

The Four Essential Ingredients for Successful Fundraising

Guidance for development teams
& fundraising professionals



This pack takes you through the the four key elements behind successful fundraising:

- Case for Support
- Need
- Leadership
- Constituency

This guide will help you to develop the key elements needed to carry out a strong fundraising strategy, tailored for your organisation. Take away tips on writing and sharing a compelling case for support, and involving your community both through giving and the opportunity to share feedback and guidance through leadership positions.

Read it and take the guidance back to your team.



Case for Support

“Reasons lead to conclusion; emotion leads to action.”

What is a case for support?

A case for support is a document to explain to potential donors why you need to raise funds, i.e. what will the funds be used for and why is this so important for your organisation?

How do you develop your case for support?

Your case for support should underpin your entire fundraising mix, including endowment, capital appeals, annual funds and legacies.

Starting with your vision of where the school is heading, you can identify areas across your academic, pastoral and co-curricular activities that can be developed. By auditing in this way, you can strategically create your case for support to address the areas that will contribute most significantly towards your vision.

How can you express your case for support?

- Document – Typically, this is the first and most comprehensive version of your case for support, available for any prospective donors. This can include a breakdown of costs and targets,
- Video – Video is an effective way to condense your case and imbue it with emotion,
- Website – Sharing your case for support on your website is a great way to share the message with your wider community who might not attend your events or have time to read your full case for support document. Major donor prospects may also check up on your development website,
- Presentation – An event where you present your case for support is a good way to engage potential donors. But presenting your case demands that you can turn often complex ideas and propositions into a pithy message.



ToucanTech Tip: Embedding videos onto your site or in news articles is a great way to promote your case for support. You can also upload your full case for support as a resource, for people to download and read in detail.

What to include in your bursaries case for support:

- What the aim is – e.g., providing opportunities for more talented pupils to receive an excellent education
- Target amount to raise
- Selection process
- Average fee remission
- How/when you will report to donors
- How you will support beneficiaries

What to include in your facilities case for support:

- What the aim is – e.g., inspiring pupils, attracting the best teaching talent, preparing for the future of the school
- Target amount to raise
- Timeline for the project
- Graphics to help people imagine the new development
- Whether there will be any disruption to studies
- Pupil buy-in

Need

“You can raise money effectively if people believe that you need it.”

Your case for support will switch donors on to understanding the aim and vision of your fundraising campaign. But how can you explain the practical need for fundraising?

In your school community, it's important to build a culture of philanthropy and normalise an ethos of giving back.

Transparency is key

Transparency when asking for donations can help with building this culture, as many schools will come up against common objections such as ‘If parents are already paying school fees, why is fundraising necessary?’

Your case for support will remind them of the vision, but addressing the current need requires practical answers to questions such as:

- Why are you choosing to fundraise now?
- What is the immediate vs long term need?
- What are the costs for the project?
- What is the school's annual accounts surplus, and how is this used?
- How will the project be funded (by the foundation, fully public campaign, any major donors already on board?)

Sharing this information can be done in different ways, including sharing an annual review or a statement of accounts, both of which can be used to point towards the genuine need for fundraising at your school.

Getting value for money

Donors are switched on and, just like in the charity sector, want to ensure that their donations are being used effectively. It's important to demonstrate to your donors that you are handling their donations with care and getting the best value for money; here are some ways to show this:

- Professional approach to procurement – ensure you're asking the right questions and completing a competitive tender to get the best deal
- Try to avoid large unnecessary fees which donors might question
- Plan out your cash flow and share this with your donors – some of the money might not be used straight away, so can you wait to raise this later or use pledges?
- For bursaries, be clear on whether this is to be used now or to build an endowment for the future



Leadership

"People give to people."

"Who should be leading the charge for your fundraising campaign?"

When considering who should be leading your fundraising campaign, you'll need to think about who your donors will be most incentivised to listen and respond to.

Headteacher

For this reason, Headteachers make great advocates for your fundraising campaign, and will likely have built a relationship with several alumni and parents. They are very influential, so developing their understanding and own narrative of your campaign is a good way to invest time.

Chair of Board

The chair of board is another important candidate to bring together your wider school community and leadership team for your fundraising activity. They are likely to be another familiar face to your parent and donor community, and can lead by example for other governors by participating in one-to-one conversations with prospects and donors.

Development Director

The development director will naturally be heavily involved in your fundraising campaign, albeit potentially a more strategic, less publicly-centered role.

Creating a development board

A development board, or fundraising committee, can act as a separate charitable entity or work within the school organisation to open doors, act as a sounding board and offer advice and critique to help meet your fundraising goals.

What are the benefits of creating a development board?

- Access to other networks
- Early donations - those who you choose to sit on your board may be your first donors
- Stress test case - the board can push back on areas of your case for support that are weaker and can be improved
- Advocates - these people can publicly vouch for your campaign at events and in their networks
- Accountability - regular meetings with your board will ensure that your team and your fundraising is more professional and effective



Constituency

“Who is in your constituency, and is it the right time to ask them?”

Of your entire school community, there will be certain groups of people that are more likely to donate. Within your community of alumni, staff, parents and friends of your school, there are further sub-groups based on warmth, propensity and affinity that can help you to pinpoint the right groups to ask at the right time.



Using a database to support fundraising

A powerful database with up-to-date information is essential to make it easier for you to identify and keep track of potential donors. By recording information around engagement for each individual, as well as preferences for communication, personal information and any anecdotal notes, you can rely on one data source to tell you whether a prospect could move into your donor pipeline.



What are the benefits of creating a donor pipeline?

A donor pipeline helps you to manage your constituency of MDPs on an individual level, by moving contacts along the donor pipeline as they become warmer until they pledge a donation. You can tag activities including phone calls, meetings, and events to records on your donor pipeline, so each member of your development team can see at a glance the latest actions and engagement.



Staying focused on major giving

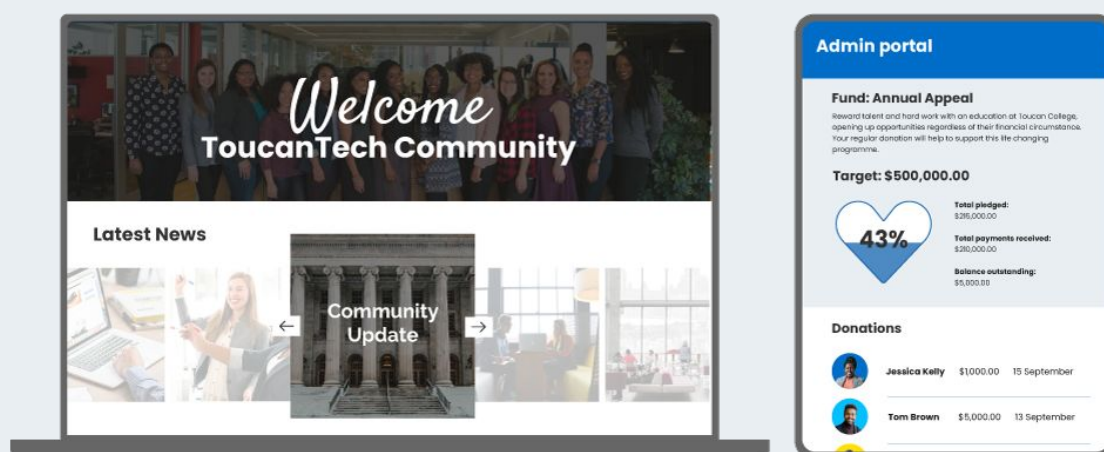
Creating a donor pipeline enables you to not only track and share your progress, but to visualise and focus on the parts of your fundraising that will make the biggest difference: in most cases, this will be through major giving.

As Pareto's principle suggests, major giving by a few donors is likely to have a huge impact on the overall success of your fundraising, with an average of 10% of donors giving 90% of the funds, which is why it's important to focus much of your effort and resources towards major giving.



Set your fundraising strategy up for success by enlisting the help of Underhill Associates, experienced fundraising consultants

James Underhill became an independent fundraising consultant in 2013, after ten years spent leading development campaigns at Tonbridge School and then King's Canterbury. Prior to schools, James gained a decade of experience in capital appeals, PR and marketing with national charity the Woodland Trust. He combines all of this experience with a knowledge of property and project management gained from his previous career as a chartered surveyor.



Engage and track your donors & prospects with ToucanTech, an all-in-one CRM, database & website tailored for school fundraising

ToucanTech is an all-in-one database, website & comms system designed for development teams, fundraisers & community managers. Choose a public website or private portal, combined with a powerful database, email engine & events management system. Manage all donor & alumni relations in one place, helping to save time, increase efficiency & boost engagement.

