

# Fundraising

# group action pack

## What are your group's needs?

Before thinking about how you are going to fundraise decide which activities are essential to the sort of support you want to offer to families. Try to put these activities in order of priority. Is it more important to find new families and invite them to your meetings (you may need to print posters or send out information) or is renting a good venue for your meetings, setting up a website or holding an annual family day more crucial? Only the group members have answers to these questions and it is important to act as a group rather than pursue several different individual courses of action. Some of the costs involved in the early activities of a group are:

- Producing posters and other publicity about your group.
- Renting a room for your meetings and providing tea, coffee etc.
- Producing a newsletter for all your families or members.
- Postage and 'phone bills: talking to new families, especially where a diagnosis has recently been given, is not something you want to rush and consequently your phone bill may increase.
- Inviting a speaker to your meetings. They may or may not expect a fee but you will at least need to offer to pay their travelling costs. Check this when you invite them.
- Extra help for those who could not otherwise join your meetings. You could perhaps help towards their transport or baby-sitting costs.

**contact** a family  
for families with disabled children

209-211 City Road, London EC1V 1JN

Tel 020 7608 8700 Fax 020 7608 8701

Web [www.cafamily.org.uk](http://www.cafamily.org.uk) e-mail [info@cafamily.org.uk](mailto:info@cafamily.org.uk)

Freephone Helpline 0808 808 3555 (Mon-Fri, 10am-4pm)

Textphone 0808 808 3556

Incorporating  
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## **Pause for thought**

Always consider the 'can it be obtained by other means?' question as it could save you a large amount of effort.

It may be that instead of raising extra money, you can make a saving or have something donated.

Can some of the smaller costs be met from within the group? This could be through a regular charge for each meeting or small subscription for membership. If you do this it is easier to establish this right from the start. Alternatively, you may feel that, when parents initially contact the group, discussing membership or other costs is not appropriate.

However, if your group has supported families through difficult times they are often more able, and willing, to contribute at a later date.

Be careful not to become obsessed with fundraising! It can sometimes take over so that other activities get neglected.

## **Why bother fundraising?**

Before organising an event consider the following questions:

- WHY is the money needed?
- WHAT will happen if it isn't raised?
- HOW much is needed?
- WHEN is it needed by?
- CAN it be obtained by other means?
- WHO will raise the money?

You must be able to answer these questions yourself because a potential donor may ask you and if you are unsure then you may lose the donation. The answers will also help you plan your fundraising events to match the time scale in which the money is required, the size of events needed and the amount of time your team of volunteers are able to give.

## **Appropriate types of fundraising**

There are countless ways of raising money and a quick 'brainstorming' session should come up with large list. When you are deciding which suggestions to use remember that all events should be:

- Within your groups' abilities. Make sure that it is a good use of your volunteer's time. If an event takes 5 people 5 hours and raises £25, that is the equivalent of £1 per hour each; they would probably rather have spent the 5 hours at home and donated £5 each!
- Within your group's aims, e.g. should your group accept a donation from tobacco or other companies manufacturing controversial goods?

- Within the law, e.g. you need a license from the local council if you want to hold a lottery or a street collection. Check up on the regulations. Remember that ignorance is no defence and do not be tempted to think that you can bend the rules because it is for a good cause.
- For the group. It is important not to mix up fundraising for a parents' group with any fundraising on behalf of individual children in your neighbourhood.
- FUN for the organisers and the public.

## **Why do people donate?**

By looking at why people give money to your cause, you may be able to target your potential donors better and thus raise more money. Individuals may give because:

- They believe in the cause
- They are having fun/socialising
- They want the goods or services offered
- They feel good having given
- They want others to think well of them
- They think it's the right thing to do
- They would feel guilty if they didn't
- They were pressured into it
- They were approached by a friend

Companies give for very similar reasons. All too often charities play on the 'belief in the cause' angle, thus taking money from the same people time after time. Whilst it is important to keep your supporters active it should be possible to offer them something in return. An example is entertainment so that they come to your functions because they enjoy them and not simply because they support your cause. This is also a good way of attracting new supporters.

## **Qualities of a good fundraiser**

Many different people get involved in fundraising and some are more suited to it than others. Some of the personal characteristics that help to make people good fundraisers are listed below, but it must be emphasised that whilst it should be possible to have most of them present within a committee of people, no one has all of them.

- cheerful, enthusiastic and have the ability to motivate others and lead by example
- believe in the cause, have the will to succeed and gain personal satisfaction from doing so
- persistent, not letting disappointments get you down
- an efficient and capable organiser with some spare time
- have a polite, professional approach
- able to learn from others, grab opportunities and not be afraid to ask for things

- able to recognise people's strengths and weaknesses and delegate responsibilities accordingly
- have a number of personal contacts

## Finance

Many people are extremely anxious about getting involved in handling money in any quantities. Lack of funds can limit a group's development so you will need to take practical steps to overcome this anxiety. Remember, the more a group does for its members, the more money it needs.

If you are nervous, ask for help from someone familiar with book-keeping or accounts. Talk to your bank manager and make sure you appoint a competent treasurer to keep records and receipts of what money comes in and what is spent. It is important that everyone has confidence in your financial procedures. You can achieve this by:

- Having two signatories on every cheque.
- Presenting regular financial reports to your committee.
- Making sure that your annual accounts are independently audited, circulated to members and funders and freely available to others.

The group may wish to become a registered charity – see the Contact a Family Group Action Pack guides *Developing a national support group* and *Charity registration* for more details. Further information about becoming a registered charity and fundraising and accounting requirements for charities is available from the Charity Commission (see page 10).

## Budgeting

Many group fundraising events tend to be small and/or tried and tested so there is a temptation not to bother with a budget, simply trusting to luck or past successes. This can lead to a reduction in potential profit or even a 'fund-lowering' event. By not producing a budget on paper and circulating it to the committee, you may be losing out on valuable ideas such as where potential savings could be made or how additional income could be generated. Preparing a budget also forces people to plan ahead and may act as a reminder of work to be done. There are six main rules to bear in mind when budgeting:

- Look at figures from past events if they are relevant but remember to add on an amount to cover rising costs.
- Be pessimistic about income – don't rely on people coming simply because the event is for a good cause.
- Be realistic about expenses and remember that many quotations do not include VAT.
- Include a 5% sum to cover unforeseen expenses in the budget.
- Be prepared to cancel the event if the net profit is too small compared with the effort involved in raising it.

- Make sure everyone knows the budget and keeps within it, for example, if someone saves £5 on prizes by obtaining donations it means £5 more profit NOT £5 extra to spend on publicity.

### Example budget for a jumble sale

Expenditure		Income	
Hire of hall	£25	Admission (200 people @ 20p)	£40
Hire of tables	£10	Refreshments (100 people @ 20p)	£20
Hire of van	£25	Sales (10% more than last year)	£200
Petrol	£5	Raffle tickets (100 people @ 50p)	£50
Advertising in newspaper	£15		
Posters	£2		
Leaflets	£10		
Refreshments	£5		
Raffle prizes	£10		
Contingency	£5		
<b>TOTAL EXPENDITURE</b>	<b>£112</b>	<b>TOTAL INCOME</b>	<b>£310</b>
		<b>ESTIMATED NET PROFIT</b>	<b>£198</b>

### Organising events

- Rate your ideas for events on each of the following factors:
  - How much will it raise?
  - Is it appropriate to you?
  - What is the likelihood of success?
  - How cost effective is it?
  - How easily can it be organised?
  - Can it be repeated?
  - IS IT FUN?
- Most groups tend to plan activities a year in advance. Try to balance your fundraising programme with your volunteers' time, include large and small events and match events with your cash flow requirements.
- Try to avoid clashes with other events. Instead consider having a stall at other groups' events; it's less work and not as risky as organising your own.

- Hold regular meetings (for national groups this may need to be by teleconference: for more information see the *Contact a Family Group Action Pack guide - Meetings via telephone conference*); make sure that records are kept; draw up a job list; and get written confirmation of bookings. Try to make contingency plans for wet weather and other eventualities.
- Decide on an incentives policy and cost it out. Most policies deal with free admission e.g. if you're working you don't have to pay – but does this also apply to spouses and non-working committee members? Other issues to consider might include free cups of tea and the advance purchase of goods at jumble sales. If the policy is publicised in advance then there should be little cause for complaint on the day.
- Make sure that people are put in charge of returning borrowed items, tidying up and notifying the press of the amount raised after an event. It is all too easy to forget and enthusiasm tends to wane after the event.
- Make a point of thanking your helpers either on the day, in writing, at the next meeting or at a special social event later.

## **Insurance**

Insurance is one aspect of fundraising that is often forgotten. It is possible to insure against almost anything, but the fundraiser must balance the risk against the cost of the insurance. You should always ask your volunteers to check their own policies to make sure that they are not invalidated by involvement in your organisations activities. For example, some car insurance policies may be invalid if the vehicle is being used on behalf of the group.

- Public Liability Insurance covers the organisation against claims for injury or loss from the public. Many local branches of national organisations will be covered by a public liability policy via the head office – check up.
- Property Insurance covers items borrowed or hired.
- Pluvial Insurance covers your event from loss resulting from heavy rain.
- Personal Accident Insurance covers volunteers involved in hazardous activities.
- Special Insurance covers events such as a 'Dice for a Car' game and will pay out in the unlikely event of someone winning!

## **Publicity & news releases**

Your organisation of an event may be superb but to make it a success it must be well publicised. For information about publicity see the *Contact a Family Group Action Pack* guides on *Speaking to the media*, *Writing a news release* and *Publicity for your group*.

## Grants from the public sector

- County, borough and district councils may give 'starter grants' to local groups. Ask your Council for Voluntary Service or the grants liaison officer (sometimes called voluntary organisation liaison officers) at the local council. It is a good idea, if possible, to get the support of someone from the statutory services, for example, a social worker or health visitor.
- Social services/social work departments may give grants to local groups – ask the area manager or local authority grants unit for advice. Service agreements may also be a possibility.
- District health authorities may be able to give you a small grant if your group is providing a service which is not provided by the National Health Service, but is helping to reduce the demand on NHS services.
- Joint Finance is a separate source of funding from central government allocated to each district health authority. The application procedures are complex and drawn-out but joint finance is a major source of funding to local groups.
- Department of Health grants are for groups who work across England. The scheme is called Section 64 funding and can be used to pay the salary of a worker, rent for an office, or volunteers expenses. Contact: Voluntary and Community Sector Partnership Team (VCSPT), Department of Health, Area 609, Wellington House, 133-155 Waterloo Road, London, SE1 8UG Tel: 020 7972 4093 <http://www.dh.gov.uk/organisation> (click on Finance and Planning and then Section 64 grants). There are similar schemes in Scotland, Wales and Northern Ireland.
- Section 64 funding is also available in Wales. For details of how to apply contact the Wales Contact a Family office (see *Useful contacts* at the end of this guide.)
- Consortium on Opportunities for Volunteering funds are for projects which involve volunteers of working age who are not in full-time employment. It is not necessary for these volunteers to be registered unemployed, and not all volunteers involved in the project must be unemployed. General Fund, Consortium on Opportunities for Volunteering, 18 Devonshire Street, London W1G 7AU Tel: 020 7323 5354 Fax: 020 7323 5363 <http://www.charitiesdirect.com/charity3/ch012453.htm>
- Inner City and Rural Grants. There are a variety of grant schemes. Ask your local Council for Voluntary Service or Rural Community Council for details of current programmes.

## **Grants from trusts and companies**

The techniques for applying for grants from trusts and companies are all relatively similar:

- They will want to know all about your group: a clear explanation of your aims and objectives; how families are benefiting; how many families are linked together.
- Grants are easier to get for specific projects rather than on-going administration costs.
- Be clear about the difference between capital costs (for example a one-off grant to buy toys for the playgroup) and revenue costs (for example, rent, telephone bills etc).
- Present your case effectively. A letter should only take up one page, but some supporting material such as a budget, accounts and an annual report can be included. The material should convey a sense of enthusiasm and excitement as well as being eye-catching. It should include some background information on your organisation, the aims of the project, why they have been selected, what you require and when it is needed for.
- Keep records of everything you do.
- Nurture your contacts and don't be afraid to ask again even if you've been rejected. If you are successful, make sure they are thanked and send photographs, Christmas cards, press cuttings.

### ***Who to write to***

Be selective in your targeting. Do not write to hundreds of trusts/companies – careful research is needed.

- Ask if any group member has personal contacts (a relative or friend) who is the trustee of a trust or a manager of a company.
- Consult one of the reference books described later and select targets which match the aims, geographical area and size of grant you need.

On average trusts donate ten times the amount that companies do but companies also 'give' in many ways other than straight donations:

- Sponsorship in return for publicity
- Seconding staff
- Advertising in group brochures/programmes
- Joint promotions on products
- Gifts in kind such as old computers/office furniture or prizes for raffles
- Advice on finance, publicity
- Services such as offering spare places on training courses
- Contacts within the business world
- Employee support through payroll giving

An application may thus stand more chance of success if it is directed as a request for help in one of these forms rather than just for cash.

Other organisations that may help with small grants include, Lions Clubs, Rotary Clubs, Inner Wheel Clubs, Round Table groups, Young Farmers, Student Rags etc. They may like you to go along and talk about your group.

If you are not a registered charity:

Many trusts and companies will have a policy of only supporting registered charities. In certain circumstances Contact a Family can accept grants or donations on behalf of affiliated groups that are not yet registered charities. Please speak to our accounts department before you submit your application.

## Useful contacts

- The Charity Commission has an online database of all registered charities which can be searched for grant making trusts <http://www.charity-commission.gov.uk>. For information about charity registration organisations established in England with expected or actual incomes below £10,000 should contact:  
Charity Commission, 20 Kings Parade, Queens Dock, Liverpool L3 4DQ  
Larger organisations, with incomes over £10,000 should contact:  
Charity Commission, Woodfield House, Tangier, Taunton, Somerset TA1 4BL  
General enquiries: 0870 333 0123 Minicom: 0870 333 0125  
**enquiries@charitycommission.gsi.gov.uk**
- BBC Children In Need grants have helped many groups. Full details of how to apply are available from: <http://www.bbc.co.uk/pudsey/apply/> or email: **pudsey@bbc.co.uk**  
England and general helpline: PO Box 76, London W3 6FS  
Tel: 020 8576 7788  
Northern Ireland: Broadcasting House, Ormeau Avenue, Belfast BT2 8HQ  
Tel: 028 9033 8221  
Scotland: BBC Edinburgh, Holyrood Road, Edinburgh EH8 8JF  
Tel: 0131 248 4225  
Wales: Broadcasting House, Llandaff, Cardiff CF5 2YQ  
Tel: 029 2032 2383
- The Charities Aid Foundation (CAF) administers donations on behalf of several companies, trusts and individuals. They operate a number of websites including <http://www.allaboutgiving.org> which allows small charities to have an online fundraising presence.  
The Charities Aid Foundation, Kings Hill, West Malling, Kent ME19 4TA  
Tel: 01732 520000 **enquiries@CAFonline.org** <http://www.cafonline.org>

- Comic Relief includes disabled people in the 11-25 age group amongst those it will support. There is also money available to support local community projects.  
UK Grants Team, Comic Relief, 5th Floor, 89 Albert Embankment, London SE1 7TP  
Tel: 020 7820 5555 Fax: 020 7820 5500 Minicom: 020 7820 5579  
**ukgrants@comicrelief.org.uk <http://www.comicrelief.org.uk>**
- The Directory of Social Change publishes a wide range of books on fundraising. They produce a number of reasonably priced grant guides and also run training courses. One of their publications is The Directory of Grant Making Trusts. Your local library should have a reference copy. The Directory is large and very daunting so you will need to allow a lot of time to get to grips with it. It does have a geographical index which can help identify local Trusts. It is also available on CD Rom and via a subscription website: **<http://www.trustfunding.org.uk>**  
The Directory of Social Change, 24 Stephenson Way, London NW1 2DP  
Tel: 020 7391 4800 Fax: 020 7391 4808  
**info@dsc.org.uk <http://www.dsc.org.uk>**
- The Institute of Fundraising offers a wide range of training courses, advice, a reference library and much more.  
ICFM, Market Towers, 1 Nine Elms Lane, London SW8 5NQ  
Tel: 020 7627 3436 Fax: 020 7627 3508  
**enquiries@institute-of-fundraising.org.uk**  
**<http://www.institute-of-fundraising.org.uk>**
- The Big Lottery Fund (formerly the Community Fund and the New Opportunities Fund). The Big Lottery Fund offers grants throughout the UK. For advice on applying phone the **Big advice line: 0845 4 10 20 30**  
**<http://www.biglotteryfund.org.uk>**
- Ronald McDonalds Children's Charities funds free 'home away from home' accommodation for families of seriously ill children. In addition grants are made to registered charities enabling them to purchase equipment relating to Special Needs Play and Special Educational Needs.  
Ronald McDonalds Children's Charities, 11-59 High Road, East Finchley, London W2 8AW Tel: 020 8700 7331 Fax: 020 8700 7417  
**<http://www.mcdonalds.co.uk>**
- VolResource provides information on collecting donations online, including a list of providers of this service **<http://www.volresource.org.uk/services/inonline.htm>**

## Wales

- Contact a Family Cymru: for advice on funding issues.  
Room 153 S, 1st Floor, The Exchange Building, Mount Stuart Square, Cardiff CF10 5EB Tel: 029 2049 8001 Fax: 029 2049 5001 **wales@cafamil.org.uk**

- Wales Council for Voluntary Action: Represents and campaigns for voluntary organisations in Wales. It offers advice and information on funding sources, an e-bulletin containing updates on funding issues and training course to help you manage the group.  
Baltic House, Mount Stuart Square, Cardiff CF10 5FH Tel: 029 2043 1700 Fax: 029 2043 1701 **enquiries@wcva.org.uk** <http://www.wcva.org.uk>
- The Welsh Funding Guide: A Directory of funding sources in Wales. Ask your local library if they can access a copy for you.  
Directory of Social Change, 2003, £16.95 **books@dsc.org.uk**  
<http://www.dsc.org.uk>

### Scotland

- Contact a Family Scotland, Norton Park, 57 Albion Road, Edinburgh EH7 5QY  
Tel: 0131 475 2608 Fax: 0131 475 2609 **scotland@cafamily.org.uk**
- [workwithus.org](http://www.workwithus.org): Scotland's portal for the voluntary sector. The website includes a searchable database of grant making organisations. <http://www.workwithus.org>

### Northern Ireland

- Contact a Family Northern Ireland, Bridge Community Centre, 50 Railway Street, Lisburn BT28 1XP Tel: 028 9262 7552 **nireland@cafamily.org.uk**

This guide is part of the Contact a Family Group Action Pack. For more information please visit <http://www.cafamily.org.uk> or telephone 020 7608 8700.

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