

SOFII: a strategy for 2009

This document explains what SOFII is, what it has achieved in its first year and what it intends to offer in the future. Throughout 2008 SOFII has consistently proved its potential, so in 2009 we will seek the right level of investment to enable us to develop this potential and expand what SOFII offers to meet the growing needs of SOFII users everywhere.

What is SOFII?

SOFII provides charitable fundraisers with an easily accessible archive of the best fundraising creativity from around the world. We aim to make it as comprehensive as possible, covering all areas of fundraising from all corners of the world and available to all fundraisers everywhere.

- SOFII is a free online resource accessible at all times.
- SOFII is a showcase. It's the Museum of Fundraising.
- A historical record. A unique archive of fundraising through the ages.
- A fertile ideas bank. SOFII is where to go for inspiration, innovation and instruction.
- A place for sharing. A model of cooperation.
- A training resource. Heaven for students.
- Source of research and essential background.
- A unifier. SOFII's a meeting place for fundraisers the world over.
- The equaliser. Lone and small fundraisers all have the same chance.
- Entertainment. SOFII is fun to use and learn from.
- Encouragement. A source of pride and delight for all users.
- Contact point for a growing worldwide community of fundraisers.
- We are a charitable foundation registered in the UK under no. 1124743. Because SOFII must be free to users.

What does SOFII offer now?

1. Exhibits of fundraising best practice

SOFII collects, prepares and presents detailed exhibits of great fundraising and campaigning from around the world. This is our USP (ie, it's something no one else has). Fundraising campaigns are analysed, in detail, with results, usually prepared and submitted by the people responsible for them. So far, we have a total of 161 exhibits, growing by a dozen or more each month.

2. A fundraising archive

SOFII offers access to some of the best fundraising campaigns in history, for information and inspiration. SOFII is building and preserving a unique record of the history of fundraising and social change campaigning.

3. Country 'fundraising situation' profiles

Useful information about the state of fundraising and fundraising trends in different countries around the world. Helpful sources of information,

country by country. Courses and seminars around the world. This material is currently being put together by our country ambassadors and will be available on SOFII soon. To start there will be profiles for Pakistan, Thailand, Switzerland, Chile, Canada and Western United States. This information is not unique to us but it is generally not available in one easy place and for free.

4. **Top tips, opinion pieces, analysis**

Feature articles and information on issues relevant to fundraisers everywhere. Although there are many others also producing and archiving articles for fundraisers, our intention is to focus on appropriate and well-written material in an easily digested format, not easily found elsewhere. We now have 34 individual features on the site, with plans for many more (see appendix).

SOFII's history and achievements

SOFII was launched on January 2nd 2008 as a 'work in progress' enabling us to grow incrementally, with minimum investment, while we tested the SOFII 'product' and demand for it.

In 2008 SOFII had just one part-time paid member of staff and three part-time volunteers. Plus a growing network of volunteer 'ambassadors'.

In its first year,

- SOFII users made 40,000 visits to the site.
- 160,000 pages of information were accessed.
- More than 4,000 new users registered. There are now more than 4,600 registered users (5000 at end Feb 2009).
- SOFII has worldwide reach. Registrants come mainly from the USA, Canada, UK, Australia and continental Europe, but also from Chile, Mongolia, Moldova, Myanmar, Argentina, Russia, Guatemala, Bangladesh, Thailand, India, Pakistan, Czech Republic, Hungary...well, now it would probably be easier to list the diminishing tally of countries where SOFII *doesn't* have a presence.
- SOFII is gathering momentum. New users have been growing at the rate of fifty to a hundred each week, though maintaining this depends on publicity and word of mouth recommendations.

Further achievements

Use of the SOFII service

It is high and it has grown as the file has grown. Even after initially high use has fallen away a bit, around 40 per cent of all registrants seem to be returning to SOFII at least once each month and many use the service on a very regular basis. This is higher than expected.

SOFII's growing content

The range of materials coming on SOFII and the regularity of appearance (new exhibits are posted every two to three weeks at present) ensures that

interest in the site is maintained, because there's always something new. However there are signs that however good the content, many users do become increasingly immune to regular updates. This is as expected. It was anticipated from the outset that SOFII would have a hard core of regular users, with many others using it irregularly or even occasionally, if at all. Nevertheless, usage is evidently higher than originally expected, though as yet it's still early days and we may see a percentage decline continuing for a while. Our intention is to ensure that this is offset by overall growth in the file.

Worldwide representation – the SOFII ambassadors

SOFII's ambassadors are international volunteers dedicated to promoting SOFII in the countries they come from. They ensure that SOFII reflects fundraising globally and that fundraisers worldwide benefit from this resource.

During 2008 SOFII recruited its first part-time staff person. Carolina has made a big impact, particularly in setting up the growing international ambassadors network. SOFII now has volunteer ambassadors in USA West, Canada, Germany, Chile, Thailand, Cameroon, Argentina, Switzerland and Pakistan. In addition several countries are going through the process now of having recognised ambassadors, including Togo, Uganda and USA East.

Promotion and positive feedback

SOFII has attracted good publicity throughout the year with articles and reviews appearing in *The Agitator*, *Third Sector*, *Professional Fundraising*, *Advancing Philanthropy* as well as in many other magazines, newsletters and on websites and on-line services. Our biggest achievement of the year though has to be the universal warm enthusiasm with which the SOFII idea continues to be greeted. This is shown in many ways but particularly in the numerous spontaneous encouraging comments we have received. Just a small selection of these is appended below.

Why SOFII?

- Because people who want to fundraise to help a cause should be given every chance to learn how to do it, without having to pay for knowledge that we can make freely available.
- Because there needs to be a historical record of fundraising. Past successes and failures need to be collected, preserved and guarded so that the lessons from them can be permanently available and shared.
- Because, through SOFII, great fundraising and campaigning ideas can be spread, like a benevolent virus, all over the world.
- Because there should be a place where, regardless of their age, location or experience, fundraisers can meet and learn on an equal footing.
- Because there should be a place where fundraisers can easily access innovative ideas to get inspired for their next big campaign, so that they can make a real difference for the causes they serve.

There's a real hunger for and interest in SOFII from fundraisers and others worldwide, plus its usefulness is being discovered by a growing band of non-profit professionals around the world.

Future development

In 2009 SOFII aims to offer,

1. More than 300 exhibits from all areas of fundraising.
2. A hundred or more of these exhibits will be from history, for the fundraising archive.
3. Country fundraising profiles for at least 15 different countries.
4. A much expanded section on book reviews and achiever personality profiles. By achievers we mean the real gurus, pioneers and thought leaders who have contributed much to our business and professionalism, but are overlooked or unknown now to so many new fundraisers.
5. Up to 60 opinion pieces, top tips and analysis.
6. Establish a forum for dialogue with and between users.

Targets for 2009

1. Financial independence and self-sufficiency.
2. Top quality full and/or part-time staff.
3. 200 users or more on the site every day, weekends included.
4. Greater quantity and variety of fundraising exhibits, from all corners of the fundraising world (ie, everywhere).
5. Detailed research among users, to establish use and priorities.

In order to prepare for growth and development of SOFII we will invest in,

- Editorial.
- Redesign of the site.
- A small amount of technology.
- The promotion of SOFII by our volunteers.
- A fundraising strategy that will make us financially self-sufficient, based on regular campaigns to acquire sponsors, major donors and regular donors.
- A partnership strategy.
- An efficient back office/administrative support.

Keeping on top of the potential

Maintenance, correspondence, keeping up to date.

This is a continual and growing task. Maxine, the volunteer who handled this workload each day from the start of SOFII, has now been obliged to relinquish this role. Carolina is taking it on, as from 1st March 2009.

Project management

Carolina is gradually returning to work after maternity leave. Her role will continue part time, particularly to oversee the redesign of the site and to grow the ambassadors group. So with the above, she will be stretched.

Management

As SOFII has grown so has the need for supervision, particularly for quality control on what's submitted for the site. As managing trustee Ken Burnett's time now is more limited than ever, so this is fast becoming a major concern.

The appointment of two new full-time staff would largely resolve these issues.

Governance

SOFII is a charitable foundation registered with the UK Charity Commission. There are currently four trustees: Lindsay Boswell, director of the UK's Institute of Fundraising, David Carrington, consultant, Marie Burnett, editor and Ken Burnett, managing trustee. Two new trustees (volunteers) will be sought in 2009, to support the paid staff. Hopefully both of these will reside outside the UK, at least one in a developing market.

SOFII's current and future needs

It is clear SOFII now needs to recruit, as soon as possible, a full time editor/researcher who is also a competent writer and interviewer. Plus a full, or at least half-time fundraiser who can raise the funds necessary to pay for these posts. We estimate that we need around £100,000 (US\$ 150,000) per annum to function properly

At the moment SOFII has enough in reserve to keep going for four to six months at current level. Fundraising is ongoing, but if we are to realise SOFII's potential it has to move to the top of our priorities. SOFII is no longer a prototype, it is now a fully functioning working resource for fundraisers everywhere. So it's appropriate that we now raise our sights so that we can raise the money that will enable SOFII to achieve all of the ambitions set out in this strategy.

Where will new money come from?

- Existing donors.
- Structured approach to appropriate trusts and foundations.
- Similar to corporate supporters – agencies, suppliers.
- A campaign to encourage monthly donors recruited from subscribers.

NB. More than half of SOFII's registered users come from North America. So far we've done no fundraising there, though our first monthly donor is an American and we have had Can\$ 2,000 pledged from a Canadian agency.

SOFII now needs help from its friends; advice, encouragement and offers of assistance, to enable us to continue and achieve our potential.

Summary

SOFII is operating in a competitive, fast-changing market. To continue to provide a viable, valuable and distinctive service SOFII has to be focused, to ensure that what we do is needed, is appropriate, is up-to-the-minute, is constantly growing and developing and is at all times relevant to our market. If we can do that, we are confident that SOFII will thrive.

KB/CH
February 2009

Carolina Herrera

The SOFII Foundation

Registered charity no. 1124743

London EC2Y 8NH, UK

Tel: +44 (0) 208 144 5791

Email: carolina@sofii.org

<http://www.sofii.org>

Appendix 1

A selection of editorial features now on SOFII

Lack of space prevents SOFII from listing everything but this will give a flavour.

- Just the facts on legacy giving.
- Fundraising in a recession.
- The 29 foundations of fundraising.
- Digital giving and the new charities.
- Why it matters to keep your staff happy.
- Jo Habib's secrets of fundraising from foundations.
- 21 keys to an effective volunteer board.
- Per Stenbeck on passion, George Smith on disrespect.
- Why words matter. How donors are changing. And just how bad are fundraisers at looking after their donors?
- The truth about corporate fundraising.
- The 11 pillars of fundraising wisdom, plus five helpful assumptions about donors.
- Richard Turner and Ken Burnett on story-telling.
- Where is stewardship going? And how profitable are your donors?
- Finding the right database, plus how to delight your donors.
- Seven blogs worth following.
- Plus lots more that's useful and good to know.