

Marketing and Communications Brief

Client: Charitable Trusts West Midlands

Subject: Marketing the network, to include improvement and development of copy and marketing templates for communicating to existing membership and recruiting new members. In particular:

- How we present and communicate our events over the calendar year, both collectively and individually.
- What we offer in a regular bulletin – its structure and content
- How we communicate and ‘sell’ membership to trusts and foundations that will increase membership numbers, as well as to associates and individuals who are trustees or paid staff of trusts

Date: September 2014

Briefed by: Executive Committee/Dipali Chandra, Secretary to CTWM

Requirements

1. Background

Charitable Trusts West Midlands (CTWM) is the leading membership association for trusts and foundations in the West Midlands. It has 50 members ranging from large national trusts that give grants in the region to local grant givers and individuals.

CTWM is an unincorporated and unregistered not for profit organisation, established in 1975 as the West Midlands Charitable Trusts Group. CTWM provides charitable trust funders with an opportunity to share and learn from each others experience of grant giving and develop good practice in grant making, explore matters of common concern, and forge productive relationships that contribute to the wider benefits and overall sustainability of the region’s voluntary and community sector.

The organisation also aims to provide a route for charitable trust funders to be able to engage formally with private and public funders and their networks to increase opportunities for co-ordination and collaboration to better meet the needs of the diverse communities in the region.

It does this by:

- Organising an annual programme of talks, seminars, workshop and networking events for its members;
- Producing an electronic newsletter between 3/4 times during the year informing members of future events, developments in the charitable trust world and regional issues of interest to trusts and foundations;
- Maintaining a website, which provides information on the annual programme of events, publications, briefings, news items relevant to the work of trusts and foundations;
- Linking with other relevant regional membership organisations that have a common interest in supporting the development of the voluntary and community sector in the region

2. Context (positioning, competition, SWOT):

- The scale of trusts and foundations in the West Midlands is estimated at around 250 many of whom are small family based trusts operating in the region. Many do not have an office base in the region but have grant giving programmes that cover the West Midlands. Currently only around 35 members of CTWM are trusts and foundations. We would like to recruit every potential member trust or foundation. They may not have a

budget for memberships of professional bodies and may be inundated with applications for funding.

- An exercise to develop a brand for the organisation was undertaken in 2010, which led to the current logo and strap line (copy attached). The approach of the network has to date been low profile, simple, informal, good practice support, though within the sector we operate in we have attracted some key speakers for particular events due to the networks and contacts of member trusts and foundations.
- Activities: The range of activities has featured quarterly roundtable discussions - some meetings operate under the Chatham House rule. These discussions are provided free of charge to members predominantly, though some non-members are also invited. There are a couple of formal seminars/conferences in a calendar year, also free to members, with a small charge when refreshments are provided. There is a differential rate for non-members seminar/conferences (double the price). Examples are available/attached
- Marketing and communicating with members and non-members is currently through bulk emails and limited use of social media – a twitter account exists (@WestMidsFunders), maintained by the current Chair, but no corporate Facebook - production of a quarterly e-bulletin, word of mouth by members and a website www.ctwm.net , which has recently been updated.
- 75% of members have email, but 25% do not, or do not want to be approached.
- A consultation of members was undertaken in 2011 (attached), a consultation with members and non-member trusts was undertaken by an independent consultant to identify the potential to reach and attract more trust members in 2013 (copy of report attached). Furthermore, a recent business planning session was held to consider the updating of the business plan. Attached is a copy of the outcome of the discussion.
- Our national competition: [Association of Charitable Foundations](#) is the national membership organisation for trusts and foundations in the UK. It has several full-time staff and is based in London. It has somewhere around 500 members, though again this does not reflect the scale of trusts and foundations that operate in the UK. Some of the larger to medium sized trusts that are members of CTWM are also members of ACF. ACF offers a comprehensive [development programme](#) and regular publications. It also operates a [Knowledge Sharing website](#) for funders and an [Intelligent Funding Forum](#) to foster positive changes in funding policy and to share information on good practice in grant-making.
- Our regional competition: There are other funding forums in the other regions of England: a list is [here](#) - it is somewhat out of date but it gives an idea of what else exists; other networks info here: [East Midlands Funding Forum](#), [European Funding Network](#), [Yorkshire & The Humber Funders Forum](#)
- There are several solicitors and accountancy firms with charity teams in the region that administer several trusts and foundations. Many of these are generally not willing to become members of CTWM and the firms can act as 'gatekeepers' to promoting the services of CTWM. Generally, though these firms hold their own seminars on fiduciary matters for trusts.
- Furthermore, national/regional/local infrastructure bodies for voluntary organisations hold information seminars that provide data, intelligence and trends on third sector issues.

3. CTWM Proposition/promise:

- Safe space for trusts and foundations to air issues on grant giving practices and approaches
- Informal networking between members and non-members that does not compromise the ethics of giving out grants.
- Exchange of intelligence and information on the third sector
- Sharing trends on the social issues due to disadvantage and poverty
- Promoting effective/good grant making

4. Support for our proposition/promise

- Network of like-minded individuals
- Experienced secretarial support for network
- Up-to-date website
- Twitter updates
- Information roundtables on topical issues
- Annual event with speaker with national profile
- It's not just about Birmingham

5. Key message

- I must join/remain a member of this network to keep up with what's happening around funding and to maximize funding resources in the region.

6. Outcomes:

- Statement that clearly articulates CTWM's value proposition.
- CTWM wants to be able to retain its current members and increase its membership of trusts, associates and individuals.
- To increase involvement at events and use of the website.
- To develop practical templates, tools CTWM can use for marketing purposes, in print and on our website/Twitter feed. Begin to implement these by January 2015.
- We will consider other ideas proposed by a marketer, especially low- or no-cost ideas.
- Increase/emphasise the differentiation between CTWM and our competitor(s).

7. Target audience

- Current members and new membership: trusts, associates and individuals - administrators, trustees, volunteers.

8. Tone of voice

Authoritative, friendly

9. Budget and Timing

Deadline for completion of project – By mid- December. The likely start date for the project will be early Nov.

We envisage not more than a maximum of 5 days work should be involved in achieving the outputs stated. Please provide a proposal for achieving the outputs with timeline, who will undertake the work with a capability statement demonstrating ability to deliver by 22nd October. Interviews will be held the week of 27th October for work to begin the week of 3rd November.

10. Contacts for the Work to be undertaken

Dipali Chandra, Secretary – dipali@ctwm.net
Pauline Roche, Chair – Pauline@ctwm.net