

ENGLISH
HERITAGE

SOS – Save Our Sanity

How to save time, resource & money

Today:

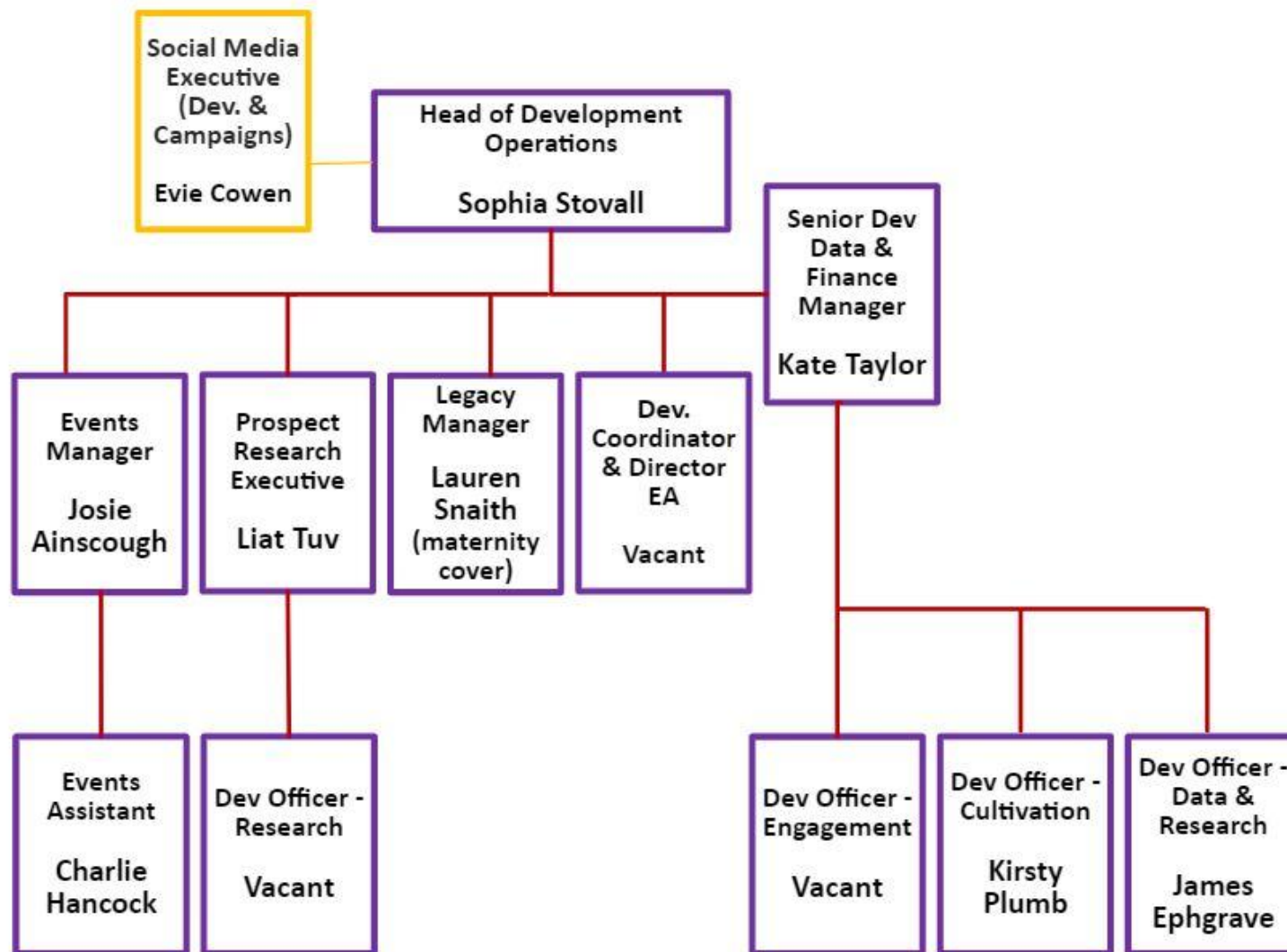
- Development Operations
- Process Mapping
- Data & Performance
- Action Tracking & Planning
- Budget & Resource Review
- What I have learned



What is Development Operations?

- Budgeting & Financial Planning
- Business Planning
- Stewardship & Cultivation
- Resource Management
- Profile & Professional Development
- Data Management & GDPR
- Marketing & Communication
- Software implementation & training
- Project Management & Reporting
- Appeals & Campaigns
- Prospect Research & Due Diligence
- Policies & Procedures
- Department Coordination
- Legacy Administration
- Department Co-ordination





Why invest in Development Operations?

Supporters notice details linked to good administration – providing a better donor journey.

Increased donor trust = increased fundraised income.

- Bolsters institutional knowledge
- Enable your team to have the tools they need to be successful
- Enable the identification, cultivation, solicitation, and stewardship – the four key phases of the fundraising cycle – to operate smoothly, consistently, and reliably.
- Deliver accurate Financial planning & reconciliation
- Better decision making based on strong data
- Supports effective long-term planning
- Data analysis & scrutiny
- Mechanisms to deliver successful fundraising



The Importance of Process

A manual will specify and clarify the expectations of the department's work and covers everything from the big things like the timeliness of your gift processing, to the minute details of data entry.

Types of Process & Protocols

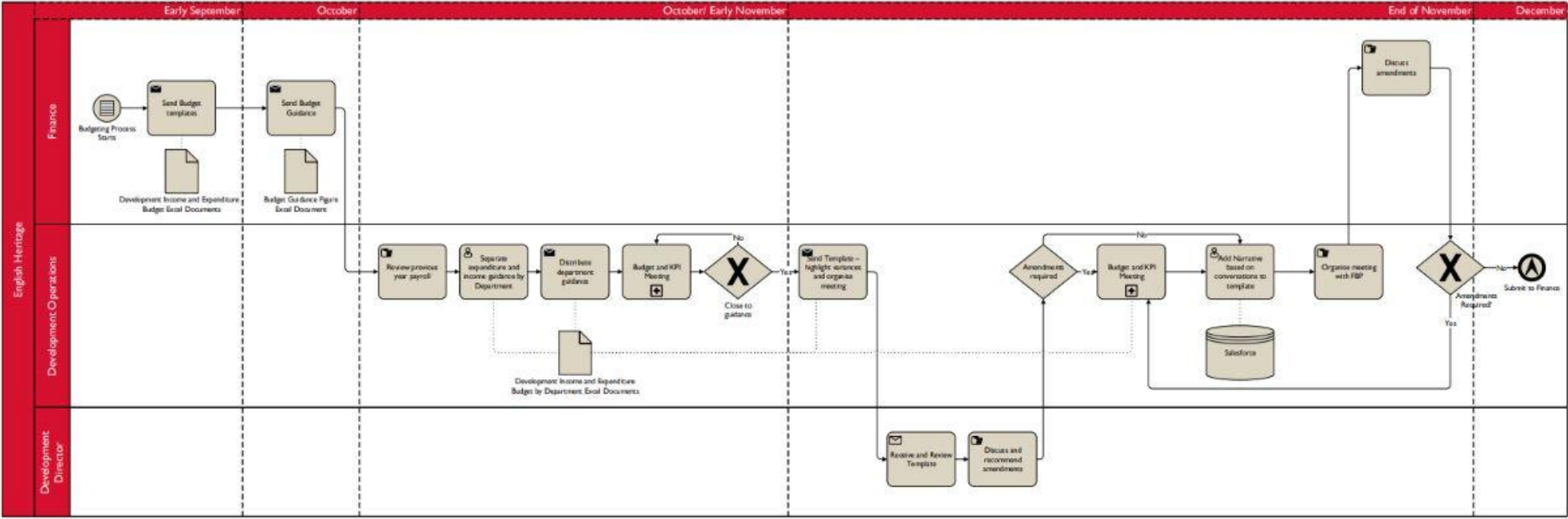
- Event Delivery
- Prospect Research
- Annual Cycle
- Reporting
- Impact Report
- Data entry

Software

- CRM – Salesforce, Microsoft Dynamics, Blackbaud, Tessitura
- Microsoft Office 365 Suite – VISIO, SharePoint, Teams, Planner, Forms, VIVA Insights
- Third Party platforms – Enthuse, JustGiving



Development Budget Setting Process



Roadmap for Fundraisers

A strong framework of development processes and protocols will support better decision making, transparency between colleagues and effective communication.

Valuable time is lost in miscommunication, and we can avoid stress by clarifying roles and responsibilities.

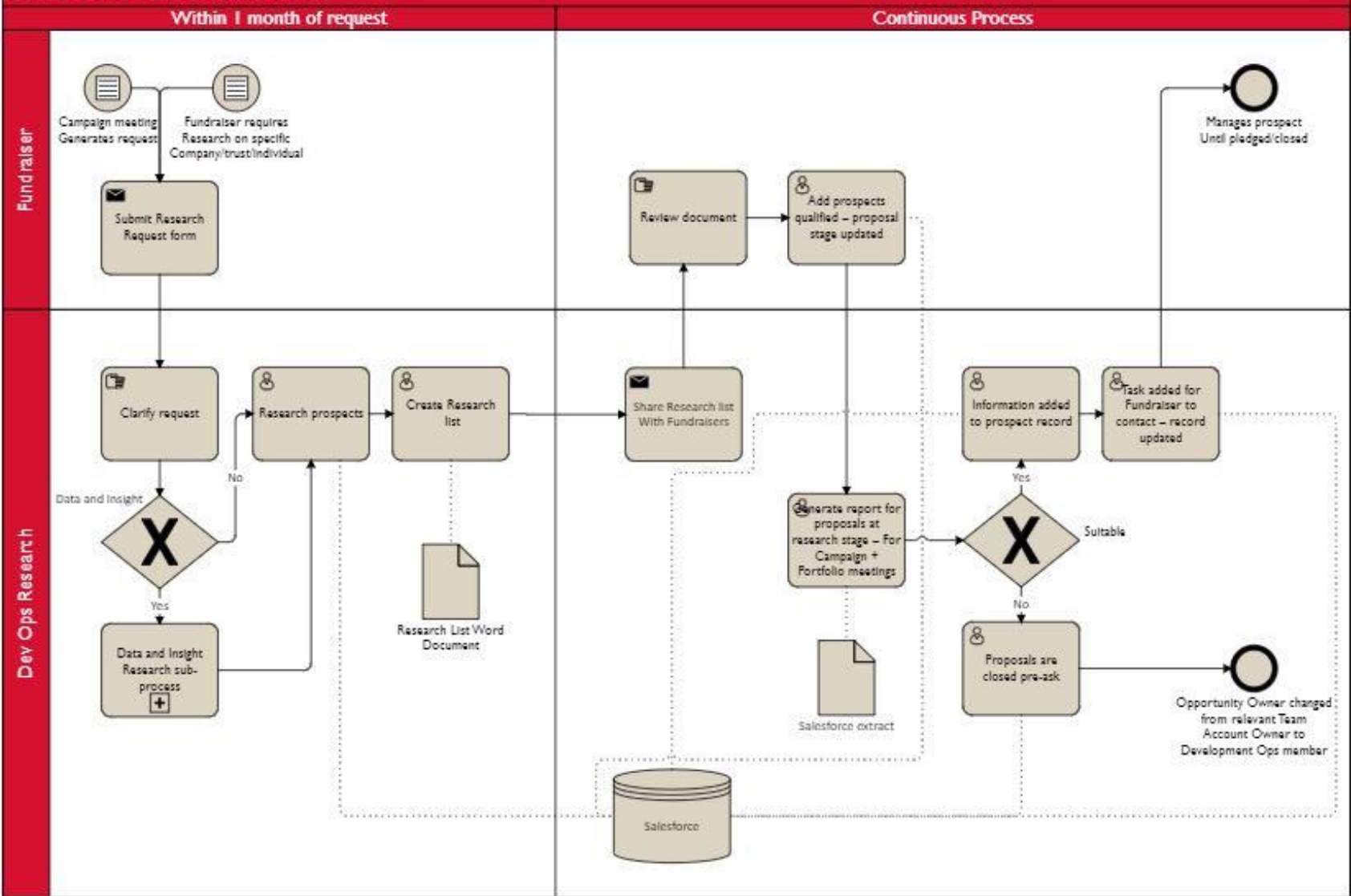
- **Process Maps**

A visual map (diagram and/or flowcharts) of business-flow for process and/or procedure.

- **Standard Operation Procedures (SOP)**

A written description of the process or procedure.

Research Prospecting Process



Research Request Form



Hi, Sophia. When you submit this form, the owner will see your name and email address.

* Required

1. Date of request *

Please input date (dd/MM/yyyy)



2. Do you wish to be contacted regarding this request?

Yes

No

3. Name of Requestor: *

Enter your answer

Data Principles

Content

- Principles
- Roles and Responsibilities
- Top 10 functionalities
- Training and support
- Current priorities
- Data statement

Top 10 functionalities

- Creating & editing a Prospect/Contact/Record
- Creating affiliated contacts/relationships/organisations for records
- Creating and editing a Proposal – pipeline management
- Adding, assigning and editing tasks
- Report pulling capability on standard queries
- Create and utilise personal Dashboards
- Setting up events and campaigns
- Adding payments/gift information
- Uploading contact report or documentation (related tab)
- Adding or amending invite lists



You are only as good as your Data

Our data needs to be:

- Accurate, complete and legible to be useful.
- Clean and easy to store.
- Structured and ready to use.

We will make better decisions, based on our own data; which will require that we all:

- Understand what data we are collecting and why.
- Ensure our data collection sufficient to generate insights and inform decision making today, tomorrow and in the future.
- Be able to produce reports on what we need to know.



Performance

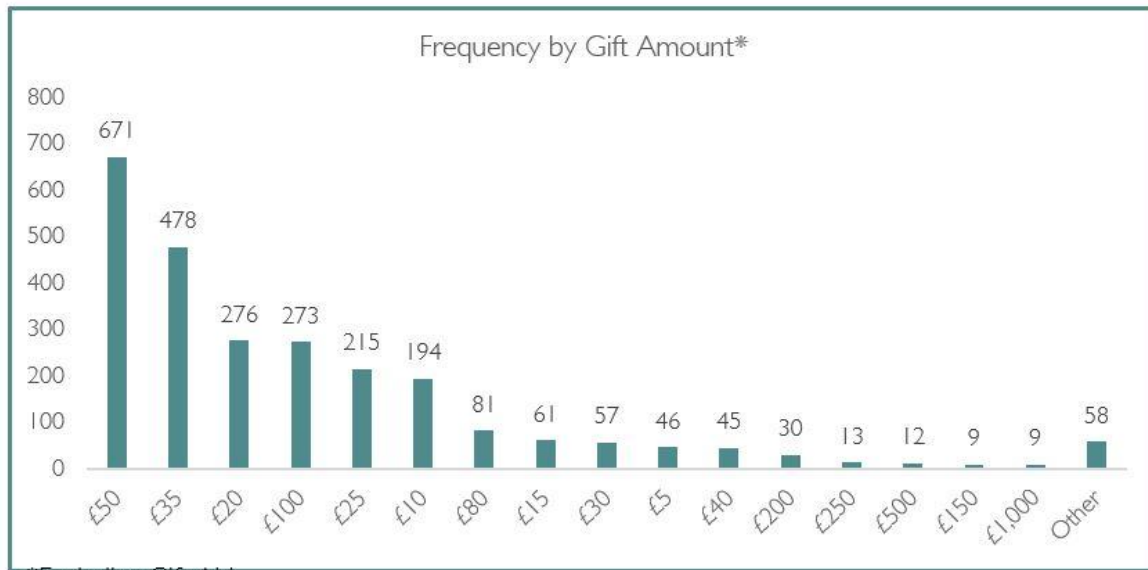
1. Report
2. Analyse
3. Review

Ask yourself

- Is this working?
- What is working?
- ROI – Return on Investment
- DAC - Donor Acquisition Costs
- Stewardship & Retention
- Meaningful KPIs



Name of event	Number of guests invited	RSVP response number (Either accept or decline)	RSVP response accept
World of Stonehenge at BM 16 th March 2022	122	23% decline 21% accept 3% no show 53% no RSVP	26 people 21%
Clifford's Tower Launch 29 th March 2022	211	8% no show 7% decline 48% accepted 37% no RSVP	102 people 48%



*Excluding Gift Aid



Action Tracking & Planning

Part of the Microsoft 365 Suite
- interfaces with Outlook,
Forms, SharePoint and
Teams.

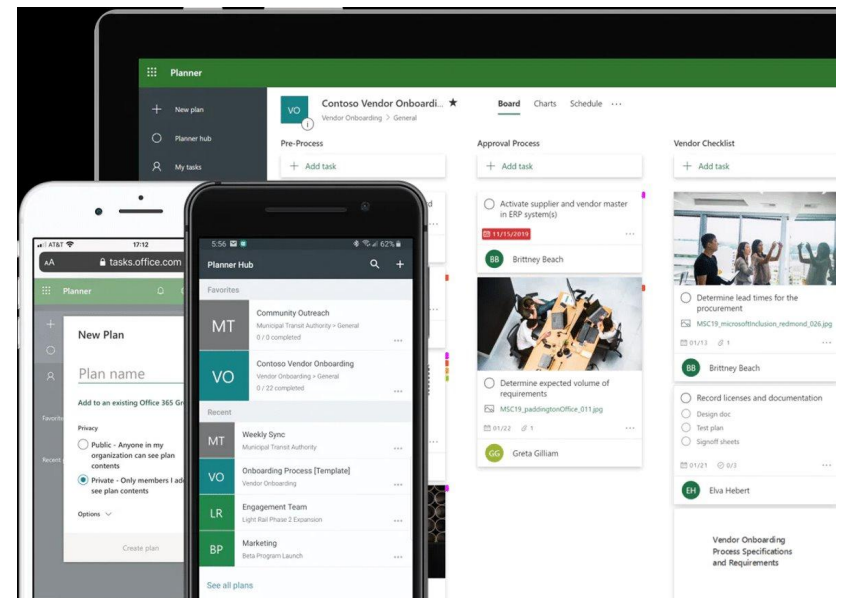
A collaborative tool where you
can set deadlines, record
meetings/training, share
files, and communicate with
each other.

Supports:

- Deadline management
- 121s
- Performance Review

Other applications:

- Asana
- Trello.
- Jiro



Month End

+ Add task

Finance Corporate

Add History Hit £180k in-kind income to P6 Forecast

02/10

Finance

Send P6 EOM email to FBP

02/10

Finance

Pull P6 monthly income reports

04/10

Finance

Update P6 forecast

09/10

Finance

Review forecast with Sue

CRM

+ Add task

CRM

Provide comms for next 12 months schedule to Janet/Su

19/09

CRM

Send through criteria for Legacy Pledger and AFEH newsletters

19/09

CRM

UAT Cycle 4 Execution

06/10

CRM

UAT Cycle 3 Execution

29/09

Finance DPIA CRM

Data 360

+ Add task

CRM Data Cleaning Data 360

Set up 360 meeting with Hannah G

22/09

CRM Data Cleaning Data 360 Corporate

Set up 360 meetings with Corporate team

08/09

Data Cleaning Data 360

HK Handover actions

1 / 2

29/09

Data Cleaning

Create Salesforce Training Materials

1 / 4

22/09

Meetings

+ Add task

DST Meetings

September DST meeting

27/09

Set up meetings/agenda/documents/file share

Annual Appeal - dev.

Annual Appeal project Group

Communications and Social Planning

Membership and Marketing Meeting

0 / 4

09/09

Meetings

September Ops meeting

27/09

Completed tasks 5 ▾

Reporting

+ Add task

Reporting

Berwick Fundra for March Projec

Papers due COP 5 Project Board. Ser by the 4th.

04/03/2024

Reporting

Berwick Fundra for February Proj

Papers due COP 6 Project Board. Ser by the 5th.

05/02/2024

Reporting

Berwick Fundra for December P

Papers due COP 6 December Project to review by the 4

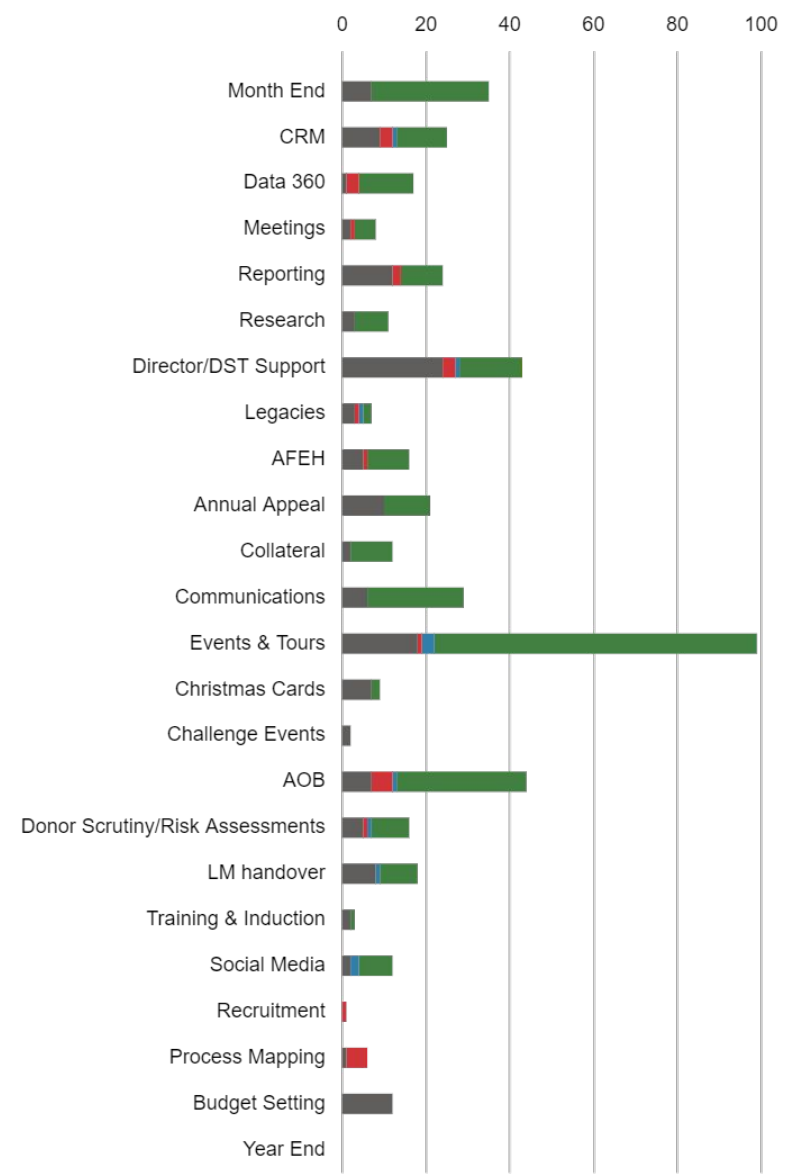
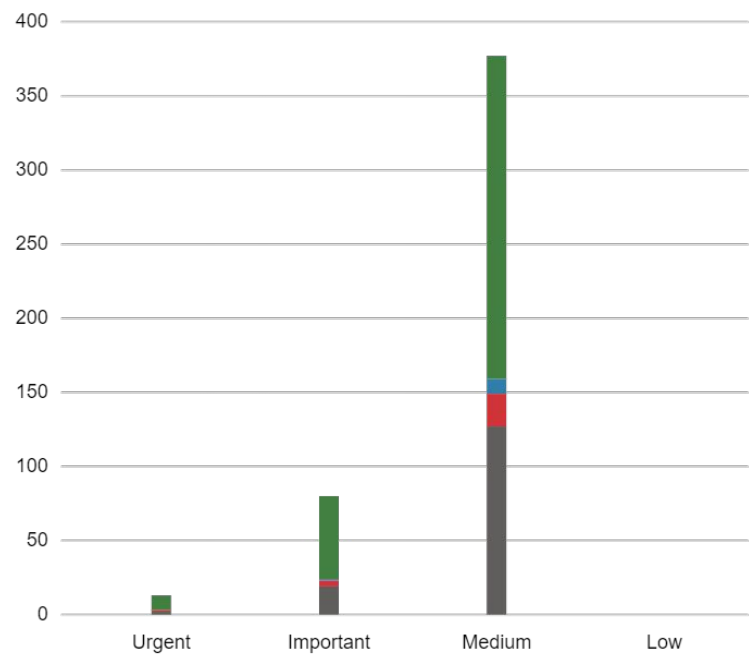
04/12

Reporting

Status



Not started	148
In progress	11
Late	27
Completed	284



Resource Review

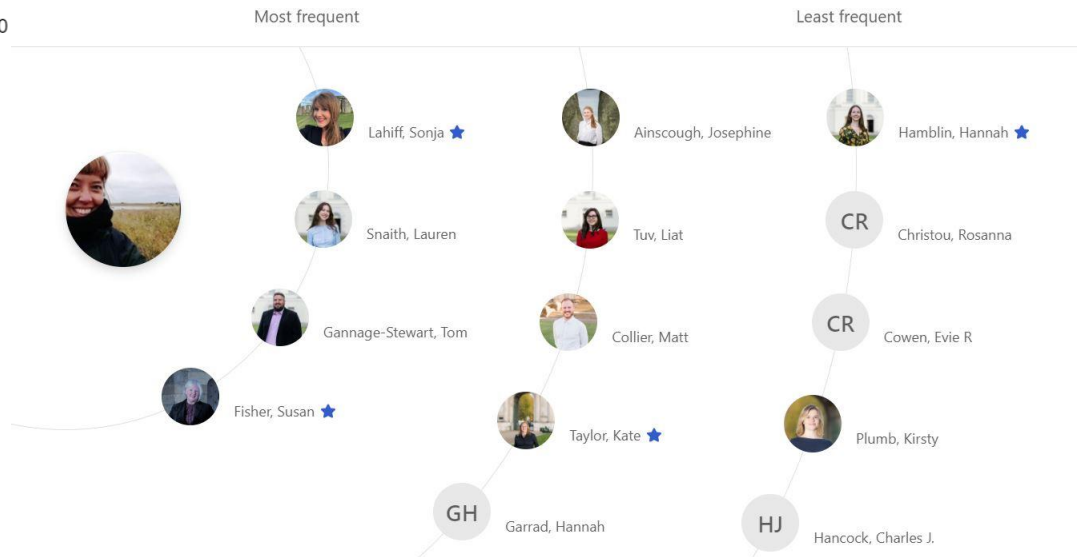
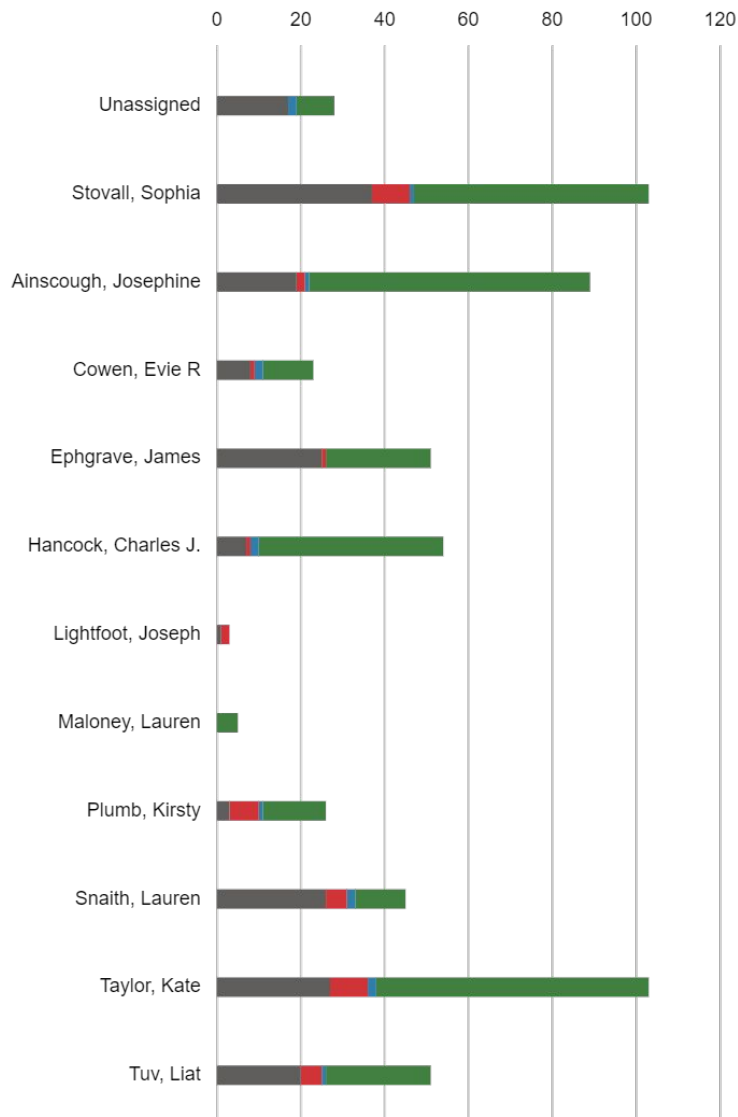
Build in time to review & refresh

- Job Descriptions & roles
- What jobs are taking the most time?
- What is the best use of time?
- A tired team doesn't work at its best
- Review your own investment & activity
- Make changes

Report on progress

- Be honest
- Don't shy away from difficult conversations
- Present facts and understand the narrative
- Present KPIs





Time spent collaborating with others

Who did you actively connect with in the past four weeks and when?

109



Number of collaborators

[View my network](#)

124 h

Collaboration time within working hours

18 h

Collaboration time outside working hours

Your communication habits

How much of your time was spent collaborating with peers?



51% 5% 16%

[Show details](#)

Suggested important contact



4 h
Time collaborating in the past 4 weeks

[☆ Pin](#)

Next person

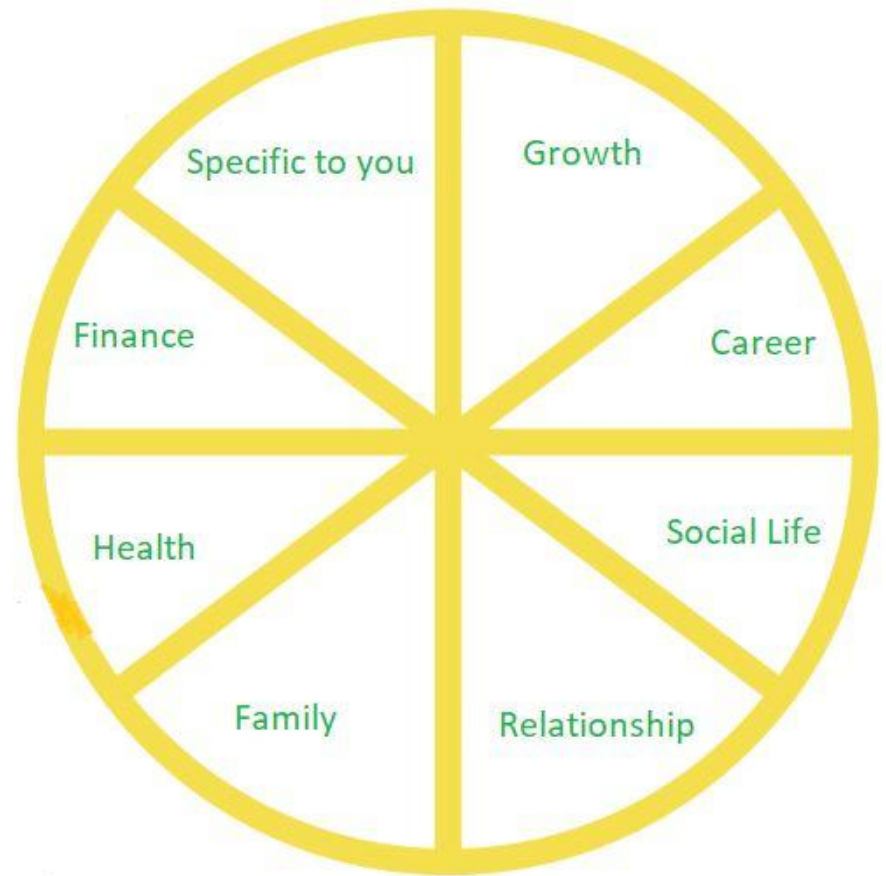
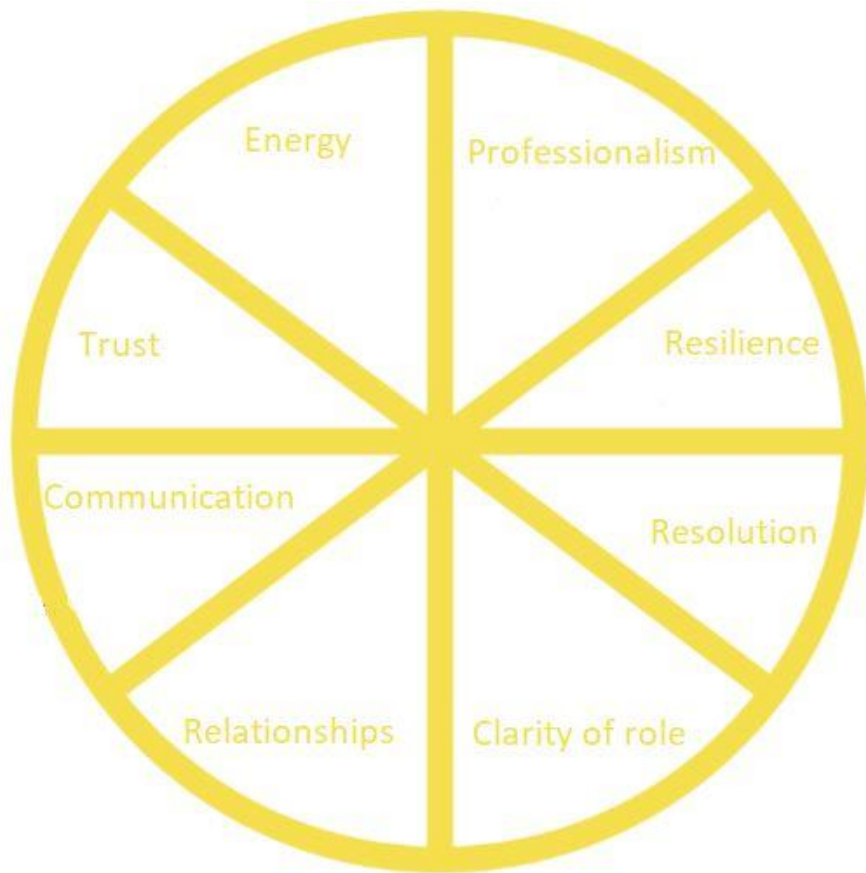
Priorities – do you know them?

Budget & Targets

- Capital
- Restricted
- Unrestricted
- In-Kind
- Budget-relieving
- Gift Aid

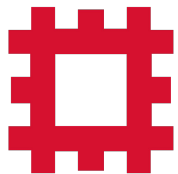
What will help achieve these fastest?

- Process Mapping
- Timeline
- Collateral
- Communication
- Events and activity
- Pipelines
- Research
- Training




What I have learned

- 1 Review resource, priorities and progress on a regular basis
- 2 Check in with colleagues, no matter how busy
- 3 Chase clarity
- 4 Set time aside to reflect and scrutinize activity – ask why?
- 5 Work with your strengths and delegate
- 6 Keep talking – you don't know what you don't know




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Step into England's story