracts high calibre staff and already provides them with Personal Development Plans that are reviewed regularly. Individuals are also encouraged to work in project groups to help to broaden their experience. As part of its mission, Crisis sees training, learning and skills development as a way of getting people out of homelessness. It is now exploring how it can extend the same model to staff as well. This is appreciated by the fundraisers who also see this as a very positive way of being able to 'live the brand' internally.

As a medium-sized charity, with 20 fundraisers, VSO has taken a long hard look at how it can help its fundraisers to develop and in the process, hopefully hold on to them for longer. Head of Fundraising, Lucy Caldicott, has been proactive in developing a career structure within the team to enable fundraisers to progress and increase their pay. Within the corporate team for example, job descriptions are drafted at three grades. Even if someone on the highest grade leaves, a new recruit is brought in on the lowest level to give them room to develop – and more senior colleagues the opportunity to act as mentors. Lucy has the authority to promote individuals within this framework.

A number of charities, including Help The Hospices and The Woodland Trust are exploring ways of becoming more strategic in their approach to training, looking at ways in which they can link development more closely with their appraisal processes. They see personal success as more than just achieving targets – it includes things like good team working and spotting opportunities for colleagues.

Of all the charities that were involved in the survey, CRUK has the most comprehensive people development programme. They believe that everyone has the right to be developed and this approach is managed through individual Personal Development Plans. One of the foundations of their approach is the Graduate Training Scheme, which receives over 1000 applications each year for the five places on offer. The programme lasts for two years and participants are guaranteed a job at the end of it. Another element is the Prospect fast-track development scheme that enables high flyers to receive additional training and development opportunities, including secondments and mentoring. This is a charity-wide scheme and two of the current directors and a number of Heads of Department have come through it. In recruiting new staff they take a long-term view, valuing talent more than experience. They look to bring in individuals who will fit into Cancer Research UK's culture and have the potential to develop – essentially dynamic individuals who have transferable skills.

## Culture & Environment

Sarah Lyness, Co-executive Director of Fundraising & Marketing at Cancer Research UK is clear that if she had to pick one area that makes a difference to the charity's fundraising it would have to be with the culture that they have developed in the department. This culture was not shaped by accident. They implemented a culture change programme and articulated an explicit set of behaviours for fundraisers, with the aim of helping the team to become even more successful in the future. Sarah describes it as being supportive of individuals, but also ambitious, daring to try new things, dynamic and passionate about the cause. Sarah emphasises that the behaviours were *“designed by fundraisers for fundraisers”* and that they *“wouldn't have got to where they are without them”*. Fundraisers in the team echo this view, reporting *“a positively challenging environment”* and one in which they *“feel supported to succeed, are not micro-managed and are given responsibility and development opportunities”*.

Of course, fundraising doesn't work in isolation in a charity and it makes a big difference to the working environment if there is mutual respect between different departments. At Kidney Research UK, Head of Community Fundraising Peter Storey reports that fundraising is held in high regard. *"It's refreshing not to be seen as the vulgar end of the wonderful profession of providing services"*.

Help The Hospices is described as having a very positive culture, both as an organisation and as a fundraising department. The department is not hierarchical, people can speak to anyone, anytime and communications across the team are pretty good. There is great support from the trustees for fundraising – including investment in new ideas.

Director of Income Generation at Help The Hospices, David Burland, believes that recruiting people based on their energy and enthusiasm helps to maintain a good working environment. New fundraisers do not necessarily come from a fundraising background and they use psychometric tests during recruitment - not for selection - but to better understand the people they are taking on. He says that they have learnt from experience the importance of a thorough recruitment process and that their current approach helps them to *"get the right kind of people, who think that we're the right kind of place for them"*. Fundraisers at Help The Hospices believe that the culture is helped by the fact that structures are flat and there is *"no massive chain of command"*. *"People are approachable and there is a positive and informal environment"*, which is seen as really important. If you have a problem, you can get help to get it sorted. Everyone mucks in when things get busy. *"You are encouraged to express your opinion"*, especially at team meetings where a real effort is made to vary the format and keep them fresh and useful. (eg. debating an article in the press.) Diversity is valued. Everyone is responsible for their own projects and way of working and work times are flexible. *"Everyone loves what they do and therefore do a good job, so we don't need anyone breathing down our necks"*. Fundraisers say they feel trusted and therefore valued.

Recruiting and retaining fundraisers in Grantham is a challenge that the Woodland Trust has risen to. Ways of working have been developed that are very flexible, encouraging colleagues to help each other out or set up new project teams to work on new initiatives. The Trust has also embraced home-working and fundraisers feel that this enables them to achieve a lot more. It seems to be working well and, despite the flexibility, fundraisers are clear about their colleague's roles and responsibilities.

## The charity interviews

### Alzheimers Society

#### *Who's the boss:*

**Director of Fundraising & Marketing:** Jo Swinhoe

**Length of service:** 5 months. Previously worked for NSPCC.

**Responsibilities:** All aspects of fundraising, plus branding for the whole organisation.

**Size of department:** 46

**Voluntary income:** £20m

#### *What the team say about her:*

“**Hands-on without being hands-in**” is the way fundraisers describe Jo. She is already felt to be very **supportive** of the team and is **good at giving credit** to individuals. She is also said to be **honest and straight talking**.

When Jo joined the charity, she said “I don't know everything, if I'm wrong, tell me” and this was appreciated by the team. A sign that two-way communication was expected.

#### *Where they excel:*

##### **The Boss' view:**

Jo is wasting no time in focussing on the processes by which Alzheimers can deliver great results. Meetings have been held to look at **values and developing a team ethos**. She is keen to see an **inclusive** rather than hierarchical approach to decision making. “Good ideas can come from anywhere”, she says.

Jo has also provided more structure to 1-1 meetings in the department, by introducing clear **supervision standards** drawn from her experience of working in a social work context. This approach provides the structure for staff to discuss personal as well as business issues when they meet with their manager.

##### **The Fundraisers' view:**

**Being open to new ideas.** Fundraisers feel that they can take on a new project and are allowed to run with it. “The trustees trust Fundraising to get on with the job”.

**Views are listened to** and there are lots of opportunities for **training** – including learning about cause related subjects. The **induction** process was felt to be good, including visits to branches.

## *Areas for improvement:*

### **The Boss' view:**

Following a period of considerable growth, some of Alzheimers' information systems are struggling to cope. The current focus organisationally is on improving the speed of **financial reporting and IT support**.

Jo also feels that there could be more **training** for those who may be leading fundraising in five years time.

### **The Fundraisers' view:**

**Coordination between teams.** Fundraisers felt that they needed to understand more about the roles and responsibilities of colleagues in other teams and there was the familiar over-reliance on email communication. "The Society is committed to reorganising itself as **one society** and this should start to show improvements organisation-wide." The new database, which will bring all of their data together for the first time, was also seen to be a key to helping improve collaboration.

The role of the **Communications** department in supporting fundraising – a common concern – could also be better. Internal communications generally was seen to be improving, however, and this was increasing confidence in the department.

More **involvement in strategy development** in the future would be appreciated.

## *Aspects of management most important in leading a successful fundraising team:*

### **The Boss' view:**

Leadership in two areas. In values - a fundraising director needs to align with the organisation and have a clear understanding of what is expected of them. Vitally, he or she also needs to be able to **live those values** with the team. With regard to the business aspect of the role, Jo believes that a fundraising leader has a critical role to play in being aware of **external opportunities** - whether they arise elsewhere in the charity or outside the organisation as a whole.

Jo feels that the sector shouldn't beat itself up about management and suggests that there should be an impACT style forum to help drive up standards.

### **The Fundraisers' view:**

Being **approachable**, whether with a new idea or a problem. That communication isn't just one-way.

Having a clear **vision** and being '**brave**'. Being prepared to fight internally for a new idea or development and have faith in the team. Fundraisers weren't enamoured of the "Oh, that won't get through" attitude of some senior staff they had come across in the past.

The fundraisers were also looking for someone who could be **discerning** and is prepared to say 'no' when appropriate. They felt that **experience of fundraising** was vital, to be able to oversee such a diverse team – and show such perfect discernment!

## Breakthrough Breast Cancer

### *Who's the boss:*

**Director of Fundraising & Communications:** Peter Reynolds

**Length of service:** 6 years. Previously worked for the National Asthma Campaign.

**Responsibilities:** All aspects of Fundraising

**Size of department:** 40

**Voluntary income:** £15m

### *What the team say about him:*

Fundraisers feel that Peter really embodies Breakthrough and that people have a lot of **respect** for him. "If Breakthrough was a film, he'd be ideally cast", said one member of his team. He is described as a role model who **inspires confidence** and is calm and in control.

He is also very **approachable** and values everyone. He is also felt to be good at **promoting** people from within the department and giving them a chance – even if they haven't had the experience.

### *Where they excel:*

#### **The Boss' view:**

Peter sees Breakthrough's **Planning** process as a real strength, with two-year rolling plans and an ambitious agenda for growth. Focus is placed on new areas for investment and the process is designed to avoid the incremental approach to budgeting. There is real belief that the organisation still has huge potential to grow - but there is no point in being unrealistic.

Everyone is **involved** in the planning process with the aim of getting people thinking about how the targets can be delivered. "I have always believed in the power of **an effective team** to achieve excellent results".

In a charity renowned for its innovative fundraising, it is not surprising to hear that fundraisers are encouraged and supported in **implementing new initiatives**. "If you do what was agreed and it doesn't work, we don't blame, we learn from it." Income is doubling every three years and Peter has no reason to believe that this will change in the near future. He believes the key to success is to be able to **invest** in fundraising and his advice to fundraisers is to "work for a charity that really values fundraising".

#### **The Fundraisers' view:**

Breakthrough's fundraising management is considered to be incredibly good at **budget forecasting**, keeping costs low and **stringent evaluation** of projects.

Fundraisers feel **well informed** on progress and what's happening in the charity. There are lots of staff presentations and departmental meetings are held when they are needed. They feel **involved** and feel that their **opinions are sought and listened to**.

Weekly 1-1s are appreciated and **training** encouraged via personal development plans. Team meetings include a 'show and tell' section, encouraging people to learn from each other. Fundraisers believe that Breakthrough is good at giving people the chance to become managers, even if they haven't had the experience.

### *Areas for improvement:*

#### **The Boss' view:**

Peter feels that although informal communication is good at Breakthrough – better than in many organisations – some more structure would be helpful to improve **internal communications**. He has consciously kept fundraising teams small, as the overall department has grown, to help communication and to ensure that less high profile areas of fundraising don't lose out in the "inevitable prioritisation" that occurs within teams.

#### **The Fundraisers' view:**

Although fundraisers feel that Breakthrough is forward looking in its fundraising, they would like to be able to take even **more risks** with new projects – for example having more leeway on fundraising ratios.

They appreciate how busy everyone is, but sometimes feel that managers seem a bit removed from the 'shop-floor' and would like to see them 'mucking in' more often.

### *Aspects of management most important in leading a successful fundraising team:*

#### **The Boss' view:**

Leaders need to **inspire**. To bring the **ambition** and **belief** that you can achieve things together. They need to help people overcome the fear of failure and provide guidance when it's needed. Leaders need to assume the positive, rather than the negative, and work with their team to help everyone **learn** and develop. "People want to do the best they can".

There need to be **clear plans**, so that you can see where the risky areas are and manage accordingly.

#### **The Fundraisers' view:**

Leaders need to have faith in their staff – to **trust** them to do a good job – in contrast with "the control-freak types who want everything done their way".

**Transparency** and **inclusivity** are also key, seeking opinions and keeping people informed. Leaders need to be seen to be **fair** and to be calm in a crisis.

## Cancer Research UK

### *Who's the boss:*

**Co-executive Directors of Fundraising & Marketing:** Sarah Lyness and Richard Taylor

**Length of service:** Sarah: 9 years. Background in Marketing.  
Richard: 8 years. Background in Retail.

**Responsibilities:** All aspects of fundraising and marketing

**Size of department:** 400 fundraisers and 1200 retail staff.

**Voluntary income:** £338m

Sarah and Richard are joint leaders, providing two voices for fundraising and marketing on the board. They share a common vision for fundraising – as well as the culture needed to deliver the biggest fundraising targets in the sector. They bring complimentary skill sets to the task and split the management reporting within the department between them, playing to their respective strengths in terms of background and experience.

### *What the team say about them:*

Sarah is described as **committed** and **focussed** and always having value to add. She is also friendly, grounded and **approachable**. Fundraisers see her as **open** and **perceptive** and good to talk things through with. “She has come through the charity herself, so checking in with people comes naturally to her”.

Richard is described as **loud, lively and exuberant** with a lot of energy. He is **forward thinking** and conversations with him always seem to focus on the future. He is good with people – “He remembers everything you tell him, including personal details”. He is also a good orator, **engaging** and charismatic and knows how to work a room. “ He makes you laugh”.

They share a **passion** for what they do and that feeds into the culture.

### *Where they excel:*

**The Boss' view:** *(Sarah spoke for the leadership duo for this interview.)*

Sarah believes that the **culture** that has been developed at CRUK makes all the difference. It is supportive of individuals, but also ambitious, dares to try new things, is dynamic and passionate about the cause. The culture was not shaped by accident; the charity implemented a culture change programme and articulated an explicit set of behaviours for fundraisers to enable the team to become even more successful in the future. These behaviours are linked back to CRUK's organisational values.

CRUK are big on **people development**, believing that everyone has the right to be developed and this approach is managed through personal development plans. One of the planks of their approach is the Graduate Training Scheme which gets over 1000 applicants each year for the five places on offer. The programme lasts for two years and participants are guaranteed a job at the end of it.

Another plank is the Prospect fast-track development scheme that enables high flyers to get an additional level of training and development opportunities, including secondments and

mentoring. This is a charity-wide scheme and two of the current directors and a number of Heads of Department have come through it.

In recruiting new staff, they value talent more than experience and look for dynamic individuals with transferable skills.

The other area Sarah highlighted was **innovation**. CRUK take this very seriously investing in innovation training and setting up an Innovation Unit to think beyond the current areas of business. Each area of fundraising also has business development managers to develop new concepts.

### **The Fundraisers' view:**

The fundraisers talked about the various fora that help them to feel **involved** in what's going on at the charity. These included regular team meetings where they can share ideas and knowledge – and have the chance to input to wider issues. One of the teams is having a 'tea and cakes' afternoon and inviting others to drop by and find out what they're up to. Others have Awaydays and everyone is encouraged to get involved in CRUK's many events – as "a team-building thing". Sarah and Richard hold regular meetings with groups of six fundraisers at a time, to "take the temperature of what's going on", to chat and answer questions. Some managers have 'open-phone' afternoons. Staff are also encouraged to go on laboratory tours, to help them to keep **close to the cause**. All these activities help to make the fundraisers feel valued and listened to.

The other area mentioned was **innovation**. Fundraisers particularly appreciate the "Fresh Perspectives" programme – a series of talks from external speakers – ranging from a Mount Everest climber, to Vodafone's Marketing director, to a cancer survivor. They also valued the process by which anyone can put forward a new idea and bid for a 'grant' to trial it.

### **Areas for improvement:**

#### **The Boss' view:**

A prerequisite for innovation is being able to **allow people to fail**. Sarah feels that CRUK has not always been as good as it could be at this. They talk about the 'freedom to fail' a lot, but she feels that they need to 'walk the talk' more in this area.

#### **The Fundraisers' view:**

With a fundraising team this large, it is no surprise that **internal communication** was raised as the main area for improvement. The amount of information – particularly the volume of emails – was difficult to cope with. They receive staff bulletins, newsletters and have an intranet, but still find it difficult to keep in touch with colleagues, particularly those in the field. Individuals felt that had to be proactive to keep up-to-date.

### **Aspects of management most important in leading a successful fundraising team:**

#### **The Boss' view:**

Sarah believes that a leader needs to have a **vision** for the future – and be able to bring that to life for people.

They also need to be able to **create the environment** that enables the team to be successful. “Everything else falls from that”.

Sarah feels “incredibly proud of the staff that work in Fundraising and Marketing. They’re the ones that make it a great place to work”.

### **The Fundraisers’ view:**

The fundraisers are looking for a leader who is **approachable** and **listens** to their views. They want someone who has “**good energy**”, **passion and a real presence**. They also want **clarity** about vision and goals, as well as **reward and recognition** for a job well done.

## **Crisis**

### *Who’s the boss:*

**Director of Fundraising:** Chris Askew

**Length of service:** 3 years. Previously worked for NCH.

**Responsibilities:** All aspects of fundraising and database management

**Size of department:** 14

**Voluntary income:** £6m

### *What the team say about him:*

“One of the most **inspirational** managers I’ve ever worked for”. He **devolves** a lot of authority, while retaining overall responsibility. He is a **good communicator**, calling a quick 20 minute meeting to update the team when needed. “He knows what’s going on in the team and is very supportive”. He is described as “**authoritative, but subtle**”. You feel that you can express your views, that you are being treated like an adult. “He comes along to events and mucks in”. There is a lot of **mutual respect** in the team.

### *Where they excel:*

#### **The Boss’ view:**

Chris thinks that Crisis is particular good at **trailing new things**. The Crisis Christmas Pudding is a good example of this – as well as a new event – the Winter Walkabout. He feels that the **trustees are very supportive** of new fundraising initiatives and are prepared to invest in them.

Behind the scenes their **database set up** is very strong and a lot on innovative work is being done. They have a direct link from their website to Raizers Edge, making them very agile and able to respond quickly. They have also invested in sound **financial monitoring systems**, which help everyone in the organisation to feel confident in the accountability of the fundraising team.

### **The Fundraisers' view:**

**Innovation!** There is a culture of innovation, which has developed because new ideas are taken seriously – and invested in. Innovation is built into plans and targets.

**Decision-making is participatory** with clear ownership. Responsibility is devolved across the team.

**Communications** are felt to be good across the fundraising department, helped by monthly meetings where ideas are shared. The meeting is also a forum to bring an example of something that's going well – and ask for help on areas where its not.

**People development** is felt to be well structured compared to other charities. Personal Development Plans are reviewed regularly and the charity is going for Investors in People status. Individuals can work in project groups to help to broaden their experience.

### *Areas for improvement:*

#### **The Boss' view:**

As a relatively small charity, Chris feels that they could still do more to **help people develop**. The other side of the coin is that individuals can get a broader experience of different aspects of fundraising in a smaller organisation, because roles are less specialised.

He also feels that there is still more work to do in **integrating fundraising** with colleagues in other departments.

#### **The Fundraisers' view:**

**People Development.** Crisis attracts good people and is looking to improve how it helps develop its people more next year. Crisis sees training, learning and skills development as a way of getting people out of homelessness. It is looking to develop that model for staff too. This is viewed as a positive way of being able to 'live the brand' more internally. Others would also like more opportunities for external training – for which there can be budget constraints.

**Cross-team working.** Different departments can have **different priorities**. For example, it can be difficult to get support from Communications colleagues for fundraising initiatives. This is a situation that occurs in many charities, especially those that are growing fast.

### *Aspects of management most important in leading a successful fundraising team:*

#### **The Boss' view:**

In small team, Chris feels that it is particularly important to spend a lot of **time with the team**, doing the 'softer' side of management. "The interesting stuff happens outside of 1-1 meetings", he says.

He believes that fundraising directors need to be **'thought-leaders'** and act as **motors for change and innovation**. They also need to **represent fundraising upwards** – helping to build confidence in the fundraising department.

### **The Fundraisers' view:**

Helping everyone to understand **the impact that their work has on the cause**. This is felt to be really important for staff retention – and vital if fundraisers are to be able to enthuse others about their cause.

Giving staff the **freedom to be creative and take risks** – and allow time for the success to come through.

To **listen** to staff – taking on board comments and being prepared to make changes. eg. the director gave suggestions for a proposal, but left the team to decide the final format of the presentation.

## **Help The Hospices**

### *Who's the boss:*

**Director of Income Generation:** David Burland

**Length of service:** 7 years. Background in the Hospice movement.

**Responsibilities:** National fundraising that is complementary with local hospices' fundraising across the UK.

**Size of department:** 15

**Voluntary income:** £7m

### *What the team say about him:*

David is described as easy-going and good at spotting when something is wrong. "He's good at **listening** when you have a problem – and helping to sort out cock-ups!".

His extensive **knowledge** of the hospice movement is highly valued, as is his **decisiveness**. He is "good at doing the **strategy** stuff" too and makes sure everyone has a chance to input to it.

### *Where they excel:*

#### **The Boss' view:**

David describes Help The Hospices as having a very **positive culture**, as an organisation and as a department. There is **great support** from above for fundraising – including investment in new ideas. Fundraising also has **good relationships with Services**. They recently assigned a fundraiser to each aspect of services, to help to further develop relationships and understanding.

He recruits people based on their **energy and enthusiasm** – with new fundraisers not necessarily coming from a fundraising background. They use psychometric tests during recruitment, not for selection, but to better understand the people they are taking on. He also feels that they are good at **promoting from within**.

The department is not hierarchical, people can speak to anyone, anytime and **communications** across the team are pretty good.

#### **The Fundraisers' view:**

**Structures are flat** and there is “no massive chain of command”. People are **approachable** and there is a **positive** and **informal** environment, which is seen as really important. If you have a problem, you can get help to get it sorted. Everyone mucks in when things get busy.

“You are encouraged to **express your opinion**”, especially at team meetings where a real effort is made to vary the format and keep them fresh and useful. (eg. debating an article in the press.) Diversity is valued.

Everyone is **responsible** for their own projects and way of working and work times are flexible. “Everyone loves what they do and therefore do a good job, so we don't need anyone breathing down our necks”. Fundraisers say they feel trusted and therefore valued. Fundraisers also feel that they are **supported** in developing new skills.

#### *Areas for improvement:*

##### **The Boss' view:**

David is currently working on the department developing better skills and systems to **plan and manage their activities** – so that people are really clear about their responsibilities. For example, they have recently had training in financial processes and individuals are being given the responsibility for developing strategy for their own area of fundraising.

They are looking to become more strategic in terms of **training** and are exploring how they can link people development more closely with the appraisal process.

##### **The Fundraisers' view:**

**Communication and information sharing** within the department and other areas could still be better, especially as Fundraising is now split across two floors. But fundraisers are aware of needing to differentiate “what you *need* to know from what it is *nice* to know”. They have tried “Friendly Fridays” when you are not allowed to send an internal email and have to go and talk to colleagues.

One fundraiser complained about being kicked out of the building at 7pm, “which can be a problem when you're busy”!

They feel that things have really improved in terms of **responsibility** and being **involved** in strategy development, but some would like to see this go still further.

#### *Aspects of management most important in leading a successful fundraising team:*

##### **The Boss' view:**

David sees being **accessible, open and honest** as key. “When a decision is needed – take it; try to be **inclusive**, but if you can't be, explain what you are doing so that people can understand it”.

However, he believes that things work better when everyone can take their own decisions, within clear guidelines. This, he believes, gives a sense of **ownership**. While the boss has a particular role to play in a team, David believes that “everyone has a place in the ‘wall’ from the foundations to the top”. He also believes that “you can’t learn everything about management on a course, it takes time”.

### **The Fundraisers’ view:**

The fundraisers here appreciate **constructive feedback**, rather than a boss who re-does things themselves, so that they can learn. They also like someone who is **accessible** and **approachable** who is easy to talk to. (They feel that there are quite a lot of loud personalities in fundraising!)

They would want someone who is **a good fundraiser – and a good people manager too**. Someone who can provide clear **direction** on strategy – and asks for your views.

A good leader wants to be ‘kept in the loop’, but has real **faith** in their staff. They “keep you **informed** of changes. Even if you really don’t care it’s nice to be told”.

## **Kidney Research UK**

### *Who’s the boss:*

**Head of Community Fundraising:** Peter Storey

**Length of service:** 1 year. Previously worked for RNIB and in the corporate sector.

**Responsibilities:** Community fundraising and retail

**Size of department:** 54

**Voluntary income:** £5m

### *What the team say about him:*

Peter is seen as being very **forward thinking** and good at strategy development. He is very **approachable** and apparently has a wicked sense of humour! He was described as a ‘joy to work for’, very **supportive** and good at **listening**.

### *Where they excel:*

#### **The Boss’ view:**

Kidney Research is good at **developing people**. There is a structured approach, with a sizable budget available for a charity of their size. A broad view is taken of development – “its not just about training courses” and this is managed by HR and linked to the appraisal and review system. Project work is used as an opportunity for staff to use wider skills.

Fundraising is **held in high regard** internally. “It’s refreshing not to be seen as the vulgar end of the wonderful profession of providing Services”.

### **The Fundraisers' view:**

There is an **annual staff conference**, which explores all the key issues internally and encourages cross-team working. Charity researchers come in and present their work, to keep staff up-to-date – and put names to faces.

**Communications** are improving across the teams. An in-house newsletter is produced every two weeks, letting staff know what is going on in different areas.

### *Areas for improvement:*

#### **The Boss' view:**

Peter thinks that their biggest challenge is to **engage everyone with the strategic objectives** of the organisation. To think in terms of the overall fundraising objectives, rather than individual fundraising products. Whilst the organisation is quite well integrated, this could still be improved. Further change in attitudes and behaviours would help to reduce the **'silos'** and increase team working.

#### **The Fundraisers' view:**

They are getting better at **long-term planning and strategic development** – including integrating other departments in what they do. This has not been as strong as it could have been in the past.

**Career development** is seen as being difficult in a smaller charity and training courses can be expensive. When they do attend courses, fundraisers feel that they could be better at **sharing what they have learnt** with others.

### *Aspects of management most important in leading a successful fundraising team:*

#### **The Boss' view:**

**"Putting the supporter at the heart of what you do"** – and really understanding their motivations, not *assuming* you know what they are. The leader also has to take the lead in driving for **sustainable income** and understanding the importance of Lifetime Value.

They need the ability to "walk outside the shop, cross the road and look at it" - to see the organisation from the supporter's point of view. They also have a key role to play in keeping people **focussed** and not over-intellectualising fundraising. "Its pretty simple really".

#### **The Fundraisers' view:**

**Leading by example.** Someone who will listen and support you – and help to find solutions to problems.

Taking the **long-term strategic** view and **developing internal processes** that enable people to do their jobs more effectively.

## Macmillan Cancer Support

### *Who's the boss:*

**Director of Communications and Fundraising:** Judy Beard

**Length of service:** 8 years. A career in fundraising.

**Responsibilities:** All aspects of fundraising, communications & branding.

**Size of department:** 346

**Voluntary income:** £90m

### *What the team say about her:*

Judy is seen to be **approachable**, positive and have a '**can do**' attitude to everything she undertakes. She is very solutions orientated and always looks to find a positive solution to any challenge.

She is also seen as **fun** and **inspiring** to work with, **trusts** her team and "allows them to get on with it". It is appreciated that she is very personable and treats everyone the same way.

She "knows her stuff" and is "**authoritative** – in a good way!"

### *Where they excel:*

#### **The Boss' view:**

Judy feels that they have a team of very **motivated people**. They have created a "can-do" culture and recruit appropriate people into that. A **cross-department Fundraising Management Group** leads strategy development. They have worked together for many years and can be very open and frank with each other.

Judy feels that they have made huge strides in being able **work consistently across the UK** – so that the donor gets the same care whether they contact Macmillan in London, Cardiff or the Highlands of Scotland.

They take **innovation** very seriously and have recently appointed an Innovations Manager to act as a catalyst – or "help us to whirl around" as Judy aptly puts it.

#### **The Fundraisers' view:**

The level of **enthusiasm** for fundraising and the cause really helps. There is a real **customer service culture** that helps to get people coming back to support Macmillan again and again. Staff feel supported themselves with a **friendly** culture and good **training** opportunities.

**Project team working** with fundraisers across the UK is felt to be very good. Macmillan has got proficient at making sure that all the key stakeholders are involved in any new initiative. This has led to a lot more 'cross-charity buy-in' than is found in many charities. It has also helped to break down a lot of the old 'silo' culture.

One of the UK-wide fundraising teams has also taken time out to look at the **processes** behind what they do. This is particularly valued because everyone in the team is involved in a different aspect of the project, with the objective of constantly improving the way they work together.

**Revising the Fundraising Strategy.** This involved 100 fundraising staff in an Awayday, working together on what they wanted to achieve over the next 5 years. This was seen as particularly successful because it included an overnight stay - and having a good time together was part of the process!

### *Areas for improvement:*

#### **The Boss' view:**

Making **innovation** part of everything they do. Judy has a theory that the next big idea is already out there, happening on a small scale – its bigger potential just needs to be spotted.

The other challenge she sees is about **how you reward performance**. Personal success is more than just achieving targets – it's about good team working and spotting opportunities for colleagues. "If you want to make the donor experience seamless, fundraisers need to work in a seamless way too".

#### **The Fundraisers' view:**

**Innovation** came up first – with fundraisers looking forward to the new Innovations Manager post and feeling that Macmillan has been quite **risk-averse** in the past. "Sometimes you have got to jump on a fundraising bandwagon while it is still moving and not wait until everyone else has got on and left us standing."

In this large and geographically spread charity, **internal communication** was seen to be an area where they could still do better. It was felt that improvements had been made, but greater buy-in was needed from staff. There was also a feeling the decision-making needs to be quicker at times.

**Career development** was mentioned; in the context that fundraisers felt that some colleagues had left Macmillan "unnecessarily", and more could be done to help people to gain wider experience.

A less often spoken, but undoubtedly more widely held concern was expressed by a middle manager that "When a fundraiser does a good job, middle management and senior management praises them, but when **middle management** does a good job, it doesn't get recognised, let alone praised." Good management is not only hard to do – it is sometimes hard to recognise when it is being done well.

### *Aspects of management most important in leading a successful fundraising team:*

#### **The Boss' view:**

"**Alcohol and eating together**" are Judy's secret ingredients for successful management. "Getting people out of their roles and seeing people as people does more than anything else to build mutual respect". The Macmillan Fundraising Management Team always get together the night before a meeting, whenever they can.

### **The Fundraisers' view:**

Being **visible** and **hands-on** – so that you feel that you are part of the same team.

**Recognition** is also said to be important. “Its nice to know that your work is acknowledged ‘higher up’”.

Being **clear** about direction and objectives is key – providing the bigger picture.

## **NDCS**

### *Who's the boss:*

**Director of Fundraising & Communications:** Tobin Aldrich

**Length of service:** 4 months. Previously worked in other fundraising roles.

**Responsibilities:** All aspects of fundraising and communications, including branding.

**Size of department:** 30

**Voluntary income:** £11m

### *What the team say about him:*

The first thing that fundraisers said about Tobin is that he has a **great sense of humour!** They quickly added that they also feel he has great **vision** and has **big ambitions**. He is keen to expand NDCS's fundraising and they feel that he has the experience to take them into new areas.

### *Where they excel:*

#### **The Boss' view:**

Tobin feels that there is a good **collaborative working culture** within the department and good **communications**. He feels that they have a positive attitude to **innovation** and are not afraid to try new things.

The management structure is reasonably flat and **individuals are given responsibility** and are well supported.

#### **The Fundraisers' view:**

Fundraisers have the freedom to trial **new ideas** and are supported in taking risks. This approach makes them feel trusted and valued by the charity.

They also value **weekly 1-1s** with their managers, which enable them to keep up-to-date with what's going on in the organisation, but also have the chance to discuss progress and plans and build a strong relationship with their boss.

## *Areas for improvement:*

### **The Boss' view:**

Tobin is clear that a stronger framework is needed for NDCS's **strategic planning** and this is his first priority to address. The organisation has been opportunistic in the past, but now has the opportunity to get things on to a more strategic platform. He is developing a multi-year plan, providing priorities for investment and, of course, ambitious growth targets!

He also intends to foster more structured relationships between fundraising and other departments. There has been a **lack of understanding** of one another's roles. He is starting with an interactive approach to budget planning, with a "this is what we're thinking of doing" approach to build bridges.

### **The Fundraisers' view:**

**Cross-team working** – even within fundraising – was seen to be the priority area for improvement. The team is looking at different ways of working together to increase understanding of what others are doing.

## *Aspects of management most important in leading a successful fundraising team:*

### **The Boss' view:**

Tobin sees **securing the support** of the rest of the organisation as a key role for a fundraising director - ensuring that everyone from the trustees down understands what fundraising is all about. "Once that is done, everything else is much easier."

He sees management of the department itself in terms of ensuring everyone has **clear**, common goals; **empowering** fundraisers to deliver and creating the environment to enable them to succeed.

### **The Fundraisers' view:**

**Good communication** was seen to be key – including about the leader's personal goals. They valued bosses who mucked in and got **involved** with the team. They did not see any benefit in having a big gulf between staff and managers.

## Practical Action

### *Who's the boss:*

**Head of Public Fundraising:** Justine Williams

**Length of service:** 5 years. Previously worked for Action Aid and Plan.

**Responsibilities:** All aspects of fundraising

**Size of department:** 10

**Voluntary income:** £6m

### *What the team say about her:*

Justine is seen as bright and **knowledgeable** with the ability to help others to succeed. She is enthusiastic, friendly and **accessible**: "She always gives the impression of wanting to help when you walk through her door, even if she's feeling pressured". She was also seen to "fight Fundraising's corner" and to do so successfully.

### *Where they excel:*

#### **The Boss' view:**

Justine highlights the way in which **plans** are developed at Practical Action. All fundraisers are involved and they employ a specialist Data Analyst in the team to undertake extensive modelling of every activity. They agree detailed criteria with the trustees and report back on performance quarterly. This approach has helped them to earn the trustees confidence as well as increase their understanding of fundraising. When a project fails, the trustees understand why. Practical Action is target focussed and include key milestones in their plans.

Her small team work hard to be **creative** in their thinking and try to keep one step ahead of what's going on in fundraising generally.

#### **The Fundraisers' view:**

One of Practical Action's greatest assets is seen as its positive, "**no-blame**" **culture**. There is a flat management structure and good accessibility to all the senior staff, including the CEO.

Fundraisers feel that they have a lot of freedom to develop their own area – and **take risks** to achieve their objectives. They feel **listened to**, a good example being having the opportunity to revise income projections.

### *Areas for improvement:*

#### **The Boss' view:**

The biggest challenge for Justine is **communication between different departments**. Because Practical Action is an international charity, fundraisers are at a distance from their beneficiaries – and many of their colleagues. Despite her considerable experience in the development sector, getting hold of good fundraising stories across huge distances and

different time zones is her biggest frustration. For the same reason, it can also take a long time to resolve any issues that arise.

She would also like to see even better **integration** with colleagues in Communications to drive stronger joint campaigns.

#### **The Fundraisers' view:**

There is now seen to be a **stronger link between strategy and implementation**. This was seen as a relative weakness in the past.

#### ***Aspects of management most important in leading a successful fundraising team:***

##### **The Boss' view:**

Being **available**, open and honest is essential. As is providing **clear direction** and understanding of "what we're trying to achieve". People need clarity of responsibilities and levels of authority, so that they know when they can take a decision – or take a calculated risk – and when they can't.

**Prioritisation** is also key. "You can't follow all the ideas out there".

##### **The Fundraisers' view:**

Making the charity's mission **marketable**. It needs to be clear, convincing, emotive and believable.

It is also very important that a leader is **accessible** to their team.

## **Stroke Association**

### ***Who's the boss:***

**Director of Fundraising:** Derek Wyeth

**Length of service:** 8 years. Background in Fundraising.

**Responsibilities:** All aspects of fundraising, including database administration and telemarketing.

**Size of department:** 60

**Voluntary income:** £11m

### *What the team say about him:*

Fundraisers describe Derek as **supportive** – always having time to talk with them. He makes a point of **getting to know new staff** - which is particularly important with the department spread over two sites – in London and Northampton. They also appreciate the fact that he sits in on team meetings to get involved in the work going on.

### *Where they excel:*

#### **The Boss' view:**

Derek established a **Fundraising Management Team** that meets monthly to increase understanding of other teams roles and to take collective responsibility for delivering the fundraising strategy. The meetings take the form of a business session in the morning with an open forum in the afternoon, with a rotating chair.

He believes the key to a charity's success is "how well you can work together" – and developing mutual trust. They have just set up a "**Working Together Group**" involving representatives from different departments to facilitate new ways of working across the organisation. One of the areas they are looking at is how they can increase understanding between Fundraising and Community Services.

#### **The Fundraisers' view:**

Fundraisers appreciate the **friendly, open door policy** at the Stroke Association. They feel that senior staff are very approachable and **trust** people to do their jobs.

**Training and development** is provided for both personal (eg. assertiveness) and job related areas. They are encouraged to attend conferences and network with other fundraisers.

### *Areas for improvement:*

#### **The Boss' view:**

Derek feels that the **Fundraising Management Team** is still in its 'forming' stage as there are a lot of new people. He feels that they still need to do more to "make it real".

**Cross-departmental working** is an on-going area for improvement.

#### **The Fundraisers' view:**

Fundraisers would like to **understand more about "what everyone else does"**. They like to hear what's happening in other fundraising teams and are starting to use quarterly fundraising team meetings for this purpose.

The charities investment in personal development is appreciated, but in some of the smaller teams **career progression** is felt to be difficult.

## *Aspects of management most important in leading a successful fundraising team:*

### **The Boss' view:**

Derek believes that **vision** is key. Leaders need to provide the big picture that people can sign up to. From that vision, they need to develop an **effective working culture** that enables the team to deliver. He sees a culture of openness and trust as vital. People need to be able to say "I've made a mistake".

### **The Fundraisers' view:**

The fundraisers look to a leader for **support** and **acknowledgement** of work well done. They want their leader to **listen** to them, have faith in their ideas and for there to be **mutual trust**.

They feel that is important to have someone to learn from, especially when you're new, and to be given the **opportunity to develop**.

They want their leader to be **knowledgeable**, **decisive** and **clear** about what is required.

## **VSO**

### *Who's the boss:*

**Head of Fundraising:** Lucy Caldicott

**Length of service:** 2 years. Previously worked in the corporate sector.

**Responsibilities:** All aspects of fundraising

**Size of department:** 20

**Voluntary income:** £5m. Total income is £38m. Their strategy is to reduce their dependency on government funding.

### *What the team say about her:*

Lucy is seen as **enthusiastic**, **knowledgeable** and not afraid to change things if they're not working. She sits with the team, so **communications are very good**. She is seen as very **approachable** and pitches in with the team when needed.

It was also felt to be a good thing that there was a woman at the top!

### *Where they excel:*

#### **The Boss' view:**

Lucy takes an **inclusive** approach to strategy development, leading a bottom-up process that involved the whole team last year.

A lot of effort is being made to increase **team collaboration**, with a variety of non-financial measures assisting in this process. Events, for example, are used as a 'shop window' and an opportunity to recruit volunteers or life-long supporters as well as donations.

Lucy has been proactive in developing a **career structure** within the team to enable fundraisers to progress – and increase their pay. Within the corporate team for example, Job Descriptions are drafted at three grades. Even if someone on the highest grade leaves, a new recruit is brought in on the lowest level to give them room to develop – and more senior colleagues the opportunity to act as mentors. Lucy has the authority to promote individuals within this framework.

#### **The Fundraisers' view:**

The fundraisers feel that **team working** is very strong at VSO. Individuals feel confident about asking colleagues for ideas and comments and enjoy regular team meetings where their views are sought.

The **training and development** is good. There are a lot of internal courses and lunchtime seminars about VSO's work. Attendance at the National Fundraising Convention and **networking** with other charities is encouraged.

The recent restructure was cited as having been well handled. Although there was uncertainty at the time, the team has come through it stronger than before.

#### *Areas for improvement:*

##### **The Boss' view:**

Lucy would like to extend the progress made on team working to different departments. There is more **cross-departmental working** than in the past, but still a lot more that can be done.

##### **The Fundraisers' view:**

**Cross-departmental working** comes up again, with relationships with fulfilment teams, for example, mentioned.

Fundraisers are getting proactive to address this and taking the first steps in building relationships – and respect for their work - with colleagues in other areas. Fundraisers are becoming 'reps' for different aspects of VSO's work and attending relevant meetings in other departments to develop their understanding and build bridges. Individuals gravitate towards areas they are interested in, so it is a great motivator too.

#### *Aspects of management most important in leading a successful fundraising team:*

##### **The Boss' view:**

**Bringing people back to the bigger picture** is key for Lucy and also **collaboration**. "Two heads are better than one" – you get braver and more ambitious.

Lucy makes sure everybody in the team feels that " All money is equal. Whether its £100k or £1, it's all getting us closer to our target".

### **The Fundraisers' view:**

To be **approachable, inclusive, supportive and respect your views**. Facilitating and encouraging cross-team working is important and also being able to **give constructive feedback**. "Whether its positive – or to tell you where you've gone wrong". As with some of the other charities featured, these attributes were particularly valued by fundraisers who had worked for bosses who did not demonstrate them in the past...

## **The Woodland Trust**

### *Who's the boss:*

**Director of Fundraising:** Karl Mitchell

**Length of service:** 11 years. Previously worked as a chartered surveyor.

**Responsibilities:** All aspects of fundraising

**Size of department:** 35

**Voluntary income:** £20m

### *What the team say about him:*

Karl is described as **down-to-earth, thoughtful and insightful**. He is considered in his approach and his advice is highly valued. He is a **good communicator** – with both staff and funders and is **passionate** about the Woodland Trust's cause. He has extensive knowledge of the sector and is considered to be very **approachable** and helpful to members of the team.

### *Where they excel:*

#### **The Boss' view:**

**Managing and developing people** are seen to be real strengths at the Woodland Trust. They have lots on internal promotions and secondments to other departments. They have a **flexible culture** and work to accommodate individuals' needs alongside the business needs. Team members are given a lot of freedom within a clear strategic framework.

In terms of performance management they are increasingly focussing on **skills and behaviours**, rather than results and outputs. When they have a success, they look at how it was achieved and what they can learn from that for the future. "Where did individuals really make a difference" – versus what was just down to luck? They are currently refreshing their appraisal process to tie in with this approach.

#### **The Fundraisers' view:**

**Communication** within the department is very good – including with people who work remotely from the office. There are good opportunities for internal and external **training**.

Ways of working are very **flexible**, encouraging colleagues to help each other out or set up a new project team to work on a new initiative. The Trust has really embraced **home-working**

and fundraisers feel that this enables them to achieve a lot more. Despite the flexibility, fundraisers are clear about their colleague's roles and responsibilities.

### *Areas for improvement:*

#### **The Boss' view:**

Karl feels that they could still be better at **measuring performance** - particularly the non-financial aspects, eg. the awareness raising value of corporate promotions. It shouldn't just be about ROIs.

Although **cross-team working** is quite good at the Woodland Trust, there are still barriers between some areas. He would like everyone to think more about what's important for the organisation as a whole – and have clear organisational targets.

#### **The Fundraisers' view:**

The whole department only meets as a whole once a year and some fundraisers feel that more **coordination** between teams could help them to be more effective, especially the home-based workers.

Like most fundraisers, some staff feel that their **workloads** get very stretched at times and they could do with more help in dealing with these situations when they arise.

### *Aspects of management most important in leading a successful fundraising team:*

#### **The Boss' view:**

Karl believes that **good people management** is an essential skill. Genuinely valuing people and their contribution is key.

The other vital role is to be able to **clarify what the needs of the charity** are, on the one hand; and **what motivates funders**, on the other; and put the two together. They need to encourage the organisation to be flexible and make the most of the funding opportunities that are out there.

#### **The Fundraisers' view:**

Being there – and being **approachable** is the most important thing. As well as being **open to new ideas**. Having the **flexibility** to be able to act quickly is vital – and then having the **support** of colleagues and other departments/regions to follow through.

Being able to **lead a diverse mix of people** is thought to be important too, not just a team of fundraising clones.

## WWF

### *Who's the boss:*

Director of Supporter Relationship Management: Nicky Bishop

Length of service: 6 years. Previously worked in the corporate sector.

Responsibilities: All aspects of relationships with supporters: product management, sales, customer service, marketing analysis, customer care, and the database for whole organisation.

Size of department: 70+

Voluntary income: £35m

### *What the team say about her:*

The team particularly value Nicky's **passion** and **belief**. "If she believes in something she can persuade anyone". They also feel that she has a "huge amount of **emotional intelligence**" – and the ability to make people feel **valued**. She is described as a good leader and very **focussed**. She has great **vision** and is good at bringing back ideas from outside the organisation. She's good at keeping everyone **informed** and being clear about what she needs from people. She is always **approachable**, if you need to talk to her.

### *Where they excel:*

#### **The Boss' view:**

Nicky believes that the WWF's **customer focus** is its biggest plus point. Two years ago WWF restructured to follow what is broadly a commercial sector model. This makes WWF's fundraising and communications structures very different from most charities. Their new set-up is organised in such a way that integrated working is essential. They split 'sales' teams from 'product' teams, so that cross-team working is a necessity to get any new initiative out of the door. They also have a Product Development Team that works across the department. This team's job is to work at improving existing fundraising and campaigning products, as well being responsible for developing new ones. The team members are expert at understanding their audiences – as well as what the competition are up to. They are not, however, responsible for 'selling' the products they work on.

Nicky is responsible for all fundraising and campaigning for WWF – so **all of these targets are within her remit**. This means that once priorities are agreed with the trustees and other directors, Nicky's team have the responsibility of delivering them.

They have an **in-house database** - which is also seen as an asset - and some of the IT staff work in the Supporter Relations department.

It is clear that at WWF 'how' things get done is seen as just as critical to success as 'what' gets done.

#### **The Fundraisers' view:**

The fact that **plans and targets are shared** across teams – including support functions – is seen as very positive. Everyone knows where they fit in and there are consequently less conflicts between teams. The thorough research and preparation that was done before the

structure change two years ago was appreciated – as was the fact that the **change was very well managed**.

**Strategy is developed inclusively** so it feels relevant and motivating to staff. The process also includes getting input from colleagues in other departments, agencies and trustees in a 'highly dynamic process'. Targets are **clear** and quarterly reviews of the annual plan enable **changes** to be made when necessary. The use of management information, such as **Key Performance Indicators**, to guide decision-making is very useful - giving an early warning signal of changes ahead.

**Internal communication** is strong, including regular talks about what is going on in the wider WWF network.

The **training and development** opportunities are appreciated and there is good access to courses such as personal effectiveness and management development.

### *Areas for improvement:*

#### **The Boss' view:**

Despite the changes, Nicky's top concern is **cross-team working** within the new shape division. To be successful it is essential that the 'baton-passing' between teams is spot on. This still needs to work better.

Also Nicky feels that the team still tend **take on too much** – a cultural issue many charities face. For WWF restructuring the department at the same time as transferring to a new database was tough. With hindsight, she wouldn't have done it all at once.

#### **The Fundraisers' view:**

**Integrated planning** – the department can't do anything without cross-team working across the four teams, so this is critical. Since the restructure, responsibilities haven't always been as clear as they could be and there is sometimes a lack of ownership. Things can fall between the gaps. Staff need to be empowered to resolve these issues when they arise - and it is felt that some managers need to delegate more.

There is felt to be a **shortage of implementers and completer-finishers** in the department – individuals who will ensure that WWF get the best out of projects before moving on to the next idea. This situation is not unusual in a fundraising department! One suggestion was that there should be a Deputy Director appointed to be responsible for day-to-day operational management and issue resolution.

***Aspects of management most important in leading a successful fundraising team:***

**The Boss' view:**

**Setting the direction** – with clarity and belief – and **facilitating** others to ensure that it happens.

**The Fundraisers' view:**

Having **empathy** with staff and making them feel important is vital. It's not about "taking all the glory". Being yourself is important – **being authentic and open** about your own strengths and weaknesses. **Listening** is a key skill.

Setting **clear, achievable targets** and **empowering** people to achieve them. Having a framework and boundaries are important.

Being **innovative** in strategy – not just responding to what others are doing.

## About Frances Hurst

Frances learned a lot about management – good and bad - in the corporate world during the 80's, but in 1991 she made the move to the voluntary sector and she has never looked back. Throughout the 90's she worked as Director of Marketing at the RSPB, where she led the development and delivery of all aspects of fundraising and brand strategy. It was at the RSPB that she honed her organisational development skills. She became well known in the sector for the introduction of innovative departmental structures and working practices, including self-managed and audience-focused teams. The changes introduced enabled the RSPB to double its income to £50m and recruit its one-millionth member.

She now works in the voluntary sector as an independent charity consultant. She is passionate about helping charities work more effectively with their people - as teams, departments or whole organisations - and speaks regularly at international conferences on the subject. She specialises in people management and organisational effectiveness, including areas such as staff satisfaction and retention and improving cross-departmental working.

Her clients include UNICEF UK, Macmillan Cancer Support, The Bat Conservation Trust and Breakthrough Breast Cancer, as well as smaller community based organisations.

She conducts research within the UK voluntary sector to publicise and celebrate good management practice. This includes the recent "Top Charities to Work For" survey. This research work provides her with a wide perspective on the management practices and ways of working in some of the UK's most successful charities. She also continues to keep up to date with all the latest developments in management and organisational development in the corporate sector.

### In summary her main areas of expertise are:

- **Organisational effectiveness** – reviews, strategy, new ways of working, restructures, vision & values, integrated working, change management
- **Staff satisfaction & retention** – talent management strategies, confidential on-line staff surveys, benchmarked findings and recommendations
- **Team building** – executive teams, departments, work groups, cross-team working
- **Leadership development** – management and personal effectiveness training, coaching, mentoring
- **Internal communications** – audits, strategy, implementation
- **Fundraising strategy** – audits, research and potential assessment

**Frances Hurst**  
Charity consultant and researcher

*Helping charities work more effectively with their people*

01707 882958

07906 273949

[frances@franceshurst.com](mailto:frances@franceshurst.com)

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