

The Complete **Fundraising** Handbook

7th edition

Nina Botting Herbst
with Lianne Howard-Dace



‘Regardless of how sophisticated your fundraising becomes, the bricks and mortar are always the same. *The Complete Fundraising Handbook* is a great reminder of how to build a fundraising programme with a secure footing. But more than that, I eagerly look forward to new editions because they always flag up latest trends, inspire new ideas and reflect the challenges faced by our industry.’

Angela Bowen, Director of Development, Imperial College

‘This is not just a fundraising handbook, not even **the** fundraising handbook. It is *The Complete Fundraising Handbook* and, as much as anything ever could, it deserves that title.’

Ken Burnett FinstF, author, lecturer and consultant for not-for-profit organisations

‘To keep up with our fast-paced world, fundraisers must have the fundraising techniques, trends and ideas of the moment in the palm of their hand. This latest revision offers up-to-date information on all of these in an engaging and inspiring way. A must-have in every fundraiser’s library.’

Di Flatt FinstF, FRSA

‘I’ve been focused on fundraising from individuals since 1996 and I love this book because it provides an excellent primer for the areas of fundraising I know less about. And for the bits I know most about, it’s jam-packed with the best and most current thinking.’

Paul de Gregorio, Executive Director and Founder, Rally

‘This book provides a solid grounding in how to raise money for good causes in today’s fast-changing world.’

Harpreet Kondel, Fundraising Consultant

‘This fundraising encyclopaedia is my first port of call if I have a query about any aspect of fundraising or a technical question that needs answering. Packed full of useful nuggets of information, it is an essential guide for all fundraisers.’

Craig Linton, Fundraising Consultant

‘An insightful and informative exploration of the current fundraising environment. The handbook is packed with practical guidance and combines theory with the experience of others through illustrative case studies. This comprehensive fundraising guide will be cherished by new and mature fundraisers alike.’

Beccy Murrell, Senior Consultant, THINK Consulting Solutions

‘The new edition of this handbook is very welcome indeed, as my current copy is well-thumbed and has highlighter pen all over it. Fundraising practices move very fast and so I am delighted to see the new chapters which bring this valuable guide right up to date.’

Gill Raikes MBE, FInstF, Chief Executive of the Royal Brompton and Harefield Hospitals Charity

‘I have been in professional fundraising for 36 years and worked across the globe. For 27 of those years *The Complete Fundraising Handbook* has been at my side, acting as a point of reference and a training tool. It is indeed the publication I would request if asked to fundraise my way off the proverbial desert island! I commend the team at the DSC for bringing the handbook bang up to date. I will be putting an order in for the latest edition as early Christmas presents for clients and colleagues.’

Daryl Upsall FInstF, Chief Executive, Daryl Upsall & Associates

‘Whether you’re a small organisation embracing fundraising for the first time, or an experienced fundraiser who wants to review their approach, this book is relevant and refreshingly practical. It covers all aspects of fundraising with clarity and structure, and includes recent developments from new data protection regulation to the growing power of social media.’

Francesca Vinti, Director of Development, British Film Institute

‘As a small charity, very reliant on grants and donations, *The Complete Fundraising Handbook* has been a fantastic reference point. When reappraising our fundraising strategy, it has encouraged us to look at smarter ways to fundraise and also to look at different sources for income generation.’

Hannah Worsley, Project Manager, Norwich Foodbank

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Head office: Resource for London, 352 Holloway Rd, London N7 6PA

Northern office: Suite 103, 1 Old Hall Street, Liverpool L3 9HG

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Foreword

This is the first time I have had the privilege of writing the foreword to a book and being invited to do so for the seventh edition of *The Complete Fundraising Handbook* has encouraged me to reflect on the changing fundraising landscape over my career.

I can remember with huge clarity using *The Complete Fundraising Handbook* as part of my interview preparation for my very first fundraising role, which happily I got! So, from the moment I entered the profession, it has been as invaluable to me as it has been, no doubt, for countless other fundraisers. It is extraordinary then how much fundraising and indeed wider society has changed since I started out and had my first connection with this esteemed publication. Phrases and techniques such as digital fundraising, social media and engagement, which are commonplace now, simply did not form part of the fundraiser's vocabulary. Today, of course, every fundraiser is expected to have real insight into and competency in modern fundraising and engagement techniques. They are also expected to be knowledgeable about regulatory requirements, particularly with regard to GDPR compliance.

The Complete Fundraising Handbook has kept pace with the accelerating rate of change in our profession so that it remains an invaluable and practical aid for any fundraiser, whether they may be just entering the profession or they are a mature practitioner. So, notably, this edition has a brand new chapter on digital fundraising, a new combined chapter on events and fundraising volunteers, a new chapter on community fundraising and significantly overhauled chapters on the National Lottery and government funding. All other chapters have been substantially revised and include new case studies and information on regulatory changes.

Writing the foreword to a book may fill some people with trepidation, being wary of recommending a book that may not deliver all the title promises. With regard to *The Complete Fundraising Handbook*, no such reservations apply. Since the very first edition, it's been providing wise counsel and practical guidance for all fundraisers and this edition brilliantly continues this tradition at a time when it's very much needed.

Paul Amadi
Chief Supporter Officer, British Red Cross

About the authors

NINA BOTTING HERBST

Nina is lead author on *The Complete Fundraising Handbook* and has been for the past four editions, starting in 2001. She is currently Director of Individual Giving at the National Trust for Historic Preservation in the USA and prior to that she worked as Senior Associate Director for Alumni Relations and Development at the University of Chicago for 12 years.

Nina is a native of London and began her fundraising career there in 1993 as an account manager at Pell & Bales. She went on to work for Shelter, Amnesty International UK and Tate. Nina served on the Institute of Fundraising Standards Committee from 1999 to 2001 and was the chair of the committee that drafted the first code of practice for legacy fundraising. Before moving to the USA in 2002, she was frequently a speaker at fundraising conferences in the UK. She now fills her spare time as a volunteer tour guide for two house museums in Chicago, and has also been a board member at one of them, Glessner House, since 2013.

LIANNE HOWARD-DACE

Lianne is an experienced fundraiser with a specialism in community and events fundraising. She wrote the chapters on these topics in *The Complete Fundraising Handbook* and collaborated with a number of fundraisers to update many of the case studies in the volume. She began her career as a hospice fundraiser and has worked for Depaul UK, RSBC and Christian Aid. Lianne now works with a variety of organisations to help them make the most of their community fundraising and is particularly interested in innovation, stewardship, and learning and development in the charity sector.

An MSc graduate of London South Bank University, Lianne self-published her master's dissertation about community fundraising and has spoken at many conferences and events on the topic. Outside work, Lianne is a lifelong member of Girlguiding UK and enjoys crafting, cooking and the great outdoors (like any good Guide!). She also contributed two chapters to DSC's *Community Fundraising*.

About the Directory of Social Change

The Directory of Social Change (DSC) has a vision of an independent voluntary sector at the heart of social change. We believe that the activities of independent charities, voluntary organisations and community groups are fundamental to achieve social change. We exist to support these organisations in achieving their goals.

We do this by:

- providing practical tools that organisations and activists need, including online and printed publications, training courses, and conferences on a huge range of topics;
- acting as a ‘concerned citizen’ in public policy debates, often on behalf of smaller charities, voluntary organisations and community groups;
- leading campaigns and stimulating debate on key policy issues that affect those groups;
- carrying out research and providing information to influence policymakers, as well as offering bespoke research for the voluntary sector.

DSC is the leading provider of information and training for the voluntary sector and publishes an extensive range of guides and handbooks covering subjects such as fundraising, management, communication, finance and law. Our subscription-based website, Funds Online (www.fundsonline.org.uk), contains a wealth of information on funding from grant-making charities, companies and government sources. We run more than 300 training courses each year, including bespoke in-house training provided at the client’s location. DSC conferences and fairs, which take place throughout the year, also provide training on a wide range of topics and offer welcome opportunities for networking.

For details of all our activities, and to order publications and book courses, go to www.dsc.org.uk, call 020 7697 4200 or email cs@dsc.org.uk.

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The publisher and authors are grateful to all previous and current contributors to this guide who have given freely of their time and experience in order to provide text, examples, case studies and advice. This edition would not have been possible without material in previous editions and we recognise the previous co-author, Michael Norton, and the original author, Sam Clarke.

We are particularly grateful in this edition to:

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- Paul Ticher for writing Appendix 2 on Data Protection Legislation;
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Chapter 14: Communicating your fundraising message

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Introduction

When the previous edition, the sixth, of this book was published in 2012, my co-author Michael Norton and I commented on how our sector was ever-changing. From my perspective, now seven years later, it is hard to comprehend the speed of change fundraisers are currently experiencing. Yet we are expected to pull rabbits out of hats with extraordinary regularity.

Fundraising goals can be moving targets. In almost every organisation I've been involved with, something occurred that prompted a rethink on the goals at some point in the year. It might have been that a mailed appeal didn't bring in as much as expected and so the target for legacy income was made 20% higher to compensate. Or one project really sparked a donor's imagination but then core operations income fell below expectations despite the overall fundraising goal being hit. It's likely you will have experienced similar situations.

In addition, with new data protection regulations and the issue of donor satisfaction now front and centre, many charities are paying serious attention to their brand, how they are perceived and how they communicate. Combine this with charity employee scandals concerning behaviour and the misapplication of funds, and you have a heady mix to contend with.

It was in this pressurised climate that we prepared the new edition of *The Complete Fundraising Handbook*. With this seventh edition, the fourth I have worked on, the aim has been to streamline the book and get it back down to the essentials. When the earliest editions came out, the internet was not the extraordinary reference and information tool it is now and so we saw an opportunity this time to be more selective and to bring more clarity to the information chosen for inclusion.

How we fundraise has changed and will continue to change, but as you read, dip into or refer to this book, bear in mind that the core fundamentals are still true. People will want to support your work and will not know that you need that support until you tell them about it and ask them.

Some chapters have not survived between the previous edition and this one, and others have been reassessed with fresh perspectives. There is also a debut, as for the first time we have a dedicated chapter on digital fundraising and the use of social media. As much as possible, we refer to the regulation that was in force at the time of writing, but things may change so it is always advisable to check again.

Happy fundraising!

Nina Botting Herbst

Part one:

Getting started

1 Background

In this chapter, we look at why non-profit organisations fundraise to support their work, the main challenges facing fundraisers, the intended readership and the structure of this book.

1.1 WHY FUNDRAISE?

Few charities can finance themselves exclusively from the interest on an endowment or investment portfolio, and not many charitable organisations have the kind of regular, dependable annual surplus to enable them to take on new work without the need for additional funding. Given the short-term nature of most grant allocations, many organisations find themselves on a kind of financial treadmill – how will this activity or that piece of work be funded once the current three-year grant finishes?

Fundraising is a fact of modern charity-sector life. For some it is a necessary task, for others a marvellous and stimulating opportunity. For most it is something in between. However fundraising is viewed, it is often a critical activity if a charity or other non-profit is to be successful.

Survival

Every organisation needs income to keep going from one year to the next – to meet project costs and develop new programmes for the future, to pay staff and run an office, to keep up buildings and vehicles, and to purchase new equipment. Often the stark reality is that if the funds are not raised, the organisation will not be able to do its work – work that might address pressing needs in society.

Every year, organisations prepare their annual budget. This budget shows how much money is needed to keep them running. It also indicates the amount of money that has already been raised or is expected, and what extra support is still required over the year to meet all of the organisation's costs.

Fundraising progress is monitored by keeping records of all money received or pledged, and by preparing and discussing management accounts at regular meetings. If the money coming in is not meeting the expected targets, then action will need to be taken – fundraising programmes accelerated, new sources

of funds located, costs cut, planned projects deferred or deficits subsidised from any organisational reserves.

Expansion and development

Few charities stand still; more often, they evolve to meet new needs that come to light as society and governments change. To address the challenges of the future, operations may need to expand and develop: services may need to be improved, new markets or neighbourhoods served, and research and campaigning undertaken. Changes may well require more funding and therefore more fundraising.

To ensure that your organisation's finances are on target, it is optimal to develop a business plan which will project what will be needed over the next three to five years. This plan should take account of the ongoing programme of work and any proposed major developments. Being strategic and planning ahead for how your organisation wants to grow and develop will help to ensure that the resources will be available when they are needed.

Reducing dependency

Sometimes an organisation is supported by one major donor or funder, or a core group of them. This can create a state of dependency, and the loss of one grant can lead to financial difficulties. It may also be difficult to determine the organisation's agenda as opposed to that of the key donor or funder.

Broadening the fundraising base can reduce this dependency. For example, can more stability be built by negotiating some form of long-term commitment from your existing funders or by developing alternative sources of income or funding?

Building a constituency

Developing a strong base of supporters is also important to an organisation in terms of both the income these people can generate and their role as advocates. Your supporter base could be integral to recruiting new people to your cause. They may volunteer or find friends who are willing to become supporters. They can provide an indication of the level of support that your organisation is attracting, and therefore can add strength to any lobbying and campaigning work.

What sorts of constituency are relevant to your organisation? Is it a particular business or profession? Are they students, activists, women or parents? How can they be identified, and what messages and medium will get a response from them?

Creating a viable and sustainable organisation

Fundraising is not simply about generating the resources for an organisation to survive from one year through to the next, or to find the funds for expansion and development. It is also about helping to create a viable and strong organisation able to sustain itself into the future.

There are many ways of doing this. One is to build an active donor base by recruiting supporters who sympathise with the aims of the organisation and who will continue to give their support each year. Other ways include organising fundraising events (which can create a regular and continuing source of income); creating capital within the organisation, such as buildings and equipment (especially when this reduces the need for running costs or can help to generate an income); and developing income-generating schemes for the organisation itself.

Many organisations focus on long-term needs – for example, through community development, which does not yield immediate results, or in looking after disabled or older people, where there is a continuing commitment to provide care well into the future. Organisations should be financially strong in the long as well as the short term, rather than being plagued by annual deficits. Financial concerns can affect the morale of a whole organisation. Emergency fundraising is time-consuming and increasingly difficult, and can exhaust your base of supporters and their goodwill. You should explore ways to strengthen the financial position of your organisation, and this means developing a sensible fundraising strategy for the future.

1.2 THE CHALLENGES FACING FUNDRAISERS

Responding to a growing need

The UK, along with other countries, continues to face rising expectations of what should be provided by government, and charities have stepped in to fill the gaps. For many years, there has been a shortage of the resources needed to meet health, welfare, educational and other modern-day societal necessities. Greater life expectancy, unemployment and poverty in some regions, changing family structures, rising costs of service delivery, requirements for high-tech solutions, and other factors are making it difficult to address even society's basic expectations. It is not just a matter of raising more money to provide more or better services. The challenge for charities is to develop solutions rather than simply provide services that, while improving the quality of people's lives, leave the fundamental problems unresolved. If charities can create more imaginative and effective approaches to the problems that exist in society, they can respond to the growing levels of need without necessarily increasing the demand for

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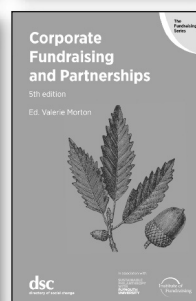
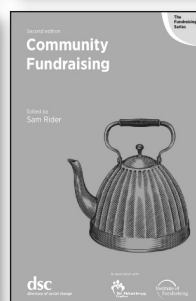
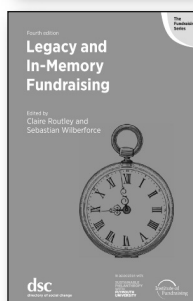
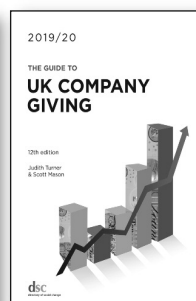
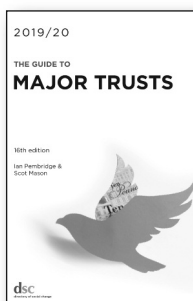
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