Fundraising Toolkit 1

How to prioritise projects to align
with your Strategy

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Introduction

The UK National Commission for UNESCO (UKNC) is developing a resilient network for UNESCO Designated Sites in the UK through our 'Local to Global' project, made possible with The National Lottery Heritage Fund, thanks to National Lottery players.

From 2023-2024, Local to Global convened UNESCO site coordinators and external consultants to generate a community of practice that promotes skills, confidence and capacity-building in the following key areas:

- Audience development, stakeholder mapping and inclusion
- Fundraising and financial sustainability
- Digital transformation and web development

UKNC commissioned Claire Glazebrook Consulting (www.claireglazebrook.com) to develop best practice guidance for UNESCO Sites in the UK in the field of fundraising and financial sustainability. This is one of four toolkits made available through the UKNC website.

Interested to know more?
Please contact the UK National Commission for UNESCO at www.unesco.org.uk

How to prioritise projects to align with your Strategy

Weighting and Rating is often described as a Course of Action (COA) Analysis. This is a process of scoring and analysis undertaken by a team knowledgeable about the organisation and external context and conditions. The intended output is to assess the most likely outcome and best return on investment of both time and resources for the various projects you're considering, as well as defining any dependencies for success.

Step 1

The process involves firstly defining a list of criteria against which to assess project proposals.

A suggested list of criteria you may wish to use as a starting point is below and on the next page:

Criteria	Why included?
Fundability	• If the project meets the criteria of funders and has a high likelihood of success.
Does it meet the UNESCO designated site & any overarching strategy objectives?	• Will the project raise the profile of the site in inter/national organisations and UNESCO networks? • Does it help with key stakeholder engagement? • Does it help to achieve SDGs?
Does it meet a community need?	• Community consultation demonstrates a need. • Charities working on the ground may have already piloted similar work. • Local development strategies. • Project to take place in area of deprivation that has been mapped. • Does the project bring multi-disciplinary partners together in a common goal?
Does it align with local plans and strategies?	• Local Authority strategies and plans. • Regional plans for environment, nature recovery, community engagement etc.

Criteria (cont.)	Why included? (cont.)
Does it align with national context?	• Does it meet devolved or national Government agendas? • Regional environmental plans. • DCMS/relevant government departments. • Statutory funders key aims (e.g. Lottery sources).
How does the project score on delivering outcomes: • **Carbon reduction** • **Health and wellbeing** • **Nature Recovery** • **Other* (see right)**	• Will the project help to drive demonstrable outcomes (i.e. changes) to issues within the UNESCO site area for beneficiaries? **Other*** Consider other outcomes specific for your site such as: • Learning • Inclusivity • Ageing well • Regeneration • Data collection • Sustainable tourism • Trailblazing / innovation • Developing pride in place • Sustainable development • Addressing health inequities • Feelings of connection and value • Widening access to green spaces • Improving climate consciousness • Maximising use of brownfield sites • Improving net zero carbon emissions • Making the most of the region's assets • Unlocking private investment to region • Providing opportunities for local people • Developing a world class visitor attraction • Engaging young people • Driving green infrastructure (e.g. tree planting) • Improving resilience to future climate threats (e.g. floods) • Developing skills (particularly for underrepresented groups) • Working in partnership with charities and community groups locally • Supporting communities to reduce natural disasters and consequences of climate change

Step 2

The weighting score is how important each criteria is to your designated site?

5	4	3	2	1
Critical to deliver	**Very important**	**Important**	**Slightly important**	**Not important**

Step 3

List your projects and 'rate' them in terms of how they meet the criteria (using the same scores of 5 (high score) to 1 (lowest score)).

The score for each option is:

Criteria Weighting **x** Project Rating **=** Score

The option with the highest scores indicates priority in order to develop a pipeline of projects against which to fundraise.

Example Template for future projects

The following template has been populated with examples of weighting and potential projects but you should tailor it to your own needs.

							Weighting Criteria				
		Fundability	**Does it meet the UNESCO designated site or overarching strategy objectives?**	**Does it meet a community need?**	**Does it align with local plans and strategies?**	**Does it align with national context?**	**How does the project score on delivering outcomes?**				**Total Score**
							Carbon reduction	**Wellbeing**	**Nature Recovery**	**Other#**	
Weighting Score		1-5	1-5	1-5	1-5	1-5	1-5	1-5	1-5	1-5	
	Weighting	5	4	4	5	2	3	1	4	4	
Example	**Rating**	3	4	1	1	3	5	0	1	1	
	Score (Weighting x Rating)	15	16	4	5	6	15	1	4	4	75
Example Options (themes):											
Human resources (new staff posts)	**Rating**										
	Score										
Infrastructure & site access works	**Rating**										
	Score										

		Weighting Criteria									Total Score
		Fundability	Does it meet the UNESCO designated site or overarching strategy objectives?	Does it meet a community need?	Does it align with local plans and strategies?	Does it align with national context?	How does the project score on delivering outcomes?				
							Carbon reduction	Wellbeing	Nature Recovery	Other#	
Weighting Score		1-5	1-5	1-5	1-5	1-5	1-5	1-5	1-5	1-5	
Public awareness & community engagement	Rating										
	Score										
Site maintenance & renovation	Rating										
	Score										
Bespoke local products & business engagement	Rating										
	Score										
Educational projects & resources	Rating										
	Score										

			Weighting Criteria								Total Score
		Fundability	**Does it meet the UNESCO designated site or overarching strategy objectives?**	**Does it meet a community need?**	**Does it align with local plans and strategies?**	**Does it align with national context?**	**How does the project score on delivering outcomes?**				
							Carbon reduction	**Wellbeing**	**Nature Recovery**	**Other# (see above)**	
Weighting Score		1-5	1-5	1-5	1-5	1-5	1-5	1-5	1-5	1-5	
Research & new knowledge acquisition	Rating										
	Score										
Nature Recovery	Rating										
	Score										

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