

arts
fundraising &
philanthropy



Essentials in Fundraising

Annie Jarvis - Director of Strategy and Programmes, Cause4

Introduction

Annie Jarvis

- Director of Strategy and Programmes, Cause4
- Head of Arts Fundraising & Philanthropy
- Trainer and Facilitator - Essentials in Fundraising / Application Writing / Corporate Fundraising / Marketing for Charities
- Strategic Fundraiser, leading on business planning, fundraising and strategic support
- Director of PHACE CIC



Introduce Yourself in the Chat

- About me and my work
- Biggest fundraising fears



Session Overview



Introduction to Fundraising is a two-hour workshop that will give you the skills and confidence needed to become a successful fundraiser.

The session will explore

- Overview of the funding landscape and sector trends
- Researching Funders and creating an Action Plan
- Reinvigorating your Case for Support

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Funding Landscape

Statutory Funding



Statutory funds stem directly from government sources and are typically managed by bodies that distribute funds on behalf of DCMS.

- Arts Council England
 - Supporting delivery for specific arts-based projects through National Lottery Project Grants
 - Interested in a range of artforms (music, theatre, dance)
 - Strategy is linked to Let's Create – focusing on a creative country and creative communities
 - Those wanting to apply should consider the ACE Investment Principles, Inclusivity and Relevance, Dynamism, Ambition and Quality and Environmentalism
 - Applications are submitted online and are for projects costing £1,000 to £100,000 – projects can last up to three years.
 - Turnaround time on receiving a response is typically 12 weeks.
- National Lottery Heritage Fund
 - Interested in funding heritage-based projects, which could include nature, landscapes, history recordings, museums and libraries, and cultural traditions.
 - You can apply for activities, repairs, digital work, new staff, training and professional fees.
 - Applications are submitted online and are for projects costing £10,000 to £250,000.
 - Turnaround time on receiving a response is typically 8 weeks.
- Local Authorities / Combined Authorities
 - Priorities of Local Councils or Combined Authorities vary depending on the region you are in – so best to search for funding opportunities in your local area.
 - Most funding will be for a defined project that needs to clearly address a need, show value for money and be clear on what you want to achieve.

Corporates

We can engage corporates in a range of ways:

- Corporate Social Responsibility - philanthropic partnerships that support an organisation's strategic objectives to give back to society - for example through a Charity of the Year Partnership.
- Sponsorship: A financial package in exchange for benefits - e.g. sponsoring an event in exchange for publicity and marketing.
- In-kind Support: partnerships where the business offers goods or services to an organisation instead of cash, through donating products, space, skilled people or volunteers.

Companies are typically interested in partnerships that benefit their CSR (their own brand, strategy and vision for change), their marketing (attracting new customers and showcasing who they are) and engagement (being able to offer opportunities for staff or clients).

Corporate Partnerships have an average ROI of £5.16 for every pound spent (Fundratios), and an average lead-in time of 6-9 months.

Individuals

We can engage individuals in a range of ways:

- One-off gifts (online or in-person)
- Monthly Donations
- Memberships
- Major Donor Giving
- Events and Public Campaigns
- Legacies



Common Motivators of Individual Giving:

- Connection to cause - e.g. mental health / music / talent development
- Connection to a region or local community
- Connection to organisation / individual
- Enjoyment and entertainment
- Access to benefits at a discounted price

Earned Income

We can generate Earned Income in a variety of ways:

- Ticketing - selling tickets to a show / performance / exhibition
- Commissions / Residencies - getting paid to produce a piece of work or deliver an output
- Sales of products - selling artwork or merchandise, or generating funds from a shop or café
- Training and Consultancy - using expertise to support others in exchange for a fee

When it comes to earned income, we need to think about:

- Our Audiences. Who are we targeting?
- Our Capacity. Who is going to deliver this work?
- Investment. Will it cost money to set up and run?
- Marketing. How are we going to market our offer so we can make the money?



Trusts and Foundations



Trusts and Foundations are private grant-giving bodies that give funds to charities, CICs, social enterprises and individuals:

- Over 10,000 in the UK
- Give away circa £2.5 billion per year (funds range from a few hundred pounds into the millions)
- Often long process – decisions made by a board of Trustees or by an Executive Team – average turnaround time is four months
- Good for socially-led projects based around a core need (disadvantage / education / arts and culture / health)



Who Funds Who?



	Statutory Funder	Trusts and Foundations	Individuals	Corporate	Earned Income
Charity	YES	YES	YES	YES	Some
CIC	Some	Some	YES	YES	YES
Sole Trader	Some	Some	YES	YES	YES
For Profit	Some	Very few	YES	YES	YES

Individual Reflection



Which of these areas have you engaged with?

Thinking about the above, which areas might you be keen to tap into?

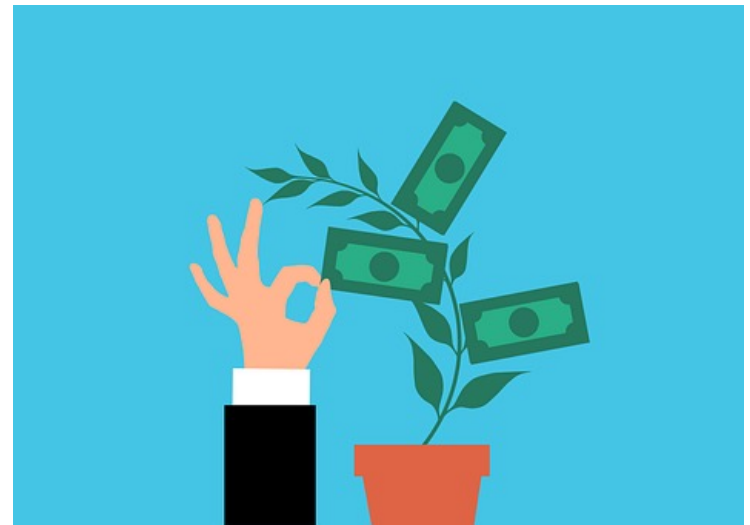
Sector Trends

Benchmarking the sector is an important way to identify where the money is coming from. There are several reports presenting important data.

One of the most comprehensive datasets is the Arts Council England Dataset – The Private Investment in Culture Survey Report 2022, collating information from nearly 5,000 organisations.

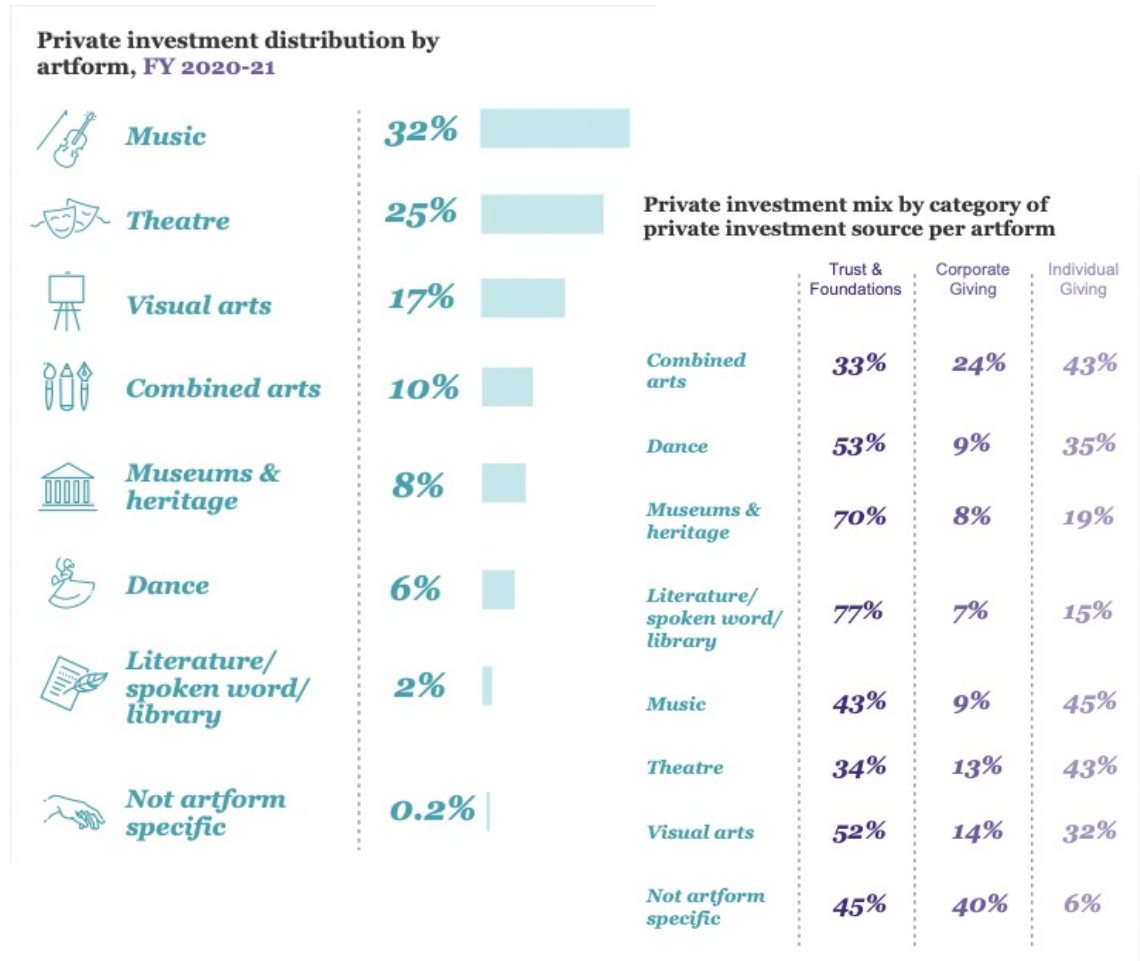
Looking back at 2020/2021, the total private investment in the not-for-profit cultural sector in England is estimated at £799.8 million.

- 44% - from individuals
- 41% - in grants from trusts and foundations
- 15% - in corporate giving



Artform Distribution

- Music receives the majority of private investment (32%) whilst non-artform specific receives the least (0.2%).
- Income from Trusts and Foundations remains relatively high across all artforms, with music receiving 43% from this source.
- Individual giving also accounts for a significant portion of investment, whilst corporate giving is significantly lower across all artforms (apart from non-artform specific).



Funding Trends



- There is an increased competition for funds, making the landscape more challenging.
- There is more of an emphasis on ‘place-based’ funding, focusing on localised giving and community projects.
- There is more concern about distributing resources nationally and a trend towards moving out of London.
- There is an increase in funding that addresses a clear need, such as health and wellbeing, deprivation, access and inclusion.
- Funders are interested in partnerships and collaborations – they want to see joined-up approaches to delivery and fundraising.

Questions?

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Creating a Funding Plan and Conducting Research

Creating a Funding Plan



To identify the right funding sources, we need to create strategic funding plan to address some key questions:

Where am I now?

Operation - what set-up do I have (Charity, CIC or Local Authority) and what are the implications for fundraising?

Communications - what messaging am I using, and do I have a strong Case for Support?

Capacity - what resources do I have to deliver fundraising and where does my expertise lie?

Financial Review - how do I currently raise money and is my income portfolio diverse and sustainable enough?

Creating a Funding Plan



Where do I want to be?

What are my future projects – what needs money?

How much do I need to raise?

What timescale do I have to fundraise and when do I need the money?

What expertise or capacity might I need to invest in?

Who are my delivery partners? Can they be turned into fundraising partners?

What is happening in the sector that we need to be aware of?

How do I find funders?

Once you have answered these questions, you can then begin to conduct research, which is an essential part of fundraising.

**Charity
Commission**

Benchmarking

Databases

Networks

Benchmarking



Benchmarking against comparable organisations is a simple and effective way to find the funders that are most likely going to be interested in your work...You can compare by a range of factors:

- The audience they support (elderly / children and young people)
- The location they're in (Matlock / Islington)
- The projects they deliver (health and wellbeing / music education)

1). Identify the organisations like yours

2). Check out their websites and annual accounts to see who supports them

3). Create a long-list of funders to research

4). Delve into these funders to find out more about them

Charity Commission



Charity Commission is a robust database of all Trusts and Foundations in the UK. It can provide you with rich information about who funds what..

THE 29TH MAY 1961 CHARITY

Charity number: 200198



Charity reporting is up to date (on time)

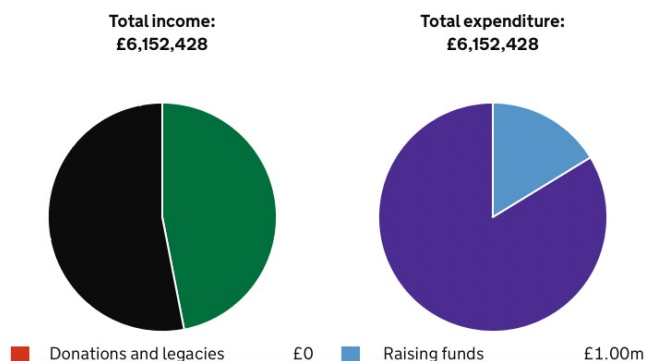
- Charity overview
- What, who, how, where
- Governance
- Trustees
- Financial history
- Assets and liabilities
- Accounts and annual returns
- Governing document
- Contact information

Activities - how the charity spends its money

The Charity is a general grant making Trust

Income and expenditure

Data for financial year ending 05 April 2022



Sector	2022 - No.	2022 - Awarded	2021 - No.	2021 - Awarded
Arts and Museums	49	£889,500	32	£614,750
Conservation and Protection	16	£157,000	13	£49,500
Employment, Education and Training	31	£519,000	39	£438,000
Homelessness and Housing	37	£577,500	40	£505,500
Leisure, Recreation and Youth	80	£739,000	78	£615,500
Medical	29	£314,000	36	£617,000
Offenders	17	£344,500	13	£153,000
Social Welfare	138	£1,526,100	186	£1,697,000
Grand Total	397	£5,066,600	437	£4,690,250

Location	2022 - No.	2022 - Awarded	2021 - No.	2021 - Awarded
International	2	£52,500	0	£0
London and the South	124	£1,100,500	148	£1,315,000
Midlands	162	£2,341,600	181	£2,446,500
National	81	£1,368,000	72	£638,250
North	28	£204,000	35	£281,500
Northern Ireland	0	£0	1	£9,000
Grand Total	397	£5,066,600	437	£4,690,250

Grants awarded

	2022
Arts and Museums	
University of Warwick	
Towards the general costs of the Arts Centre	£271,000
Towards the costs of providing USA travel bursaries	£19,000
Royal Shakespeare Theatre	
Towards the core costs of the theatre in Stratford Upon Avon	£60,000
Towards the costs of the educational work of the theatre in Stratford Upon Avon	£20,000
City of Birmingham Symphony Orchestra	
Towards the core costs of the orchestra	£60,000
Royal College of Music	
Towards the costs of their instrument procurement and maintenance fund	£30,000
Black Country Living Museum Trust	
Towards the costs of further development of the site in Dudley, West Midlands	£30,000
Science Museum Group (The)	
Towards the costs of their "One Collection" project at the museum in London	£25,000
National Museums Liverpool	
Towards the costs of redeveloping the Walker Art Gallery in Liverpool	£20,000
National Art Collections Fund	
Towards the costs of funding the purchase of art by institutions	£20,000
Music for Youth	
Towards the costs of an online mentoring programme, free to young musicians	£15,000

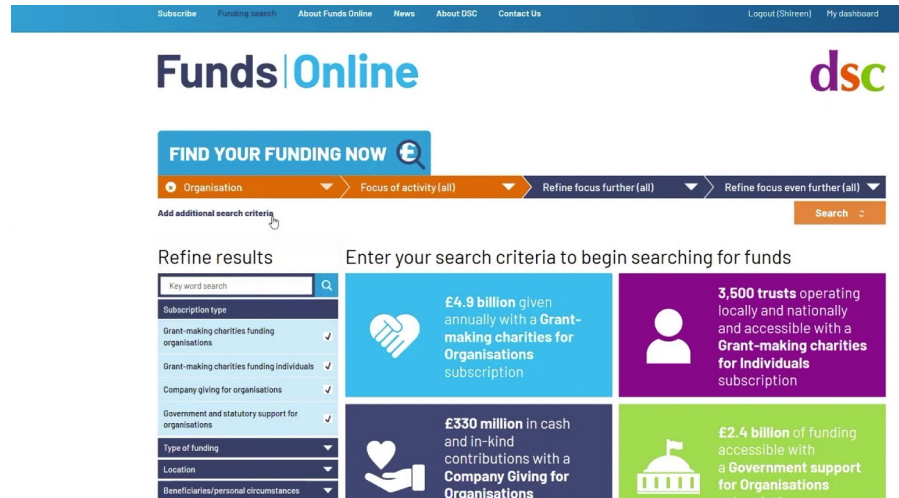
Databases

There are multiple databases to sign-up to that will allow you to conduct a bespoke search for different funders:

- DCMS Funds Online - £150+
- Grin.Coop - £15+
- Invisible Grantmakers - £280+
- CVS Newsletters - free

These funders allow you to refine your search based on:

- Location
- Type of funding
- Beneficiaries
- Operational Set-up

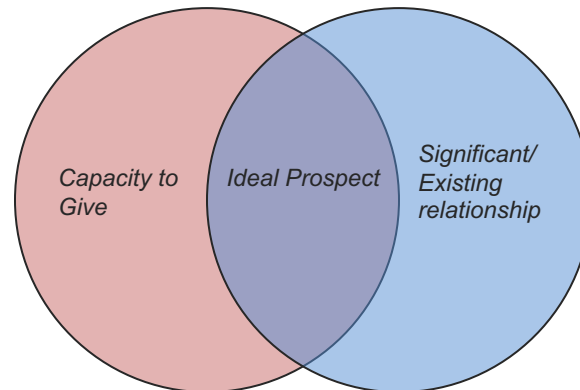


The screenshot shows the FundsOnline website interface. At the top, there is a navigation bar with links for 'Subscribe', 'Funding search', 'About Funds Online', 'News', 'About DSC', and 'Contact Us'. On the right side of the navigation bar, there are links for 'Logout (Shireen)' and 'My dashboard'. The main header features the 'FundsOnline' logo and the 'dsc' logo. Below the header is a search bar with the text 'FIND YOUR FUNDING NOW' and a magnifying glass icon. Underneath the search bar, there are several filters: 'Organisation', 'Focus of activity (all)', 'Refine focus further (all)', and 'Refine focus even further (all)'. There is also a link to 'Add additional search criteria' and a 'Search' button. The main content area is divided into two sections. On the left, there is a 'Refine results' section with a 'Key word search' input field and a list of filters: 'Subscription type', 'Grant-making charities funding organisations', 'Grant-making charities funding individuals', 'Company giving for organisations', 'Government and statutory support for organisations', 'Type of funding', 'Location', and 'Beneficiaries/personal circumstances'. On the right, there is a section titled 'Enter your search criteria to begin searching for funds' which contains four informational cards. The first card is blue and states '£4.9 billion given annually with a Grant-making charities for Organisations subscription'. The second card is purple and states '3,500 trusts operating locally and nationally and accessible with a Grant-making charities for Individuals subscription'. The third card is dark blue and states '£330 million in cash and in-kind contributions with a Company Giving for Organisations'. The fourth card is green and states '£2.4 billion of funding accessible with a Government support for Organisations subscription'.

Networks

The best supporters can be those who are already aligned to your work in some way:

- Known to you
- Known to your staff, volunteers, Trustees,
- Connections of existing funders
- Existing supporters / members / visitors



Conducting Research



Trust	Contact Information	Description	Grant size	Application Information
29 th May 1961 Charita ble Trust	Ryder Court, 14 Ryder Street, London, SW1Y 6QB. 020 7024 9034 enquiries@29may1961 charity.org.uk	<p>The Trust supports general charitable activities, including arts, culture and heritage. It funds both revenue and capital projects.</p> <p>Previous grants included £813,000 to the University of Warwick Arts Centre; £100,000 to the Imperial War Museum; £30,000 to the Geffrye Museum Trust and £25,000 to the Westminster Abbey Foundation.</p>	The average grant size in 2017/18 was £15,000	<p>Apply in writing to the correspondent, including a cover letter and a two-page Case for Support.</p> <p>Trustees normally meet in February, May, August and November.</p>

Conducting Research

No matter the income stream you choose, research is a vital element of successful fundraising.

You will need to carefully identify the potential individuals, corporates, or Trusts that are suitable to approach, and ask some key questions:

- Do their interests align with ours?
- Have they previously supported similar organisations or similar projects?
- Do they give an amount that is suitable for the income I need?
- Am I eligible to apply to them / approach them for support?
- Does anyone within our organisation know them, or would we be making a cold approach?

Questions?

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Case for Support

A Good Fundraising Story Is...

- Bold - it catches attention
- Emotive - it captures the heart
- Easy to get on board with
- About an urgent but solvable problem
- Bespoke to your target audience
- Ambitious but not impossible
- Filled with tangible examples of how you can make a difference



My Case for Support



Case for Support



- The head (Cognitive preferences – what do our supporters find important?)
- The heart (unconscious motives – what are our supporters passionate about?)
- The hand (Actions – What we can our supporters do to make a difference?)



Individual Reflection



What is emotive about my story?

What is factual about my story?

What is my ask?

The Importance of Why

Simon Sinek's TED Talk on the need for leaders to *inspire* others

"People don't buy what you do, they buy why you do it"

- Do you know what you are delivering?
- Do you know how you are going to deliver it?
- **Do you know why you are delivering it?**



The Importance of Why

Sharing vital stories, exposing hidden truths

There is a lack of representation from marginalised groups in the arts, particularly those with disabilities, not getting the space or recognition they need and deserve as professional artists.

*Our work is **Vital** to diversity and inclusivity in the arts.*

*We offer **Xposure**, to both audiences and artists. The stories we tell strongly influence our actions and our understanding of the world. Exposing audiences to new and under-represented stories is vital to building community and compassion.*

*Vital
Xposure*



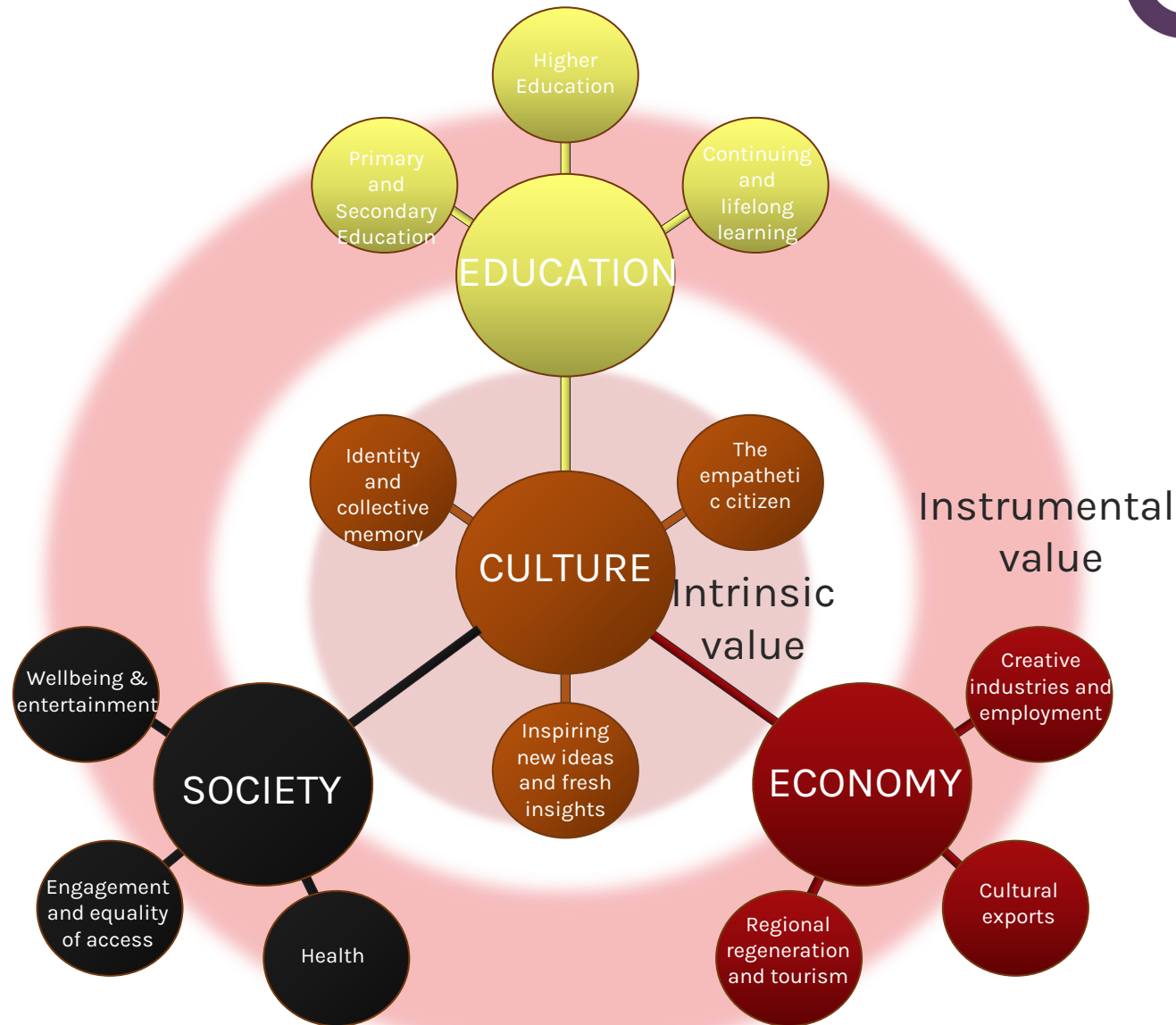
Task – Articulate Your Why



- Why do we exist?
- What do we aim to achieve?
- How do we achieve it?

Questions?

Make A Holistic Case for Support



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Tips for Writing

Avoid Jargon



“A demonstrated commitment to co-operation and collaboration forms the cornerstone of this extremely unique partnership between the two organisations.”

Never assume they know you, and cut out the jargon

Avoid Unsubstantiated Claims



“Our organisation is a unique company in the visual arts sector and our work is highly innovative....but we operate in a very desolate and most deprived area....”

Always back up your arguments with evidence

Avoid going on and on and on and on...



“I hope you will be able to give favourable consideration to our request for support; if you would like to discuss this initiative further or require more information, please do not hesitate to contact me at the above address.”

Keep it sharp and to the point

Vary Sentence Length



Vary the length of sentences: eg.

The performers are reminiscent of characters from a Beckett play; they explore their stage space and their relationship with each other using movement, music, video, and props.

= 27 words

The result is at once bizarre, intriguing and touching.

= 9 words

Split and Connect Sentences



Use a **FULL STOP** and restart the sentence with a connecting word such as ‘**however**’, ‘**and**’, ‘**so**’, ‘**also**’, ‘**yet**’, or ‘**further**’

Evidence indicates that the arts are a “vehicle for socially marginalised groups to articulate their concerns, emphasise their contributions to communities and assist with social integration” (LGA, 2001). = 26 words

***However**, for many there is scant provision for social integration through the arts, especially artistic work of world-wide renown. = 19 words*

Use Lists and Bullet Points



Vertical lists break long sentences into manageable chunks. (eg.)

Through Cre8, we aim to:

- *develop young peoples' interpersonal, communication and creative learning skills*
- *introduce participants to different disciplines related to physical movement, music and drama*
- *provide young people including those who are disabled with performance opportunities*
= 40 words

Aims & Objectives



WHO will do **WHAT** to **WHOM** by **WHEN**

- **AIM** is a statement of what you hope to do
- **OBJECTIVE** is **HOW** you will do it & should be **SMART**
 - **S – Specific**
 - **M – Measurable**
 - **A – Achievable**
 - **R – Realistic**
 - **T - Timely**

Creating a Budget

Your budget needs to:

- Tell the same story as your Case for Support
- Include full details of expenditure plus a plan for how you will generate income
- Factor in full cost recovery - overheads / salaries / management / contingency
- Include a clear budget statement that explains your finances and plan for fundraising



Constructing a budget



Expenditure	Amount	Notes
Co-ordinator	£16,425.00	£225 per day at one day a week - 73 days
PR Support	£1,200.00	£200 per day - 6 days total
Curator fees	£23,500.00	£250 per day - 94 days total
Curator travel	£450.00	
Materials / Equipment	£5,600.00	Digital Technology, 3D equipment, Panels and Display Boards - £700 per workshop group
Digital artefacts / Documentation	£5,000.00	Commissioned Film Work and Projection, photographic and sound installation.
Exhibition catalogue	£6,000.00	Highlights all of the work of participants and the process - contributing to the report
Transport - Hire costs	£1,200.00	Support children and families where needed to access the exhibition
Venue	£7,000.00	Five days of exhibition + set-up and get-out
Catering - Launch event	£1,250.00	
Invigilators (£150 per day)	£750.00	One person per day for five days
Marketing & Print costs	£1,000.00	Physical print, digital and social media
Arts Award - Quals	£3,360.00	Paying for young people to get qualification as part of the programme.
External research commission	£5,000.00	External Evaluation Commission
SUB TOTAL	£78,735.00	
% of Marketing Manager Salary	£1,000	2 weeks at £500 per week
Contribution to fixed costs (10%)	£7,873.50	Equipment, lighting, heating, IT.
SUB TOTAL	£87,608.50	
Contingency (5% of total)	£4,380.45	
TOTAL	£91,988.50	

Constructing a budget



INCOME	Cost	Notes
Partner income	£8,000.00	Contribution of £1,000 from each partner (Confirmed)
Trust and Foundations	£69,735.00	Pledge of £20,000 from David Johnson Foundation Confirmed Applications to various Trusts, including Garfield Weston, Foyle Foundation and Backstage Trust submitted.
Patrons	£14,253.50	Individual patrons (Confirmed)
TOTAL	£91,988.50	

The total cost of this work is £91,988.50, of which £42,253.50 has been raised from Trusts, project partners and patrons, leaving a shortfall of £49,735.

We are approaching a number of Trusts and Foundations to secure this shortfall, and would be delighted if X Foundation would support us with a grant of £23,000.

Donor cultivation cycle



Cultivation refers to the methods you will use to build a relationship with a donor, stewardship is the process of looking after that donor

*How might you
cultivate a donor?*

How to Cultivate a Donor

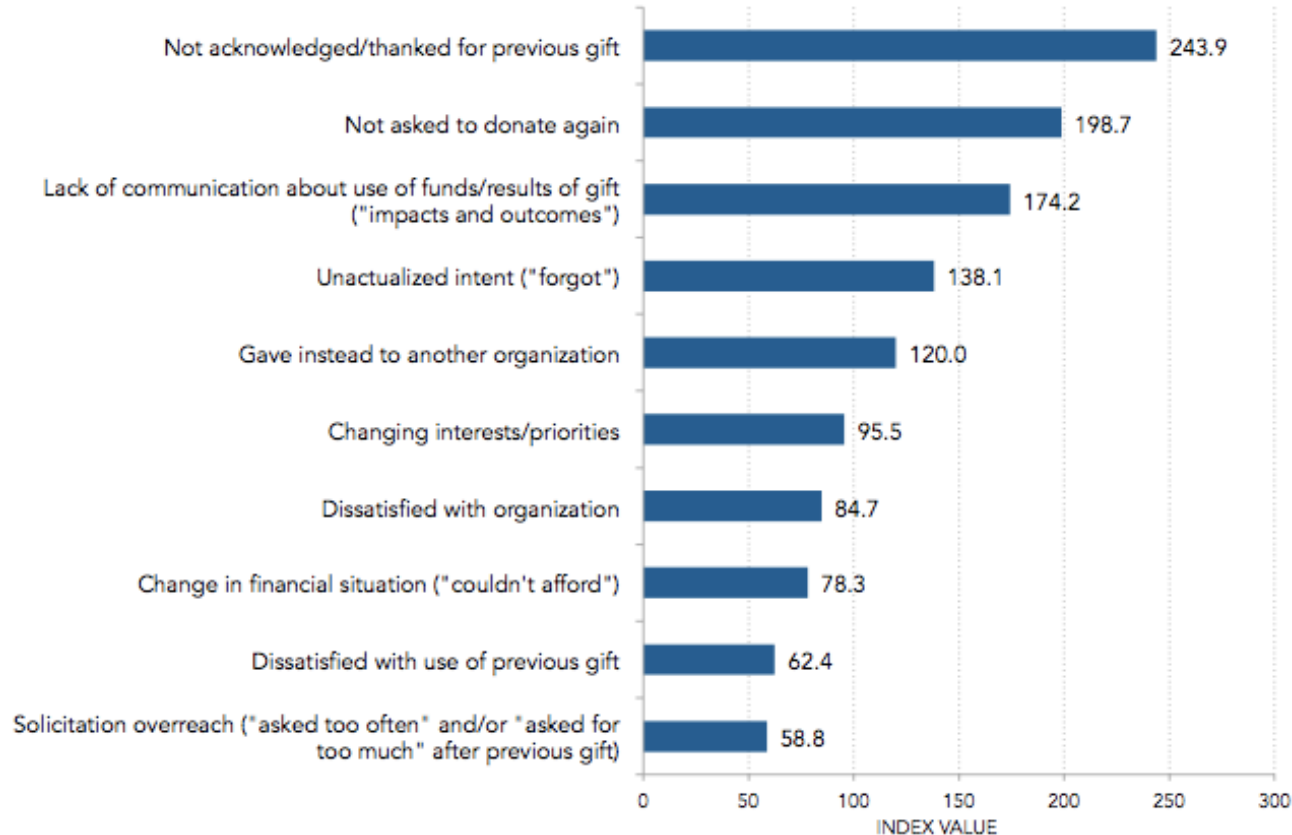
- Letters or emails
- Newsletters
- Invitations to Events
- One to One Discussions
- Meet and greet with beneficiaries
- Conversations with staff
- Dinners
- Phone calls
- Project experience
- Backstage tour / site walk-through
- Volunteering opportunities
- Ask for feedback and advice



Some of these opportunities work for better for different funders e.g. some Trusts will attend events, others will simply want to see an application.

Why did you not make a donation?

(Previous \$250-\$2,500 annual donors who had did not donate again within 24 months)



Top Tips



Remember getting funding is only the start of the relationship:

- Have a plan and stick to it!
- Fundraising is a team effort – always get a second opinion
- Research research and more research -do your homework and follow the guidelines
- Don't forget to ask for the money
- Be confident and bold
- Write in plain English and proof read everything
- Tailor your approach to the funder
- Say thank you and then say it again – cultivate
- Manage rejection – ask for feedback and reflect on what you can change next time

Questions?

get in touch

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