

HOW TO GUIDE

Next steps in fundraising



Inside...

Major donors

Legacies

Grant funding

Events

**Corporate
partnerships**

Fundraising
magazine

Published by Civil Society Media



INTERVIEW JOYCE MATTHEWS
‘We’re not waiting for other people to effect change’

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Editor's message



Stephen Cotterill

Welcome to the first full edition of the How to Guide series produced by Civil Society Media and Fundraising Magazine.

Whether you are just starting out on your career as a fundraiser or working for a smaller charity with limited resources, this guide is designed to give you a broad overview of some of the key income channels used in the sector. Each one has associated opportunities and challenges, and a basic knowledge of each segment will help you develop as a professional fundraiser and help drive income for your cause.

A lot of innovation in fundraising is through trial and error. This can be expensive and time-consuming. Luckily, some of the bigger charities have the resources to experiment and are generous enough to share their learnings with the wider sector. In this edition, you will find out how RSPB has used digital film to help engage donors with its legacy proposition, while the British Heart Foundation explains how it has held an annual swimming challenge for over three decades, raising hundreds of thousands of pounds. Each case study is followed by group activities and exercises to help you apply what you have learned to your own fundraising initiatives.

Keep an eye out for future editions of the How to Guides which will focus on specific specialisms, offering a deep dive into areas such as legacies, digital fundraising, and trust and foundations.

How to Guide

Next steps in fundraising

Take the next steps in your career as a fundraiser with the How to Guide series produced by Civil Society Media and Fundraising Magazine

This first volume is one of several publications gathering expert insight and real-life case studies on a range of professional fundraising specialisms including major donor giving, trust and foundation grant applications, legacies and many more.

This edition includes case studies from:

- Parkinson's UK
- RSPB
- Nationwide Community Grants Programme
- British Heart Foundation
- NSPCC

This edition takes a broad look at some of the main fundraising channels, highlighting best practice, successful strategies and common pitfalls to avoid.

How to Guide – Next steps in fundraising includes:

- Insight into securing major gifts
- How to adapt legacies in line with consumer behaviours
- Guidance on writing successful grant applications
- A look at what's next for event fundraising
- How to get the most from corporate partnerships

How to Guide – Next steps in fundraising is the first in a series of books packed with useful information curated from Fundraising Magazine and civilsociety.co.uk

Upcoming editions will focus on individual channels, including:

- Digital fundraising
- Trusts and foundations
- Corporate partnerships
- Legacies
- Face-to-face fundraising

A dynamic **fundraising** *landscape*



Fundraising has faced some strong headwinds in recent years, but through adversity comes opportunity, writes **Stephen Cotterill**

Fundraising has always been a dynamic sector but the last few years have seen it face unprecedented challenges in all areas of income generation. Lockdowns, geopolitical instability, humanitarian crises, economic downturns and the cost-of-living crisis – have all put pressures on charities' financial sustainability and donor giving.

However, through adversity comes opportunity and the five fundraising methods covered in this guide all offer potential for income growth if you have the know-how and tools to tap into it.

Trends in major donor giving

With the economic climate putting a pinch on the spending power of the average household, charitable giving by the nation's richest donors has become paramount for many charities.

The good news is that recent data related to philanthropic generosity show an upward trend in giving. According to the Sunday Times Giving List produced in association with the Charities Aid Foundation (CAF), Britain's wealthiest gave £3.4bn to charity in 2023, up by £1.1bn on the previous year's total. According to the list, seven members gave more than £100m in the past year, and 42 gave £10m or more.

Neil Heslop, chief executive of CAF, says: "The effect of high-net-worth individuals giving is extraordinarily beneficial and I applaud it.

"The cost-of-living crisis and rising inflation continue to increase costs for charities and many more are relying on their vital services, at a time when the general public are reducing their donations. It is more important than ever that those who can afford to give, encourage others to join them in giving more."

"The effect of high-net-worth individuals giving is extraordinarily beneficial"

Legacies and the transfer of wealth

As the decade continues, we are heading towards the largest multigenerational transfer of wealth in modern history. Legacy giving has already risen by 43% over the past decade (reaching £3.85bn in the UK according to Legacy Foresight) with legacy income generating some 44% of annual voluntary income in the UK, most of which is unrestricted.

Legacy Foresight predicts that charities will see around 145,000 bequests every year until 2027, an 11% increase on the average of 131,000 bequests seen between 2018 and 2022.

This is largely due to progress made in reducing the probate backlog alongside rising death numbers.

“The charity legacy market is becoming increasingly competitive”

Although this presents a tremendous opportunity, it doesn't mean it is going to be a free-for-all cash bonanza. Ashley Rowthorn, group chief executive officer at Legacy Futures, says: “The charity legacy market is becoming increasingly competitive with more organisations entering this space and, despite the volume of legacies increasing, the average gift value is likely to decrease, at least in the short term.

“Charities will need to understand market conditions, how these are affecting their supporters and be relevant in their fundraising to secure legacy income for the future.”

The grant-giving landscape

Many foundations and trusts were quick to pivot during the pandemic, offering unrestricted emergency funds to partner charities which were coping with sudden drops in fundraised income.

Grantmaking by the UK's largest foundations rose by 13% in 2020-21 despite their incomes reducing, according to the Foundation Giving Trends 2022 report released by the Association of Charitable Foundations

(ACF). It shows that the country's 300 largest grantmakers distributed funds worth £3.7bn that year compared with £3.3bn in 2019-20. The rise is despite foundations' total income falling by 10% in 2020-21, partly due to the impact of the pandemic, the report says.

As things return to normal, grant giving through foundations is still outstripping other avenues of funding, offering a tremendous opportunity to fundraisers.

According to a study by 360Giving over £20bn was paid in grants to voluntary organisations in 2021-22, with UK-based foundations giving more money to charities through grants than government bodies, research suggests. Some £7bn of this (35%) came from non-governmental grantmaking organisations, with government bodies being the second-highest group of donors to the sector with £6.4bn (32%).

The return of events

Events are making a comeback since the pandemic, with many charities saying that sign-up rates for in-person mass participation events are nearing pre-pandemic levels. The top 25 charity-owned mass participation events raise around £114m each year, according to event agency Massive's annual report. This, coupled with the rise of hybrid and virtual challenges, is proving a boon for fundraisers not only in terms of income but also engagement.

John Tasker, partner at Massive, says: “While Covid and the cost-of-

living crisis have created a difficult climate for fundraising, it's hugely positive to see so many events getting back on track.

"Mass participation fundraisers know that these events provide so much more than in-year income. In these difficult economic times, building sustained, authentic connection with supporters has never been so important."

Back to business

Partnerships with businesses are also about building sustainable long-term relationships, which can be worth millions to charities. With more emphasis on corporate social responsibility, businesses are looking to engage at a deeper level with charities that have shared values and objectives.

"True partnership is through open conversation and understanding"

Deputy executive director of partnerships and philanthropy at Unicef UK, Mohini Raichura-Brown, says: "What we are seeing, especially among private sector organisations, is that they are increasingly taking social purpose seriously. They have their own mandates, their own objectives and things they are looking to deliver

themselves. True partnership is through open conversation and understanding what those objectives are. It is about recognising that we are separate organisations, with separate values and ways of operating. From that point you can seek out where there is mutual alignment. It's about identifying what those mutual interests are and what the donor is looking to achieve.

"Stewardship is about understanding what your donor wants, how the relationship is going to add value to them and your cause, and always advancing that mutual goal."

Well-rounded understanding

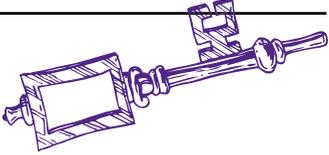
Of course, these are only a handful of the channels open to fundraisers to generate income. Having a well-rounded understanding of all methods is key to progressing your career as well as making the most of every opportunity for your charity. And an organisation-wide understanding of the importance of fundraising is critical.

As Noha Al Affi, director of fundraising and communications at Arthritis Action, notes: "Everyone in your organisation should be a fundraiser. Not just your comms people, not just your fundraisers, but top down from your trustees and your chief executive. There are a lot of opportunities where we can generate income, but it's about making them comfortable with the ask, and increasing their knowledge on why fundraising is important."

SECTION 1



Unlocking major donor potential



Russell Hargrave highlights the keys to success when looking to secure major gifts

Economic challenges of recent times have put more pressure on major donor giving programmes to make up the shortfall. And as many of the world's wealthiest individuals appear to have shrugged off the worst financial blows of the pandemic, the role philanthropy can play in securing sustainability for charities should not be underestimated.

Vast monetary gains by the world's richest individuals over the past four years stand in stark contrast to the economic difficulties faced by so many. The pandemic particularly created opportunities for internet fashion retailers, computer games tycoons and technology entrepreneurs who deliver their products direct to people's homes. There are also more "unicorns" – start-up businesses with a valuation in excess of \$1bn – in the Times Rich List than ever before.

So, has this increasing wealth been passed on to the charity sector? Well to some degree it has. The Sunday Times Giving List – the annual measure of philanthropy among the super-rich – has shown incremental gains over recent years, hitting £3.4bn in 2023.

“Large charities are investing heavily in looking after their biggest backers”



So, philanthropy appears to be on upward trend. However, the trick now is to maintain that momentum.

Back in 2017, the millionaire philanthropist Matthew Bowcock published a paper arguing that the UK



could unlock £4bn more each year for charities if the richest individuals felt greater pressure to give money to good causes. Furthermore, the Beacon Trust has warned that charities need to transform their work with millennials if they hope to access some of the trillions of pounds in assets soon to be handed down by the baby-boomer generation. So, what can charities do to unlock this potential?

The importance of relationships

The days of simple transactional relationships between donors and charities are long past, says Helen Fleming, head of high-value partnerships at the disability charity Sense. Large charities are investing heavily in looking after their biggest backers, she says, not just to secure donations but to build a community of philanthropists who bring other value to charities.

"People will have their own reasons for giving, at every level," says Fleming. "All good fundraisers recognise that and work with that."

In the case of high-value donors, charities are looking to networking events or activities that can deepen relationships between the charity's philanthropists. "Whether it is virtually or in-person, you can bring the group together," she says. "You can hold very specific events for those people. You can bring along your operational colleagues, or interesting speakers. You can share insight. This creates

a space and intimacy in which they can get to know each other, not only to understand a shared mission but also to spot links and opportunities which wouldn't otherwise be evident."

Fleming adds that such groups can develop "a life of their own", led by philanthropists who, through their own financial success, will bring "a collective sense of what you can do together".

Charities unsure of how to develop this sort of convening role can look for inspiration across the Atlantic, says Fleming. "Those sorts of circles and clubs have been going much longer in America, Canada and other more progressive philanthropic cultures."

"Charities need to transform their work with millennials to access trillions of pounds"

Clare Wilkins, who heads up work on effective philanthropy at the think tank NPC, agrees that relationships with and between philanthropists have to be nurtured. But this doesn't end when funding is secured, she warns. "Charities can be really enthusiastic with new funders, but then sometimes they fall down when it comes to maintaining the partnership that they have been able to build. So [it is important] to keep a funder updated

on what it is they are doing, by having transparent conversations.”

Donors can become frustrated if “they have not quite developed an understanding of how the charity is working or the impact it is aiming to have”, she adds.

And there is plenty at stake: “If a funder has a really bad experience with one charity, they might translate that experience to how they work with other charities they are supporting.”

Major donor co-production

Some commentators fear that the power of philanthropists – whose funding decisions can make or break whole programmes – threatens to bend charities’ priorities out of shape.

Fleming is not so sure. Charities have plenty to teach philanthropists, of course, but a donor’s expertise can be invaluable to the voluntary sector as well. “You need to commit to a level of transparency and offer a level of access and the opportunity to shape projects,” she says. “This does not necessarily feel like natural territory for a lot of charities, but I think there is something valuable in seeing that as co-production.

“Lots of charities would feel much more comfortable thinking about co-production from a beneficiaries’ perspective, working with the people who use services to design, develop and deliver services, and to evaluate the impact. Fewer charities think about co-production with high-value

donors. But increasingly, that is where you can see incredible value.”

It takes a new approach, Fleming says – what she calls “radical openness” – that can lead to “amazing things happening”.

Power of the individual

With fundraising events cancelled during Covid and the cost-of-living crisis, charities have lost out on millions in donations over the past few years. Worse still, individual giving and regular direct debits are also likely to have taken a hit.

“Smaller donors shouldn’t be sacrificed in pursuit of the big bucks”

“The problem we have at the moment is that a lot of people are reviewing their financial priorities,” says Wilkins. “If people are going through a difficult time financially, rethinking what is most important to them, perhaps tightening their belts, [then] in some cases they might feel they just can’t continue with their monthly direct debit to charities.”

There isn’t much data on this yet, but Wilkins is cautiously pessimistic. “I suspect it [a fall in small donations] has happened and will continue to happen because the economy is not going to spring back like an elastic band. Individual giving will probably be the same.”



Those with deeper reserves can provide some insulation against a drop in smaller donations. But be wary of putting all your eggs in one basket, urges Sense's Fleming. Smaller regular donors shouldn't be sacrificed in pursuit of the big bucks. Winning donors in the first place is hard – and losing them again means finding new supporters to take their place, which is an expensive process.

“Those with deeper reserves can provide insulation against a drop in smaller donations”

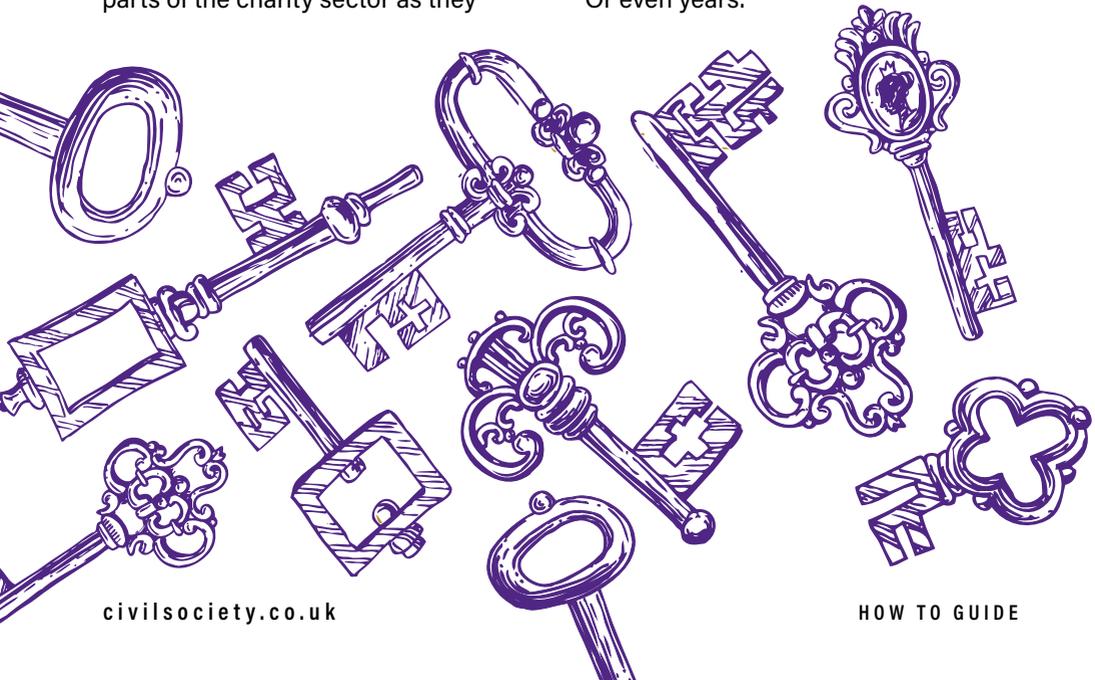
Fleming says that small givers could be better looked after in some parts of the charity sector as they

“aren't classically encouraged to think of themselves as part of a collective whole” when that could help retain their loyalty when the going gets tough.

The long game

Building relationships with philanthropists of all kinds requires patience, and although big donors will often respond quickly in an emergency, turning conversations about philanthropy into sustainable giving can be a long process, says Fleming. Charities may be urgently aware of the pressing needs of their beneficiaries, but that doesn't translate into immediate actions by philanthropists.

The first chat between a potential funder and a charity might well elicit a generous gift, but it would be foolhardy to guess how long that process may take. “It could be days, weeks or months,” Fleming says. “Or even years.”



Exercises

Exercise 1

Questions to consider when talking to philanthropists:

What skills or experience can your major donor bring to the cause other than funding?

How willing are they to question how and what they give now and in the future? And what experiences may be necessary to facilitate that change?

How much of what they want from their giving relates to their sense of right or wrong and how much of it is a simple personal preference?

What elements of their philanthropy are they willing to disown so others can own it, and what are they not?

Are there people in their networks who could also become involved? Can they become ambassadors?

Exercise 2

Thinking about your major donor base, what do you think are their priorities?

Passion for the cause

Altruism

Prestige

Networking

Praise

Self-esteem

Personal involvement

Civil duty

Can you think of other drivers?

Case study

NSPCC

Over recent years, NSPCC has looked beyond the basics of philanthropy fundraising and the solicitation cycle (identify, research, engage, ask, steward) to turn a standard philanthropy programme into one that drives transformational gifts. Key learnings include:

Build strong propositions

NSPCC fundraisers work closely with the finance department to ensure that donors can see how their money will be spent. The charity offers philanthropists the chance to fund national programmes or projects in various locations. Often the most compelling ask to a philanthropist is a capital project, giving them the opportunity to see their donation creating a new building or equipment, and with the potential for them to be recognised for their support through naming.

Listening to donors

At the heart of a good relationship with a philanthropist is the ability to listen to their needs, not spend the time selling them your organisation. The first meeting with any prospective donor is about asking the right questions and listening to their response. What motivates their philanthropy? What

interests them about your work? How would they like to be involved with your charity?

Leadership involvement

Many philanthropists prefer to be engaged by senior leaders. This gives them trust in your organisation and illustrates their importance to your mission. However, not every senior leader is comfortable with this form of fundraising, so find those who are.

“Major donors respond better to their peers than to fundraising staff”

First-hand experience

Philanthropists will often want to experience your work in person and visit your service. Charities that can make these visits informative as well as inspiring are the most successful in soliciting major gifts from philanthropists.

Advocates

As philanthropy fundraising becomes more competitive, simply writing to people on the Sunday Times Rich List and hoping for a response becomes

ever more pointless. Major donors respond better to their peers than to fundraising staff, and finding those influential individuals who will advocate for your cause, open their networks and introduce you is key to success.

Openness and transparency

One of the pitfalls when engaging philanthropists is to attempt to oversell the work of your charity; to “spin” what you do to make it sound perfect. Philanthropists, particularly experienced ones, will see through this façade. Openness and honesty is the best policy.

A specific ask

This sounds straightforward, but so often fundraisers or senior stakeholders can feel awkward about asking. They soften the ask into a vague request for “support” rather than a specific ask for a gift. Be open about why you’re meeting a philanthropist from the start, and make sure that when the time is right to ask, you’ve got a specific sum to request and someone in the room who’s willing to request it.

Tell stories

There’s sometimes a perception that major donors will want to know about wider strategic issues, understand your financial situation, review your delivery models, and focus on impact, but even if they do, don’t forget to illustrate your work with stories of those helped by your activities.



Personalised thank-yous

As with all fundraising, one of the classic mistakes is not to say thank you when a gift is made. For philanthropists, this should be from the highest possible person who can personalise it. A standard letter from the chair is far weaker than a personal call from the CEO. And a handwritten letter, is better than an email.

Patience

Philanthropy programmes are notoriously slow to develop. Measure your progress beyond just money by tracking the number of meetings, number of asks made and attendance at events across your prospective donor pool. These will show you whether you’re on the right track. Don’t promise your organisation a huge uplift in income in year one – wait to see if the prospects give and then continue to build from there.

By Edgar Sutcliffe, voluntary income director, NSPCC

Exercises

Exercise 1

Thinking about your major donor strategy, consider which of the key takeaways are most important. Put them in order of priority:

Key takeaways	Order of priority
First-hand experience	
Listening to donors	
Patience	
Personalised thank-yous	
A specific ask	
Build strong propositions	
Advocates	
Openness and transparency	
Leadership involvement	
Telling stories	

Exercise 2

Key questions to discuss:

How would you prepare for your first meeting with a potential major donor?

What questions would you ask a major donor?

Who do you think should be at the first meeting?

What background information do you need about a potential donor? Where would you find it?

Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

Checklist

- Research potential donors
- Define proposition
- Identify advocates
- Decide the specific ask
- Establish contact
- Thanking and follow-up

Notes:

Resources

Case studies:

NSPCC

civilsociety.co.uk/nextstepsinfundraisingresources

List of pathways for becoming a major donor.

CRUK

civilsociety.co.uk/nextstepsinfundraisingresources

Information on how philanthropists can get involved in capital appeals, funds and research programmes.

Cats Protection

civilsociety.co.uk/nextstepsinfundraisingresources

Case studies of how major donor gifts and philanthropic engagement has helped support cat welfare.

Guidance

Institute of Sustainable Philanthropy

www.philanthropy-institute.org.uk

Training and consultancy services for major donor fundraising professionals.

New Philanthropy Capital

www.thinknpc.org

Think tank and consultancy for charities working to increase impact through philanthropy.

Charities Aid Foundation

www.cafonline.org

Research and resources on major gift fundraising strategy.

SECTION 2



Adapting legacies to new trends

Co-founder of Legacy Foresight **Meg Abdy** offers her top tips on how to adapt legacy fundraising to changing consumer behaviours

Legacy giving is undoubtedly one of the fundraising success stories of recent times. Over the past 30 years, real legacy income (after inflation) has trebled in value, set to reach a record £4bn per annum, and is expected to grow strongly over the next three decades. At Legacy Foresight, we forecast that legacy incomes will double in real terms (after inflation) by 2050.

“Digital brings huge opportunities to raise awareness and build relationships”

But that doesn't mean we can keep doing what we've always done in the

belief that donors will keep on giving as they have before. We are a diverse population, ever evolving, and those charities that are successful with legacy fundraising understand the nuances of changing consumer behaviours and respond effectively. Our clients are reporting boards' fresh willingness to invest – that in turn is leading to innovation in strategies and channels, and more creative, ambitious legacy messaging.

After 30 years analysing gifts in wills, here are my top tips on how to adapt legacy fundraising to changing consumer behaviours.

Recognise a new generation

Compared to the war babies who are leaving gifts today, the profile of legacy donors is changing. The expected income growth is thanks to the number,

wealth and attitudes of today's 60+ population. The dominant group over the next 30 years will be the babyboomers – born 1946-64 – now in their 60s to mid-70s.

Growing up in an age of mass media with an opportunity to travel and meet people from different cultures, their worldview is broader and more fluid than previous generations. Alongside perennial favourites of health and animal charities, boomers are likely to support environmental and overseas development charities. Triggered by the pandemic, we also see new interest in causes closer to home, including homelessness, mental health, food banks and charities linked to the NHS.

“The Muslim population is a significant opportunity for legacy fundraisers”

These consumers have been exposed to escalating legacy messaging over the past 30 years; awareness and interest in this form of giving is reassuringly high, with half of all boomers open to the idea of leaving a gift in their will.

Your legacy communications need to connect with your supporters and tap into their worldview, their desires and circumstances. Show the bigger picture and the tangible impact.

Be transparent and clear

The women in this generation – which

have become key influencers in legacy decisions – have seen their role expand enormously. They have enjoyed more access to education (30% of women born in the 1960s went to university, compared to just 16% of women born in the 1930s), longer working lives, more financial independence and greater self-confidence.

Boomers – both men and women – are demanding and questioning. Compared to the more accepting warbaby generation, they expect more proof of how their gift will be used, the value it will bring to the cause and the way it will be managed.

When you're communicating the power of legacies you need to be honest and open, using case studies and figures. You might allow access to behind-the-scenes activities, or offer conversations with staff and service users, so donors can understand how their money will be used.

A diverse population

The population is also far more diverse – 11% of today's 60-somethings are non-white, and latest census data shows this is growing fast. In particular, the Muslim population is a significant opportunity for legacy fundraisers, as charitable giving plays an important role in Islamic culture.

Until now, British charities' portrayal of legacy donors has been woefully one-dimensional. Research by Drs Claire Routley and Haseeb Shabbir looked at the depiction of donors, beneficiaries and service delivery staff in legacy brochures from 100 leading

UK charities. Their research showed that just 5% of legacy donors depicted were non-white, along with 30% of service delivery staff and over half of all beneficiaries, suggesting something of a white saviour premise. Astonishingly, five of the top 10 legacy charities did not have any non-white images in their legacy brochures. And where non-white people were depicted, they were often nameless, faceless and voiceless.

“Legacy campaigns need to show impact, build trust and create empathy”

Surely if legacy fundraising is about changing social norms – as Dr Russell James puts it, about saying “people like me do things like this” – we risk alienating a population simply by not representing them.

It’s important not to generalise. There are huge differences between cultural groups and within them too. Ensure your legacy communications depict the full range of cultures and that you give equal voice and humanity to all people. Plan your strategy with care and think about the communities which matter most to you. Tailor your channels, media, messages and languages to your target audiences, working through the host of specialist community websites, radio stations and social networking groups out there.

Build relationships with third parties working in those communities such as solicitors, funeral directors, places of worship and schools, and consider co-operating with faith-based charities too. Play to your own strengths and collaborate rather than compete.

Harnessing the value of time

We know that the more engaged a supporter is with a charity, the more likely they are to leave a gift. Most boomers are now retired or approaching retirement – bringing a very different lifestyle and mindset. They may be more financially cautious but, for now, have time and energy to spare. They will be looking for inspiration, community, fun and new things to learn, with the potential to become brilliant volunteers, campaigners or trustees.

Move away from a reliance on direct marketing towards more personal interaction through fundraising events, volunteering, campaigning and so on. Your legacy specialists will need to build bridges with



the teams that interact directly with supporters, such as volunteer management, community fundraising and major donors.

Ultimately, it's about embedding a legacy culture throughout your organisation.

“Be brave, think big, and make your mark”

The power of digital

Digital brings huge opportunities to raise awareness and build relationships. Our recent research shows that compared to younger generations, usage among boomers

is functional – using the web for information and accessing services, rather than entertainment or content generation. Clear,

straightforward communications that are easy to navigate, well laid out, brief and visual are essential. The right tone of voice is also vital – think friendly, warm and approachable. Digital boomers are seeking a purposeful, rather than transactional, relationship with

charities. As well as inspiration, they want to stay informed, and learn about outcomes.

To build long-term commitment, legacy campaigns need to show impact, build trust and create empathy. Communicate the joys of legacy giving alongside the credible benefits.

Family first or building togetherness?

Over time we have seen boomers' confidence and comfort eroded by the growing economic and social uncertainty. What we increasingly hear from those with children – and particularly those with grandchildren – is that family must always come first.

With the huge multidimensional uncertainty we are facing now, we can expect such self and family-first attitudes to become even stronger. But we also know that the legacy fundamentals are resilient and enduring. Despite the uncertainty, or perhaps because of it, people are still keen to give something back, to work together to leave their world a better place.

You may have to work harder to counteract the turmoil and noise, but supporters will still make space in their wills for charities which have touched their lives deeply, or champion the things they care most about.

The population is shifting, attitudes are changing. The new consumer landscape is radically different. But charities can harness this for legacy giving success.

So, be brave, think big, and make your mark.



Exercises

Exercise 1

Note down some of the key figures around legacy fundraising:

Figures Legacy fundraising

£	expected real legacy income per annum
%	today's 60-somethings are non-white
%	of women born in the 1960s went to university
	years when babyboomers were born

Exercise 2

Key questions to discuss:

How representative of the population is your legacy programme?

How can you engage with more diverse communities?

How are you engaging the next generation of legacy givers?

What unique selling points does your charity have as a legacy proposition?

What digital channels are the most effective for reaching your audience?

How can you get buy-in from across your organisation for legacies?

Case study

RSPB

Legacies are a crucial income stream for the RSPB and yet, without an active legacy fundraising programme in recent years, the number of pledgers was in decline.

Aiming to reverse that trend and to inspire more nature lovers to consider the charity in their will, the RSPB appointed Catsnake: The Story Agency to help develop a digital storytelling campaign that would convey its mission to protect habitats, save species and help end the nature and climate emergency.

“RSPB was able to continually adjust the campaign around the most successful and timely elements”

Launching in 2020 on the RSPB’s social channels, the video and story-based campaign was a first for the RSPB legacy marketing team. Developed as an adaptive acquisition campaign, multiple variants were trialled, from the emotional drivers woven into the copy to the specifics of the storyline, its length, and more.

In another first, in 2021 the charity launched its DRTV legacy advert, which ran alongside waves of the campaign on social media, amplifying its impact.

With ongoing monitoring and testing, the RSPB was able to continually adjust the campaign around the most successful and timely elements, delivering bursts of activity at key moments and enabling it to keep legacies front of mind with an evolving storyline.

Vicki O’Hare, head of legacy marketing at RSPB, says: “Although we spent a great deal of time planning our narrative and how it could develop, this campaign felt miles apart from what we’d done before. It was nerve-racking doing something so new and different. But we had a great response and it’s transformed how we feel we can inspire supporters and articulate our legacy message going forwards.”

Setting an ambitious goal of increasing the average number of legacy enquiries by 300% per month, the RSPB exceeded this target and, in 2020, topped a 460% monthly increase.

O’Hare adds: “We found that our older audiences are not only increasingly tech-savvy but also that digital channels work for them. Legacy giving and end-of-life planning



“A key success metric for RSPB was the level of opt-ins to future communications from engaged supporters”

can be very personal, and they like having the opportunity to download information and digest it in their own time. Still, we aren't just thinking about older people here. More people are thinking about wills at a younger age

and we want to be visible in that space for them too.”

A key success metric for RSPB was the level of opt-ins to future communications from engaged supporters. O'Hare concludes: “What's worked so well for us is that, thanks to the quality of the new enquirers we've had from our digital campaigns, we've been able to build on that engagement and steward those supporters. More people have signed up for communications from us and, in just a year, our newsletter open rate has jumped from 23% to 42%, and our click-through rate more than doubled.”

Exercise 1

**Which of these channels do you already use for legacy campaigns?
What form did the campaigns take and what were the results?**

Channel	Yes	No	Don't know	Type of campaign and results
DRTV				
Newsletters				
TikTok				
Facebook				
Instagram				
Direct Mail				

Exercise 2

Key questions to discuss:

What was the key to RSPB's success?

Would you use an outside agency?

What was its key metric?
What key metric would you use?

What are your warm audiences for legacies?

Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

Checklist

- Identify warm audience
- Define which channels would work for you
- Outline key storytelling
- Define key messaging
- Select/research agencies
- Decide on metrics for success

Notes:

Resources

Case studies:

Brooke

civilsociety.co.uk/nextsteps/infundraisingresources

Useful frequently asked questions section informing donors of how to leave a legacy.

Dogs Trust

civilsociety.co.uk/nextsteps/infundraisingresources

Good use of video to encourage people to leave a gift in their will.

WaterAid

civilsociety.co.uk/nextsteps/infundraisingresources

WaterAid's most successful video legacy campaign to date – What Jack gave.

Guidance:

Institute of Legacy Management

legacymanagement.org.uk

Resources and training on legal aspects of legacies.

GOV.UK

www.gov.uk/guidance/wills-and-charitable-legacies

Guidance around fundraising through gifts in wills, produced in collaboration with the Charity Commission.

Fundraising Regulator

www.fundraisingregulator.org.uk

Code of Fundraising Practice has dedicated section for legacy and gifts in wills.

SECTION 3



Successful **grant** *applications*

Paul Playford offers guidance on applying for funding based on his experience as a grants officer with the Benefact Trust

I've been working as a grants officer for the Benefact Trust for almost 10 years. I assess applications for grants across Wales, the West Midlands, the south, and the south west of England as well as looking after our Methodist Grants Programme and our Heritage Grants Programme. My role at the Trust has given me a unique vantage point on what funders are looking for when they decide to award grants to charitable initiatives.

“Identify funders that are compatible with your charity’s mission”

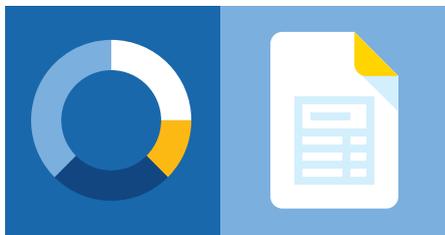
It is important to draw upon our experience to offer insights and

strategies to help charities navigate the often-intricate landscape of grant applications. My aim is to equip you with the knowledge and tools you need to make your grant application stand out.

The trusts and foundations landscape

In the UK, there are approximately 8,000 trusts and foundations that offer grants and funding to charitable organisations. The sheer number can make the task of finding the right funder seem overwhelming. However, this also means that there is a wide array of options to explore, increasing the likelihood of finding a funder that aligns with your mission.

The first step is to identify funders that are compatible with your charity's mission and goals. Recommendations



from colleagues, church members or other fundraisers can be invaluable.

A reliable resource is the Directory of Social Change's (DSC) Directory of Grant Making Trusts, which categorises trusts by subject and lists them alphabetically.

Another option is the DSC's Funds Online website, a subscription service that details 3,500 searchable trusts. Online forums and social media groups dedicated to charity fundraising can also offer useful tips and resources. Networking at industry events can provide valuable leads.

“It's crucial to have a clear understanding of your project costs”

The Charity Commission's Register of Charities is a free resource that lists charities registered in England and Wales. Using search filters, you can identify potential funders which support your area of work. Scotland and Northern Ireland have their own separate registers.

For Christian charities, the Christian

Funders Forum is an excellent starting point and offers a list of members and potential funders. This is a forum comprising of 40 organisations.

Initial contact

Once you've identified possible funders, the first step is to visit their websites and gain a better understanding of their areas of interest. You may also be able to find examples of other grants they have awarded, helping you to establish whether your project or organisation is likely to be a priority for support.

Once you are confident that you meet the potential funders' criteria, reach out and make initial contact. This could be through a formal letter of enquiry or an email. Always remember to follow up; persistence can often make the difference between a missed opportunity and a successful grant.

Identifying existing relationships between your organisations' trustees and the trustees of the potential funder can also help to facilitate warm introductions.

How to research and apply

Before you even begin to fill out application forms, it's crucial to have a clear understanding of your project costs. Whether you need funds for capital expenses such as building repairs, or revenue expenses such as salaries, being clear about your needs will help you target the right funders. A detailed budget can serve as a valuable reference throughout the application process.

It's essential to do some preliminary research to ensure you meet the funder's criteria. Websites often have "Which grant is for me?", "How to apply", and "Apply for a grant" pages that can guide you.

Webinars and online tutorials can also offer additional insights into what specific funders are looking for.

While it may be tempting to copy and paste answers into multiple application forms, each application should be tailored to the specific funder. Make sure your application stands out by aligning it closely with the funder's focus. Consider creating a template that can be customised for each application to save time without sacrificing quality.

“Do some preliminary research to ensure you meet the funder's criteria”

Your application should make it abundantly clear what you need the money for and what impact it will have on your community. Use word counts wisely and consider including evidence from survey results and relevant quotes to strengthen your case.

Visual aids such as charts or infographics can also help convey your message more effectively.

Some funders prefer to give grants early in the project planning phase in

the form of seed funding, while others may prefer to plug a funding gap later. Either way, you'll need to demonstrate that your project will be sustainable in the long term. Providing a timeline of the key milestones can help reassure funders of your project's viability.

Understand the programme criteria

It is important to get a full understanding of the criteria and details of each programme for which you are applying. At Benefact Trust, for example, we launched a new grants framework in 2023 which included the Community Impact and the Building Improvements programmes. This new framework reflects a broader shift towards targeted and impactful giving focusing on projects that tackle major social issues such as mental health, homelessness and poverty. This framework also represents a more holistic approach to grant giving, where the emphasis is on creating lasting change rather than offering temporary relief.

Community Impact Grants focus on projects that address social challenges faced by vulnerable communities.

The aim is not just to provide financial support but to foster long-term solutions to social





issues ranging from homelessness to human trafficking.

Building Improvement Grants fund the conservation and restoration of community and church buildings. In addition, grants fund projects that ensure church and community buildings can be put to best use. From funding physical access ramps to the renovation of a building for wider community use, these grants help preserve valuable buildings for the benefit of local communities.

The right approach

Navigating the world of grants and funding can be a complex task, but with the right approach and a thorough understanding of what funders are looking for, your charity can secure the financial support it needs to make a meaningful impact.

In 2020-21, £3.7bn was awarded by the top 300 UK foundations, according to the Association of Charitable Foundations, so foundations represent a significant fundraising opportunity.

Remember, the key to a successful grant application rests in aligning your project closely with the funder's

priorities, demonstrating clear community impact and ensuring long-term sustainability.

Helen Gray, trust director of Benefact Trust, adds: "The Benefact Trust team is passionate about the power of community to effect real, lasting change. It's not just about the financial aspect; it's about building partnerships that empower communities to solve their own problems in sustainable ways.

"Over the years, we've seen firsthand the transformative impact that even a small grant can have. Whether it's a community garden that becomes a hub of neighbourhood activity, or a skills training programme that opens doors for unemployed youth, the ripple effects can be extraordinary."

"The key to a successful grant application rests in aligning your project closely with the funder's priorities"

Exercises

Exercise 1

Key questions to discuss:

How much will the project cost?

What are the grant criteria?

Why do you need the funds?

What is the right fund for you organisation?

Exercise 2

From your discussion, note down some of your answers:

Questions

Answers

Project cost?

What are the funds for?

What are the criteria?

Potential funders?

Case study

Nationwide Community Grants Programme

Set up in 2017, the programme tackles local housing issues by giving charities, community land trusts and housing co-operatives access to grants between £10,000 and £50,000. The value you apply for should be at least 50% of your overall project cost. A project will need to support one of three aims: helping people into a home, preventing them from losing their home or helping them to thrive at home.

“Make sure your project is costed and simple to understand”

Now in its sixth year, the Community Grants Programme has given more than £17m to support local housing issues, with another £4.7m planned for 2022. This year we are supporting 94 local projects, helping 23,907 people. Since 2017, our programme has supported 444 local projects.

Recent beneficiaries included an organisation based in Hampshire that runs a life skills programme for young people who are homeless or have experienced homelessness; a hostel

in Worcester that provides counselling support, training and employment opportunities to residents; and a charity in Merthyr Tydfil, Wales, that offers support and advocacy to victims of domestic abuse.

Our local branches don't just build relationships with members, they build them with charities too. Every time we give a community grant to a charity, we match them with a local branch, which gives them ongoing support such as media relations and fundraising.

The applications window opens in April and closes at the end of May. We look at all applications and give a shortlist to our community board members, who vote on which projects to fund in their local area.

Our 11 regional community boards are made up of Nationwide members and colleagues who come together to discuss which housing-related projects should be awarded a grant. Board members are allocated a region based on where they live so they can make informed decisions on what housing issues are most needed in their local area. Each of our community boards has 22 members and they meet in autumn to decide on the beneficiaries of the

grants, with applicants notified at the start of the year.

Our applications are split across 11 regions in the UK so the amount differs per region. Due to the volume of applicants, we are capping the number of applications in each region to 40. Even if you have received a grant previously, you can apply again.

Lots of factors contribute to a great application, but there are some basics we are always looking for:

- 1. A clearly costed project** – Make sure your project is costed and simple for us to understand.
- 2. Clear objectives and outcomes** – Try to be concise. What are you aiming to achieve? How does this align with our three purposes? What will success of the project look like and what impact will this have?
- 3. Know your audience** – If you are shortlisted, we'll be using your application to create a summary which will be shared with our regional community board members

who award our grants. Make it clear and concise, try not to use acronyms or jargon, and bring the project to life as much as you can. We know you are passionate about your projects and proud of the difference they make; we want to see this in your application so we can share it with our community boards.

- 4. What makes it special?** – We review a lot of applications, so the best projects are those which stand out from the rest. Let us know what makes you different.
- 5. What makes it sustainable?** – We know that our grant won't last forever, but we want to know how you will continue to support the people you're helping beyond the life of the grant. Can some of the money be used to support a longer-term impact?

By Craig Taylor, senior social investment manager, Nationwide Building Society



Exercise 1

Note down some answers to questions a funder might ask about your project:

What main areas does your project support?

What makes it special?

What makes it sustainable?

What are you aiming to achieve?

Can some of the money be used to support a longer-term impact?

What will success of the project look like?

What impact will this have?

Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

Checklist

- Identify potential funders
- Identify the fund or programme
- Check if you fit the criteria
- Research what the funder funds
- Gather information, including visual aids
- Commit resources to writing application

Notes:

Resources

Case studies

Benefact Trust

www.benefacttrust.co.uk

More information on its support of churches and Christian charities in the UK and Ireland.

Civil Society

www.civilsociety.co.uk/topic/grants.html

Useful hub for case studies, finding out who is funding and further insight into application processes and timings.

Guidance

Charity Commission's Register of Charities

<https://register-of-charities.charitycommission.gov.uk/charity-search>

Regulator's search engine for trusts and foundations.

Directory of Social Change's Directory of Grant Making Trusts

<https://www.dsc.org.uk/category/fundraising>

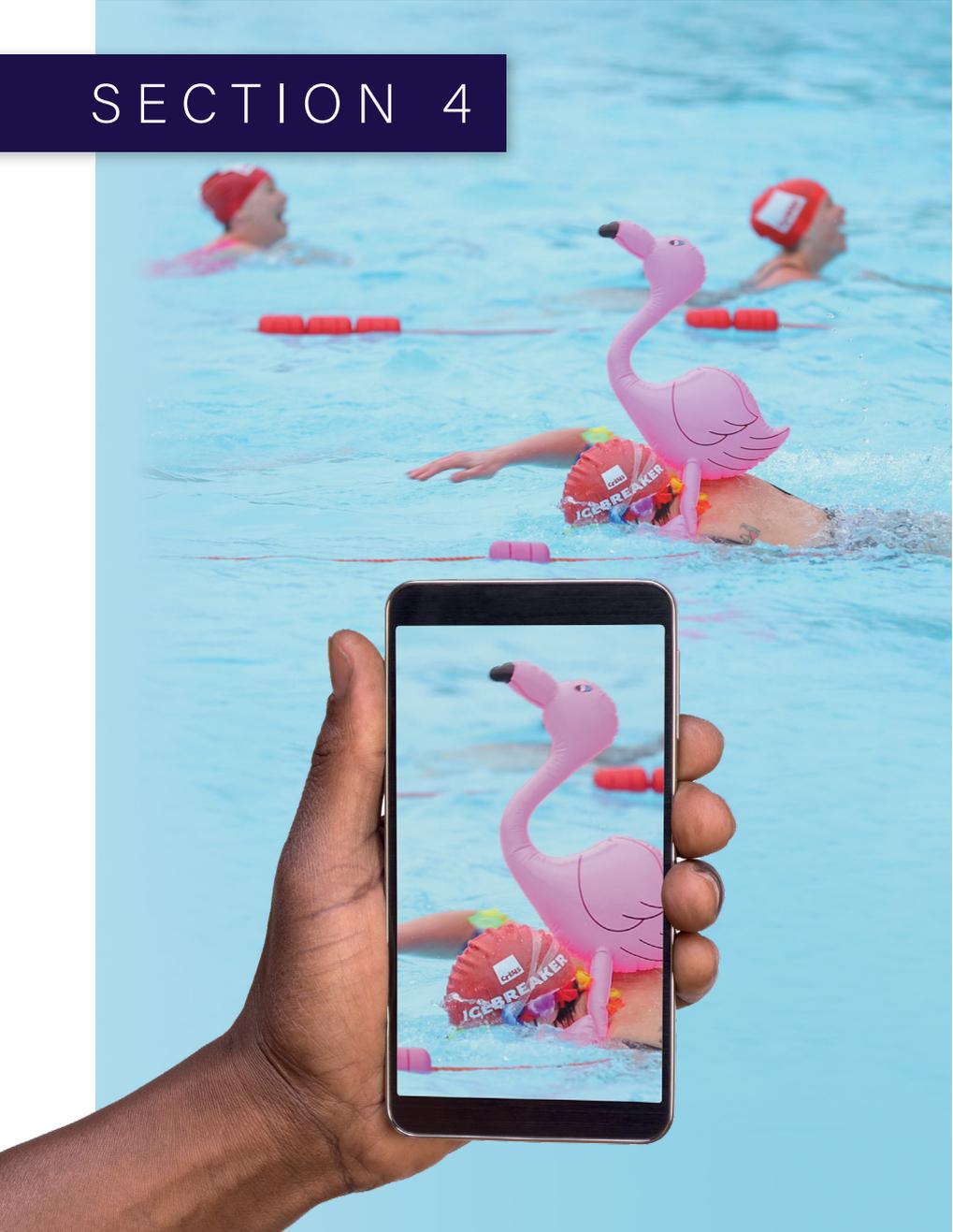
The UK's best-selling guide to funding from grantmaking charities.

Association of Charitable Foundations

www.acf.org.uk

Events and blogs on all things relating to charitable foundations.

SECTION 4



What's next for **event** *fundraising?*

Mixing virtual and in-person elements is all the rage in event fundraising, but how is it being used and is it worth it?

Stephen Cotterill finds out

Virtual fundraising came into its own during the pandemic, as lockdown prevented in-person events and major mass participation fundraisers such as marathons and coffee mornings were stopped in their tracks. This presented massive challenges, but also significant opportunities.

Now that life is back to normal, fundraisers are looking at how to keep the benefits, without diluting the supporter experience of those all-important face-to-face points of contact.

How is hybrid being used?

Since the pandemic, the armed forces charity SSAFA's annual 13 Bridges Challenge event, which takes place in London and involves supporters walking 10 miles across 13 iconic

bridges, includes a virtual element.

"The physical event went ahead and in 2021 we also launched a virtual version, creating our first hybrid event," says senior challenge events officer Hannah Siddle. "This saw people walking 10 miles in their own communities. We quickly learned that the virtual event in itself was incredibly popular with people who couldn't easily get to London."

"Our initial target was £25,000, but we ended up raising £76,000"

A similar course of action was taken by the RNLI, whose annual flagship national fundraising campaign, Mayday,



asks supporters to donate and fundraise for the lifeboat charity during

May. "In 2021, a new

virtual event was proposed

as part of the campaign," says senior marketing team manager Rebecca Hodges. "The Mayday Mile was developed as we were looking for a hybrid event concept that could provide flexibility."

"It is a huge advantage not to be constrained by date, time, location"

The Mayday Mile saw supporters across the UK and Ireland encouraged to get active and cover at least a mile in aid of Mayday, whenever and wherever they liked during the month of May.

Crisis also changed two of its flagship events – the Race to End Homelessness and the cold swimming Icebreaker challenge – into virtual events during the pandemic.

"Previously they had been in-person events that had been running for 26 and nine years respectively," says community and events fundraising team manager at the homelessness charity, Becky King. "We have since run

them as hybrid events with both in-person and do-it-yourself options for fundraisers."

How successful is hybrid?

These moves were made through necessity during the pandemic, and of course they will only be sustainable in the future if they make financial sense. It appears that in general, they do.

The 13 Bridges Challenge in 2021 was incredibly successful, raising three times more than initially planned, with the physical event selling out. Siddle at SSAFA says: "Our initial target was £25,000, but we ended up raising £76,000. It was the most successful year yet and I believe this was mostly to do with the accessibility of the event."

RNLI's Mayday Mile also proved a hit with supporters. Hodges explains: "Over 1,900 people registered for the event, surpassing a target of 900. In 2021, the new event had a fundraising target of £100,000, but we raised three times that amount."

At Crisis, fundraising from both events increased, with more people taking part. King says: "We have had greater participation from across the UK, compared to previous years when most of our fundraisers were London-based. We saw a 55% increase in funds raised compared to previous years."

However, Dorothy House Hospice Care, which flipped most of its events to

PHOTO: BENJAMIN YOUNG



virtual during the lockdowns, saw varying degrees of success. "The virtual events raised less but we successfully engaged with a few hundred supporters at a time when it was hard to do so," says head of relationship fundraising Phillippa Watson. "We took advantage of hybrid when offered by third parties such as in the Bath Half Marathon and London Marathon where runners were given the option to run virtually or rebook for the next in-person run. Only four runners from the Bath Half 2022 have opted for the virtual option as a hybrid to the event. The appetite is there, but only for a select few it would seem."

"Event fundraising has changed dramatically in the last two years"

At East Anglia Air Ambulance (EAAA), fundraising in itself hasn't been the main focus of its hybrid events so far but there have been other benefits. EAAA's special events and communications lead, Phillipa Levy, says: "Fundraising hasn't been our objective so far with hybrid but there are other advantages such as data capture, and we have the benefit of recording the content on the day to repurpose it to promote future events. I also think it is a huge advantage not to be constrained by date, time, location or venue capacity."



How easy is hybrid?

For many organisations, this may be the first time hybrid has been undertaken, and there is a lot to consider.

Siddle says: "Managing the different supporter journeys and aspects of the separate events was a learning curve, but now that we have the knowledge, planning for the next event will be easier."

Crisis, however, had already been running virtual and DIY events for several years, so was well prepared to adapt its flagship events at speed. King says that the key is to make sure the remote and in-person experiences are equal. "When planning hybrid events, you have to consider how you create engaging, inclusive and memorable event experiences that are equally rewarding for both in-person and remote fundraisers. Both events must be integrated and planned together."

Levy at EAAA says something similar: "It is essentially like organising two events in one and you really have



to think about the kind of experience that an online attendee would have compared to an in-person attendee."

Siddle agrees that ensuring that the virtual element of the event is as well planned as the physical one is paramount. "The supporter journeys and on-the-day experience for virtual participants are just as important as for the participants who join us in London."

What about the tech?

At the core of successful hybrid events is the technology and knowing how to use it. "Hybrid and virtual were easy in terms of appetite within the team to get on and try something new," says Watson at Dorothy House. "The main issues we had were around the technologies available and how quickly we could get them to work for us."

Siddle says that there is an element of trial and error in getting the tech right: "You have to be willing to try new things and take risks with hybrid events. There are many different events platforms out there and they offer a variety of products. Choosing the right one for your event is important."

King at Crisis warns: "You must ensure there is the available resource to run the two different kinds of events alongside one another and consider the impact this has on data, digital, marketing and finance teams, as well as your own. This includes how you will manage the increased complexity, cost and risk associated with integrating different platforms, tools and technologies."

Is hybrid here to stay?

From the Royal Marsden's Banham Marsden March walking challenge to the Royal Life Saving Society UK's Make a Splash, the fundraising calendar is jammed with hybrid events. And there is no reason to think this trend will end any time soon.

"Certainly, for the foreseeable future we will continue hybrid events," says King. "For many supporters, in-person events help build their tangible connection to the cause, while virtual and DIY events give supporters flexibility, provide greater inclusivity and can increase your geographical reach and diversity of audience."



"You should only make events hybrid if both parts will bring value"

Siddle says that the SSAFA has already launched its 13 Bridges 2022 and the hybrid element is included. "Event fundraising has changed dramatically in the last two years and many of those changes are here to stay," she adds.

But hybrid might not be for everyone or for every event. King at Crisis closes with a word of caution: "You should only make events hybrid if both parts will bring value. A hybrid model may work for some events, but not all."

Exercises

Exercise 1

Looking again at the article, what are the pros and cons of hybrid events. Can you think of any not mentioned?

Pros

Cons

Pros	Cons

Exercise 2

Key questions to discuss:

Which of your events would work as hybrid?

Do you have the resources, technology and know-how to run hybrid events?

Which audiences would you promote virtual events to?

Would a purely virtual event be more cost-effective?

Case study

BHF's Pier to Pier Swim

Every summer the British Heart Foundation (BHF) hosts its Bournemouth Pier to Pier Swim fundraising event. More than 1,500 swimmers gather on the seafront before taking to the water to complete the 1.4-mile challenge.

“Events allow people to feel they are part of something bigger”

Owned events such as this are hugely important to us. Not only do they exist to help fund the work that we do, but they also allow us to raise awareness and give us the potential to engage more supporters. That's why it's essential that they are well planned and organised to ensure our participants have the best possible experience.

The Bournemouth Pier to Pier Swim is a staple in our events calendar and adds variety to our events portfolio. Having a diverse range of challenges is essential as our supporters have different backgrounds, interests and abilities.

Events allow people to feel they are part of something

bigger. While participants may have a specific personal connection, such as a loved one having a heart issue, when they are engaged in mass participant events, it puts everything they're doing into perspective. It allows them to feel part of a movement.

It is important for us that all participants feel well looked after and well informed about the event and the bigger impact they are having. While they will have packs sent to them in the post arriving a week before the swim – with swim hats, a timing chip and wristband to wear during the swim – we'll have regular contact with them from sign-up to start line.

We are also conscious that many people signing up for the event won't be professional swimmers so we help with training tips and plans, advice on how to fundraise, and provide case studies and information about what BHF does that they can share with their sponsors.

The cost to put on the event is covered by the £50 registration fee and we set a £300 fundraising target for our supporters. We are in touch with them at regular points to offer tips and ideas to help them hit their target.

Although this is a longstanding event for BHF, we still allow ourselves





ample time for planning – so as soon as we wrapped up this year's event, we jumped straight into getting next year's swim organised.

Our operations team will work through the health and safety side of things with our suppliers, and our product team will help with marketing and advertising the event. The safety of our events is a top priority for us. We work closely with water safety teams and are constantly assessing risk – especially when it comes to the weather. This is one of our biggest challenges as unfortunately, it's not something we can control. While we can plan the date of the swim around the tides, we always have to be thinking about the weather and closely monitoring forecasts.

Having the right sponsors on board makes a huge difference. We want to create partnerships with companies where it is mutually beneficial to get them brand exposure and help us increase reach, but it's important that

our brand values align. JAZZ™ Apple for example is a longstanding partner.

We work to a five-year planning cycle, so we know what events we want to put on between now and 2028-29. We always look at how we can grow the number of people taking part and how we might be able to diversify our portfolio. We also establish how much we want to bring in during the years ahead, which helps to guide our portfolio income.

While it's vital to build in the proper amount of time to organise a safe event, what sits above everything else is ensuring you view the whole experience through the eyes of a supporter. If we want to improve or change something, we need to always be thinking about our events from their point of view, understanding what it is they might need from us and when.

By Roisin Greenup, senior product delivery manager, BHF

Exercise 1

Key questions to discuss:

What type of event would work best for your supporters?

What insurance or legal infrastructure do you need for your event?

How do you make it inclusive?

Who will be your key logistic partners?

Who will be your key sponsors?

Exercise 2

What donor support will you need? Check what you will need and if applicable, make a note of what you will need to provide for your event:

Tick list What will you need? Notes

Pre-event pack:

Medical support:

Specialist equipment:

Logistic support:

Participant awards:

Complimentary products:

Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

Checklist

- Decide on the type of event
- Decide on the format ie in-person, virtual or hybrid
- Define the target market
- Design a fundraising pre-event pack
- Check all legal and safety issues
- Plan logistics
- Recruit volunteers

Notes:

Resources

Case studies

BHF

civilsociety.co.uk/nextsteps/infundraisingresources

More information about the range of challenges available for supporters.

Macmillan Cancer Support

civilsociety.co.uk/nextsteps/infundraisingresources

Health charity showcases some of the most successful mass participation events of all time.

Guidance

CharityDigital

charitydigital.org.uk

All things digital with some blogs about how to run hybrid events.

Nonprofit tech for Good

www.nptechforgood.com

Lots of information and case studies of available tech to support hybrid events.

Fundraising Regulator

www.fundraisingregulator.org.uk

Offers lots of guidance on best practice for event and community fundraising.

SECTION 5



Model corporate partnerships

Founder and creator of WellGiving **Paul Rhodes** examines the different models for partnerships and how to get the most from them

Businesses must increasingly demonstrate a positive impact in their wider communities to win the hearts of both their staff and their customers, with many corporates looking to make a social and ethical return as well as a financial one. This offers a huge opportunity to charities, which can benefit immensely from working with businesses, utilising the resources, networks and people they possess.

“Corporate partnerships are a win-win situation for both parties”

Corporate partnerships are a win-win situation for both parties. Businesses are able to boost their local reach and better realise their

corporate social responsibility (CSR) strategies, while charities remain funded and able to deliver their important services to the community.

So, how can charities best engage potential corporate partners, and lay the framework for a long and mutually beneficial relationship?

What are the benefits?

One of the most obvious benefits to non-profits is the level of resources businesses have access to, both financial and otherwise, and these are invaluable in helping charitable organisations to grow.

On a wider level, businesses can help charities to improve their visibility within the community. As for-profit corporations, they rely on building trust and rapport with customers, clients, and their communities, and in partnering with them this trust is transferred to their

charity partners. Aligning your own marketing efforts with those of a corporate partner offers a powerful way to boost awareness.

Charities should also be aware of the value they offer businesses. Companies that partner with charities tend to experience increased levels of employee retention and engagement, with staff reporting higher satisfaction rates with their employers. This is in addition to the benefits non-profits bring in helping companies realise their CSR strategies. This is of particular importance to smaller, localised charities, which can get on the radar of large corporates as they take a hyper-localised approach to CSR, focusing on making positive impacts within their own communities.

“Businesses can help charities to improve their visibility within the community”

Effective partnership models

Corporate partnerships have historically taken the form of sponsorships, essentially a form of advertising that allowed a business to be associated with a certain charitable activity or event. While sponsorship models continue to be effective, there are many other possibilities that charities should explore when looking to partner

with a business. Workplace-giving programmes, such as those that deduct a donation directly from an employee's salary, or where employers match donations of their employees, are popular, but there are other methods that non-profits should also consider:

Cash and in-kind donations

One of the easiest and most straightforward ways a company can support a charity partner is simply to donate funds. However, there are also in-kind donations, whereby a business transfers some other kind of useful asset. This might be a physical item, such as a vehicle or piece of technology, or could take the form of a service, such as administrative or legal support. These types of resources can be incredibly useful to smaller charities, especially those that do not have dedicated departments to perform these functions. One great example of this is software vendor Hootsuite partnering with apprentice programme charity Juice Academy and offering free software licences and lectures to apprentices.

Skill-based volunteering

Linked to in-kind donations, skill-based volunteering allows individuals with specific qualifications or expertise to lend their time to charities. As many charities face financial struggles, they do not necessarily have the means to pay staff or contractors to fulfil certain roles, so corporations that provide these kinds of expertise can directly

strengthen the infrastructure and operational capability of non-profits. Corporate volunteering is growing in popularity, with the Corporation for National and Community Service reporting that over 50% of companies with a volunteer programme also offer skill-based volunteering.

Cause marketing

Mutually beneficial marketing strategies in the form of cause marketing partnerships can be valuable to both charities and businesses when done right. Corporations can leverage customer support for a good cause to promote a particular product, increase sales or simply boost awareness, while charities benefit from increased visibility, donations or royalties from a product. It is particularly important that both partners ensure they are aligned when it comes to cause marketing, and non-profits are cautious of corporations that simply appear to be hopping on a trend, as charities benefit the most from cause marketing when it is formed based on a long-term partnership and a shared mission.

Engagement and development

Forming successful partnerships can pose a challenge to charities, as there can be a lot of competition, and smaller charities may lack the visibility to attract larger businesses. Building a robust and long-lasting partnership requires determining the kind of partnership you want to form and establishing an effective engagement strategy.

Here are some of the things to consider:

Alignment of values – A truly symbiotic partnership requires that a potential corporate partner shares the same core values as a non-profit, while the charitable cause should reflect the sector or model of the company in some way. Partnerships

“Corporations can leverage customer support for a good cause”

wherein both parties hold similar perspectives and values are far more likely to hold mutual benefits, while developing effective partnership models is far easier when missions are aligned. Many larger corporates are looking to make strategic partnerships such as these. For example, Royal London, a large financial company, strategically aligned its partnerships to include debt management charities.



Clear communication –

Communication is key, and identifying the kind of corporate support that would be of most benefit to your cause is vital. While monetary donations will always be important, many charities can also benefit immensely from other kinds of support. Communicating your mission to a potential corporate partner is also important, as this can help volunteers and employees get on board with your cause and understand exactly how they are helping to make a difference.

Strategic thinking – Charities should always consider the expertise they themselves bring to a partnership, and the best corporate partnerships are those which can be viewed as a knowledge transfer between both parties. When pitching large corporates, provide the materials the business needs to see the core offer that comes with the partnership, and how it will help them boost employee engagement and inclusivity with the initiative. The more information you can provide, the more attractive the partnership to a potential business.

A relationship-based approach – Corporations want to form meaningful relationships with charity partners, usually one that also helps them achieve their own strategic goals, such as boosting their reputation, gaining credibility with new audiences, or reaching CSR goals. As a non-profit, it is important to understand and highlight the value you bring to a corporation

in achieving these goals through a long-term relationship.

Nurture your online presence –

Most charities will already have some kind of social media presence and strategy in place, but this can also be invaluable for identifying and engaging potential corporate partners that could be a good fit for your charity. Social media channels are also a great way to continue nurturing this relationship once a partnership is formed, featuring them in posts and updates, or simply thanking them for their continued support.

“Corporations want to form meaningful relationships with charity partners”

Consider impact and return –

Businesses will most likely want to gain an accurate picture of the outcomes of their partnership with a charity, especially if this is part of a wider CSR strategy. Providing impact reports will allow them to not only see proof of their corporate responsibility efforts, but also the value the partnership brings. Similarly, charities, especially smaller ones with limited resources, must ensure that the corporate partnership is providing a good return on investment. For those activities which provide a lower return on investment, it is advisable to incorporate these into a wider strategy.

Exercises

Exercise 1

Key questions to discuss:

What companies are potential partners for your charity? Why?

What values as an organisation can you not align with?

How can you improve existing partnerships?

Which charity corporate partnerships do you admire the most and why?

What core values are you looking for in a corporate partner?

Exercise 2

Looking back at the article, what are some of the benefits for both partners? What others can you add?

Benefits for corporate

Benefits for charities

Benefits for corporate	Benefits for charities

Case study

Parkinson's UK

Corporate partnerships are not a case of speed dating, but more like long-distance dating, often lasting for several months, even years. And often you don't have to go out to find the right partner, you just need to look inwards. The most natural corporate partnerships are the ones that are right in front of you, but you don't realise their potential because they have sprung up so organically. When you have a member of the Parkinson's community, who is already working for a potential corporate partner, brokering discussions is easier.

The idea of working with Next started when one of their designers, Genna Douglas, who lives with Parkinson's and is an advocate for mothers with young onset Parkinson's, approached us. Teaming up with a high-profile retailer such as Next seemed a perfect fit, but we did not set out to court them; Douglas brought them to us. She wanted us to help share her experience of young onset Parkinson's,

and the challenges of balancing family life with work, to inspire others experiencing the same problems.

Conversations really started in lockdown and we officially launched the partnership on 11 April 2021 – World Parkinson's Day. It kicked off with an exclusive range of T-shirts and tote bags. Next agreed that 100% of the profits would come to Parkinson's UK.

“The most natural corporate partnerships are right in front of you”

Our second collaboration with Next was with designer Alex Echo, who also has personal lived experience of Parkinson's. He created bold, uplifting designs for an exclusive range of homeware and kids' T-shirts. The Share the Love cushions flew off the shelves in a matter of weeks.

The success of both collaborations was their person-centred nature, based around lived experience of Parkinson's.

Our approach to corporate partnership is that we don't dictate, we listen to our community and take its lead.

An example of this approach is our work with digital out-of-home





advertising company SmartOutdoor. Owner Mark Catterall, who was diagnosed with Parkinson's in 2019, offered us free digital advertising space after contacting the charity via our support services. It

was his diagnosis that led a family member to contact the Parkinson's UK's Excellence Network, a network of 7,000 healthcare and social care professionals providing support for people with the condition. During a conversation with a specialist, Catterall mentioned an interest in increasing publicity about Parkinson's and using his digital advertising business. A shared purpose was discovered and the lead was passed to my team to follow up on.

SmartOutdoor donated outdoor digital advertising billboards to support the soft launch of the charity's highly successful Time for Can campaign, which ran during September last year. This phase of our campaign was not overtly asking for funds, but designed to increase campaign reach to an audience of four million people over four weeks.

Images from the campaign were broadcast along the route of the Great North Run and cornered a captive audience during the pandemic by posting digital messages on hand

sanitiser stations in Moto service stations across the UK. Historically, all of our corporate partnerships have been initiated by members of the Parkinson's community but now, we are going further and handing over the reins to people outside the organisation. Collaborating closely with our partners, we utilised their business connections and networks.

In our 2020-24 strategy, we set out a plan to put people with Parkinson's at the heart of everything we do. Our agile and collaborative approach to corporate partnerships is an extension of that.

We have a truly multidisciplinary approach to securing corporate partnerships; we don't set boundaries. Although the relationships are,

mostly, corporate led, we work closely with our media, VIP, marketing, brand and content teams to imagine what these partnerships could be and then to bring them to life. It is an agile approach to cross-collaboration, securing corporate partnerships and raising awareness of what we do.

We want to continue building on the foundations of these relationships. We are hoping to invite our partners – old and new – to more fundraising events both in-person and virtual.



By Ghalib Ullah, head of commercial partnerships, Parkinson's UK

Exercise 1

Here are some of Parkinson's UK's top tips for partnerships:

- 1. Be person-centred and driven by your community. Lived experience and connections may be the most important assets you have.
- 2. Pivot. Look for a crossover. Some of your potential partners could be in plain sight. You just need to uncover them.
- 3. Be patient. Corporate partnerships do not happen overnight. Get to know them, understand what their USP is, how they operate and their challenges. Try to make a case for a longer-term shared purpose.
- 4. Don't go in with a pound-sign mentality. The right partnerships can build brand, as well as income, if you find your shared purpose and strategic alignment. Remember you are as valuable to their aims as they can be to yours.
- 5. Try to stand out. Say thank you, send e-cards and ask for feedback. Be polite.
- 6. Take your internal team with you. We educated our teams about what we were trying to achieve, built understanding and upskilled them on how to spot potential prospects. Invite wider internal teams to brainstorming sessions, and embrace new ideas and suggestions together.
- 7. Take advantage of the working-from-home renaissance. It has made it easier to slide into someone's DMs to say hello.

Can you suggest any others?

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Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

Checklist

- Identify corporate partners
- Identify key contacts
- Define benefits for both sides
- Define shared values
- Create stewardship strategy
- Highlight and share key successes

Notes:

Resources

Case studies

M&S Charity Partnerships

civilsociety.co.uk/nextstepsinfundraisingresources

High street retailer has successful partnerships with a range of charities including Breast Cancer Now and Shelter.

Lloyds Banking Group

civilsociety.co.uk/nextstepsinfundraisingresources

Key statistics around social impact from the national bank.

John Lewis

<http://civilsociety.co.uk/nextstepsinfundraisingresources>

Famed for its Christmas appeals, the retailer runs charity partnerships all year round.

Guidance

Remarkable Partnerships

www.remarkablepartnerships.com

Consultancy with lots of information and list of best corporate partnerships.

Business Fights Poverty

www.businessfightspovetry.org

Consortium of businesses looking to make social impact.

Charities Aid Foundation

www.cafonline.org

Blogs and information on corporate partnerships and how to pitch for them.

Fundraising magazine

With an 18+ year history, Fundraising Magazine is the leading publication for the sector providing unparalleled in-depth coverage across the spectrum of today's fundraising issues.

Each issue contains 32 pages of:

- Donor behaviour insights: better understand your donor base, and learn from peers how they are utilising this knowledge to develop more effective fundraising practices
- Exclusive interviews with funders: our Meet the Funder section dives into what funders are looking for, their current programmes and activities, and what they value from applicants
- Thought-provoking interviews with visionary sector leaders and new voices in the sector
- Case studies showcasing best practice and innovative campaigns
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- How are charities using AI in fundraising?
- Analysis of the ethics of using AI from fundraising think tank Rogare

March

- Getting the most from online gaming
- Making the most of fundraising milestones

April

- The role of trustees in fundraising
- Getting more fundraisers on trustee boards

May

- Results of annual CRM benchmarking survey
- How to get the most from your CRM

June

- How is technology shaping the sector?
- Benchmarking online giving platforms

July

- Fundraising directors survey 2024
- Interviews with the key leaders in the sector

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