



A Recipe *for Fundraising*

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INSTRUCTIONS

- Read through the Recipe
- Check all ingredients & equipment
- Mix it up & add some sparkle
- Bake!
- Relax & Enjoy...

WHAT IS FUNDRAISING?

“**Fundraising**...is the process of soliciting and gathering voluntary contributions of money or other resources, by requesting donations from individuals, businesses, charitable foundations, or governmental agencies.”

WHO IS RESPONSIBLE?

- “Whoever does the fundraising in your charity, you as charity trustees are ultimately responsible for any activities carried out in your charity’s name.”

OSCR - Fundraising Guidance for Charity Trustees

www.oscr.org.uk/guidance-and-forms/fundraising-guidance-for-charity-trustees/

GIVING IN SCOTLAND 2019

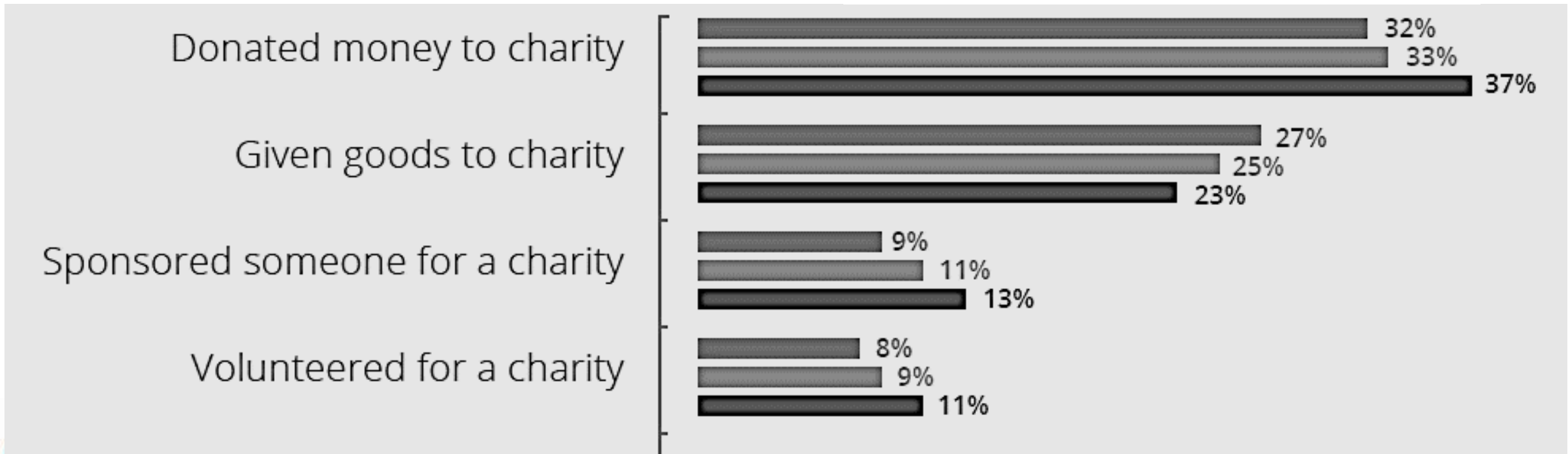
£851M was donated by individuals in Scotland in 2018, down from £1.2bn in 2017.

The main causes donated to were:

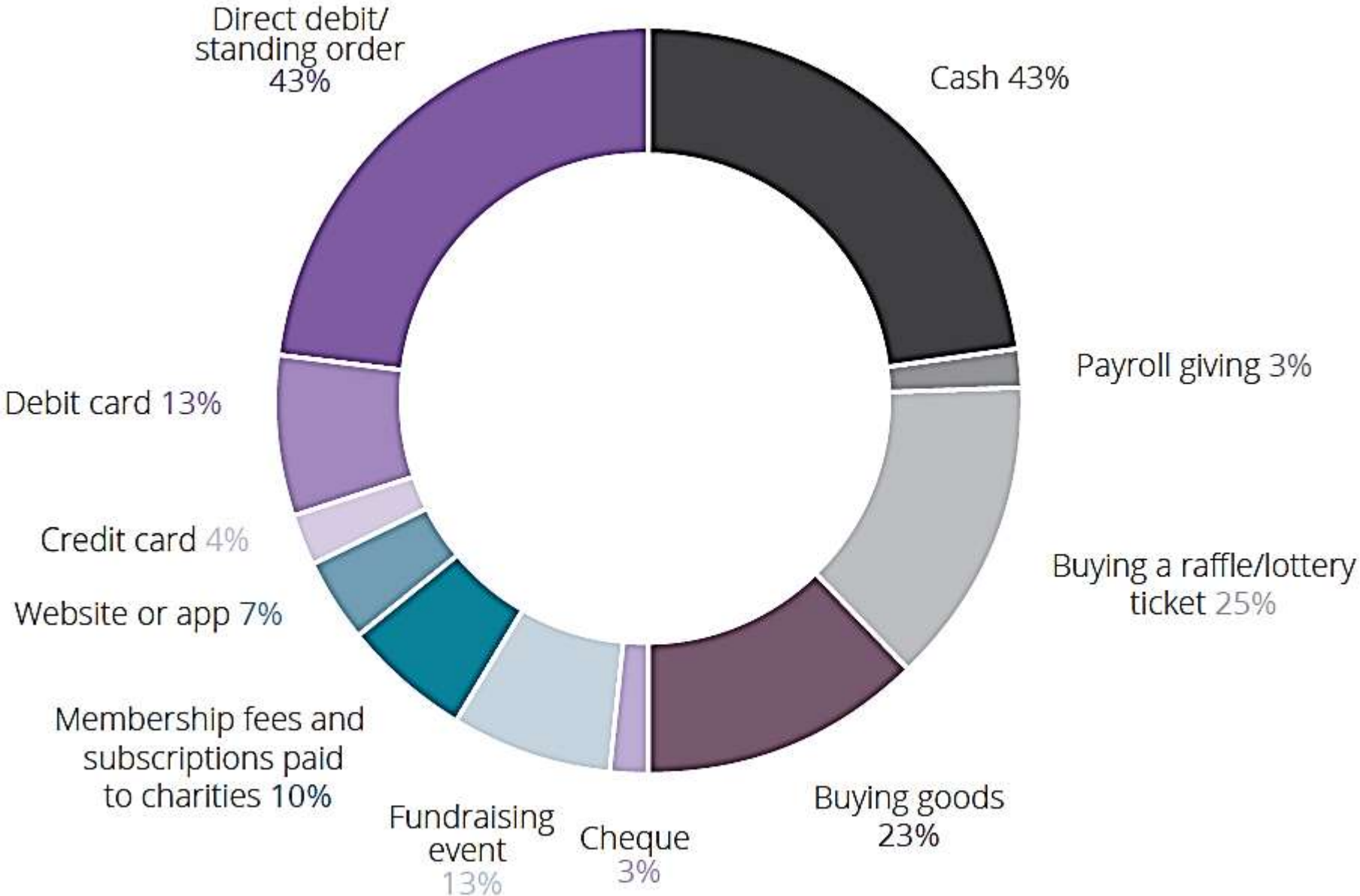
- Children & young people 30%
- Medical research 28%
- Animal welfare 24%
- Hospitals & Hospices 19%
- Overseas Aid & Disasters 15%

WHICH OF THESE HAVE YOU DONE IN THE LAST FOUR WEEKS?

■ 2018 ■ 2017 ■ 2016



HOW PEOPLE GIVE IN SCOTLAND



GIVING IN SCOTLAND 2019 - TRENDS



Scots more likely to take part in a charitable or social activity in the last four weeks than UK as a whole



Fewer people are being asked to give

There has been a decrease in the methods by which people are asked to give, with on street and direct mail in particular having fallen back year on year.



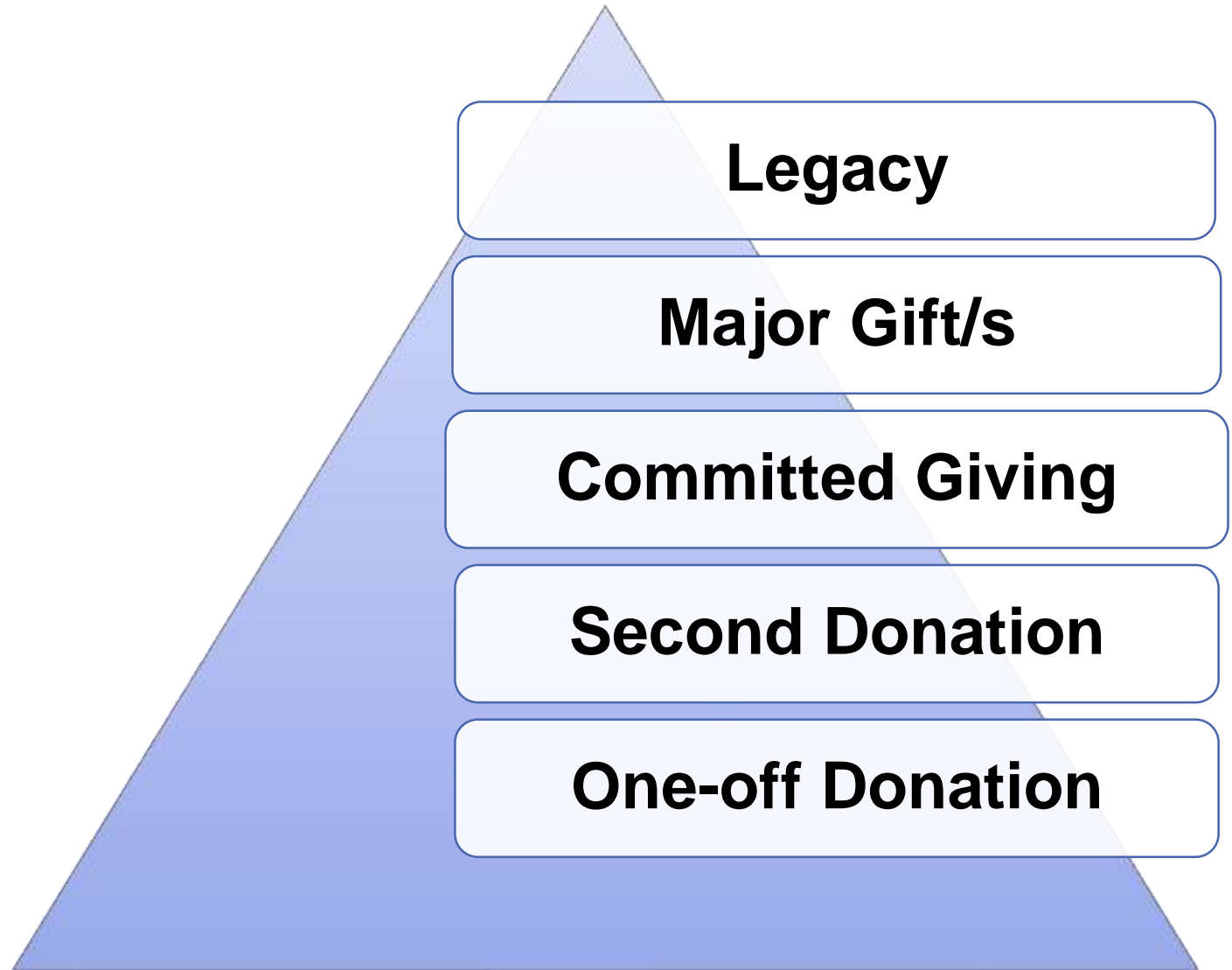
Frequency of giving is decreasing

From 31% giving weekly or monthly in 2017 compared to 27% in 2018, this is a trend we're currently seeing across the whole of the UK.

WHY WE GIVE?



DONOR DEVELOPMENT PYRAMID

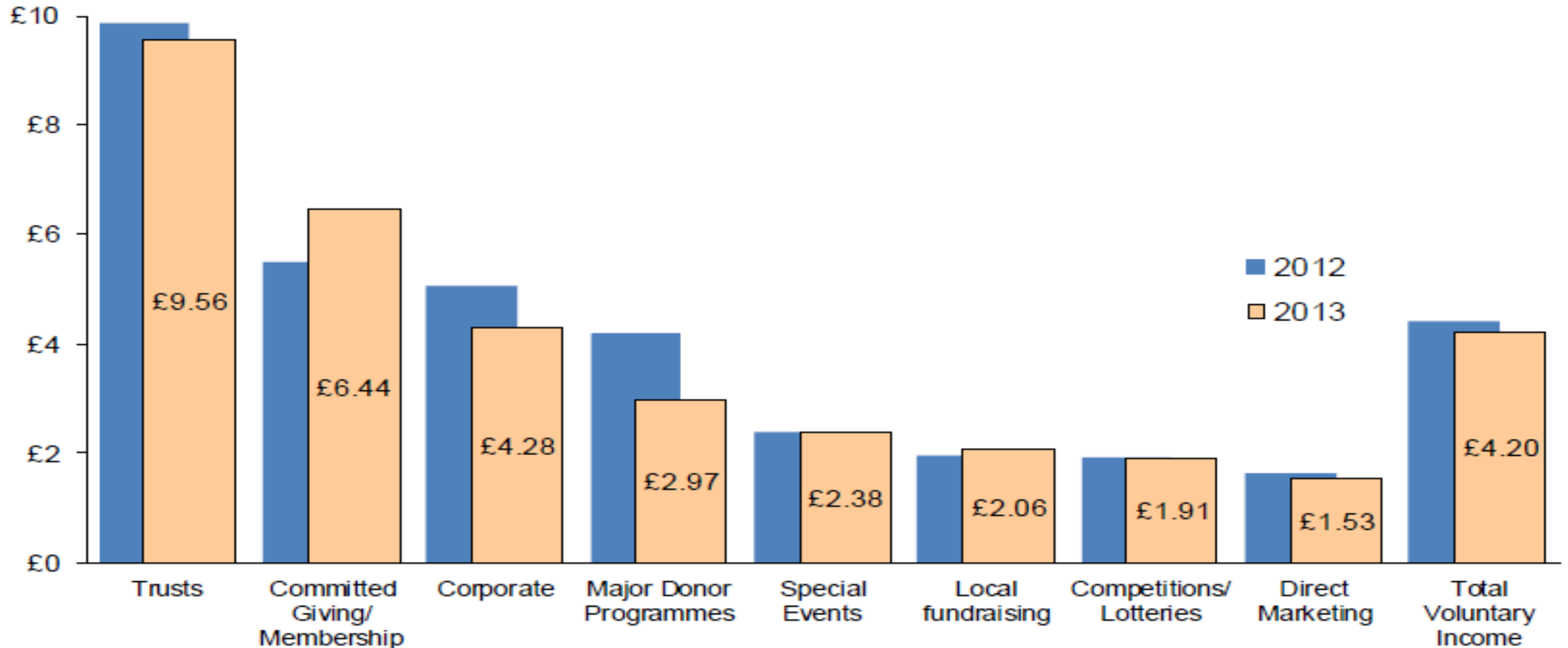


FUNDRATIOS 2013

© Centre for Interfirm Comparisons & Institute of Fundraising

Chart 7

Voluntary Income per £1 Invested



STRATEGY

1. Where have we come from?
2. Where are we now?
3. Where do we want to be?
4. How are we going to get there?



REGULATION OF FUNDRAISING



**Scottish
Fundraising
Standards
Panel**

- Legal
- Open
- Honest
- Respectful



**FUNDRAISING
REGULATOR**



OSCR REGISTRATION LOGO



www.oscr.org.uk/becoming-a-charity/registration-logo-for-scottish-charities

COMPLAINTS POLICY

Having a clear fundraising complaints handling procedure in place can help your charity deal with any concerns raised quickly and easily. It also shows the public and your donors that you are committed to best practice in your fundraising.

Example here:

www.goodfundraising.scot/model-complaints-handling-procedure/



FUNDRAISING COMPLAINTS

Stage 1:

Complain to the Charity

Stage 2:

Appeal to the Charity Trustees

Stage 3:

Complain to the Scottish Fundraising Standards Panel or the Fundraising Regulator

THE FUNDRAISING GUARANTEE



<https://www.goodfundraising.scot/fundraising-guarantee/>

CODE OF FUNDRAISING PRACTICE

“The Code of Fundraising Practice and its associated Rulebooks for Street and Door Fundraising outline the standards expected of all charitable fundraising organisations across the UK. The standards were developed by the fundraising community through the work of the Institute of Fundraising (IoF) and Public Fundraising Association (PFRA).”

<https://www.fundraisingregulator.org.uk/code>



CODE OF FUNDRAISING PRACTICE: CASH HANDLING UP TO 1 OCT 2019

20.2 a) Cash **MUST** be collected, counted and recorded by two unrelated individuals, wherever possible. (Collection boxes **MUST*** only be examined and opened by the promoter of the collection (eg. a charity's fundraising manager) and one other responsible person or by an official of a bank).

b) Unsecured cash **MUST** never be left unattended or in an unattended environment.



CODE OF FUNDRAISING PRACTICE:

4.1 CASH

4.1.1 You must not leave cash unattended

4.1.2 You must count cash in a secure place

4.1.3 You must make sure that all cash you have collected is counted and recorded by two unrelated people, where possible

4.1.4 You must make sure that cash donations are placed in a sealed container or collecting box.

CODE OF FUNDRAISING PRACTICE

13 GRANT-MAKING BODIES

13.2.1 In general, you must avoid mass mailing and cold calling to grant-making bodies, except in exceptional circumstances, for example a national disaster or emergency.



PROTECTING FUNDRAISING VOLUNTEERS

The Code of Fundraising Practice states that your organisation has a responsibility to protect your volunteers. Organisations must:

- Protect volunteers information - GDPR
- Ensure PVG/Disclosure is in place (if applicable)
- Volunteers are recruited without discrimination
- Provide “Out of Pocket” Expenses

“ON BEHALF OF..” VOLUNTEERS

The positives of having “on behalf of” volunteers are:

- You will have a volunteer who is formally recruited
- Volunteers will have clear understanding of your organisation
- You will have more control over the role of the volunteer

The negatives of having “on behalf of” volunteers are:

- Organisation have a responsibility to protect their volunteers
- Manage volunteer expectations

“IN AID OF..” VOLUNTEERS

The positives of “in aid of” volunteers are:

- Raising money for free
- Raising the profile of your charity

The negative of “in aid of” volunteers are:

- The organisation has no responsibility – less control
- Fundraising methods may not be approved by the charity
- Lack of understanding of the organisation’s values

GIFT AID:

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- Donation from a UK Taxpayer £100
- Charity can claim £25

Donor earned £125 before basic rate of Income tax
@ 20% was deducted

$$\frac{\text{Donation} \times \text{basic rate of tax}}{\text{---}} = \frac{y^* \times 20}{\text{---}}$$

- 100 – basic rate of tax 80

* y = value of donation

MAXIMISE GIFT AID

Gifts of money from Individuals who are tax-payers:

- ✓ Auctions
 - ✓ Donated goods
 - ✓ Membership Subscriptions
 - ✓ Sponsored events
 - ✓ Membership Subscriptions
 - ✓ Volunteer expenses
- Gift Aid Small Donations Scheme

giftaid it

CASE FOR SUPPORT

A clear, compelling and concise argument which convinces potential donors of the beneficiaries' vision for their future.



IoF's 5 GOLDEN RULES FOR TRUSTEES

1. Everything begins with a **strategy** - have a clear fundraising strategy and ensure it is integrated into your overall strategic planning
2. **Think long term** - ensure sustainable planning is at the heart of your fundraising
3. Do the right thing - always consider the legal and ethical implications of your fundraising
4. **Don't put all your eggs in one basket** - where possible, diversify your fundraising strategy
5. **Play your part** - what can you do to ensure that your organisation's fundraising achieves its potential?

MY MAGIC INGREDIENTS FOR FUNDRAISING SUCCESS..



1. If you don't ask, you don't get
2. Fundraising is never "free"
3. The scatter-gun approach doesn't work
4. Always look a gift horse in the mouth
5. Ethics matter
6. People give to People
7. Give, Get or Get Off?
8. Donor fatigue...

9. Don't expect quick wins
10. Its all about relationships and partnerships
11. Get yourself away from the data and talk to people
12. Know your supporters
13. Understand finances and how finance people think
14. Understand what is important versus what is urgent
15. Don't put all your eggs in one basket unless..
16. Believe in the cause
17. Love your role...

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Relax
&
Enjoy

