



Tools for Fundraising

Funding and Finance Toolkit 1





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About the Funding and Finance Toolkit Series

The *Funding and Finance Toolkit Series* has been designed to provide practical checklists, templates and exercises to help frontline Voluntary and Community Organisations (VCOs) improve their funding and finance for long-term sustainability. The exercises and templates can be completed by frontline VCOs independently or in conjunction with in-put from a Council for Voluntary Service (CVS) or other support-agency-based advisor who can help organisations consider their options and can signpost to further support where necessary.

The *Toolkits* are companion publications to the *Introductory Pack on Funding and Finance* and aim to complement it. The *Pack* provides information on key areas of voluntary sector funding and finance. The *Toolkits* provide supporting exercises and templates to help organisations put ideas into practice. There are four sections, each relating to an income generation topic covered in the *Introductory Pack*:

- Fundraising
- Trading
- Procurement and Contracting
- Loans and Other Forms of Finance

Two additional resources related to the *Toolkit Series* are the pocket guide, *Introducing Funding and Finance for Voluntary and Community Organisations* and the *Sustainable Sun Needs-Analysis Tool*. These are first-step awareness-raising tools designed to alert new, small and less-well-resourced VCOs to the funding environment and to highlight where development work may be needed to improve their place within it. They are appropriate for organisations not yet ready to engage with the exercises included in the *Toolkits* or the *Introductory Pack*.

The *Introductory Pack*, *Toolkit Series* and related resources were commissioned by the Finance Hub from NCVO's Sustainable Funding Project.

Copies of all these resources are available from both the Finance Hub and NCVO's Sustainable Funding Project. They can be downloaded from the Finance Hub website at www.financehub.org.uk or NCVO's website at www.ncvo-vol.org.uk/sfp/Introductory-Pack

About the author

The Institute of Fundraising is the professional and membership body for fundraisers and fundraising organisations in the UK. It provides information and advice on fundraising and conferences on the latest developments in fundraising, including a three-day National Convention. Training opportunities range from one-day short courses to the Certificate in Fundraising Management, the professional qualification for fundraising. The Institute also hosts the Payroll Giving Centre, providing information on payroll giving, and runs a tax-effective giving initiative, providing training and one-to-one support on all aspects of tax-effective giving, with a telephone helpline and guide, 'Making Giving Go Further'. Committed to raising standards in fundraising, the Institute publishes the 'Codes of Fundraising Practice', which set out legal guidance and best practice on fundraising across a range of fundraising activities.

Further information is available at www.institute-of-fundraising.org.uk

Toolkit authors, contributors and advisors

The *Toolkit Series* has been developed by experts in voluntary and community sector funding and finance with input on design and presentation from practitioners including an advisory group of front-line funding advisors.

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How to use this Toolkit

Who should use the Toolkit

These Tools have been designed with the aim of providing funding advisors (e.g. an advisor based within a CVS or other support agency) with a series of templates, checklists and exercises they can either work through with, or copy and hand out to, clients based on what support the advisor feel is needed.

VCOs can use the Toolkit independently, but best results will be achieved by working in tandem with an advisor who can provide additional support or advice where appropriate.

The Tools are best used by a group of stakeholders from within a VCO. Each Tool gives an indication of who should get involved for guidance, but this may vary between organisations.




Structure of the Toolkit

Each *Toolkit* contains Tools of varying levels of complexity. These are designed to build upon and complement the Tools and information included in the associated guide from the *Introductory Pack on Funding and Finance*. Some Tools are equally relevant to a number of income generation areas (e.g. developing a business plan). It is therefore useful to be aware of all the Tools available and to mix and match where appropriate. A complete list of the Tools contained within the *Introductory Pack* and *Toolkit Series* is available at the end of this document for reference.

Choosing Tools

The Tools that are most relevant to a particular organisation will depend on how familiar it is with the individual topic, the development stage it has reached, and the commitment it wishes to make in moving forward in that area.

The three Tool levels are:

Level/Symbol	Overview
Introductory 	Suitable for new organisations or for those getting to grips with a new area (e.g. contracting). Designed to help VCOs gain an understanding of the area (e.g. preliminary checklists or exercises to gauge whether an income stream is suitable).
Intermediate 	Suitable for organisations wanting to explore a topic further. Designed to help organisations get started in the topic area.
Advanced 	Suitable for organisations wishing to seriously explore a topic or income stream further. Activities requiring some time and resource commitment from an organisation. May be best used in conjunction with input from a funding advisor.

Each Tool level is indicated by the icon at the start of the Tool and highlighted in the reference list at the end of this document.

Intermediate and advanced-level Tools

These Tools use a design based on the advice cycle: an action learning approach to advising VCO clients. The overall aim is to equip clients with the skills to achieve sustainable funding for their organisations.

Each Tool is designed to achieve a specific aim and set of objectives. These are stated at the beginning, to set the scene for the three main stages of the advice cycle: planning, action and review.

The **planning** stage focuses on models and methods that can be used to research and explore key issues associated with the highlighted aim and objectives. This leads to the **action** stage, where organisations are required to put their plans into practice, and learn through their experiences. This learning is reinforced in the final stage of the cycle, where the organisation and advisor **review** the outcomes of their actions.

By engaging in this cycle, organisations will learn from their own actions and experiences, and will develop sustainable funding skills.

Fundraising in a nutshell

The principle of fundraising is to raise money by asking for it. This might be from individual donors (e.g. through street collections, events or appeals), private businesses (e.g. through sponsorship), or grant funders (e.g. Big Lottery Fund, Esmée Fairbairn Foundation).

Fundraising should complement a VCO's primary objectives and, ideally, should combine raising funds with effective promotion of the organisation. VCOs also need to ensure the ongoing integration of fundraising plans with wider organisational plans – so that money raised matches organisational need in terms of type, size, duration and appropriateness.

There are many ways to raise funds, from collection boxes, raffles, events and sponsorship, to legacy donations and applying for grants. A key skill of fundraising is communication. Good fundraising requires being able to show donors how their gift will enable a VCO to meet the needs of its beneficiaries, or for grants that delivery will meet funder objectives.

Everybody involved in fundraising needs to have an excellent understanding of the cause. For smaller VCOs, the lines between fundraiser and service provider may be blurred and, in many cases, will be one and the same person. In such organisations the individuals responsible for fundraising are in a unique position and have a real opportunity to ensure integration between fundraising and their organisation's objectives.

Further detailed information on fundraising is available in the *Introductory Pack Guide to Fundraising* which is the companion publication to this Toolkit. The guide is available at www.financehub.org.uk and www.ncvo-vol.org.uk/sfp/Introductory-Pack



Tool 1.1 – Deciding who should fundraise

Aim

VCOs evaluate the different options available when considering who will undertake their fundraising.

Objectives

- VCOs understand the different fundraising needs that can be met by volunteers, staff, fundraising consultants and professional fundraisers.
- VCOs understand their fundraising needs and are able to delegate fundraising to an appropriate individual.

When to use

For VCOs new to fundraising that want to establish who should be responsible for it.

How to use

1. Planning

- The choice of who should fundraise for a VCO depends on time and resources, the activity to be undertaken and the ultimate objectives of both the fundraising and the organisation ongoing.
- Begin the process of establishing the best choice for a particular VCO reading through the **Potential fundraisers overview** overleaf. For further information see also:
 - *Introductory Pack Guide to Fundraising: Chapter 2 – Who should carry out fundraising?*

2. Action

- Advisor and VCO should try and establish exactly what it is a fundraiser is needed for. Establishing the scope of the fundraising role will enable advisor and VCO to determine whether a volunteer, staff member, or consultant is the best option. For example, is it simply for researching potential donors and funders? Completing grant applications? Or much more (e.g. establishing a relationship with the local authority, promoting the VCO through networking, drawing up a business plan)? Use the **Potential fundraising need options** given below to assist with this discussion.
- Next, review the options selected alongside the **Establishing fundraising need checklist** to establish a clear sense of what fundraising a VCO needs.
- This discussion should also help the VCO understand how its fundraising needs can best be met and confirm whether it needs a fundraising consultant (e.g. if need is short-term or a time-limited project in itself), a fundraising staff member (e.g. if fundraising support is needed ongoing) or a volunteer (e.g. if fundraising need is one-off or small-scale).

3. Review

- Use the outcomes of the above discussion to lay the basis for a volunteer fundraising overview, job description or consultant briefing (depending on which of these is seen as the most appropriate fundraising option).
- Finally, consider whether the resources available to an organisation are sufficient for moving forward with its preferred fundraising choice (e.g. if a paid staff member is the best option, can the VCO pay such a person?). For less-well-resourced VCOs in particular, an 'interim' strategy may be the best approach (e.g. recruiting a volunteer fundraiser who will seek funding for both a paid fundraiser and the VCO's ongoing projects thus enabling the VCO to recruit a dedicated fundraiser as well as seek support for immediate need).

Materials

Potential fundraisers overview

Volunteer fundraiser – Volunteers can be a great asset when it comes to fundraising. They can be particularly useful and appropriate fundraisers for tasks such as leafing through a grants directory to identify potential grant-makers, collecting donations, helping organise one-off events or mailing letters to potential donors. They are most appropriate where specific tasks can be assigned and where a staff member is available to supervise and direct their input. Occasionally, VCOs may receive an offer of support from or know someone who has specific fundraising skills which can be used to advantage.

Fundraising consultant – A consultant may be an individual, an employee of a company, or an individual from amongst an association of individuals, who, for a fee, provides independent advice and support in developing and/or executing strategic and operational plans to meet defined fundraising targets, objectives or aspirations.

Professional fundraiser – The definition, by law, of professional fundraiser in England and Wales is 'any person (or organisation, other than a charity's trading subsidiary) who carries on a fundraising business (soliciting funds for charitable, benevolent or philanthropic purposes) or without carrying on such a business solicits money or other property for the benefit of a charitable institution'. Consultants may be fundraisers by profession but are only professional fundraisers (under the terms of the Charities Act 1992 (Section 58(1)) if they *directly ask for money* on behalf of the charitable institution or earn more than £500 per year doing so. If they do so, they must, in accordance with Charity Law, have an agreement with a VCO which must state the terms of payment and amount of remuneration the professional fundraiser will earn. When asking donors or funders for funds, a professional fundraiser is required by law to state the terms of his/her remuneration by the charity or VCO. Note: Definition may change once the new Charities Act 2006 fundraising regulations are published.

Potential fundraising need options

Copy out the statements opposite onto each side of separate pieces of card. Advisors should add in further fundraising need statements based on their own experience of VCO needs.

For suggestions of roles likely to be carried out by professional fundraisers or consultants see and adapt:

- **Tool 1.5 – Hiring a fundraising consultant: Tasks frequently undertaken by fundraising consultants.**

Place the cards **Front up** on a table and ask VCO representatives to look through the cards and create a pile which best reflect the fundraising needs they feel their organisation has. Once selected, go through the pile, turning the cards over to view the suggested options **on the back**.

Remember, these suggestions are for guidance only and are by no means exhaustive. Each VCO is different and so advisors will need to use judgment and their understanding of the organisation to establish what other needs the VCO may have and whether the suggested solutions are appropriate. The following **Establishing fundraising need checklist** should help with clarifying suitability.

Front of card	Back of card
'We need someone to research potential grant-funders'	Volunteer?
'We need someone to complete one grant application'	Volunteer?
'We need someone to organise a one-off fundraising event'	Group of volunteers?
'We need ongoing support to raise money'	Staff fundraiser?
'We need someone to complete several grant applications ongoing'	Staff fundraiser?
'We need someone to organize large-scale fundraising event(s)'	Staff fundraiser?
'We need someone to draw up a fundraising strategy'	Staff or fundraising consultant?

Establishing fundraising need checklist

Use the pile of fundraising need cards chosen by the VCO in relation to the following questions to discuss the VCO's fundraising needs and potential options for meeting this need.

		Yes	No
1	Does the VCO itself have the skills required to fundraise?		
2	Does the VCO have any experience of fundraising?		
3	If 'yes' to 2, has it been successful in the past?		
4	Does the VCO have time and resources to fundraise?		
5	Does the VCO have a clear mission statement and a well-defined description of fundraising need?		
6	Is the fundraising need for a relatively modest amount?		
	<p><i>If the VCO answers mainly 'yes' to the above then:</i></p> <ul style="list-style-type: none"> • <i>A consultant may not bring much additional input or benefit.</i> • <i>The VCO may need to consider if a proportion of a current staff member's time can be dedicated to fundraising.</i> • <i>If capacity is the key issue, the VCO should consider using a volunteer and/or staff member to fundraise.</i> • <i>If need is likely to be ongoing or increasing, a priority might be to raise funds to pay a full or part-time dedicated fundraiser.</i> <p><i>If still undecided, continue to questions below.</i></p>		
7	Does the VCO want to fundraise for a large, one-off initiative for which a developed strategy is needed (e.g. purchasing a property)?		
8	Can a consultant produce what is required more cost-effectively than VCO staff and volunteers?		
9	Does the VCO need an impartial view to assist with the development of its fundraising strategy and business plan?		
10	Can the VCO afford to allocate a proportion of one staff member's time to work closely with the consultant over an extended period?		
11	Could the cost of taking on a full or part-time staff member to fundraise be out-weighted by amount of funds potentially raised by a dedicated person?		
	If the VCO answers mainly 'yes' to these last five questions, then a fundraising specialist (either consultant or staff member) may be the best option.		



Tool 1.2 – Applying to grant-making Trusts and Foundations

Aim

VCOs feel better equipped to apply to charitable grant-making Trusts and Foundations for funding.

Objectives

- VCOs understand the purpose of grant-making Trusts and Foundations.
- VCOs learn where to find out about Trusts and Foundations, and how to meet their criteria.
- VCOs understand how to put together a good quality application.
- VCOs understand the value of follow-up and building relationships with funders.

When to use

Anyone within a VCO when considering seeking grant funding.

How to use

1. Planning

- For VCO's new to grant applications see the **Grant-making Trusts and Foundations information sheet**. Reading the Institute of Fundraising's Code of Fundraising Practice – *Fundraising from Grant Making Trusts* is also a useful starting point.
- Depending on organisation size, fundraising may be undertaken by staff, Trustees, or volunteers. Smaller VCOs in particular may wish to consider training up a willing volunteer – someone who understands the funding needs of a project or organisation, who can read through funding directory entries and draw up a 'short-list' of potentials, or even write applications on a VCO's behalf. Subscription services (to which many CVS will have access) can be used to carry out on-line searches for funders in specific areas. For support in deciding who should be responsible for fundraising see:
 - **Tool 1.1 – Deciding who should fundraise.**
- Before putting pen to paper, VCOs need to clearly identify what they need money for. See the **Structuring applications checklist** for guidance on capturing this information.

2. Action

- Having established what the VCO needs money for, VCOs and advisors can work together to research potential funders. Most CVS should have access to grant-making directories and online searchable databases.
- Once identified, research a funder's specific needs and interests. When making applications, VCOs need to think about how they can help the Trust or Foundation meet its charitable objectives as well as their own.

- Build up a clear picture of why the funder should fund a piece of work.
- Complete the funder's application form, if they have one, if not use the **Structuring applications checklist** to develop an application.
- With application forms, answer all questions on the form, carefully and clearly. Try not to use 'jargon'. Use a reasonable size type-face (at least 10 point and ideally larger). If a funder wants 'Referees' – choose people that know the VCO, and can answer any questions well.
- Unless indicated otherwise, applications should include a VCO's most recent Annual Report and Accounts.
- Always ensure applications are submitted well before the deadline date.

3. Review

- A few days after posting or emailing an application, phone to check it has arrived safely, and ask if any further information is required.
- Wait to hear if an Assessor is coming out to visit, or will be conducting an Assessment by telephone.
- If an Assessor is getting in touch, make sure that those who will be meeting the assessor are well prepared and know both the application, and the purpose for which funding is being sought, well so that they can answer any questions.
- If funds are awarded, always thank funders and acknowledge support in publicity material.
- Complete any monitoring reports or annual returns which the funder requests promptly and courteously.
- Keep records of all applications submitted, to whom, for what, and when – this can be very useful in planning future applications, even where submissions have been unsuccessful.
- Ongoing, try to build a 'relationship' with the funder – it is always much harder for them to turn down applications from applicants that they 'know'.

Materials

Grant-making Trusts and Foundations information sheet

What are grant making Trusts and Foundations?

Most Trusts and Foundations are themselves registered as charities with the Charity Commission or Office of the Scottish Charity Regulator. Grant-making Trusts and Foundations exist to give grants to meet their charitable purposes, and can be set up for a variety of reasons - for example, a wealthy individual may establish a Trust during their lifetime or after their death to ensure that the family name and charitable interests continue (e.g. Esmée Fairbairn Foundation); or a company may establish a Foundation to give away a proportion of its profits each year (e.g. Lloyds TSB Foundation). Such funders are also known by a wide variety of terms like Mission, Bequest or Settlement – words more commonly in use when these initiatives were founded in the 18th or early 19th Century.

How are Trusts and Foundations administered?

It is important that VCOs understand the idiosyncrasies of the funder they are applying to. Because there is such diversity in the purposes of Trusts and Foundations, there is consequently a wide range of differing administrative systems and processes. Those registered as charities will have a board of Trustees who are responsible for making decisions on how its money will be spent. Larger initiatives employ staff to administer the huge numbers of applications received daily, while smaller family Trusts may undertake all the administration themselves around the kitchen table. Essentially, successful applications will be achieved by VCOs that understand the specific criteria and expectations of a particular Trust or Foundation.

Finding the right Trust or Foundation

There are a variety of publications, databases and on-line resources which can help VCOs search for appropriate Trusts and Foundations. Local CVS will hold information on funders. Practical resources usually available through a CVS include:

- **Publications** – *A Guide to the Major Trusts, Directory of Grant-making Trusts' and The Grant-making Trusts* CD-ROM available from the Directory of Social Change. See www.dsc.org.uk.
- **FunderFinder** – a website providing a variety of resources alongside a paid-for subscription service with details of a wide range of Trusts and Foundations in the UK. See www.funderfinder.org.uk

Structuring applications checklist

If a Trust or Foundation does not have an application form, the following checklist provides a structure for laying out a request.

Section	Content
Summary	Brief paragraph giving a clear and concise picture of the proposal.
Introduction and background	VCO's background – mission, aims, structure, track record.
Problem for which funding is sought	What is the problem? How has it arisen? Why and where is it occurring? Who is affected by it?
Solution	How will funding enable the VCO to tackle the problem? Explain the anticipated outcomes of the project and the specific, measurable objectives the VCO expects to achieve.
Measure	How will the VCO know the project is successful?
Budget	How much will it cost? When will money be needed? Who else is involved in funding or delivering the project?
Future	Is this a pilot project, a one-off activity, or an ongoing activity? If applicable, how will the VCO sustain the work or continue to fund the project?

Further Resources

For tips on applying to Trusts and Foundations see:

Trust Fundraising by Anthony Clay, published by the Institute of Fundraising and Charities Aid Foundation, available from Directory of Social Change. See www.dsc.org.uk

Tiny Essentials of Raising Money from Foundations by Jo Habib, published by White Lion Press. See www.whitelionpress.com

Association of Charitable Foundations

The Association represents most of the charitable Trusts and Foundations in the UK, particularly the larger ones. Their website contains links to the websites of most of their members, alongside some useful pointers on how to apply. See www.acf.org.uk

Institute of Fundraising

The Institute's Code of Fundraising Practice – *Fundraising from Grant Making Trusts* can be found at www.institute-of-fundraising.org.uk



Tool 1.3 – Raffles and lotteries

Aim

VCOs understand how to run raffles and lotteries.

Objectives

- VCOs learn about different types of lotteries (small, private, society) and the rules governing each type.
- VCOs understand the need to obtain authorisation to run a lottery.
- VCOs learn what information, by law, must be printed on raffle tickets.

When to use

Useful for VCOs considering raffles or lotteries as a fundraising option, or that are looking for an initiative that can be incorporated into some other fundraising event (e.g. fête, drinks evening etc). Useful for alerting VCOs to the legal requirements of lottery-based fundraising.

How to use

1. Planning

- Working together, advisor and VCO should read through the **Raffles and lotteries information sheet**. Ensure the different types of lotteries and associated legal requirements are understood.
- Consider what resources a VCO has available to run a raffle or lottery.
- Based on available resources, or those which can be raised in support, consider what kind of raffle or lottery would be appropriate.
- Questions to consider include: how many tickets can the VCO sell? Who will sell them? Can volunteers be enlisted? How many prizes will supporters donate? Will the VCO have to buy prizes? How much will that cost?
- Establish whether a raffle or lottery is actually a viable option.
- If a VCO is unable to run its own raffle or lottery, the Alexandra Rose Day Scheme may be a useful alternative. See their website (address below) for details.

2. Action

- If a raffle or lottery is an appropriate fundraising tool then the VCO should read the Institute of Fundraising's Briefing *Everything you wanted to know about raffles and lotteries* and its *Code of Fundraising Practice – Raffles and Lotteries*.
- If applicable, the VCO should also contact their local authority's licensing officer or the Gambling Commission to obtain their guidelines and information on how to complete a return if needed.
- Use the **Raffles and lotteries planning checklist** to plan the event.

- If running a society lottery, see the **Checklist for designing raffle tickets** to ensure all the necessary information is included on tickets.
- Consider promotional activity. How will it be promoted? When will it be held? Who will draw the winning ticket? Can it be a celebrity supporter? Does the VCO want to generate publicity and press coverage from the event? If so, who will handle this?

3. Review

- Following a lottery event the VCO should ensure it keeps all associated paperwork for at least two years.
- The VCO should review the success of the event and, in particular, the proportion of income raised relative to set-up and running costs. Use this assessment to establish whether such activities should be repeated and, if so, what could be improved upon.

Note: The Gambling Act 2005 comes fully into force on 1st September 2007. This will change some of the rules for lotteries. The Gambling Commission is updating its guidance, including its guide *Lotteries and the Law*. VCOs should check the Gambling Commission's website www.gamblingcommission.gov.uk for changes to rules before proceeding.

Materials

Raffles and lotteries information sheet

What is a raffle or lottery?

Any type of draw where participants pay money or make a contribution 'in kind' to have an equal chance of winning a prize are **legally defined as lotteries**. This includes raffles, tombolas, prize draws (e.g. where people pull-out winning ticket(s) from a hat/box), and sweepstakes (e.g. 100 clubs, even 'Name the Teddy' draws).

It is essential to understand that all lotteries are illegal unless they are authorised by the Lotteries and Amusements Act 1976, or classified as 'exempt'. An exempt lottery takes place during an exempt entertainment. Such events include:

- Bazaars.
- Sales of work.
- Fêtes.
- Dinners.
- Dances.
- Sporting or athletic events.
- Other entertainment of a similar nature which can be limited to one day or extended over two or more days.

VCOs should consult their local authority licensing officer and/or the Gambling Commission to confirm the status of any potential entertainment and lottery.

Benefits of organising a lottery

- Prizes can be donated, thereby reducing costs.
- Income from private and small lotteries is exempt from tax.

Different types of raffle and lottery

Small lotteries – useful additional fundraising tools during an event. Tickets do not have to be specially printed. The value of donated prizes is limitless but no more than £250 should be spent on purchased prizes and, whilst none of the prizes can be cash prizes, vouchers are allowed. Small lotteries must be run as part of another exempt event or entertainment (e.g. pub quiz, garden fête or dinner) and the sale and draw of tickets must take place during the event. Tickets can only be sold to people attending the event.

Private lotteries – can be offered only to people who live or work at the same premises or who belong to the same membership organisation. All proceeds must be split between prizes and the membership organisation. Tickets can be printed but a sweepstake is also permissible.

Society lotteries – to sell tickets to the general public over a period of time, a VCO must run a society lottery. Depending on the size of the lottery, either the VCO's local authority or the Gambling Commission will be responsible for regulating the lottery. If sales of tickets will exceed £20,000 for a single lottery, or £250,000 in one calendar year, then the lottery should be registered with the Gambling Commission, for which there is a fee. If the value of tickets on sale is less than £20,000 then the VCO should contact the licensing officer of their local authority for permission. The maximum permitted price of a society lottery ticket is £2 and tickets cannot be bought or sold by young people under 16.

On-line raffles – under the 2005 Gambling Act 'remote gambling' including on-line, via mobile phone and interactive TV is also lawful. VCOs wishing to operate remote gambling, including lotteries, are however, required to hold a licence issued by the Gambling Commission and different rules apply. Although currently more suitable for larger VCOs, as technology improves this may well become something smaller organisations can use in the future.

Alternative lotteries

Alexandra Rose Day – if a VCO feels it does not have the resources to organise a raffle itself, it may wish to join the Alexandra Rose Day scheme, which enables small people-caring charities to join its national raffle scheme. For further details see www.alexandraroseday.org.uk

Raffles and lotteries planning checklist

		Yes	No
1	Check if the raffle or lottery will be legally exempt (see Raffles and lotteries information sheet).		
2	Read the Institute of Fundraising's Code of Practice – <i>Raffles and Lotteries</i> and the Gambling Commission's <i>Lotteries and the Law</i> .		
3	Investigate VAT and income tax implications for society lotteries (the Gambling Commission and HM Revenue and Customs can advise).		
4	If applicable, consider running society lotteries and prize competitions through the VCO's trading arm.		
5	Budget for expenses and ensure the VCO has resources available or can raise them.		
6	If applicable, register the lottery with the Gambling Commission or the local authority.		
7	Decide on prizes and ensure they conform to the law (see Raffles and lotteries information sheet).		
8	Draw up a list of prizes that will be donated/purchased.		
9	If applicable, ensure raffle tickets are printed according to the law.		
10	Undertake any associated promotional activity.		
11	Brief all volunteers selling tickets and ensure secure systems are in place.		
12	If applicable, read the local authority's guidelines on how to complete a return and submit it to the relevant licensing authority.		
13	Keep records separate from other lotteries and retain paperwork for two years.		

Checklist for designing raffle tickets

There are rules about what must appear on any society lottery ticket. VCOs running such events must ensure their tickets carry the following information:

Required information on ticket	Added?
Price (this cannot exceed £2). Note this may change after september 2007	
Name of the VCO/society/charity.	
Details of whether the lottery is registered with the Gambling Commission or the local authority.	
Date of the lottery.	
Name and address of the promoter (in a font size no larger than that used for the beneficiary VCO's name).	
VCO's registered charity number (if applicable).	

Further Resources

The Gambling Commission

Further information on lotteries, included a handy booklet, *Lotteries and the Law*, can be downloaded from the Gambling Commission's website or ordered by calling 0121 230 6666. See www.gamblingcommission.gov.uk

The Institute of Fundraising

The Code of Fundraising Practice – *Raffles and Lotteries*, and briefing *Everything you wanted to know about Raffles and Lotteries*, are available on the Institute's website. See www.institute-of-fundraising.org.uk

Local authorities

To find the telephone number for a local authority to register a lottery, see: www.direct.gov.uk/DI1/Directories/LocalCouncils/fs/en

Alexandra Rose Day

For further information about this scheme see www.alexandraroseday.org.uk

Lotteries Council

The Lotteries Council was formed 25 years ago to represent the interests of fundraisers working to comply with gambling laws. The Council is open to any organisation or person who promotes a lawful lottery. See www.lotteriescouncil.org.uk



Tool 1.4 – Running charitable events

Aim

VCOs decide whether event fundraising is suitable for them and learn how to adequately plan and run a successful charity fundraising event.

Objectives

- VCOs understand the key issues and steps involved when planning an event.
- VCOs understand the legal requirements for running charitable events.
- VCOs understand how events fit into their fundraising strategy and how to gauge the return on investment.

When to use

For VCO fundraisers (staff, volunteers or Trustees) when considering using events for fundraising.

How to use

1. Planning

- In preparation, VCOs and advisors should read through the **Charitable events information sheet**.
- To establish that a fundraising event is an appropriate option, VCO and advisor should consult the **Charitable event planning checklist**.
- Remember, fundraising events cover an almost infinite range of size and complexity with the planning and costs required reflecting this. For larger and more complicated events, VCOs are recommended to seek specialist advice and assistance and may want to consider hiring a specialist events company to run the event.
- Planning is essential to successful event fundraising. Depending on the event, a VCO may wish to consider running a small-scale pilot to check suitability.

2. Action

- Establish what type of event will be suitable (e.g. small-scale dinner, auction, disco, large-scale fête etc.).
- The choice of event should be informed by an understanding of what resources and staff are available, and potential costs of any event. The VCO should research potential costs of the options being considered. Costing several options may be a good idea.
- Once the type of event has been established, use the **charitable event organisation checklist** to develop a strategy for the event and to ensure all necessary preparation is undertaken.

3. Review

- As part of event organisation, consider how its success will be evaluated. This will ensure that successful initiatives are repeated and mistakes identified and avoided. Positive feedback can also be invaluable for future bids for event sponsorship to demonstrate the VCO's successful track record with events.
- A crucial part of the evaluation process is to establish how much an event cost (resources, staff, licences, publicity etc) against how much was raised? Overall, was the time, effort and resources well spent? Should the event be repeated, or would other fundraising activities be more suitable?

Materials

Charitable events information sheet

Benefits of organising a charitable event

- A well organised event can generate publicity and raise awareness of a VCO's activities.
- A wide base of new donors can be reached through sponsorship of individuals in events such as runs, cycle trips and treks abroad.
- VCOs can often claim Gift Aid on qualifying donations, adding 28p to every pound donated that is eligible for Gift Aid.
- New regular givers' first contact with a VCO is often through an event.

Types of fundraising events

In-house events – Run completely by the organisation. These may include events organised by volunteers. A task group of volunteers is sometimes recruited exclusively to help organise fundraising events on behalf of a VCO.*

Sub-contracted events – VCOs contract another party to conduct the event on their behalf. This could be a professional fundraiser who does not work directly for the VCO, but asks supporters for donations on the VCO's behalf. Alternatively, the event could be organised by or sponsored by a commercial company.

Third party events – A third party approaches a VCO to carry out an event in aid of the organisation. This might be a local community group or a group of supporters. The third party is responsible for having its own insurance and for entering into all contracts related to the event. The VCO should be clear about the level of support it is able and wishes to offer the third party, and decide if it is fitting to provide support to the organisers.

Key Legal Requirements for fundraising events

There are a number of legal requirements in running events dealing with the public. The following is a list of areas where the effect of legislation should be considered. However, it is by no means exhaustive and should be read in conjunction with the Institute of Fundraising's *Code of Fundraising Practice – Event Fundraising*. See www.institute-of-fundraising.org.uk for details.

Area	Legislation
Advertising	Restrictions on where the advert is displayed and its content.
Aerial displays and release of balloons	Requires consent of the Civil Aviation Authority.
Auctions	Sales of donated goods to raise funds for charities are zero-rated for VAT purposes. Most payments at auction cannot be Gift Aided.
Children and vulnerable adults	If event allows VCO employees, volunteers or contractors to unsupervised access to children and/or vulnerable adults then the organisation must carry out a risk assessment to determine if CRB checks are needed.
Data protection	Organisations must comply with data protection legislation. See the Institute of Fundraising <i>Code of Fundraising Practice – Data Protection</i> .
Discrimination	People should not be discriminated against in relation to the event due to their disability, sex, age or race.
First aid	VCOs must make adequate first aid provision for people involved in the event.
Food safety	Any food supplied must comply with food safety regulations.
Fundraising material and restricted funds	If it is stated that funds raised will be used for a particular purpose then the funds must be used for that purpose only and the income must be identified in the charity's accounts as restricted income.
Health and safety	The VCO will be responsible for any breaches of health and safety at the event (e.g. failing to ensure that fire escapes are not blocked).
Licences and Temporary Events Notices	In most cases the premises on which an event is held must have a current premises licence. Guidance is available from local authority licensing officers and Department of Culture, Media and Sport. Entertainment and alcohol licences may also be required.
Music	If live or recorded music is to be played, a licence to play music may be required so that royalties can be distributed to the copyright owners.
Product safety	Any product being sold at the event must comply with safety standards. Contact Trading Standards (www.tradingstandards.gov.uk) for further details.
Raffles and lotteries	Must comply with the Lotteries and Amusements Act 1976 and the Gambling Act 2005. See: • Tool 1.2 – Raffles and Lotteries.
Registered charity status	If the VCO is a registered charity this must be stated on all documents soliciting funds.
Public collections	VCOs must obtain permission from their local authority.

Charitable event planning checklist

As part of the planning process, and before starting to organise an event, VCO's should be able to positively answer the following questions.

Issue to consider	Response
Is there a need for an event?	
Does the VCO have the resources to organise an event?	
Will the event be held primarily for fundraising or for profile raising?	
What type of event will it be (e.g. gala dinner and auction, sponsored walk round the local park, bicycle trek in Vietnam)?	
What types of events have similar and other local VCOs held?	
Will the local community turn out for the planned event or it is too similar to another event held recently by another organisation?	
Who will organise the event?	
When will it be held?	
What is the maximum number of people that can feasibly participate?	
How will people find out about the event?	
Who will do the publicity for the event? Is there a budget to cover this?	

Charitable event organisation checklist

Having decided to run an event, use the following checklist to assist organisation.

Task	Details	Done
Establish objectives	Ensure that these fit within the VCO's charitable and strategic objectives.	
Establish the target audience	Consider what fundraising activities might be attractive to potential participants or guests to determine what type of event will most successfully meet the objectives.	
Analyse potential benefits and returns	Consider qualitative (e.g. positive publicity) and quantitative (e.g. likely financial return against potential costs – how many people will need to attend for money to be made?)	
Establish a clear budget	Ensure all costs are included (e.g. VAT and hidden expenses such as staff time).	
Consider the elements critical to success	How will these be secured and how long will it take to negotiate and finalise agreements? (e.g. good venue, celebrities, sponsorship)	
Consider any risk to VCO's reputation	For example, arising from involvement with particular events or companies.	
Carry out a thorough risk assessment	Consider all elements of the event and the venue, including health and safety training	
Get approval from senior management and trustees		
Avoid clashes with similar activities and dates	Are other VCOs considering similar activities, are other events taking place around the same time?	
Ensure any insurance policies are in place	E.g. public liability insurance.	
Draw up written contracts	For any contractor (e.g. entertainer) and sponsor.	
Consider environmental impact	Especially if outdoors, likely to be noisy etc.	
Consult with others	Draw up a list of all agencies that will need to be informed and consulted before the event proceeds (e.g. local council).	
Brief everyone	Ensure everyone who will be involved in running the event understands what is required of them.	
Make contingency plans	Consider eventualities such as bad weather.	
Evaluation	Plan how the success of the event will be gauged.	

Further resources

Institute of Fundraising

For further guidance on running charitable events, see the Institute of Fundraising's Codes of Fundraising Practice covering:

- *Event Fundraising*
- *Volunteer Fundraising*
- *Charities Working with Business*
- *Charity Challenge Events*
- *Outdoor Fundraising in the UK*

See also the Institute's *Did You Know* Briefings:

- *Gift Aid and Charity Auctions.*
- *Charity Challenge Events and Gift Aid.*

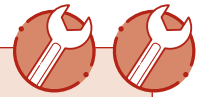
Contact your local authority

Local authorities have regulations governing events and some may provide guidance on areas such as conducting a risk assessment for a public event. To find the telephone number for your local authority see: www.direct.gov.uk/DI1/Directories/LocalCouncils/fs/en

Event safety

The Event Safety Guide (ISBN 0717624536) published by the Health and Safety Executive gives guidance on managing health and safety at large public events.

See: www.hse.gov.uk



Tool 1.5 – Hiring a fundraising consultant

Aim

VCOs feel able, with confidence, to select and hire a fundraising consultant, professional fundraiser or a fundraising staff member.

Objectives

- VCOs are able to understand their fundraising needs and appoint an appropriate fundraiser.
- VCOs know how to draw up a contract for a fundraising consultant or professional fundraiser.

When to use

For VCOs considering hiring a consultant to undertake fundraising activity. Particularly useful for VCOs about to undertake a major fundraising drive (e.g. property renovation) for which appointing a dedicated fundraiser seems necessary.

How to use

1. Planning

- VCOs using this Tool should have already established just what a fundraiser is needed for. If not, see:
 - **Tool 1.1 – Deciding who should fundraise.**
- Advisors and VCO should read through the **Fundraising consultants information sheet** to ensure the tasks the VCO wants to achieve are suitable for a consultant or professional fundraiser.

2. Action

- Working together, advisor and VCO should discuss what it is that a fundraiser is needed for to lay the basis for a fundraising job description or consultant briefing.
- Consider what it is the VCO wants to achieve and how they think this can be implemented. Consider what skills will be needed to raise the funds needed. Discuss whether these skills can be best provided by a current in-house staff member, new full or part-time salaried fundraiser, or whether hiring a consultant for a specific period of time will be the most appropriate solution.
- This discussion should also help the VCO confirm whether it needs a fundraising consultant (e.g. if need is for a short-term project), or a fundraising staff member (e.g. if fundraising support is needed ongoing).

- If seeking ongoing fundraising support seems the most suitable option, then hiring a consultant may not be appropriate. In this situation, the VCO should consider:
 - Using a volunteer.
 - Recruiting a dedicated staff fundraiser through advertising the role.
 - Use current staff or volunteers in the short-term to raise funds to employ a dedicated fundraiser who will fundraise in the long-term.
 - Adapting a current staff member's job description to include fundraising (N.B. this should be instead of other tasks, or to increase a part-time to full-time hours, not to simply increase workload!)
- If a consultant is appropriate, use the **Steps to employing a fundraising consultant** to establish next steps.
- Research potential consultants. CVS staff may already be aware of local consultants with the specialist skills sought by the VCO. Alternatively, lists of consultants are available on dedicated websites such as the Institute of Fundraising, or NAVCA. Independent internet searches can also be useful. Finally, asking other local VCOs if they have used consultants they can recommend may yield a result.
- Draw up a short-list of potential consultants. Depending on the nature of the fundraising tasks and scale of the work, the VCO may wish to invite several consultants to pitch for the work, or simply contact one to discuss their needs.
- Once a consultant has been identified, again refer to the **Steps to employing a fundraising consultant** to agree role, contract and terms for payment.

3. Review

- Fundraising consultancy does not always run smoothly. However, there must be a commitment by a VCO to work with the consultant.
- VCOs can help relationships with consultants run smoothly by:
 - Informing consultants of events that may impact upon their work.
 - Discussing with the consultant anything that the client is unhappy about as soon as an issue arises.
 - Preventing small problems grow into a major crisis by dealing with them swiftly.
- Once fundraising work has been completed by a consultant, it is useful to review the work, relationship and benefits. For example, did the VCO get value for money? Did the relationship work well? What could have been improved? Answering these questions will inform any future relationships with fundraising consultants that the VCO may have.
- If overall things went well, keep in touch with the consultant in case of future need.

Materials

Fundraising consultants information sheet

Understanding if a fundraising consultant can help

VCOs may think a fundraising consultant will solve all of their funding (and indeed organisational) problems. However, a consultant should only be engaged by VCOs that have a clear idea of what a consultant would achieve for them. Establishing the objectives a VCO would have for any potential fundraising consultant should be a first step. This exercise will often in itself help clarify whether or not a consultant is really the best option for achieving a VCO's aims.

What fundraising consultants can achieve

A consultant should be appointed by a VCO because he/she has special experience, knowledge, insight, skills, and a demonstrable track record. Consultants may be specialists or generalists, dealing with total strategy or a particular field (e.g. direct marketing or alumni), working with all types of not-for-profit organisations or with a select segment (e.g. churches, schools, universities; larger or smaller charities).

Tasks frequently undertaken by fundraising consultants

Fundraising consultants undertake a range of work. However, the most common types of work undertaken include:

- Fundraising audits and reviews.
- Fundraising strategies.
- Creating or improving a fundraising Case for Support.
- Development of specific programmes (such as charitable trust, donor, legacy or corporate fundraising plans).
- Fundraising event management.
- Fundraising or donor research.
- Recruitment of fundraising staff and volunteers.
- Fundraising training programmes for Trustees, staff and volunteers.
- Fundraising database design and management.
- Feasibility and resources studies.
- Major gift and capital campaigns.
- Trust, grant and lottery applications.

Steps to employing a fundraising consultant

There are four key elements to employing a fundraising consultant:

1. Choosing the consultant.
2. Agreeing a contract with the consultant.
3. Agreeing what the consultant will do.
4. Agreeing a payment method with the consultant.

1. Choosing a consultant

Having established what the consultant is required for, hiring a consultant will involve:

- Identifying the consultant(s) to approach.
- Making initial contact and requesting details.
- Holding exploratory meetings/briefing the consultant.
- Inviting selected consultant(s) to submit a proposal/tender.
- Interviewing consultant(s).
- Selecting the most appropriate consultant.
- Checking consultant's references/track record.

2. Agreeing a contract

The Institute of Fundraising's *Code of Fundraising Practice – Best Practice for Fundraising Contracts*, sets out best practice for fundraising contracts and legal requirements. A model contract is also included at the end of the Code. The Code is available on the Institute's website at www.institute-of-fundraising.org.uk

In general, the terms of any agreement should include:

- **A brief** – Be clear about with whom the consultant will deal and what the VCO is expecting them to achieve.
- **Contact and timescale** – State who the consultant will report to and at what stages.
- **Fees** – This should include any charges for VAT and agreed expenses, plus the schedule of payments. See below for further support.
- **Length of contract and terms for disengagement** – Explain what will constitute completion of the work and what process will be used to rectify any disagreements.
- **Arrangements for review** – usually these will be between the consultant and VCO lead contact. Delivery should allow for any over-run or under-run in the programme and for termination of the contract.
- **Copyright and ownership of materials** – VCOs should agree terms with consultants about ownership of copyright (of any materials developed e.g. of promotional material or any work developed as part of the contract).
- **A confidentiality clause.**

3. Establish what the fundraising consultant should do

The role to be carried out by a consultant should be established prior to hiring and should form part of the criteria for selecting a particular consultant. Greater detail may be established during preliminary meetings, or initial scoping studies (e.g. if the consultant is asked to establish funding needs). In addition, the following principles are considered good practice for consultants and should be expected.

- Consultants should make clear all fees, expenses and other associated costs; the basis or range upon which fees will be based, and the payment timescale.
- Consultants should advise potential clients of the strengths and weaknesses of their case and objectives.
- Consultants should ensure that the client understands the scope of the consultant's service and responsibilities and what input will be required from the client.
- Consultants should exercise due diligence with regard to the credentials of a potential client.
- Consultants should not to apply undue pressure to secure contracts.
- Consultants should not work on a commission only basis.
- Consultants should alert clients if a Consultant is aware of a potential conflict of interest (actual or perceived) between the prospective client and other clients with whom the consultant is already working.
- Consultants should prepare a written proposal for the client setting out services and costs and timescales.

4. Agree payment method

Fundraising consultant fees can range from £200 - £2,000 per day. The fee level should reflect expertise, track record (not the overheads of the consultancy) and the difficulty or complexity of the work required. As a general rule, the greater the level of expertise and longer the track record, the higher the fee will be.

The Institute of Fundraising does not recommend paying consultants by commission. Consultants should use time-based fees or some other form of remuneration that is not commission based only, such as a fixed fee. A time-based fee rewards an individual for the time that is spent on a project by that individual.

Potential payment methods are:

1. A fixed amount monthly or on completion of a project.
2. A fixed amount on delivery of pre-agreed targets or portions of work.
3. A percentage of income raised on exceeded targets, in addition to another non-commission based form of payment. Cap payment if concerned about budget overrun.

Further Resources

Institute of Fundraising's Codes of Fundraising Practice

For further support on working with fundraising consultants the following guidance is available from the Institute's website:

- *Best Practice for Fundraising Consultants*
- *Best Practice in Fundraising Contracts (and model agreement)*
- *Standard form of agreement Guidance Notes*
- *Salaries in Fundraising Briefing*

Finding a consultant

The Institute of Fundraising's website contains a searchable database of fundraising consultants who are members of the Institute and abide by its Codes of Fundraising Practice. Its Consultants Special Interest Group is also a source of information and networking. See: www.institute-of-fundraising.org.uk

The Association of Fundraising Consultants

Membership organisation for fundraising consultants. See: www.afc.org.uk/contact.php

Directory of Tools

Further Tools in addition to those contained in this document are available in the other Toolkits in the series and in the accompanying *Introductory Pack on Funding and Finance*. Details of available Tools and their location are given below.

The Tools contained in this document are highlighted. Tools included elsewhere which are *directly* relevant to procurement and contracting are also highlighted for guidance. Those highlighted do not form an exhaustive selection, however, and others may also be relevant depending on a VCO's individual circumstances.

Topic	Tool	Level	Location
Sustainable funding	Summary overview of funding environment with first-step assessment exercises	Introductory	<i>Introducing Funding and Finance for Voluntary and Community Organisations</i> pocket guide
	Self-assessment needs-analysis tool		<i>The Sustainable Sun Needs-Analysis Tool for Voluntary and Community Organisations</i>
	SWOT and PEST environmental analyses		<i>Introductory Pack Guide to Sustainable Funding</i>
	Risk analysis		
	Business plan		
	Income diversification diagnostic tool		
	Organisational capacity and capability assessment grid	Intermediate	
	Skills/knowledge audit		
Financial management	Developing a financial strategy	Introductory	<i>Introductory Pack Guide to Financial Management</i>
	Example revenue budget		
	Example cash-flow budget		
	Example monthly budget report		
	Example of fixed and variable costs		
	Example cash-book summary		
	How to do a bank reconciliation statement		
	Example receipts and payments management account	Intermediate	
	Example of how accrual accounting works		
	Example contents of an annual report		
	SORP information required in the annual report		

Topic	Tool	Level	Location
Fundraising	How to prepare and use a Case for Support	Introductory	<i>Introductory Pack Guide to Fundraising</i>
	Fundraising from individuals jargon buster		
	Legacy fundraising jargon buster		
	Deciding who should fundraise		
	Applying to grant-making Trusts and Foundations	Intermediate	<i>Tools for Fundraising</i>
	Raffles and Lotteries		
	Charitable events		
	Hiring a fundraising consultant	Advanced	
Trading	Exploring attitudes to Enterprise	Introductory	<i>Tools for Trading</i>
	Developing an entrepreneurial culture		<i>Introductory Pack Guide to Trading</i>
	Developing a competitive advantage	Intermediate	<i>Tools for Trading</i>
	Deciding where to start		
	Peer-learning for trading activities		
	Establishing an enterprise team		
	Cultural shift	Advanced	<i>Introductory Pack Guide to Trading</i>
	Feasibility studies		
	Business plan test		
	Trading activity development framework		
	Trading subsidiaries checklist		
Procurement and contracting	Contract checklist	Introductory	<i>Tools for Procurement and Contracting</i>
	Is Value Added Tax (VAT) applicable?		
	Identifying likely customers checklist	Intermediate	<i>Introductory Pack Guide to Procurement and Contracting</i>
	Marketing to potential purchasers checklist		
	Making direct contact with purchasers checklist		
	Meeting potential purchasers checklist		
	Deciding whether to bid and what for	Advanced	<i>Tools for Procurement and Contracting</i>
	Checklist for tender preparation		
	Negotiating contracts		
	Working with other VCOs		

Topic	Tool	Level	Location
Loans and other forms of finance	Checklist for loan finance decision-making	Introductory	<i>Tools for Loans and Other Forms of Finance</i>
	Comparison table of grants, debt and equity		<i>Introductory Pack Guide to Loans and Other Forms of Finance</i>
	Preparing a proposal for finance	Intermediate	
	Checklist of information required by finance providers		
	Checklist of investment decision criteria		
	Assessing finance needs	Advanced	<i>Tools for Loans and Other Forms of Finance</i>
	Finance options planning		
	Negotiating finance		
Demonstrating the social value of investment			



The Finance Hub is delivering to the Government's ChangeUp programme to create voluntary and community organisations which are effective and independent because they are financially sustainable.



NCVO's Sustainable Funding Project encourages and enables voluntary and community organisations to explore and exploit a full range of funding and financing options to develop a sustainable funding mix.

The Sustainable Funding Project
funding in the round
Website: www.ncvo-vol.org.uk/sfp
Tel: 020 7520 2519
Email: sfp@ncvo-vol.org.uk

The Finance Hub
Charities Aid Foundation
St Andrew's House
18-20 St Andrew Street
London
EC4A 3AY
info@financehub.org.uk
www.financehub.org.uk
Tel (020) 7832 3014
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Textphone: 0800 01 88 111
HelpDesk: 0800 2 798 798
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Websites: www.ncvo-vol.org.uk
www.askncvo-vol.org.uk

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