



STRENGTHENING THE SECTOR

A business support and development
programme for cultural organisations
in Belfast

Fundraising Toolkit



Belfast
City Council

Introduction

This toolkit is designed to complement the “Building Your Case for Support” workshop delivered by **Sandara Kelso-Robb**, Executive Director of the Lloyds Bank Foundation for Northern Ireland and Strategic Advisor for Giving NI. Sandara has been active in the voluntary sector for over thirty years. An experienced fundraiser as well as grant maker, Sandara continues to be an active volunteer within a range of organisations and initiatives. Sandara also Lectures on the Fundraising Module for the Arts & Business NI Leadership Programme Creating Futures.

This toolkit will help you to develop an inspiring statement that creates a uniform message about why you are important as an organisation, how you make a difference and what people can do to support or get involved. The ‘case for support’ is the cornerstone of any fundraising activity. It captures who you are, what you do, what your goals are and why people should join with you to achieve these goals.

Alongside a practical step-by-step guide, this toolkit features an expert interview, glossary and a select list of further reading – from useful data to case studies and tools that will help you develop the cornerstone of your fundraising strategy, a case for support.

Fundraising FAQ's

What is a fundraising audit?

A fundraising audit is a useful starting point when thinking about developing new fundraising activities. A fundraising audit examines your current sources of income, historical sources of income, and future sources of income.

These resources will help you carry out a fundraising audit for your organisation:

Fundraising Audit Questionnaire

<http://www.managementandthearts.com/pdf/FundraisingAuditQuestionnaire.pdf>

How to Conduct a Fundraising Audit

<http://culturehive.co.uk/wp-content/uploads/2014/08/Fundraising-audit-guide2.pdf>

Do we need a fundraising strategy?

A fundraising strategy will enhance your chances of being successful in your drive for funding. The aim of a fundraising strategy is to create a tailored framework of funders you would like to target, and allows you to gather key supporting evidence such as a case for support, impact data and your organisations mission statement. It is both a practical tool, and a more strategic document that will act as a foundation for all fundraising activities.

This is a useful guide:

Fundraising Strategy Essentials

<http://culturehive.co.uk/wp-content/uploads/2014/06/Fundraising-strategy-essentials.pdf>

What is a case for support?

A case for support clearly sets out why donors should give to your organisation and ways that they can support your work. It is a brief, well-crafted statement that is both factual and evocative.

Do we need more than one case for support?

A general case for support statement sets out the core information that you want to communicate to a range of donors. This can then be tailored to meet the needs of specific funders or to support different fundraising activities.

What makes a successful funding application?

A clearly written application that is jargon free and guides the reader through the document like a story. Signpost the reader with diagrams, and quotes, draw their attention to the things that make your organisation stand out. If possible ask someone who is not familiar with your work to proof read and reality check your written fundraising efforts.

Developing a Case for Support: A Step-by-Step Guide

1. Who you are:

- Outline your organisations mission and values.
- Outline why your organisation is unique.
- Paint a picture – when was your organisation founded, your legal status, number of staff, where you are based.

2. Key achievements:

- Evidence the impact your work has.
- Draw attention to any awards you have won.

3. Why the project is important:

- Who is your target audience?
- How many people will benefit (include participants and staff).
- Is there a need for this work? What evidence do you have to support this claim? Outline problems in a way that will appeal to the person reading your application. Convey a sense of urgency, why this project needs funded 'now'.
- Include some headline numbers + some more personal quotes.

4. Outline the Project:

- Briefly outline core components i.e. number of workshops or shows.
- Timescale.
- How you plan to evaluate the work.

5. Precedence:

- Have you got quotes from previous participants – use them to breathe life into your case for support.

6. What support are you asking for?

- If you are asking for financial support breakdown how this money will be spent.
- If you are asking for support in kind, outline what support you would like.

7. What are the benefits of funding your project / organisation?

- Does it help a Trust or Foundation fulfil its mission?
- Does it help fill a funders strategic priorities?

8. Review | Design | Improve

- The case for support should be brief, compelling and interesting. It should make the reader want to find out more.
- Make your case for support visually appealing use images, diagrams and large format statistics and quotes to make the core points stand out.
- Get feedback on your case for support, from others in your organisation and people outside your organisation. Give selected people your case for support for 1 minute and then take it away and ask them to tell you what it said, this will help you to refine your key messages – is the reader taking away what you want them to?
- Proof read and accuracy check all facts and stats.

Expert Insight

[Wendy Elliott]

Wendy Elliott is the Fundraising Manager for the National Trust in Northern Ireland, and Current Chair of the Institute of Fundraising, Northern Ireland

“A successful case for support should be succinct, show clarity of purpose, be visually appealing, not too long and not too wordy”

A seasoned fundraising professional, Wendy Elliott has worked at the National Trust for the past 12 years where she is responsible for cultivating funding from trusts, grants, foundations, major donors, legacy fundraising, corporate partnerships and direct fundraising. One recent campaign of note is the campaign to raise funding to purchase the Family Library Collection at Mount Stewart. In the space of 18 months Wendy was able to successfully raise the £97,500 needed to acquire this collection, £95,000 of which was raised from external funds. The next challenge is to raise funding to catalogue and digitize this newly acquired collection. In this generous and practical interview Wendy shares some of her top tips for creating a successful case for support:



Q. What advice would you give an organisation that is developing their first fundraising strategy? Ideally a strategy should cover all the areas of potential fundraising for reference. Not all can/will be progressed in the same time lines; if you are a sole fundraiser like me (yes I know it's hard to believe) – it is all about doing some things well – and picking up others as capacity permits! Integrity for me is totally key.

Q. How long should a good case for support be? It should be commensurate with the level of money being sought – it needs to whet the appetite and create interest; more information can always be sent as and when required or discussed at follow up meetings.

Q. Do you create a new case for support for every funding application? Or do you work off one master case for support and tailor accordingly? - A bit of both - Once I have a funding proposal that has been successful – I often use it as the bones for further presentation to other donors – being careful off course to ensure that the tailored and individual message comes across in each of them.

Q. How do you refine your case for support? The Trust has a diverse range of “experts” who feed into any and all proposals I make – which makes for an intensive review of any documentation produced; I also share proposals with advocates – so that they are aware of what has gone out to contacts with whom they are trying to broker relationships on our behalf.

Q. Is the visual look and design of a case for support important – or is a simple – text based case for support a better approach? – Very – As an organisation we have a duty of care for the use and presentation of our text and our logo, so presentation is very important – the document speaks and conveys the values of the organisation, which I am representing – and which the potential supporter will review. In essence the document is creating a tone and style on which opinions will be formed; including images is important – as it helps to create a visual connection – if it was all words it would be boring.



**National
Trust**

Fundraising Glossary

Campaign Costs

Expenditures that are deemed essential to the planning and operation of a fundraising campaign and that are directly related to campaign budget projections. These might include staff costs, postage and printing.

Ethics

When identifying potential funders, your organisations ethical position needs to be considered. If you are working with vulnerable adults or children then this becomes a key concern.

Feasibility Study

An analysis of a specific funding stream to deem if its criteria align with the work of your organisation (in terms of artistic vision and your fundraising strategy). Completing a pre application feasibility study will help you to make more nuanced and appropriate applications.

Fundraising Steering Committee

A committee of staff and board members that strategically leads fundraising activities.

Fundraising plan

This short specific document outlines all the tasks involved in making a single funding application. Including: Staff requirements, timetable, budget and how this individual plan fits into the overall fundraising strategy.

Gift Aid

When money is donated by a UK tax payer, arts organisations can claim Gift Aid – depending on the current rate of tax this can increase the donation by around 28%. To claim Gift Aid, donations must be made alongside a Gift Aid declaration form.

Gift Range Chart

A chart or spread sheet which outlines the size and number of gifts needed at each level of giving in order to achieve the campaign goal. This helps campaign managers to place appropriate emphasis on a variety of large and small funders.

Mission

A brief statement that says what an organisation does, why it does it, and what makes it stand out from the crowd. Think of it like a headline – intended to draw someone's attention.

Patron

Someone that lends his or her name to support or endorse your organisation. Unlike board members a patron has no legal responsibility. Patrons are often high profile individuals who have the power to influence and garner financial support for causes they support.

Philanthropist

Anyone who gives their time or money freely to a non-profit organisation. This term is primarily used to describe someone who financially donates to causes they deem worthy. It is a term used to describe individuals rather than businesses.

Third Sector

A term used to describe all not-for-profit organisations and institutions. Also known as the voluntary sector.

Further Reading

“The Complete Fundraising Handbook”, Nina Botting Herbst and Michael Norton. Directory of Social Change (2012).

“Fundraising Management: Analysis, Planning and Practice”, Adrian Sargeant and Elaine Jay. Routledge (2014).

“Writing Better Fundraising Applications: A Practical Guide”, Mike Eastwood and Michael Norton. Directory of Social Change (2010).

“Perfect Phrases for Writing Grant Proposals: Hundreds of Ready-to-use Phrases to Present Your Organization, Explain Your Cause, and Get the Funding You Need (Perfect Phrases Series)”, Beverly Browning. McGraw – Hill Professional (2007).

“Fundraising Activity in Arts, Culture, Heritage and Sports Organisations a Qualitative Study”. The Culture and Sport Evidence Programme (2011)
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/186823/CASE_fundraising_report_Sep11.pdf

“Fundraising Strategy Essentials”, NCVO + Culturehive.
<http://culturehive.co.uk/wp-content/uploads/2014/06/Fundraising-strategy-essentials.pdf>

“Tell your Story and Make your Case Head”, Culturehive.
<http://culturehive.co.uk/wp-content/uploads/2014/08/Tell-your-story-and-make-your-case-heard.pdf>

“A Funder’s View on Making a Funding Application”, Culturehive.
<http://culturehive.co.uk/wp-content/uploads/2014/12/A-funder’s-view-on-making-a-funding-application.pdf>

“Investing in Change” Arts Fundraising & Philanthropy + Culturehive.
<http://culturehive.co.uk/wp-content/uploads/2014/09/Investing-in-change.pdf>

“Trust Applications – a Funder’s Perspective”, Culturehive.
<http://culturehive.co.uk/wp-content/uploads/2014/09/Trust-applications-a-funders-persecptive1.pdf>

“Money for Good UK”, NPC (2013).
<http://www.thinknpc.org/publications/money-for-good-uk/>

“Fundraising Audit Questionnaire”, Management and the Arts.
<http://www.managementandthearts.com/pdf/FundraisingAuditQuestionnair.pdf>

“How to Conduct a Fundraising Audit”, Culturehive.
<http://culturehive.co.uk/wp-content/uploads/2014/08/Fundraising-audit-guide2.pdf>

Notes:

Toolkit produced by Dr Oonagh Murphy
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