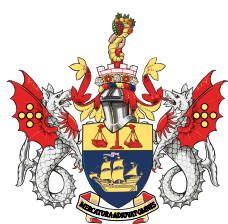


# Fundraising Guide for Smaller Charities: Tips for a bigger, brighter Future

A Worshipful Company of Marketors - Outreach  
Programme Publication



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**Welcome to this smaller charities' marketing guide from the Worshipful Company of Marketers' Outreach Programme. We'll be suggesting ways in which marketing can improve your charity's success and income.**

But first, let's look at what leading experts are saying about the current state of the sector:

## **Situation and Outlook**

According to website "Charity Digital", in 2022 small charities were 96% of the not for profit sector but accounted for only 4% of income and 5% of spend. 67% partnered with other charities to achieve their aims. 62% of charities anticipated "a threat to financial viability" in 2023.

"NCVO Almanac" confirmed that the public were the largest source of all charities' income - 48% or £27bn of a total £56bn. Nearly 85% of voluntary sector expenditure (£46bn) was spent on charitable objectives, with 14% on fundraising and 1% on governance. Sector staff were 67% female and 33% male.

In 2020/21, charities suffered Covid shock and then in 2022, fallout from the Ukraine invasion. This raised inflation and cut living standards throughout Europe. According to website "Wood for Trees", by mid-2022 regular giving was beginning to fall, one-off donations were down -19% and gaming receipts -5%. Lapsed donors increased from Q2 2022 onwards, following a 30% attrition rate in 2021. There was a marked decline in community fundraising.

Charity Finance Group's "Economic Outlook" forecast staff expenditure would be 9% higher in 2024 vs 2021. On the demand side, the cost of living crisis was causing rising client pressure for charities' services. Overseas aid charities had been disproportionately hit by falling donations.

On the positive side from a marketing communications viewpoint, Charity Digital also revealed that 72% of charity leaders expected to introduce new methods of giving in 2023, whilst 36% of the public said they would donate more if it was easier to do. Digital leader "Media Monks" forecast that by 2025, 70% of media spend would be digital - a potentially lower cost method of soliciting donations.

## **Successful Fundraising Strategies**

Faced with declining income and increasing demand for services in 2023, how can charities both retain and boost funds? Let's start with some actions that don't need time to implement, then we'll discuss strategies for approaching each type of donor:

### **No-Brainers**

#### **Gift-Aid It!**

Tax-paying members of the public who sign a Gift Aid form with a donation will increase the value of their giving by 25% - both now and for years to come. Ensure that your fundraising team always ask donors for their details, and ask your accountants to set up the appropriate scheme and register with any Financial Services Providers. This also benefits donors by slightly reducing their tax bill.

#### **Donate Buttons**

Add as many Donate buttons as possible – to each page of your website, social media, posts and emails. Remember, research said that 36% of the public would donate more if it was easy to do! If you need help appointing a Financial Services Provider, a guide from Charity Digital may help – just Google "Charity Digital - Topics - The best online fundraising platforms for charities".

## Contactless Payment



### Invest in Contactless

Most fundraisers now have card readers or self-service units connected to mobile signals. The immediacy of donating is attractive and the set-up costs negligible.

### Prompt Existing Donors

Your best chance of instantly raising cash will probably be from those who have supported you before. So ensure you have an up-to-date supporters' list which is GDPR cleared for immediate contact. Send an email with an appeal for funds – but explain why you need the cash and what your target is. "Help us to clothe thousands of destitute people in Ukraine – we need £100,000 now to keep our teams active". Include a donation hyperlink – and don't forget to ask them to Gift Aid it!

### Fundraising from Foundations and Grant-Making Charities

This form of fundraising has proven highly lucrative, often returning the highest return on investment and can be done from home with few resources other than good research and writing skills. Access to a computer and the internet, plus a subscription to Funds Online <https://fundsonline.org.uk> are the main tools needed.

If you don't wish to do this yourself, consider appointing a professional Fundraiser. They have access to lists of major philanthropic and altruistic organisations (plus corporates) and should be able to recommend and run a fundraising campaign. They tend to work on results-based commission but may require an up-front fee. To start looking for this support, try [Chartered Institute of Fundraising - Consultants Directory \(ciof.org.uk\)](http://Chartered Institute of Fundraising - Consultants Directory (ciof.org.uk)).

There's more advice from The Fundraising Regulator - [Fundraising topics | Fundraising Regulator](#).

Enhancing these funders are Charitable Trusts. They provide grants to those charities which write compelling applications matching their giving criteria (for details, Google "directory of grant making trusts" - subscriptions are needed but you may be able to access for free through a local Council for Voluntary Service).

### Fundraising from Individual Supporters

Whilst fundraising from Foundations, Grant-Making Charities, Trusts and Corporates remains a key activity, it's time to revisit individual supporters - both donors and volunteers - to offset the decline in giving and ensure you have a large enough team to cope with rising demand for your charity's services.

This Guide addresses the steps needed to:

- **Profile your Supporters** – why did they connect with your charity?
- **Introduce Membership and Supporter Progression** – make your charity more attractive
- **Develop Events** – with new ideas
- **Increase Awareness** – to increase your market share
- **Improve Communications Frequency** – and expand Media resources

## Profile your Supporters

Why did your supporters join or donate to your charity? Here's a few possible reasons:

- You have helped them or their families
- They are friends or relatives of those helped by you
- They had or have friends or relatives suffering from medical conditions or social issues on which you focus
- They live close to your bases or shops and were looking to give back to society
- They are friends or relatives of existing supporters
- They strongly relate to your aims
- They responded to your advertising campaigns
- They feel they may need your services in future

It's important to understand why people support you and to keep that information in your supporter database. The best way to find out is to ask them – via a postal survey, a page in your support magazine, or via a digital emailed survey such as SurveyMonkey which can be sent in response to a donation or a volunteering session.

You'll then be able to discover the relative importance of each reason, both by number of supporters and the revenue generated.

This helps you to successfully develop content that connects with current, GDPR-cleared supporters, helping retention. You can also produce targeted recruitment campaigns for new supporters, including through data marketing. The DMA has members who can advise - [DMA - Data & Marketing Association](#).

## Membership and Supporter Progression

Many charities have different levels of membership, with varying annual subscriptions. This might include, in declining order:

- A/ Trustees/Directors - between 5 and 12 is usual
- B/ Patrons - generally members who promote the charity using their name, influence and contacts. They can be Celebrities and may be called "Ambassadors"
- C/ Members - who vote for Trustees. They may be offered an upgrade to "B/ Patron" status
- D/ Donors - regular donors by direct debit or standing order, or one-off donors. Regulars may be offered an upgrade to "Member" status. Major Donors (hidden in your Donors' list) may give at much higher levels - Google "Database wealth screening" to identify. Needs tailored approaches and high levels of care
- E/ Volunteers - the life-blood of your charity, providing pro-bono support to your core activities and service users
- F/ Paid Partners (Staff) - who might also register as one or more of the other categories
- G/ Service Users - may also provide financial support



**Attract More Volunteers**

Categories A, B and C may be expected to donate a minimum amount per annum to the charity, varying by supporter level. In return, the charity should provide each level with events, information and access. These become more exclusive, the higher up the supporter chain. Donors should be asked periodically to consider increasing their standing orders/direct debits in line with inflation and should be targeted with legacy campaigns. With a 9% increase in UK deaths in 2022, asking supporters to include you in their will can really enhance income. That's why large charities such as NSPCC, British Red Cross, Macmillan and British Heart Foundation have mounted TV and Radio advertising campaigns.

If your charity doesn't include all (or any) of the above levels, consider creating them. Ask supporters if they'd like to move up the membership chain, improving engagement and income. New levels also give you the chance of recruiting more supporters who welcome the new benefits.

To recruit celebrities, ask your supporters whether any live nearby. There will be actors, comedians, broadcasters, diplomats, sports people, journalists and of course politicians who will be happy to be Ambassadors for your charity pro-bono. As well as attending major events, they'll meet your Service Users, give speeches and lobby on your behalf.

## Events Development

A key to low cost fundraising events which can develop supporter commitment, is to host on members' premises as well as your own. Ensuring you have insurance cover, we suggest some recently successful events – plus more general activities:



**Trustees' and Patrons' Gardens**

- **Open Gardens** From Spring to September, members' interesting gardens are opened either singly or in multiples as a "Garden Safari". There's a "One Price Safari Ticket" and further income from catering at one venue. Your local gardens can be linked to the "National Garden Scheme" - [Home - National Garden Scheme \(ngs.org.uk\)](https://www.ngs.org.uk). Appeals to membership categories A, B, C, E
- **Blooms Appeal** Give a plant or flowers (or anything else reflecting your charity's purpose) to some or all of your Service Users, funded by a supporters' appeal. Supporter categories A, B, C, D. Balance of income appeal goes to the charity
- **Parties** A chance for Members (C) to meet with each other, Volunteers (E) and Service Users (G). Visits from Celebrity Patrons (B) can bring excitement.
- **Patrons' Parties** Exclusive to Patrons (B) and Trustees (A), often including representatives of E, F, G categories to create an understanding of the charity's achievements and how Service Users are being helped. Can include a meal, tombola or raffle, online auction and music. In summer, often held in a marquee in a Patron or Trustee's Garden – and called a Sunset Soiree if only drinks and nibbles are included. In winter, use an upmarket venue or a Trustee's (large) home



- **Pub Quiz** Usually with a free venue, provided that food and drink is purchased by attendees. Appeals to all categories A-F
- **In Memoriam** If your charity works with end of life situations, families can remember those who have died by purchasing an item to be displayed en masse at the charity's premises. In the manner of the Tower of London's "Blood Swept Lands and Seas of Red" (2014), the charity displays the products, which are given to the purchasers after display. Examples include metal snowdrops and personalised ribbons. A-F
- **Participation** Ever since Captain Sir Thomas Moore raised awareness of charitable participation, many others have run and walked for charity. Whilst some individual charities have always found it difficult to stage their own events, they can still ask active supporters to raise cash via branded runs and treks. For example, in the London area these include [Home - TCS London Marathon](#), [General information | Half Marathon \(royalparkshalf.com\)](#), [Thames Bridges Trek - Ultra Challenge](#) and [Thames Path Challenge - Ultra Challenge](#). A-F
- **Sales** Ask your supporters to produce something for sale. Cakes, second hand toys, garden produce. Then hold a fête or garage sale. If you have charity shops, make sure supporters know there's a special event on! A-F
- **Dinner Dance** A great fundraiser but research the likely turnout if you haven't held one before as the upfront cost is high. Ensure your celebrities attend and advertise their presence. A-G
- **Visits** If your charity has links to the arts, supporters will be attracted to visits to galleries, museums and notable buildings. The key is to arrange a unique experience that supporters couldn't buy themselves. Arrange for a curator to guide your tour, for example, and visit areas not usually open to the public. A-F
- **Shops** If you don't have a shop, this may be the time to consider opening one. It's reported that 50 shops a week are closing in the UK, so one close to your operation may be available at very low cost and on a short lease. Ensure that there's no other charity shop nearby (particularly if you intend to sell recycled clothes and household goods)
- **eBay** Try opening a charity eBay site



Fundraising Runs and Treks

If you need other fundraising ideas, try the [UK Fundraising website](#) and search for fundraising ideas or read [Eventbrite's blog](#) on fundraising ideas.

## Increase Your Charity's Awareness

In marketing, we have a saying that Share of Voice = Awareness = Market Share. The more you invest in advertising vs your competitors, the greater the income you'll achieve. Actually in today's Social Media world it's not the amount you spend but the Presence you generate for your charity vs others that matters. And that comes from frequent, relevant and targeted messaging – it needn't be expensive.

Unfortunately when charitable giving is low, you need to shout louder at the right supporters to keep your income up. That's why you've profiled them and know about their interest in your organisation. Your content should remind them about the achieved and desired outcomes of their generosity – with case studies of people or causes they would relate to. Children who have been cured, the infirm who have been befriended, artworks and buildings that have been restored.

This means that you need to state and re-state what you are trying to achieve and why people should support you. What will happen if support falls short? Link your communications to any news, research or surveys that are relevant to your operation – for example, the British Red Cross issues a press release every time there is a world or national crisis such as Ukraine or the Turkey/Syria earthquake, saying how they are helping people in those situations.



**Link your Press Releases to Emergencies**

Develop an attractive website, an active blog and regular activities generating news content. Print flyers to hand out at events and in your shops and premises.

And if you're thinking of a legacy development programme, a will writing service can create further awareness.

## Improve Communications and Frequency

Ask yourself:

- Do we have an up-to-date website (if it's over 4 years old, replace it)? Are we monitoring views and visits?
- Do we update content at least weekly? This gives supporters reasons to visit and improves Search Engine Optimisation
- Is there a trained individual responsible for posting content daily and ensuring social media continuity (including headers, hashtags and avatars)?
- Do we have a monthly digital newsletter to email to supporters? Include reports of Events (with lots of images), visits by Celebrities, Case Studies, Staff new joiners and promotions and any national or international news relevant to your charity
- Are we GDPR compliant, do we have an up-to-date Privacy Policy and do we include "Unsubscribe" on all emails?
- Do we have active WhatsApp, Facebook, Instagram and Twitter accounts? Do we use [Facebook's Charitable Giving Tools](#)?
- Are we using tools such as Eventbrite for booking events?
- Influencers – have we approached stakeholders such as suppliers and supporters to become influencers - and supplied them with a media pack?
- Online fundraising – are we using sites such as [Just Giving](#) and [Crowdfunder](#) to develop campaigns and promoting them through social media?

These key actions will help to raise messaging interest, consistency and frequency amongst your supporters. Renewed awareness and commitment should lead to re-engagement, greater income and much-needed volunteering.

Once you've reassessed your marketing strategies, remember to brief your staff and use your ideas to help recruit more supporters!

Help bring a bigger, brighter future to your charity!



**A Bigger, Brighter Future!**

## **How the Worshipful Company of Marketors Supports Smaller Charities**

The Worshipful Company of Marketors, a City of London Livery Company, helps good causes through a pro-bono Outreach service. Highly qualified marketing experts can review charities' marketing activities, give general marketing advice and suggest new fundraising programmes. Our charitable arm, the Marketors' Trust, also gives cash grants to selected charities and runs an annual competition for good causes' marketing – awarding cash and pro-bono consultancy.

For details of these schemes or a digital copy of this Guide including hyperlinks, please email [outreach@marketors.org](mailto:outreach@marketors.org) or contact us at:

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### **Court Assistant John Wheen, July 2023**

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