

Making Fundraising Work for your Organisation

Webinar 2: Getting Your Board on Board Engaging Funders

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This session will focus on:

- How to get your Trustees to become Fundraising aware
- 10 Tips to include Trustees
- Case for Support... and a challenge
- Engaging with Funders, including those you know and those you've not yet met
- Recipe for Engagement

Declaration

- All material provided is either existing research, which is credited, or is regarded as ‘best practice’ as at 1st March 2020.

However, this is **not** a substitute for professional, legal or financial advice.

Getting Your Board on Board



Who is Responsible?

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

Fundraising Guidance for Charity Trustees

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

OSCR
Scottish Charity Regulator



Fundraising Guidance for
Charity Trustees

Trustees and Fundraising Handbook

The Institute of Fundraising offer a full range of resources for Trustees, including the free Trustees and Fundraising Handbook, covering Trustee responsibilities for fundraising at www.institute-of-fundraising.org.uk/trustees .



IoF's Five 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?

Regulation of Fundraising



**Scottish
Fundraising
Standards
Panel**

Legal

Open

Honest

Respectful



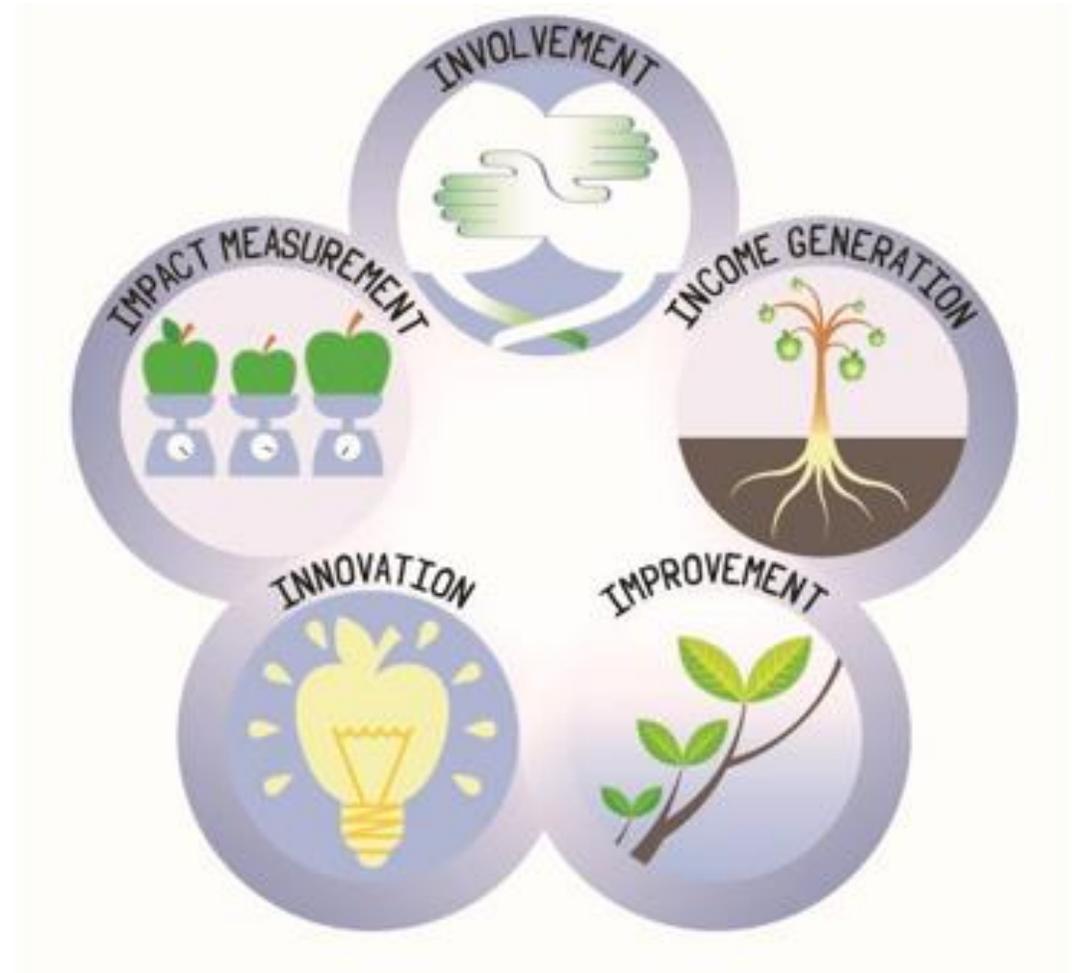
FUNDRAISING
REGULATOR



Sustainability: Making a Lasting Difference

- Involvement
- Income Generation
- Improvement
- Innovation
- Impact Measurement

www.lastingdifference.com



Tip 1

Run an 'Introduction to Fundraising' Session and make it a regular part of Trustee Induction



Tip 2

Be Honest and Open



Tip 3

Make it Clear How
They Can Help



Tip 4

Get Fundraising on the Agenda



Tip 5

Establish a
Fundraising Sub-
Committee



Tip 6

Set a Period of
Time to Champion
Fundraising



Tip 7

Don't Be Afraid to
Ask Difficult
Questions



Tip 8

Seek Trustee
Approval



Tip 9

Don't Wait Until
the Last Minute



**Mark
Your
Calendar**

Tip 10

Help Trustees with
'The Rules'



Case for Support

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



Ten Questions Every Trustee Should be able to Answer...

1. What are your responsibilities when it comes to fundraising?
2. Are you happy that your charity is compliant with all fundraising standards and legislation?
3. Do you monitor how many fundraising complaints have been received?
4. Is your charity transparent and accountable in its approach to fundraising?

10 Questions...

5. How is your charity's fundraising approach sustainable?
6. What is your charity's fundraising strategy?
7. Do you have robust processes in place to ensure you have appropriate fundraising policies, systems, culture and control mechanisms?
8. Which fundraising methods do you use?

10 Questions...

9. Who delivers your fundraising: staff, volunteers, third parties? Are you confident that they are doing so legally, and to the highest standards?

10. Are you confident your fundraising expenditure is being used as efficiently as possible to achieve short and long term objectives?

Engaging with Funders



Engaging with Funders

Relationship building is key.

Having a funding plan in place will direct you. Our next webinar discusses how to develop your organisation's funding plan.

Engaging with Funders you Don't Know

- Don't Waste Their Time
- Good Communication is Key
- Understand Your Organisation/Project
- Have a Case for Support Ready
- Attend Funders' Forums
- Request to be Added to Their Mailing Lists
- Attend Workshops/Events Delivered by Funders
- Use people you know to introduce you- Board Members

Engaging with Funders you Know

1. Thank Them!
2. Identify a Personal Contact
3. Keep Them Up-to-Date
4. Share Challenges
5. Acknowledge Their Contribution
6. Invite Them to Events
7. Be Timely with Reports
8. Ask Advice

Recipe for Engagement

Ingredients:

- mutual respect
- clear expectations (from both sides)
- open and ongoing communication
- trust
- humility
- mission alignment

Some other ingredients for the perfect combination: respect for failure, open-mindedness – and a willingness to learn from each other.

Recipe for Engagement

Directions:

- Stir together power and respect
- Fold in trust and transparency
- Add spice
- Marinate
- Manage expectations
- Whip up a communications plan
- Sauté
- Taste

When all ingredients are added

- Check for anything missing
- Garnish the plate
- Deliver to the table- and enjoy!

Note: Recipe to be adapted to your own situation

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