
The trustee as a fundraiser: how hands-on are you?

The trustee as a fundraiser – how to get it right

- Make sure your trustees know what is expected of them.
- That your trustees know their legal responsibilities.
- The advocacy role – to promote the organisation and protect its reputation – is generally expected of trustees.
- Boards who extend the advocacy role and get involved in fundraising are not so common - if you are expecting your trustees to fundraise then tell them right at the start of their engagement with your organisation.

The trustee's legal responsibilities

- Ensure that the fundraising carried out by the organisation complies with the Charities & Trustee Investment (Scotland) Act 2005 and the Charities and Benevolent Fundraising (Scotland) Regulations 2009.
- Ensure that you are aware of and are complying with any fundraising regulations.
- Monitor fundraising activity - so you need to know enough about fundraising to do that.

What do all trustees need to know about fundraising?

- Trusts, sponsorship, individual donations, earned income etc – what will work for your organisation?
- Timescales – when you need the money can determine the method – don't expect instant results
- Implications for staffing – is the type of fundraising appropriate for the staff resources available?
- Setting budgets – fundraising costs and projected income
- Regular monitoring to ensure that fundraising spend is proportionate to income raised.

Typical fundraising activity by volunteers (who may also be trustees)

- Raffles, tombolas
- Events: Ceilidhs, Whisky/wine tastings, Coffee mornings, Quiz nights, Charity golf days
- Second hand book or jumble sales, pop-up shops, car boot sales

One-off events that can bring in funds without requiring too much strategic input from the organisation.

How else can a trustee be a hands-on fundraiser?

- If there are no paid staff or volunteers to carry out fundraising, then trustees will have to be prepared to be involved in income generation in some way – typically making funding applications to public funders or private trusts and foundations, or fundraising events as noted above.
- All trustees should take a proactive interest in identifying potential sources of income.
- Trustees with useful contacts might be prepared to go to the next step and make introductions and open doors for CEO and paid staff.

And if you do get involved in fundraising, please remember...

It is fantastic that you, as a volunteer or trustee, are prepared to help fundraise by introducing your contacts to the organisation - but you must plan the approach with the CEO or fundraiser (if there is one) or together with the board so that you make sure that you ask for the right amount of money, for the right project, at the right time – and that you don't ask them twice!

How can the organisation help the trustees

Equip trustees with information to support action

- Key current activities and recent achievements of the organisation
- What is being planned
- What are you seeking money for?

About current and potential funders, sponsors and supporters:

- Who are they?
- Which are the most significant?
- What do they give us money for?
- What might they be interested in giving us money for?

Feedback

- Create structure for reporting action at meetings
 - Feedback on results of trustees' effort
 - Chair/CEO say thanks for action – in public and private.
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Some ways that a nervous fundraising trustee can help

...if you are not yet feeling brave enough to ask for money yourself!

- Provide intelligence on a prospective sponsor or donor.
- Set up a meeting for a colleague with a prospect
- Email, call or visit a donor just to say thanks
- Explain to a prospect why you support the organisation yourself
- Host a small gathering at your home
- Help negotiate a good price from a supplier.

Advocates, Ambassadors and Askers

- **Advocates:** While they are not asking for money or focused on cultivating specific potential donors, they are always telling the organisation's story and sharing its mission and work with others.
 - **Ambassadors:** Board members who assist with donor cultivation and stewardship. While not making outright asks for money, they engage with prospective or current donors to the organisation and focus on relationship development.
 - **Askers:** Board members who are comfortable through experience and training asking others to make gifts to the organisation.
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Where does the money come from – and how? What the trustees need to know.

- **Trusts and foundations**

- Time: 6 months to 2 years or more to mature.
- Who: Usually a staff member unless volunteer run organisation.
- Minuses and pluses: Huge competition for their funds but they exist to give away money. If you meet their criteria you have a good chance of success.

- **Individual Giving Campaign**

- Time: Can have quick results, at fairly low levels, such as via a telephone campaign, crowdfunding, or direct mail campaign.
- Who: Trustees can play advocacy role but due to administration required, campaign more likely to be run by staff members.
- Minuses and pluses: Labour intensive, but can have quick results and bring in new and potentially long term supporters.

- **Legacies**

- Time: 5+ years for a legacy campaign to begin to bring in results.
- Who: This is part marketing campaign and part individual giving campaign so the board can play an advocacy role in promoting this.

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- Minuses and pluses: Very few charities can budget for legacy income, but it is not administratively heavy.
 - **Fundraising events**
 - Time: Quick results
 - Who: Often not a good use of paid staff time but it can be a way for volunteers and trustees to be involved in fundraising.
 - Minuses and pluses: Very labour intensive to organise, but quick turn around and can also serve another purpose as a publicity exercise and to reach a new range of possible supporters.
 - **Corporate Sponsorship**
 - Time: 2 years or more to build a relationship from a cold call
 - Who: A trustee can play a significant advocacy role, but would usually expect a staff member to prepare the proposal and deliver the sponsor benefits.
 - Minuses and pluses: You will receive many more “noes” than “yeses”, but if you can convince them that they have something to gain from the sponsorship, then there is more to be gained than just the cash such as publicity and staff engagement.

About Arts & Business Scotland

We act as a conduit between the cultural and business sectors, helping to nurture the creative, social and commercial relationships that will enrich creativity and cultural engagement across Scotland.

We aim to provide the arts, culture and heritage sectors with knowledge and expertise. We bring business acumen and funding to the cultural sector, investing in, developing and promoting best practice in the business of the arts, culture and heritage. Historically we have focused on governance and fundraising: increasingly we place a particular emphasis on how cultural organisations can become more entrepreneurial and commercial businesses while maintaining their core creative values.

For more information about Arts & Business Scotland including our board development programmes please go to www.aandbScotland.org.uk email contactus@aandbScotland.org.uk , or phone 0131 556 3353.

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