



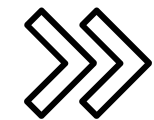
Giving Architects | 2024

Driving positive change for people, planet & place

Fundraising Development Services Overview

givingarchitects.com





Giving Architects design sound solutions based on international best practice, significant local awareness and the unique opportunities associated with each client.

We focus on solutions that deliver significant giving and investment for great causes to drive positive change for people, planet and place. Built on decades of combined experience, Giving Architects understands the needs, nuances, unique characteristics and cultural aspects of philanthropy and impact investment in New Zealand and Australia.

We have the knowledge and experience you need to achieve your mission in a world that is now, very different. We work with a wide range of organisations – different sizes, scope, sectors and purpose. We take the time to fully understand and appreciate your unique situation so that we can provide a solution that will work. We offer a wide range of services for the for-purpose sector and also design and facilitate impact investments.

We specialise in:

- *Capital Campaigns*
- *Fundraising strategy development*
- *Major donor programmes*
- *Gifts in Wills programmes*
- *Digital strategy development*
- *Healthcare philanthropy*
- *Education advancement*
- *Impact investment*



Our team

What sets us apart is our team of passionate problem solvers and innovators. We are committed, responsible and flexible. With decades of experience between us, we boast top fundraising talent in New Zealand and Australia. With us in your team, you'll have the confidence needed to think big and succeed.

We understand your mission is unique. And that's why we don't have a one-size-fits-all way of working. With our tailor-made solutions and proven track record, you can trust us to deliver. Whether you need a high-level strategic view or hands-on delivery, we'll commit to seeing your project through to fruition.



Clive Pedley CFRE FFINZ
Director and Chief Executive | Giving Architects

A thought leader and advisor continuing to raise tens of millions of dollars for great causes. Specialises in designing innovative philanthropy and impact investment models that enable money and purpose to work together.



Robert Brooke BSR Bsc. (Hons)
Senior Consultant | Giving Architects

Robert brings in a wealth of fundraising experience from offshore and New Zealand and has been involved in the educational advancement space since 2016 as a Development Manager at King's College. Prior to that he managed numerous functions including; marketing, sponsorships, membership and subscription management and has extensive event experience including Super Rugby, Test Matches, Rugby World Cup 2011 and Motor Sport Hall of Fame in the United Kingdom.



Jon McQueen MFINZ
Senior Consultant | Giving Architects

Jon has proven success in fundraising, sponsorship, sales and marketing in the United Kingdom, Europe and New Zealand. He was previously in a fundraising role which was integral to the growth and sustainability of Land Search and Rescue and was part of a number of high profile fundraising projects, including leading Strategic Fundraising for Experience Wellington and successfully leading a Capital Campaign at the British High Commission in Wellington.



Raewynne Jacobs
Consultant | Giving Architects

Raewynne, a proud New Zealander from Ngāti Tuwharetoa, brings extensive experience in philanthropic management to our team. She has worked in both government and community-based sectors, excelling in relationship development, stakeholder management, and community engagement. With a proven track record in supporting rural and urban communities, she joins the Giving Architects team to further her commitment to diverse and multicultural communities. Raewynne holds degrees in Business Studies (Accounting) and Arts (Sociology).



Marie De Silva MBus MBA ACIM
Marketing & Operations Manager | Giving Architects

Having transitioned to the social purpose sector after extensive experience in corporates, Marie brings a plethora of skills in leveraging digital presence and optimising digital outcomes for social purpose organisations keeping in mind the unique ecosystem in which they operate.



Carly Robertson
Copywriting Specialist | Giving Architects

With more than 10 years of experience working for leading charities in New Zealand and the United Kingdom, Carly knows what makes donors tick. Her background lies in event fundraising and marketing, but she also has experience in corporate sponsorship and community fundraising. Carly is Giving Architect's go-to copywriter, specialising in developing compelling and donor-centric Case for Support documents.



Leigh Cleave MBA CFRE FFIA
Senior Associate | Giving Architects Australia

Dynamic in working with purpose driven organisations to build healthy and sustainable futures covering all aspects of fundraising across healthcare, medical research, international development, faith-based and community welfare sectors.



Stephanie Wise B.Des, Dip, MFIA
Associate | Giving Architects Australia

Stephanie is a passionate fundraiser with over 10 years of experience in events and fundraising across the not-for-profit and arts sectors. She has developed skills in events and project management, community fundraising, philanthropy, appeals, volunteer management, digital fundraising, registration, and ticketing platforms.



Bridget Brown BSc, BA, GradCertBus
Associate | Giving Architects Australia

Bridget is a communications professional who has worked for hospitals and not-for-profit organisations in the areas of communications, marketing, event management, project coordination and public relations in Australia and the United Kingdom. She has worked as a consultant for clients in the healthcare sector, the arts and community organisations.



Nigel Harris MBA CFRE FFIA GAICD
Strategic Counsel | Giving Architects Australia

A Highly regarded non-profit sector leader specialising in philanthropy and effective fundraising. An outstanding track record in organisational growth and development with a unique range of experiences and insights in governance, executive leadership and applied fundraising practice.



» Giving Architects has worked with many iconic charities over the years on transformational projects to grow their revenue.

A few of our clients include ChildFund NZ, Salvation Army of New Zealand, St John New Zealand, Spectrum Foundation, First Foundation, King's College, Mercy Ships, Foundation North, Liston College, Dilworth School, New Zealand Breast Cancer Foundation, Starship Foundation, Auckland Grammar School, Catwalk Trust, Ronald McDonald House Charities, Cystic Fibrosis New Zealand, Coastguard New Zealand, Community Energy Network, Kohatu Park Trust, Waikato Rugby Union, Hawke's Bay Community Health and Sport Centre, Christian Broadcasting Association, Tawa Anglican Church, Rhema Broadcasting Group and MOTAT.

Organisations our consultants have worked with prior to the establishment of Giving Architects include SPCA Auckland, Blind Foundation, Heart Foundation, Wellington Philharmonic Orchestra, Heritage New Zealand, New Zealand Symphony Orchestra, Hillary Institute of International Leadership, Cancer Society Central Districts, UNICEF, Rathkeale College, Scott's College, Canterbury West Coast Air Rescue Trust, Massey University Foundation, Wintec Foundation and Hereworth School.

The Giving Architects Experience

Hear it from our clients...



Parenting Place



The Selwyn Foundation



The Spectrum Foundation





»» Our 5 D approach

Giving Architects are highly renowned fundraising experts and advisors. we're passionate about helping organisations like yours make a lasting impact. Our tailored solutions, tried and true methods, and an unwavering commitment to your success, will help increase the capacity and capability of your fundraising efforts.

Our team have been involved in successful capital campaigns, major donor, gift and wills and general fundraising development since 2000. Giving Architects has established core fundraising strengths, expertise and significant experience that have increased with the development of a highly skilled team. Our approach to engaging and delivery of services involves 5 stages:

01

DISCOVERY

We begin by getting to know each other. Our goal is to understand your unique mission and where you aspire to be. Through open and candid discussions, we'll uncover the problem you need to solve.

02

DEEP-DIVE

During this stage, we engage in meaningful discussions with you and your wider community. By going deeper into your pain points, we determine the right solution tailored to your specific needs. Your input is invaluable as we craft a strategy that aligns with your vision.

03

DEVELOPMENT

Next, we leverage the expertise and experience of our team and your unique knowledge to develop a bespoke solution. By combining innovative ideas and best practice, we'll design a well-considered strategy that will maximise your impact.

04

DELIVERY

Once the approach has been agreed upon, our solution is delivered. From comprehensive reports of our findings to detailed strategic and implementation plans, we'll guide you through every step of the process.

05

DRIVE FORWARD

Our commitment doesn't end with the delivery. Many clients choose to keep us on board as advisors to drive their projects forward for maximum impact.

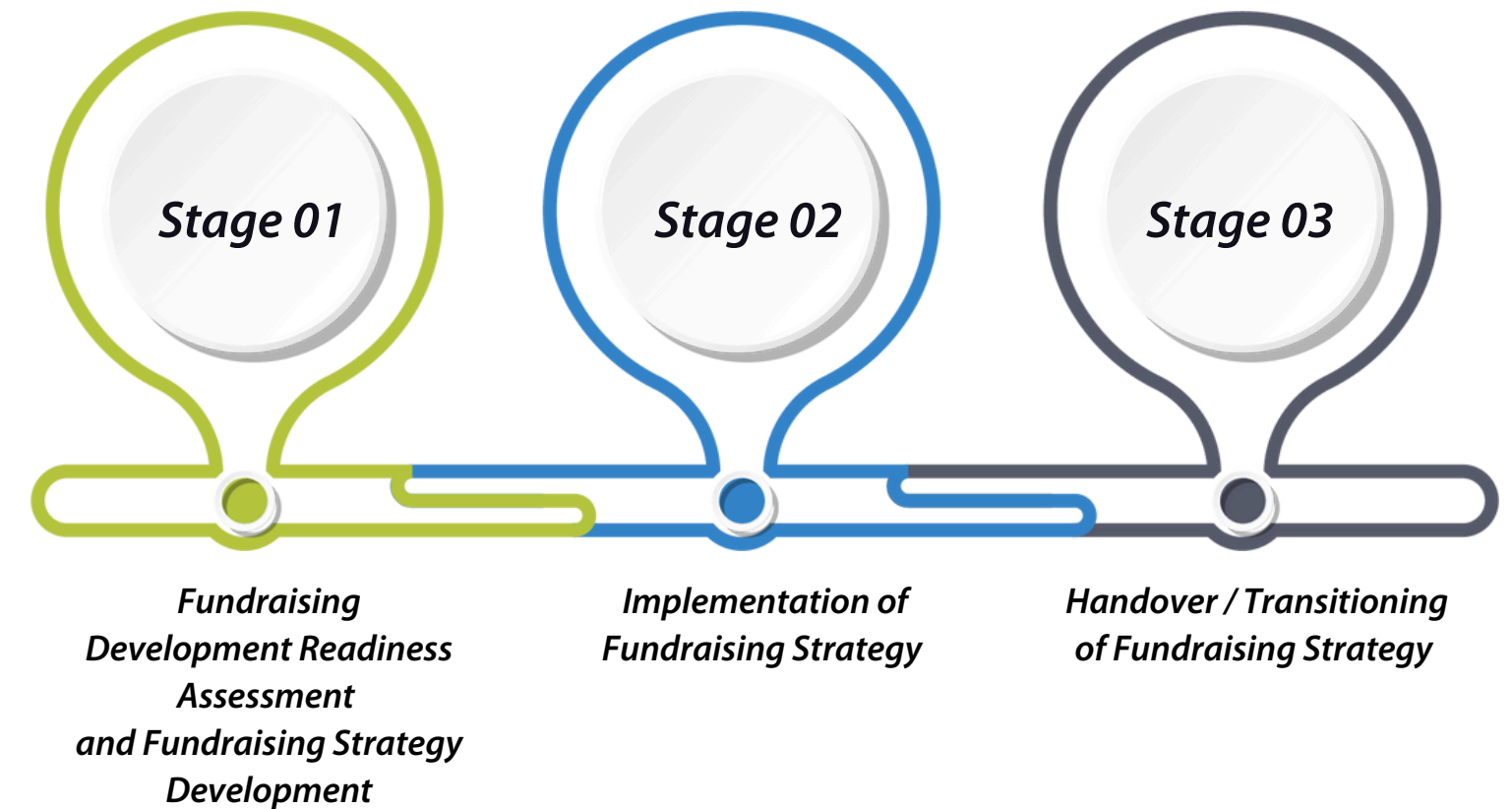


»» Fundraising Assessment & Implementation

Great fundraising outcomes are based on establishing a culture of philanthropy. This culture is based on asking with pride, great donor care and making a demonstrable difference in the lives of the people you help.

The Fundraising Development Programme offered by Giving Architects is designed in three stages. Stage 01 involves a thorough Fundraising Development Readiness Assessment and development of a bespoke fundraising strategy for the organisation and stage 02 and 03 primarily involves the implementation of the developed strategy.

We will consider all of the available channels and opportunities including individual giving, corporates, trusts and foundations, community and events. The intended outcome of this assessment and implementation process is an informed and manageable fundraising growth strategy with a focus on medium to long-term outcomes.





Stage 01

Fundraising Development Readiness Assessment and Fundraising Strategy Development

The objectives

- To directly and personally engage with key stakeholders during personal interviews. Those interviewed should represent the primary audience that could financially assist to achieve effective fundraising or inform that strategy.
- To test a prepared draft Case for Support with those who are engaged and assess their response to the key messages presented. It is important to understand views and opinions about them as well as the proposed fundraising objectives.
- To identify and assess the most likely sources of support, keeping in mind the scale of giving required to achieve reasonable fundraising objectives.
- To identify and assess additional sources of influence that can directly support and would positively and proactively support the fundraising programme.
- Based on these findings and other information made available, make sound recommendations and present an informed fundraising strategy with a draft three-year fundraising programme.

What you can expect - Outcomes

- Due diligence for both Boards and senior leadership, resulting in any decisions about commitments to fundraising being based on a professional analysis and best-practice.
- An informed strategy will be presented that will include estimated costs for different fundraising options i.e. key roles, contract options, prioritised appointments and any additional resourcing requirements to support the recommended programme.
- The organisation will receive an independent third-party report on the views and opinions of the engaged audience. Straightforward questions and answers will be analysed and presented to reflect the comments shared, reflecting the sentiment and perception that exists amongst key stakeholders.
- Key stakeholders become better informed and prospective donors who are inclined to support the organisation and fundraising objectives will be enthused, having been given an opportunity to indicate their support for the intended impact.
- The types of roles and responsibilities additional influential volunteers are prepared to take on will have been qualified.
- Evaluation of the opportunities for partnerships with aligned organisations and businesses.
- Evaluation of the fundraising-related data and the giving history of the organisation.



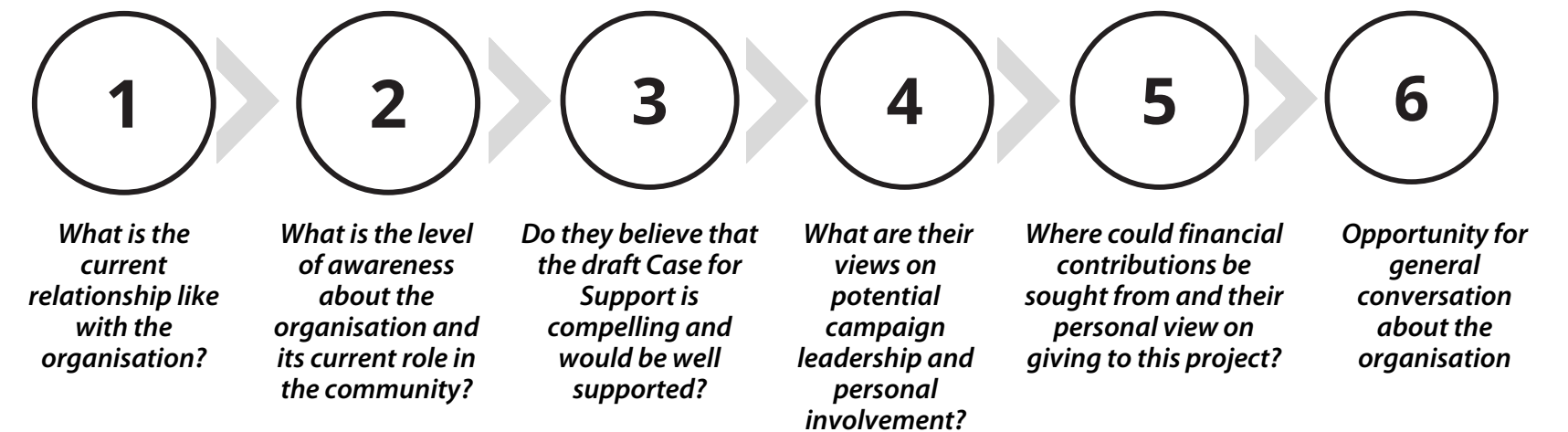
Stage 01 contd...

The process for identifying and engaging stakeholders for fundraising development involves:

- Considering previous donors who, if suitably informed and engaged, may have the inclination to make further financial contributions to support the organisation.
- Considering significant community stakeholders and influencers.
- Considering individuals and organisations that could be involved in funding or grant-making decisions to support the project.
- Influential leaders in the wider community.
- Develop the list to 35- 40 names with addresses and contact details, prioritising the top 20 for initial approaches. If some of those initially approached decline or are unavailable, the remainder can be approached.
- A personal letter is sent from the organisation asking for advice and opinion to assist with important strategic decisions required to raise significant funds for the proposed project.
- A personal phone call from the organisation follows, asking if they have received the letter, whether they are prepared to be involved and their preferred contact details.
- Those who have agreed then have their details provided to Giving Architects who make contact to arrange a convenient date, time and location for a 45-minute interview.
- Send the draft Case for Support document once an interview time has been secured so they can consider the base information available about the proposed project.

The interview process is as follows:

The interview has a set of questions which provide an effective conversation guideline. In essence, they seek to understand the below for the project:





Stage 02

Implementation of Fundraising Strategy

An informed and effective fundraising strategy is only helpful if implemented well.

Giving Architects will work to determine a manageable process. This strategy will be designed to have the right capability and capacity in place to manage the recommended fundraising programmes. This will involve everyone in the organisation, each understanding their unique roles and responsibilities for supporting great fundraising outcomes. Often the implementation process will involve the recruitment, onboarding and supporting of any key new roles in the organisation. It will also involve helping new and existing volunteers, and advocates understand new roles that support great fundraising outcomes. All of this works towards achieving independence for the day to day management of the prescribed fundraising programme within six to nine months.

Relevant financial and non-financial key performance indicators for core fundraising roles being well informed and understood within the organisation is another key feature of the implementation process. These are typically process driven, rather than focused on financial outcomes. When involved in the implementation stage of a new or improved fundraising strategy, Giving Architects' role is very active on a week by week process. We sit alongside key staff, volunteers and advocates to ensure there is a sound understanding of the fundraising programme and how it will evolve to achieve the intended levels of success. Giving Architects have a wealth of experience in managing these relationships and outcomes, becoming a crucial part of the fundraising infrastructure for a period of time.

Commitment to a fully costed implementation schedule of work will only be required once the initial assessment and delivery of an informed strategy have been done, considered and approved. Upon completion of Stage 01 Giving Architects will be able to provide an informed and costed approach for the implementation of the future stage(s).



Stage 02 contd...

Implementation of Fundraising Strategy

Objectives

- Implement the fundraising programme, subject to feedback and associated amendments from Stage 01.
- Manage the early stage fundraising activities, including major donor, gift in will, event, donor acquisition, direct mail, trust funding and donor care activities, supported by effective marketing and communication.
- Develop and recruit key roles that will support sustainable growth of revenue through the fundraising programme.
- Identify and focus on early win opportunities that demonstrate the effective nature of the implemented strategies.

What you can expect - Outcomes

- Providing ongoing management and leadership during the implementation of the agreed fundraising strategy.
- Establishing systems, processes and policies that will support effective fundraising at the organisation.
- Implementing initial fundraising activities, including donor acquisition, supporting events, trust funding and donor care activities. Also, consider an early focus on those that were identified in Stage 01 as presenting opportunities for positive early fundraising outcomes.
- Implementing an effective engagement with potential donors and their advisors.
- Identify effective roles for volunteers to support fundraising outcomes.
- The initial appointment/s of fundraising staff to manage and develop the fundraising strategy.



Stage 03

Handover / Transitioning of Fundraising Strategy

Objectives

- Ensure recruited personnel are equipped, informed and supported to take full charge of their roles through the scheduled reduction of direct involvement by Giving Architects.
- Conduct a full handover.

What you can expect - Outcomes

- Transition towards effectively handing over full management of the fundraising programme to the appointed staff and volunteers, ensuring any knowledge or skills gaps are supported.
- Training and support for key fundraising roles.
- Implementing a framework for the effective evaluation of the fundraising programme and those who manage that work.



»» Training & Development

Additionally, the team at Giving Architects has been providing a range of training solutions to the for-purpose sector for many years, ranging from large group settings and workshops at various conferences and summits, multi-day in house training for not for profit clients and bespoke single issue/opportunity training sessions for small groups and individuals. A wide range of topics and issues related to effective fundraising are covered.

Our team would consider the requirements in the short and long-term and the skills, experience and expertise needed and plan to provide a practical and insightful solution to the team.

We will focus on up-skilling the current team members whose roles impact fundraising outcomes to strengthen the current revenue generation streams and provide guidance on exploring new revenue streams. We will hold an initial briefing with the team to discuss training needs and opportunities and then refine the training plan further.

Key deliverables may include:

- Identifying key skill gaps within the team and develop a customised training approach based on the organisation's specific needs and goals.
- Conducting an interactive training session covering various fundraising topics, including the role of leadership, donor stewardship, relationship building, fundraising channels and techniques, and capital campaign management.
- Sharing industry best practices and emerging trends in data management, analysis, and utilisation for effective fundraising.
- Providing practical tips and techniques for data cleansing, segmentation, personalisation, and data-driven decision-making.
- Discussing strategies for integrating online and offline data to create a unified view of donors.
- Providing tailored recommendations based on the organisation's data infrastructure and requirements.
- Facilitating Q&A sessions and offer personalised guidance to address the organisation's specific challenges



»» Digital Strategy Development & Advisory Services

The team at Giving Architects bring together a unique blend of expertise from both the fundraising and digital spheres. Led by this expertise, Giving Architects will first conduct a digital audit on the current digital channels and platforms to analyse its current position and will then develop a strategy to achieve the above objectives. The recommendations made will include short and long-term actions.

The overall objectives of the digital work by Giving Architects include:

- Gain a thorough understanding of the current digital strengths and tools available, which can be leveraged to achieve fundraising goals through an effective digital strategy in both the short and the long term.
- Optimising engagement with the organisation's digital audience and creating awareness around its mission to create a better platform for digital fundraising.
- Leveraging the regular giving programme and individual fundraising campaigns by increasing digital acquisitions and conversions to support the achievement of the fundraising goals of the organisation.
- Building strong online advocacy for the organisation and creating a digital community for the organisation which would then encourage and inspire their wider network to get involved in its mission.



»» Digital Strategy Development & Advisory Services

The overall approach, as mentioned previously, will entail two phases: the first will be the digital audit, and the second phase will be the development of strategy / strategic recommendations for the organisation.

Phase 1

Digital Presence Analysis / Digital Audit

- Website and Google Analytics detailed review on traffic to the site.
- Overview of audience behaviours and key metrics analysis.
- Social media analysis - including primary and secondary digital target audiences, digital visibility and engagement review.
- Analysis of EDM Strategy and execution at present and engagement rates.
- Preparation and delivery of a report on recommendations.



Phase 2

Strategy Development

Based on the feedback and discussion on Phase 1's findings and the organisation's objectives, Giving Architects will provide a short—to medium-term set of recommendations on how the organisation can leverage digital as a fundraising channel. This will include recommendations on paid and organic efforts and the approach to take for long-term sustainable revenue generation through effective digital channels. The strategy will also offer guidance to the team on how the effectiveness of digital efforts can be measured through a robust and regular reporting and measurement process.



Your trusted advisors, partnering with your mission to design and deliver effective fundraising strategies

Driving positive change for people, planet and place

Get in touch with us today at:

www.givingarchitects.com