

# Volunteer fundraising in health and social care

Attend   
Academy

On behalf of



Department of Health sponsored research supporting volunteer fundraising activities in health and social care.

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## Introduction

Currently volunteering organisations raise many millions of pounds if their fundraising efforts to support the delivery of health and social care. For examples Attend's member groups alone raised £27m in 2007-08, most of which was used to fund and enhance NHS services.

In fact in the wider Voluntary and Community Sector (VCS) 65% of current volunteers are engaged in raising or handling money (NCVO UK Civil Society Almanac 2008).

However it is widely accepted that there is unrealised fundraising potential within the sector and even a modest increase in capacity would have a significant impact both on the extent of funds raised and the subsequent benefits to patients and service users through enhanced service delivery.

For example, research undertaken by the Institute of Fundraising 'Fundraising Volunteers - Promoting Recognition' (2008) highlighted the following:

- 88% of health and social care fundraising organisations who responded to our consultation saw volunteer fundraising as important or very important
- Volunteer fundraisers raised more than 50% of the organisations fundraised income in almost 30% of those health and social care fundraising organisations who responded to the Institute consultation
- In 29% of those health and social care fundraising organisations, volunteer fundraisers raised in excess of £100,000 per annum
- Only 21% of respondents felt that the investment that they had was sufficient
- 85% of these health & social care organisations felt that the potential of volunteer fundraisers was yet to be realised
- 71% of respondents felt that a lack of in-house resources to support volunteers was the key obstacle to realising the potential of volunteer fundraisers

- Despite the extent of volunteer fundraising and its importance to the voluntary and community sector, Government continues to overlook volunteer fundraising as a vital and valid volunteering activity
- The McKinsey Report is likely to result in more well-defined core of what constitutes NHS health and social care. Therefore there is a likelihood that more services will need to be funded by voluntary organisations.

Further, research undertaken by the Directory of Social Change (2010) highlighted that more than one-third of charities' fundraising applications were ineligible due to the applicants failing to match the needs of their organisation to the requirements of the funders.

The Department of Health are committed to improving the current situation and have commissioned Attend to co-ordinate a scoping exercise that seeks to inform how these issues can be progressed.

To date there has not been a co-ordinated scoping exercise on the potential fundraising capacity undertaken by volunteers in health and social care. Neither has there been a comprehensive review of what support, resources and training provision is in place to optimise volunteer fundraising contribution. Such activities will inform a future strategy for developing volunteers' knowledge and abilities in fundraising and as such will clearly benefit the delivery of wider health and social care services, supporting the Department of Health in achieving its Departmental Strategic Objectives (DSOs).

The Department of Health are aware of the need to develop the current situation and state in their Strategic Vision for Volunteering\*: *"Many user-led organisations are almost, if not entirely, volunteer run. A common feature among such organisations is the holistic nature of their approach. This can be a great strength in terms of the service user's experience. It also means that organisations are able to meet multiple objectives through a single service. However, it can make it difficult for organisations (especially those that lack any dedicated fundraising capacity) to secure the resources necessary to run their services."*

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\*Volunteering: involving people and communities in delivering and developing health and social care services

## **Aim of the report**

The purpose of this report is to establish the needs that exist in volunteering fundraising in health and social care and to identify solutions that could be utilised to meet these needs.

## **Objectives**

1. To establish a framework for researching and analysing volunteer fundraising in health and social care
2. To identify the current capacity of volunteer fundraising in volunteering groups working in health and social care, and the range and extent of development needs of these organisations
3. To establish current levels and accessibility of the support and resources available for volunteer fundraising
4. To cite the key conclusions resulting from the analysis of needs and the identification of current resources available
5. To make recommendations for increasing volunteer fundraising capacity of organisations involved in health and social care

## **Methodology**

### **Objective 1:**

To establish a framework for researching and analysing volunteer fundraising in health and social care

- A review of the Fundraising National Occupation Standards and a framework of standards developed to best reflect the nature and context of volunteer fundraising. Developed in conjunction with fundraising consultants with significant experience of volunteer fundraising.
- A review of the Institute of Fundraising's Volunteer Fundraising Codes of Practice, and an analytical tool developed to establish what enabling factors need to be in place within an organisation to support volunteer fundraising. This tool to be incorporated into the above framework. Also, developed in conjunction with fundraising consultants with significant experience of volunteer fundraising.
- A questionnaire designed to incorporate the 2 reviews above.
- A sampling frame of VCS organisations in health and social care designed to reflect the sector. This was a stratified sample to include organisations of different size, location, age, constitution and sub-sector (e.g. mental health, linked to Acute Trusts, working in the community etc.).
- Questionnaire distributed to chosen organisations, and returns collated and analysed.

### **Objective 2:**

To identify the current capacity of volunteer fundraising in volunteering groups working in health and social care, and the range and extent of development needs of these organisations

- Comparison of questionnaire returns with the bespoke volunteer fundraising framework. Organisational needs identified on the basis of:
  - a) Knowledge and understanding within the organisation
  - b) Availability/accessibility of skills/competencies within the organisation
  - c) Organisational infrastructure/capacity to support volunteer fundraising

### **Objective 3:**

To establish the nature of current levels and accessibility of the support and resources available for volunteer fundraising

A scoping exercise focusing on two key areas:

1. Highlighting the fundraising support that can be accessed via the Internet, and reviewing the amount of information available and the nature of the subject areas covered.

Subject areas to include the Institute of Fundraising's 'Fundraising Mix'

- Face-to-face fundraising
- House-to-house collections
- Organising events
- Disaster appeals
- Charity shops
- 'Members' or 'Donors', Supporter Care and friendship schemes
- Planned giving
- Grant-making trusts and foundations
- UK Statutory funding
- European funding
- Lottery funding
- Sources of information
- Legacy fundraising

2. A review of the nature of the support and resources offered

Resources to be further broken down into the following sub-categories:

- Internet information services
- Hard copy information
- Training programmes
- Other resources (e.g. software, consultancy etc.)

Data collected using a manual browsing and website search engine method using appropriate keywords, covering core organisations in the volunteer field. Also, a number of fundraising consultants were contacted to ensure a robust scoping exercise was undertaken.

Each section was populated into the matrices above and used a basis of this review.

**Objective 4:**

To cite the key conclusions resulting from the analysis of needs and the identification of current resources available

The findings were summarised to highlight the main trends and the key areas for development. The resulting conclusions then fed the recommendations section that followed.

**Objective 5:**

To make recommendations for increasing volunteer fundraising capacity of organisations involved in health and social care

Each area highlighted for development was linked to suitable proposals based on the needs identified and the nature of the organisations in health and social care involved in volunteer fundraising.

## Findings

### Objective 1: Establishing a research framework

To establish a framework for researching and analysing volunteer fundraising in health and social care

#### 1. A review of the Institute of Fundraising's Volunteer Fundraising Code of Practice

The following management issues represent the key enabling factors for effective volunteer fundraising:

- 1.1 Trustees/senior management have a clear understanding of the role volunteer fundraising has within their organisation
- 1.2 Trustees/senior management have a clear understanding of the framework of good practice for the range of activities undertaken.
- 1.3 The organisation has a written volunteer policy that covers volunteer fundraisers
- 1.4 The difference between volunteers acting 'on behalf of' the organisation, and 'in aid of' the organisation understood by all parties
- 1.5 The organisation has a registration scheme for volunteer fundraisers
- 1.6 Policies are in place to protect children and vulnerable adults involved in volunteer fundraising
- 1.7 Recruitment processes check volunteer fundraisers have the necessary skills and experience and credentials required for the role
- 1.8 The organisation provides volunteer fundraisers with written information that clarifies the nature of the relationship, and the role of the volunteer fundraiser
- 1.9 Volunteer fundraisers are provided with guidelines and training by the organisation
- 1.10 The organisation insures both themselves and volunteer fundraisers
- 1.11 Trustees/senior management is clear about when they can accept/refuse donations, and can act in the event of inappropriate fundraising by volunteers claiming to act 'in aid of' the organisation
- 1.12 The mutual expectations between a charity and a celebrity are clearly defined and communicated

## **2. A review of the Fundraising National Occupational Standards**

The following categories represent areas relevant to volunteer fundraising, and the good practice principles that underpin them.

- 2.1 Types of fundraising
  - 2.1.1 Community fundraising/fundraising events
  - 2.1.2 Corporate fundraising
  - 2.1.3 Charity Challenge events
  - 2.1.4 House to house collections
  - 2.1.5 Legacy fundraising
  - 2.1.6 Raffles and lotteries
  - 2.1.7 Collection boxes
  - 2.1.8 Generating grant income
  - 2.1.9 Major gift fundraising
  - 2.1.10 Using electronic media
  
- 2.2 Planning and management of fundraising activities
  - 2.2.1 Conducting a fundraising audit
  - 2.2.2 Developing an integrated fundraising plan
  - 2.2.3 Managing health and safety
  - 2.2.4 Processing donations
  
- 2.3 Managing volunteers
  - 2.3.1 Recruiting and retaining volunteer fundraisers
  - 2.3.2 Supporting and leading volunteer fundraisers
  - 2.3.3 Supporting the work of the fundraising team
  - 2.3.4 Providing learning opportunities for colleagues
  
- 2.4 Managing other relationships
  - 2.4.1 Managing relationships with supporters
  - 2.4.2 Developing relationships with third party stakeholders
  - 2.4.3 Promoting public trust/confidence
  
- 2.5 Evaluation of fundraising activities
  - 2.5.1 Management of fundraising information
  - 2.5.2 Monitoring the implementation of fundraising plans
  - 2.5.3 Producing fundraising reports
  - 2.5.4 Reporting fundraising outcomes to the Board

### **3. Questionnaire design**

The questionnaire was split into 3 categories.

The first category was designed to assist with the analysis of findings, by seeking to categorise the nature of the organisation and the extent and type of its fundraising activities.

The second category was designed to capture the extent that management practices support volunteer fundraising.

The third category was designed to explore current skills and knowledge of those involved in volunteer fundraising. The respondent was asked to gauge organisational skills and knowledge, although for smaller charities there is likely to be an overlap with the individual's skills and knowledge.

To encourage responses, Attend offered free individual membership for one year for all those who completed the questionnaire, and each respondent was put into a draw, with one winner receiving an invitation to lunch at the House of Lords.

NB to prevent too many questions being asked of respondents, the third category has number of optional questions that could be answered if respondents wished to. However, these more detailed questions were signposted from the main questionnaire and completing these questions was not a pre-requisite of receiving the year's free membership or being entered into the draw.

See appendix 1 for the full questionnaire.

#### **4. Sampling frame**

Section one of the questionnaire asked respondents to clarify the type of their organisation and the specific nature of their own volunteer fundraising environment. Respondents were asked to classify the following:

- Whether a national organisation, a branch of a national organisation, or a local community group
- Whether the organisation operated in an urban or rural environment, or both
- Whether the organisation supported an acute trust, a mental health trust, a PCT/GP surgery, or none of these
- Whether volunteers were fully led by paid staff, had a degree of autonomy, or were fully responsible for volunteer fundraising activities
- The number of volunteers involved in the organisation in total
- The number of volunteers involved in volunteer fundraising
- The extent 'external' people are involved in fundraising for their organisation
- The extent of funds raised in an average year

Invitations to respond were then circulated through a number of networks, and after 85 had responded, the sampling frame was considered robust enough for analysis of findings (see analysis for more discussion on the reliability of data etc.)

## Objective 2: Current capacity and development needs

### Overall findings

#### 1. Focus on Fundraising Activities

The volunteer fundraising activities that are used regularly (in order of extent of usage are:

- Community fundraising
- Retail
- Generating grant income

The volunteer fundraising activities that are used infrequently are:

- Corporate fundraising
- Charity challenge events
- Major gift fundraising.

NB House to house collections are undertaken very rarely.

#### 2. Management Practice

- Well developed:  
Nearly all organisations have extensive insurance cover for the organisation and its volunteers.  
Most organisations have management/trustees with a sound awareness of the role volunteer fundraising plays within the organisation and what constitutes good practice.
- Sound:  
Organisations have checks in place for to assess volunteer fundraisers before recruitment.
- Average:  
Some attention is paid to the following areas:
  - Volunteer fundraisers policy
  - Clarity on whether to accept/refuse donations
  - Provision for an up-to-date database for volunteer fundraisers
  - Policies to protect children or vulnerable adults involved in volunteer fundraising
  - Provision of guidelines, training and support for volunteer fundraisers
- Weak:  
There is limited clarity around differentiating between how to manage volunteers and how to manage those acting on behalf of the organisation.

### 3. Skills & Knowledge

- **Reviewing the fundraising environment:**  
Organisations considered they had sound knowledge and practice to review the fundraising environment. However, when considering each fundraising activity individually, organisations had average or below average knowledge and practice.

Specifically, organisations have below average knowledge and practice to review the fundraising environment in:

- Corporate fundraising
- Legacy fundraising
- Major gift fundraising
- Direct marketing

Very few organisations have complete knowledge and practice to review the fundraising environment.

- **Communicating to potential funders or partners and managing these relationships**  
Organisations considered they had average knowledge and practice in these areas. When each fundraising activity was considered individually, several were recorded as below average. These were the same areas as outlined above.

Very few organisations have complete knowledge and practice in communicating to potential funders or partners and managing these relationships.

- **Preparation before asking for support**  
Organisations carry out sound preparation before asking donors/supporters for help.
- **Use of electronic media**  
Organisations make limited use of electronic media suited to communicating to target donor groups. Few organisations make use of many media and only target some groups.

## Comparative findings

### 4. National, Branch and Local Groups

National organisations are better placed than local organisations to:

- (i) Undertake fundraising activities overall, in particular:
  - Corporate fundraising
  - Generating grant income
  - Major gift fundraising
  - Charity challenge events
- (ii) Review specific fundraising environments.
- (iii) Communicate to potential funders/partners in specific fundraising environments.
- (iv) Manage funder/partner relationships.
- (v) Manage the legal framework of fundraising.
- (vi) Manage the framework of tax and VAT for corporate and individual giving.
- (vii) Make more use of electronic media and target more effectively.
- (viii) Optimise fundraising success by collating and analysing donor/supporter data.
- (ix) Reviewing the effectiveness of volunteer fundraising and producing relevant reports.

Overall, branch and local organisations have a similar level of focus on fundraising activities.

Branch organisations are better placed to take advantage of:

- (i) Legacy fundraising.
- (ii) Retail fundraising.

Branch organisations are not so effective in:

- (i) Corporate fundraising.
- (ii) Community fundraising events.
- (iii) Using electronic media.
- (iv) Reviewing the effectiveness of volunteer fundraising.

## 5. Urban and Rural settings

Organisations in an urban setting are more involved in:

- (i) Charity challenge events.
- (ii) Retail fundraising.

Organisations in a rural setting are more involved in:

- (i) Community fundraising.
- (ii) House to house collections.
- (iii) Raffles and lotteries.

Organisations in an urban setting are better placed to:

- (i) Manage the legal, tax and VAT aspects of fundraising.
- (ii) Collate/analyse donor and supporter data.
- (iii) Accept/refuse donations with clarity.
- (iv) Manage income, expenditure and Return on investment.

Organisations in a rural setting are better placed to:

- (i) Ask for help from donors and supporters.

## 6. Organisations supporting Acute Trusts, Mental Health Trusts, PCTs/GP surgeries or the wider community (unlinked to the statutory sector)

- (i) Volunteers offer significant fundraising support across all sectors of the NHS but there is room for improvement.
- (ii) Organisations linked to the NHS are as focused as organisations unlinked to the NHS for most fundraising activities.
- (iii) Unlinked organisations are better placed to review the grant income environment, communicate to potential funders or partners, and manage funder/partner relationships in this environment.
- (iv) Unlinked organisations make more use of electronic media and target more effectively.
- (v) Organisations supporting PCT/GP surgeries and Mental Health Trusts possess the least developed management practices and the least amount of skills and knowledge of volunteer fundraising overall.

## 7. Extent of volunteer responsibility for fundraising

Organisations with volunteers led and managed by paid staff:

- (i) Have more developed management practices and a higher level of skills and knowledge about volunteer fundraising
- (ii) More frequently use activities to generate grant income, better placed to communicate to potential funders/partners and manage these relations. They are also better placed to review this environment.
- (iii) Are more particular about checking skills, experience and credentials of volunteer fundraisers prior to recruiting them.
- (iv) Have a significantly better grasp on the legal framework of tax and VAT for corporate individual giving.
- (v) Make more use of electronic media and target more effectively.
- (vi) Have the largest capacity (knowledge, skills, systems and processes) to manage income, expenditure and return on investment of volunteer fundraising activities
- (vii) Are more able to optimise fundraising success by collating and analysing donor/supporter data.
- (viii) Are more able to review the effectiveness of volunteer fundraising activities and produce relevant reports.
- (ix) Organisations with volunteers that have a degree of autonomy and responsibility, yet are still managed by paid staff, are more focused on raffles & lotteries and retail fundraising than any other type of organisation.

## 8. Number of volunteers involved in fundraising

Organisations with over 200 involved volunteers are:

- (i) More focused on fundraising activities (except retail)
- (ii) Better placed to review specific fundraising environments.
- (iii) Better placed to communicate to potential funders/partners in specific fundraising environments.
- (iv) Better placed to manage funder/partner relationships.
- (v) More aware of the legal framework of fundraising.
- (vi) More aware of the legal framework of tax and VAT for corporate and individual giving.
- (vii) More involved in using electronic media, and target more effectively.
- (viii) More able to optimise fundraising success by collating and analysing donor/supporter data.
- (ix) Better at producing relevant reports.
- (x) Organisations with 51-200 volunteers involved in volunteer fundraising activities make significantly greater use of retail fundraising events.

9. Funds raised by others 'in aid of' the organisation

There is a positive correlation between how much funds other people raise 'in aid' of an organisation and:

- (i) The organisation's focus on charity challenge events, legacy fundraising and major gift fundraising.
- (ii) Its ability to utilise electronic media.

To a lesser extent than there is positive correlation between how much funds other people raise 'in aid' of an organisation and:

- (i) Its ability to optimise fundraising success by collating and analysing supporter/donor data.
- (ii) Its ability to review the effectiveness of volunteer fundraising activities and produce relevant reports.

10. Funds raised in an average year

Organisations which raise over 250K in an average year

- (i) Make significantly greater use of corporate fundraising, legacy fundraising, major gift fundraising and generating grant income.
- (ii) Are better placed to review specific fundraising environments.
- (iii) Are better placed to communicate to potential funders/partners in specific fundraising environments.
- (iv) Are better placed to manage funder/partner relationships.
- (v) Have a better grasp on the legal framework of fundraising.
- (vi) Have a better grasp on the legal framework of tax and VAT for corporate and individual giving.
- (vii) Make more use of electronic media and target more effectively.
- (viii) Are more able to optimise fundraising success by collating and analysing donor/supporter data.
- (ix) Are better at producing relevant reports.

There is direct positive correlation between the amount of money raised and frequency of generating grant income and corporate fundraising events held.

Organisations which raise 50K-250K make more frequent use of retail fundraising activities than organisations falling in other categories.

## 11. General Findings

- (i) Independent volunteer organisations make significant use of certain fundraising activities, but not all the whole range.
- (ii) Only directly related knowledge and skills make a significant difference in the ability of an organisation to focus on a particular fundraising activity.
- (iii) There is evidence of a relationships, between an organisations ability to focus on fundraising activity and indirectly related factors (e.g. knowledge and skills), across different divisions of the sampling frame.
- (iv) There are features characterising organisations, not mentioned in the questionnaire that might have caused them to be more focused on fundraising activities.

### **Issues arising from the questionnaire findings**

- There is potential to develop the range of fundraising activities to optimise the contribution of volunteer fundraising.
- Legacy fundraising and direct marketing are used fairly frequently, however organisations feel they have below average knowledge in these areas. Therefore there is potential to increase funds raised by these methods.
- When considering in more depth their capacity to undertake specific types of fundraising, organisations acknowledged limited skills and knowledge compared to their initial overall impression. This indicates an unawareness of the scope of fundraising potential.
- National organisations and their branches have the potential to dovetail their fundraising efforts as they have strengths in different areas.
- Organisations 'unlinked' to the NHS are better placed to manage fundraising in several areas, which indicates the potential for cross-learning for organisations linked to the NHS
- Organisations that use paid staff to lead and manage volunteer fundraising have more knowledge and capacity to optimise their fundraising efforts. This indicates a training/capacity need within volunteer-led organisations.
- Smaller organisations are less able to optimise fundraising success. NB according to The UK Civil Society Almanac ( 2009), approximately 145,000 of the 171,000 charities in the UK have incomes of less than £100,000 per annum. This would indicate a significant issue for volunteer fundraising in health and social care.
- Medium sized organisations and organisations where volunteers have some responsibility for leading and managing fundraising tend to have particular strengths in retail.
- Organisations supporting PCTs and GP surgeries have greater training and fundraising capacity needs.

## Summary analysis

The findings from the questionnaire indicate that there are particular training needs and capacity-building opportunities for organisations involved in volunteer fundraising. The main needs identified are as follows:

### 1. Training needs

- (i) Legacy fundraising and direct marketing.

These methods are used fairly regularly but knowledge is below average.

- (ii) Other fundraising activities used regularly.

Training would enhance income generation in these core activities.

- (iii) Fundraising activities used infrequently.

Training may encourage organisation to fundraise previously untapped markets.

- (iv) The key areas of need relating to generic fundraising knowledge are:

- The use of electronic media
- Reviewing the fundraising environment
- Communicating to potential funders or partners
- Managing these funder/partner relationships

NB these needs are more prevalent in relation to corporate fundraising, legacy fundraising, major gift fundraising, and direct marketing.

### 2. Capacity-building opportunities

- (i) National organisations and branches can coordinate their expertise in different areas.

There is potential for a pilot study to explore how expertise is currently being coordinated and how this could be improved.

- (ii) Organisations 'unlinked' to the NHS could support organisations linked to the NHS.

Particular areas for cross-learning include:

- Reviewing the grant income environment
- Communicating to potential funders or partners
- Managing the funder/partner relationships in this environment
- Making use of electronic media and targeting this effectively

There is potential for a pilot initiative on how this cross-learning could be facilitated.

- (iii) Smaller volunteer-led organisations have greater training and fundraising capacity needs.

There is potential for a pilot initiative on how to meet these needs.

### Objective 3: Current support and resources available for volunteer fundraising

This section covers a selection of the fundraising resources currently available in the marketplace. The following areas are considered in turn:

1. Generic support – to give an indication of the overall resources available for someone seeking an introduction into fundraising.
2. Specific fundraising activities – to signpost the range of resources available for people seeking to explore a type of fundraising.
3. Skills and knowledge – highlighting the development of key skills and knowledge that underpinning effective fundraising.

The tables below outline the range of resources available (referring to specific examples), and this is followed by a summary analysis of the relevance of these resources to those responsible for developing volunteer fundraising.

#### Generic Support

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
Resource Alliance	IFC Online virtual fundraising conference ( 3 days, £279, A), Recommended reading; Articles; Useful Contacts; Resources			SOF II - archive of fundraising activity from around the world
Charities Aid Foundation	E-newsletter		Training courses (one/half day, £70-120; Central London)	
Black Baud				Razor's Edge (system to facilitate fundraising and increase capacity)
Free Management Library				List of useful Software

How2fundraise	Useful Templates/Fact Sheets (insurance, finding a charity, fundraising planning, miscellaneous) Guides (miscellaneous, arranged according to fundraising organisation)			
Forum for Fundraising				Open and Senior Forum; Consultants Corner
NCVO	Online Blog		Fundraising Training 2010	
Directory of Social Change		2 Publications (Databases; £5), Other Publications	5 general courses	
Fit4funding	General Training		Various training programmes in the North East (half days from £200)	E-learning programmes
Volunteering England		Volunteering Magazine		
Institute of Fundraising	Comprehensive Fundraising Platform	Long List of Relevant Publications for Sale (including good fundraising guide);	Courses (Foundation; London, Manchester and etc.; £150-1500; 1-5 days)	Volunteer Fundraising Conference (c£300 and materials c£75)
Fundraising Online	All about fundraising online training			
GrantTracker	Numerous online articles with guidance & advise			
Company Solutions			Half-day Courses in several aspects of fundraising (several locations @ c£60)  Bespoke training for organisations to purchase	

## Fundraising Activities

### Community Fundraising

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
Resource Alliance	How to Guide			
How2fundraise	Relevant Guides			
Forum for Fundraising	Online Seminar (\$40)			
NCVO	Online Tips & Guides			
Directory of Social Change		5 publications (£5-22.95)	One Course (2days; £380-705; London summer and autumn); 5 courses (1-2 days; London summer and autumn; £170-530)	
Fit4Funding			Training programmes in North East (half days from £200)	
Institute of Fundraising	Fundraising Learning On-line (£199)		4 courses (London; 1-2 days; £195-705)	
Fundraising Online	Directly Relevant Online Course			
GrantTracker	Some relevant articles online with guidance and advice			
Company Solutions			Essentials of Community and Events Fundraising ( Summer 2010; Brighton; £59; 3 hours)	

## Corporate Fundraising

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
Resource Alliance	How to Guide			
Forum of Fundraising	Online Seminar (\$40)			
NCVO	Online Tips & Guides			Links to External Websites
Directory of Social Change		Three Publications (£5-22.9)	Three Courses (1-2 day; £195-705; London summer and autumn; one tailored for C&D)	
Institute of Fundraising			3 courses (London; 1-2 days; £195-705)	
Fundraising Online	Directly Relevant Online Course			
Company Solutions			Essentials of Corporate Fundraising ( Summer 2010; Brighton; £59; half-day)	

## Charity Challenge Events

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
How2fundraise	Relevant Guides			
Directory of Social Change		Publication		
GrantTracker	Some relevant online articles with guidance and advice			

### House to House Collections

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
How2fundraise	Relevant Guides			
Directory of Social Change		Publication		

### Collection Boxes

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
How2fundraise	Relevant Guides			

### Legacy Fundraising

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
NCVO	Online Tips & Guides			Links to will arranging websites
Directory of Social Change		2 Publications (£5-25)	2 courses (1-2 day; £170-600; London summer and autumn)	
Institute of Fundraising			2 courses ( London; 1-2 days; £210-600)	
Fundraising Online	Directly Relevant Course			
Company Solutions			Essentials of Legacy Fundraising (Summer 2010; Brighton; £59; 3 hours)	

## Raffles and Lotteries

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
How2fundraise	Numerous Relevant Guides			
Institute of Fundraising	Relevant Guides and Code of Practice			
GrantTracker	Some relevant articles online with guidance and advice			

## Generating Grant Income

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
Free Management Library	Articles & Links (proposal writing)			
Forum of Fundraising	Online Seminar (\$40)			
NCVO	Online Tips & Guides (links to Funding Central which has additional guides, tools and resources)			
Directory of Social Change			Three courses (1 day; £200- 360; London summer, autumn and winter)	
Institute of Fundraising		Guide	Five Courses (London, Edinburgh & Manchester; 1 day; £160-360)	
Fundraising Online	Directly Relevant Course			
Company Solutions			Essentials of Capital Appeals Fundraising (Summer 2010; Central London; £59; 3 hours)	

## Major Gift Fundraising

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
Charities Aid Foundation	Online Tips			
Forum for Fundraising	Online Seminar (\$40)			
NCVO	Online Tips & Guides			
Directory of Social Change		Four Publications (£ 9.95-22.95)	One course (2 day; £285-555; London summer and autumn)	
Institute of Fundraising			One course (London; 2 days; £285-555)	
Fundraising Online	Directly Relevant Course			
GrantTracker	Some relevant articles online providing guidance			

## Direct Marketing

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
Directory of Social Change			Mail & Email Marketing, Digital Marketing (1 day; £150-320; London; September)	
Fundraising Online	Directly Relevant Course			
Company Solutions			Internet Marketing (Autumn 2010; Central London; £129; half-day)	

## Skills and knowledge

### Communicating to potential funders/partners

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
Company Solutions			Relevant training provided by Negotiation Skills Course (Brighton; Summer 2010; £59; 3 hours)	
Resource Alliance	How to Guide on Proposal Writing			
Directory of Social Change		2 Publications (Proposal Writing; £9.95-18.95)	2 courses (Proposal Writing, 1 day, London summer & autumn, £160-305)	
Institute of Fundraising			Courses (Proposal Writing, London, Manchester and etc.; £150-1500; 1-5 days)	

### Managing the funder/partner relationships

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
Company Solutions			Relevant training provided by Negotiation Skills Course (Brighton; Summer 2010; £59; 3 hours)	
Fundraising Online	Directly Relevant Course			

### Preparation into the request to ask donors/supporters for help

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
Company Solutions			Relevant training provided by Negotiation Skills Course (Brighton; Summer 2010; £59; 3 hours)	

### The legal framework of fundraising, tax and VAT

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
Charities Aid Foundation			Training Course (one day, £120, Central London)	
How2fundraise		Fact Sheets		
NCVO		Online Legal Advice/Guidelines		
NAVCA			Workshops (various locations)	
Volunteer England		Guides & Articles		
Institute of Fundraising		Guides & Links	Tax Effective Giving Workshops (London and Liverpool)	Model Contracts; Standard for of Agreements

### Utilisation of electronic media

Organisation	Type of Support			
	Internet information resources	Hard copy information resources	Training programmes	Other
Resource Alliance	Virtual Fundraising Conference (3 days, £279)			
Charities Aid Foundation			Training Courses (£550, Central London)	
Free Management Library		Articles and links ; Links to text books		
Forum of Fundraising	Online Seminar (\$40)			
Institute of Fundraising			Courses (Foundation; London, Manchester and etc.; £150-1500; 1-5 days)	
Fundraising Online	Directly Relevant Course			

### Reviewing the fundraising environment

No support with this specific focus

### Capacity to manage income, expenditure and return on investment for volunteer fundraising activities

No support with this specific focus

### Optimise fundraising success by collating and analysing donor/supporter data

No support with this specific focus

### Review effectiveness of volunteer fundraising activities and produce relevant reports

No support with this specific focus

## **Analysis of support and resources available**

### **Range**

- There is a wide range of support and resources available, covering each area of fundraising.
- There is specific coverage of some of the underpinning knowledge and skills for effective fundraising, but not all areas. NB support and resources may well cover these as part of a wider remit

### **Focus**

- The vast majority of support and resources available make no distinction as to whether fundraising is undertaken by paid staff or volunteers
- The Institute of Fundraising resources for volunteer fundraising tends to be suited to organisations where paid staff manage volunteer fundraising. However there are a range of tips and techniques in specific areas of fundraising developed/submitted by volunteers.

### **Cost**

- There are a range of free resources available to download – some specifically related to volunteer fundraising (e.g. Institute of Fundraising)
- Costs for training programmes range from £120 - £400 per day

## **Suitability for volunteer fundraising**

Overall the support and resources are quite costly for volunteer run organisations, although the downloadable resources offer some affordable resources. However, these resources are not written with a focus on volunteer-led fundraising. The training programmes that are more affordable (e.g. c£60/half day), cover a range of topics and can be delivered in several locations. However, the course delegates with the associated discussions and activities will not be focused on the needs of volunteer-led fundraising.

Where the support and resources have a volunteer fundraising focus, they tend to be directed at organisations that manage volunteer fundraising using a paid staff infrastructure, and where focused on volunteer-led fundraising tend to be a set of tips and techniques, not overtly supported within a robust learning and skills framework.

## Conclusions

This report has sought to research the nature of volunteer fundraising and the capacity of organisations involved in these activities. The research framework has been constructed from the relevant national occupational standards and the Institute of Fundraising's Volunteer Fundraising Codes of Practice.

The following conclusions are based on the issues arising from the research undertaken:

### **The nature of the needs identified**

1. Volunteer fundraising has significant room for development across a range of activities (e.g. legacy fundraising, direct marketing etc.), but volunteering organisations are unaware of the scope of their fundraising potential.
2. Volunteer involving organisations have a number of areas of need relating to generic fundraising knowledge and also areas of need related to specific fundraising activities, and these needs are greater within volunteer-led organisation and smaller organisations.  
NB this applies to the vast majority of volunteering organisations in health and social care.
3. There is potential for organisations linked to PCTs and GP surgeries to learn from fundraising knowledge and practice from community-based organisations.
4. There is potential for national organisations and their branches to share learning and in the respective areas they have experience and expertise in (e.g. in relation to grant income, corporate fundraising, legacies and retail etc.)

### **The nature of current resources**

5. The availability of fundraising resources provide the opportunity for those involved in volunteer fundraising to develop their current knowledge and practices, however these resources are not comprehensive in providing a coordinated focus on volunteer fundraising.
6. The provision of training tends to be outside the budget of small organisations and volunteer-managed organisations. Also, as there are few training courses designed to cater for the needs of those involved in volunteer fundraising, the value of attending courses alongside those involved in fundraising more 'professionally managed' way is limited

## **Recommendations**

### **Resources**

1. To enhance the range and scope downloadable resources (based on the areas of need highlighted in this report) for volunteer fundraising, in consultation with both the Institute of Fundraising and volunteer fundraising groups.

### **Shared learning**

2. To develop a pilot for cross-learning for organisations linked to the NHS to learn from the fundraising experiences of organisations working within the community.
3. To undertake a pilot initiative in partnership with a national volunteering organisation to enhance cross-learning in volunteer fundraising between the national organisation and its branches.

### **Training provision**

4. To develop a range of bespoke training programmes (based on the areas of need highlighted in this report) tailored to the needs of those involved in volunteer-managed fundraising, piloting the delivery of these programmes to establish their potential for wider roll-out (particularly involving smaller organisations).

### **Evaluation**

5. To undertake further evaluation of any implementation of the above initiatives to establish the impact on fundraising success, management practices and the profile of organisations with key stakeholders.



## References

UK Civil Society Almanac (2008). NCVO.

'Fundraising Volunteers - Promoting Recognition' (2008). Institute of Fundraising.

McKinsey & Co, (2009). Achieving World Class Productivity in the NHS 2009/10 – 2013/14: Detailing the Size of the Opportunity. Department of Health

Ineligible Applications – The Wasted Work of the Voluntary Sector (2010). Directory of Social Change.

Volunteering: involving people and communities in delivering and developing health and social care services (2010). Department of Health.

Volunteer Fundraising Code of Practice (2006). Institute of Fundraising.

Fundraising National Occupational Standards (2008). UK Workforce Hub.

## Appendix 1 - Questionnaire

# Volunteer fundraising in health and social care

Attend   
Academy

 Department of Health

Department of Health sponsored research supporting volunteer fundraising activities in health and social care.

- ☺ Help to inform the first ever piece of nationwide research into volunteer fundraising!
- ☺ Receive 1 year's free individual membership of Attend!
- ☺ Enter the draw to be offered lunch at the House of Lords for 2 members of your organisation!

Attend is working with the Department of Health and the Institute of Fundraising to establish how best to support volunteering fundraising health and social care.

This is the first time that this piece of research has been undertaken in England and would be most grateful for your contribution to this.

We are really keen to encourage people to respond, and Attend will be offering 1 year's free individual membership to all that do, and also putting all respondents into a draw, with the winner being offered lunch at the House of Lords for two members of their organisation.

We are seeking your perspective on your organisation's capacity in volunteer fundraising, rather than your own personal skills and knowledge, and the 3 parts of the questionnaire are designed to do this.

The questionnaire has less than 30 questions, all of which are 'tick-box' answers.

There are also a number of optional, more detailed questions (again 'tick-box', or 'scoring out of 5' questions) that you may wish to answer, however responses to these are not needed to receive 1 year's free individual membership of Attend or the entry to the draw.

Please return all completed forms to.....etc. etc.

### Section 1 (of 3): Your organisation and volunteer fundraising

Answering these questions will help us to pick up the issues relating to specific type of organisation. As a result we will be able to ensure the proposed solutions are tailored to the needs of organisations, whether they are large or small, national or local and the type of fundraising the is/can be relevant.

Please tick the appropriate response(s)

1.1 Which descriptions most accurately describe your organisation?

a)

National organisation	Branch of an organisation	Local/community group
Please just tick one option		

b)

Urban setting	Rural setting
Please just tick one option	

c)

Supporting an Acute Trust	Supporting a MH Trust	Supporting a PCT/GP surgery	Work unlinked to statutory sector
Please just tick one option			

1.2 How are volunteers involved in fundraising within your organisation?

Led/managed by paid staff, responsible for fundraising tasks	A degree of autonomy and responsibility for fundraising activities	Accountable and responsible for all fundraising activities

1.3 How many volunteers are involved with your organisation?

0-5	6-20	21-50	51-200	Over 200

1.4 How many of these volunteers are involved in fundraising activities?

0-5	6-20	21-50	51-200	Over 200

1.5 What is the extent that people (not your own volunteers) are involved in raising funds 'in aid of' your organisation?

Significantly	Regularly	On occasions	Limited overall	None

1.6 How much funds are raised in an average year

£0 - £1,000	£1,000 - £10,000	£10,000 - £50,000	£50,000 - £250,000	Over £250,000

1.7 What are the main types of fundraising your organisation is involved in?

Type of fundraising activity	Frequent	Some	None
Community fundraising/fundraising events			
Corporate fundraising			
Charity Challenge events			
House to house collections			
Legacy fundraising			
Raffles and lotteries			
Collection boxes			
Generating grant income			
Major gift fundraising			
Retail			

**Section 2 (of 3): Management practices**

Whilst fundraising skills and knowledge are important, frequently it is the organisation's management practices that enable fundraising to be effective by paving the way for volunteers to optimise their contribution to the organisation

2.1 To what extent are management/Trustees aware of the role volunteer fundraising plays within the organisation and what constitutes good practice?

Thorough in areas	Sound in most areas	Sound in some areas	Partial in most areas	Minimal overall

2.2 Is there a policy in place that covers volunteer fundraisers?

Specific policy with extensive coverage	Specific policy with some coverage	Included as part of overall policy for volunteers	Some coverage in overall policy for volunteers	Not included in any volunteer policy to date

2.3 Does the organisation have different arrangements in place for its own volunteers acting 'on behalf of' the organisation and 'external' volunteers acting 'in aid of' the organisation?

Clearly in place and communicated to all involved	Clearly in place and communicated to some extent	Partially in place and communicated to all involved	Partially in place and communicated to some extent	Little/no different arrangements in place

2.4 How clear are Trustees/senior management about being able to accept/refuse donations?

Ethics clearly documented with supporting action plans	Ethics clearly documented with some action plans	Some clarity on ethics with supporting action plans	Some clarity on ethics with some action plans	Little clarity and action planning overall

2.5 Has the organisation an up-to-date database in place for volunteer fundraisers?

Comprehensive database All volunteers' information included and accurate	Sound database, most volunteer information up-to-date and accurate	Limited knowledge of volunteers involved in fundraising

2.6 Has the organisation any policies and/or practices in place to protect children or vulnerable adults who may be involved in volunteer fundraising?

Comprehensive policies and procedures in place	Some policies and procedures in place	Limited/no policies and procedures in place

2.7 To what extent are the skills, experience and credentials of volunteer fundraisers considered, prior to recruiting them?

Thorough recruitment and selection/matching processes in place	Includes an interview and/or taking up references	Some checks undertaken for new volunteers	Limited checking undertaken overall	No checks undertaken for any volunteers

2.8 To what extent are volunteer fundraiser given guidelines, training and ongoing support?

Thorough guidelines, training and support	Full guidelines, and some additional training/support	Some guidelines and comprehensive training/support	Some guidelines and some further training/support	Limited guidelines, training/support in place

2.9 What does organisational insurance cover?

The organisation and volunteer fundraisers	The organisation, but not volunteer fundraisers	No insurance in place for fundraising activities

### Section 3 (of 3): Skills and knowledge

This section explores the overall capability of people involved in volunteer fundraising. The purpose is to obtain a broad picture of those involved rather than a detailed analysis of the skills and knowledge of the questionnaire respondent.

- 3.1 What is the extent of knowledge and practice within the organisation that enables it to review the fundraising environment?

Comprehensive knowledge & practice	Moderate knowledge & practice	Ad-hoc knowledge & practice	Little/no knowledge & practice

- 3.2 What is the extent of knowledge and practice within the organisation that enables it to communicate to potential funders or partners?

Comprehensive knowledge & practice	Moderate knowledge & practice	Ad-hoc knowledge & practice	Little/no knowledge & practice

- 3.3 What is the extent of knowledge and practice within the organisation that enables it to manage the funder/partner relationships?

Comprehensive knowledge & practice	Moderate knowledge & practice	Ad-hoc knowledge & practice	Little/no knowledge & practice

**Go to optional questions**

- 3.4 How much preparation goes into the request to ask donors/supporters for help?

Significant	Partial	Limited

- 3.5 What sort of grasp do you feel your organisation has on the legal framework of fundraising?

Thorough	Sound	Partial	Weak

3.6 What sort of grasp do you feel your organisation has on the legal framework of tax and VAT for corporate and individual giving?

Thorough	Sound	Partial	Weak

**Go to optional questions**

3.7 To what extent does your organisation utilise electronic media best suited to communicating to target donor groups

Many media used. Targeted to relevant groups	Many media used. Some targeting to groups	Some media used. Targeted to relevant groups	Some media used. Some targeting to groups	Limited/no media used overall.

3.8 To what extent do you consider your organisation has the capacity (knowledge, skills, systems and processes) to manage income, expenditure and return on investment for volunteer fundraising activities?

Significant capacity for all fundraising activities	Significant capacity for key fundraising activities	Partial capacity for all fundraising activities	Partial capacity for key fundraising activities	Limited capacity overall

3.9 How would you rate your organisation's ability to optimise fundraising success by collating and analysing donor/supporter data?

Significant in all areas of volunteer fundraising	Significant in some areas of volunteer fundraising	Partial ability in all areas of volunteer fundraising	Partial ability in some areas of volunteer fundraising	Limited ability overall

3.10 To what extent is your organisation able to review the effectiveness of volunteer fundraising activities and produce relevant reports?

All activities reviewed with associated report writing	Some activities reviewed with associated report writing	All activities reviewed with limited report writing	Some activities reviewed with limited report writing	Limited evaluation undertaken overall

## Optional questions

The table below outlines how different types of fundraising can be developed. Please consider each statement as they relate to each activity and fill in each box with numbers 1-4 (see key).

**Key:** My organisation has:

**4** – Comprehensive knowledge & practice

**3** – Moderate knowledge & practice

**2** – Ad-hoc knowledge & practice

**1** – Little/no knowledge & practice

Type of fundraising activity	3.31 Reviewing the environment	3.32 Communicating to potential funders or partners	3.33 Managing the funder/partner relationships
a) Community fundraising	Review of local community fundraising environment, identifying fundraising opportunities	Awareness of motives of individuals or organisations for offering local support	Developing current and future connections and local relationships
	Score	Score	Score
b) Fundraising events	Review event activity of others in geographical area and/or with the same category of cause	Using techniques & processes to gain support of colleagues and other stakeholders	Consulting suppliers, contributors and other partners during the development of event
	Score	Score	Score
c) Legacy fundraising	Review the legacy gift environment, identifying critical issues & giving patterns	Selection of appropriate communication and solicitation strategies	Role of professional intermediaries, and soliciting legacies from all stakeholder groups
	Score	Score	Score
d) Corporate fundraising	Review the corporate fundraising environment, critical issues, competitor activity & giving patterns	Negotiating mutually beneficial relationships with corporate supporters	Developing trust with corporate supporters, and monitor the ongoing relationship
	Score	Score	Score
e) Generating grant income	Identify areas of work that might attract grant support and identify potential grant makers.	Establishing the nature of grant makers, and their funding criteria for evaluating proposals	Preparing evaluation documentation for grant makers, inviting them to events etc.
	Score	Score	Score
f) Major gift fundraising	Review the major gift fundraising environment, identifying critical issues and giving patterns.	Understanding of what motivates major donors to offer general support and project support	Maintain relationships and fostering potential overlap with other fundraising disciplines
	Score	Score	Score
g) Direct marketing	Review the current direct marketing environment identifying critical issues and giving patterns.	Develop fundraising 'message' for each audience, and organise technical support	Analysing responses and tailoring follow-up strategies to enhance involvement of donors
	Score	Score	Score

3.41 To what extent are the following activities undertaken to support the request to ask donors/supporters for help?

<b>Activity</b>	<b>Significant</b>	<b>Mostly</b>	<b>Partial</b>	<b>Limited</b>
a) Researching the need to be addressed/met				
b) Communicating what will happen if the need is not met				
c) Developing specific outcomes, supported by fundraising activities				
d) Specifying how donors & supporters can help				

3.51 What sort of grasp do you feel your organisation has on the legal framework of fundraising in the following areas?

<b>Area</b>	<b>Thorough</b>	<b>Sound</b>	<b>Partial</b>	<b>Weak</b>
a) Liability for actions of fundraisers				
b) Health & safety / risk assessments				
c) Data protection issues				
d) Intellectual property				
e) Trusteeship of funds				
f) Volunteer rewards				

3.61 What sort of grasp do you feel your organisation has on the legal framework of tax and VAT for corporate and individual giving?

<b>Area</b>	<b>Thorough</b>	<b>Sound</b>	<b>Partial</b>	<b>Weak</b>
a) Cash donations				
b) Gifts in kind				
c) Gifts of stocks/shares				
d) Sponsorship				
e) Payroll-giving				
f) Cause-related marketing				

## Appendix 2 – Analysis of questionnaire data

### A.1

Scores used in this report are a measure of performance. They can be denoted as a weighted average. They are denoted in percentage terms; 100% is the best score possible, with 0 % being the worst. An example of how a score is calculated is given below.

Scores used to measure focus of national, branch and local organisations at Community Fundraising Events

Involvement	National	Branch	Local
Frequent	9	2	19
Some	6	6	25
None	2	2	4

were calculated using data in the table below.

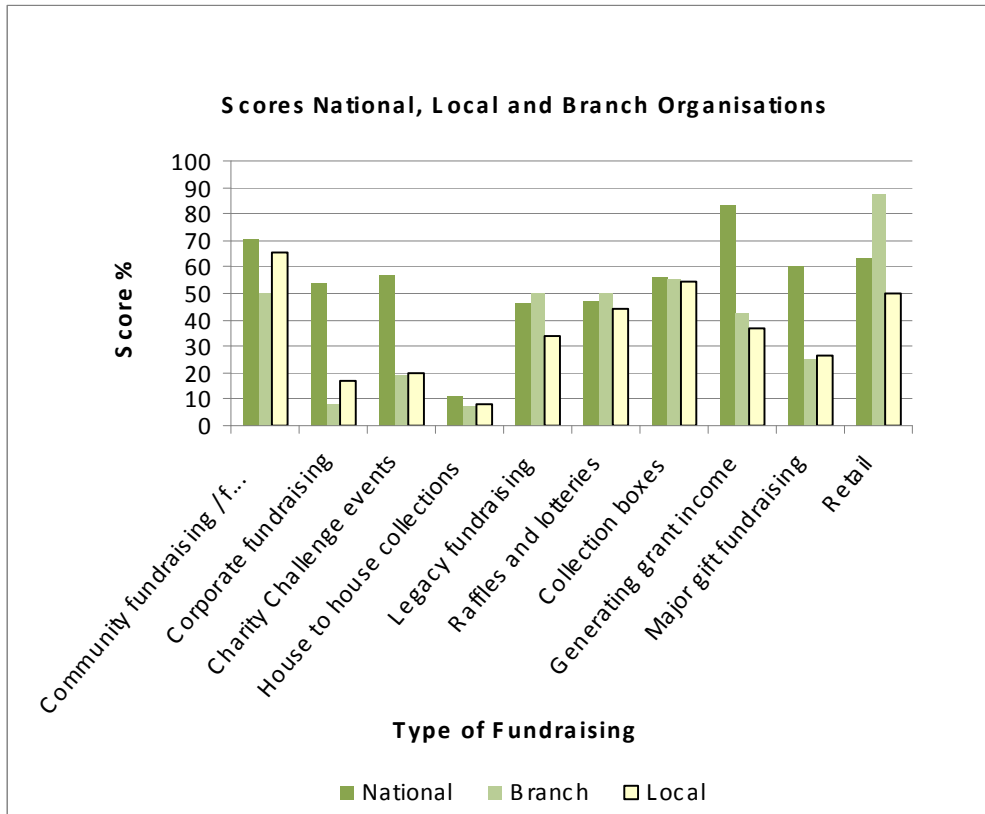
For fields Frequent, Some and None corresponding weights were applied; 2,1 and 0. Scores are calculated as follows

$$\text{National: } (9 * 2 + 6 * 1 + 2 * 0) / ((9+6+2) * 2/100) = 71\%$$

$$\text{Branch: } (2 * 2 + 6 * 1 + 2 * 0) / ((2+6+2) * 2/100) = 50 \%$$

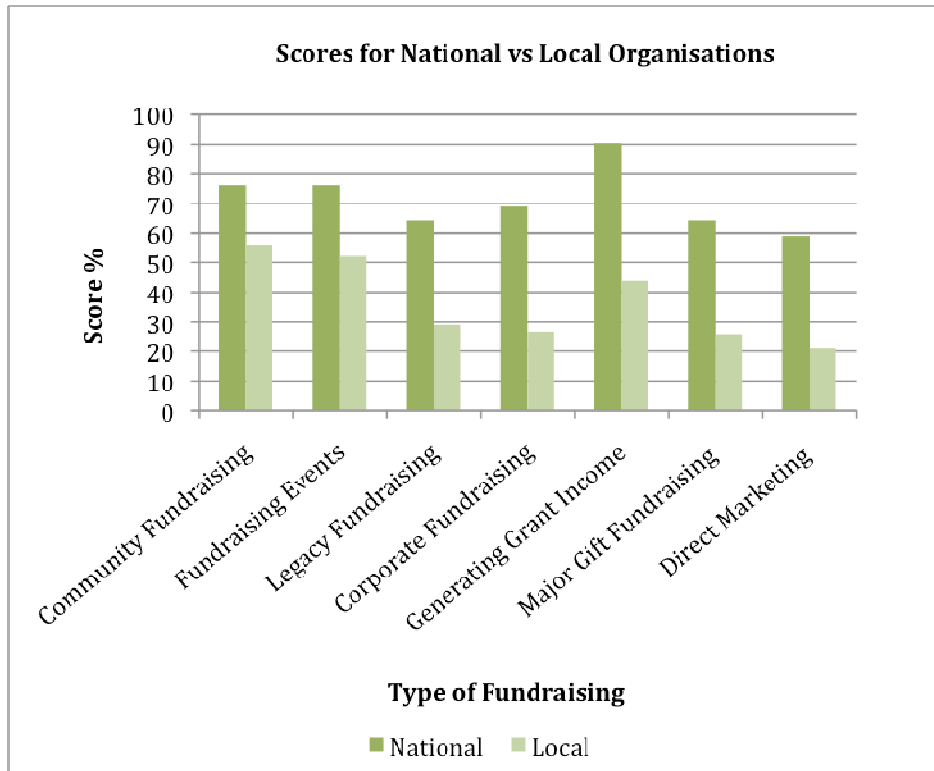
$$\text{Local: } (19 * 2 + 25 * 1 + 4 * 0) / ((19+25+4) * 2/100) = 66\%$$

**A.2**



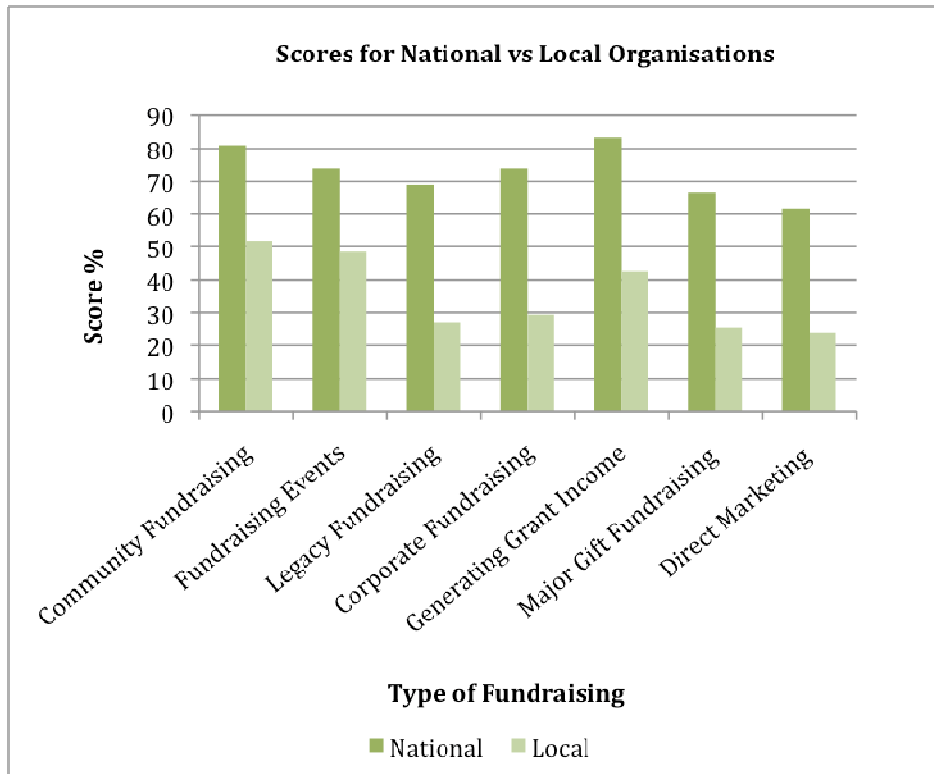
The scores in the graph above are weighted averages calculated from data summarising the number of organisations in a particular category. Each category represents the frequency at which a particular fundraising activity was carried out; Frequent, Some or None. Correspondingly, the weights applied are 2,1 and 0. From this it follows: the scores illustrated in the graph above are representative of how focused organisations are on a particular fundraising activity.

### A.3



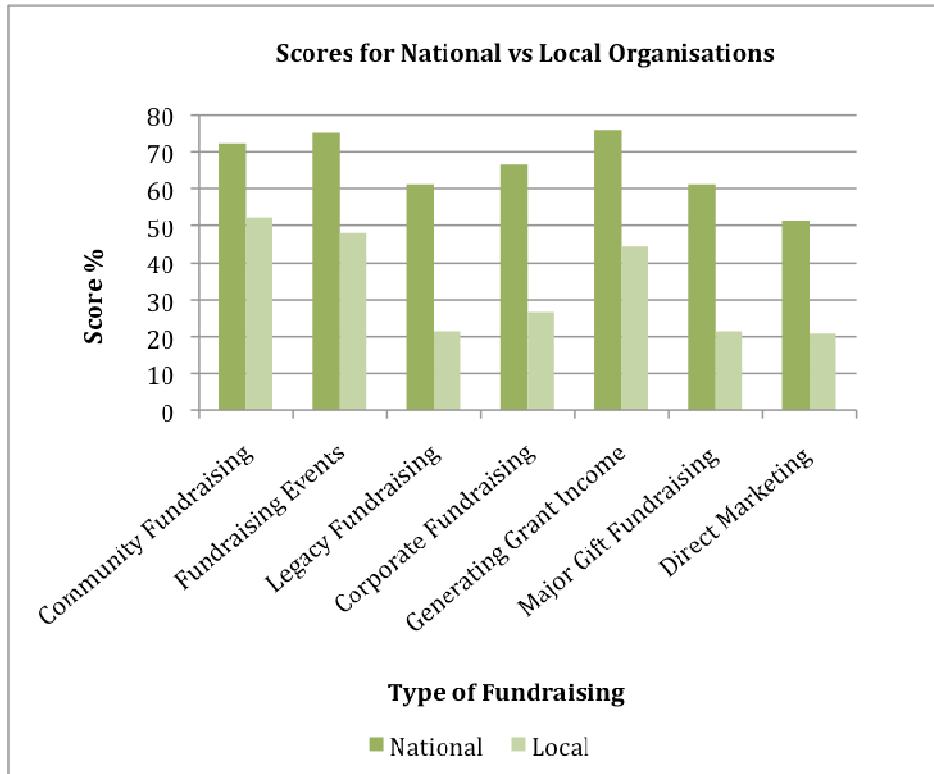
The scores in the graph above are weighted averages calculated from data summarising the number of organisations in a particular category. Each category represents how well placed an organisation is to review the fundraising environment in a specific fundraising activity; comprehensive knowledge & practice; moderate knowledge & practice; ad-hoc knowledge and practice; little/no knowledge and practice. Correspondingly the weights applied are 3,2,1 and 0. From this, it follows: the scores illustrated in the graph above are representative of how well placed an organisation is to review the fundraising environment in a specific fundraising activity.

#### A.4



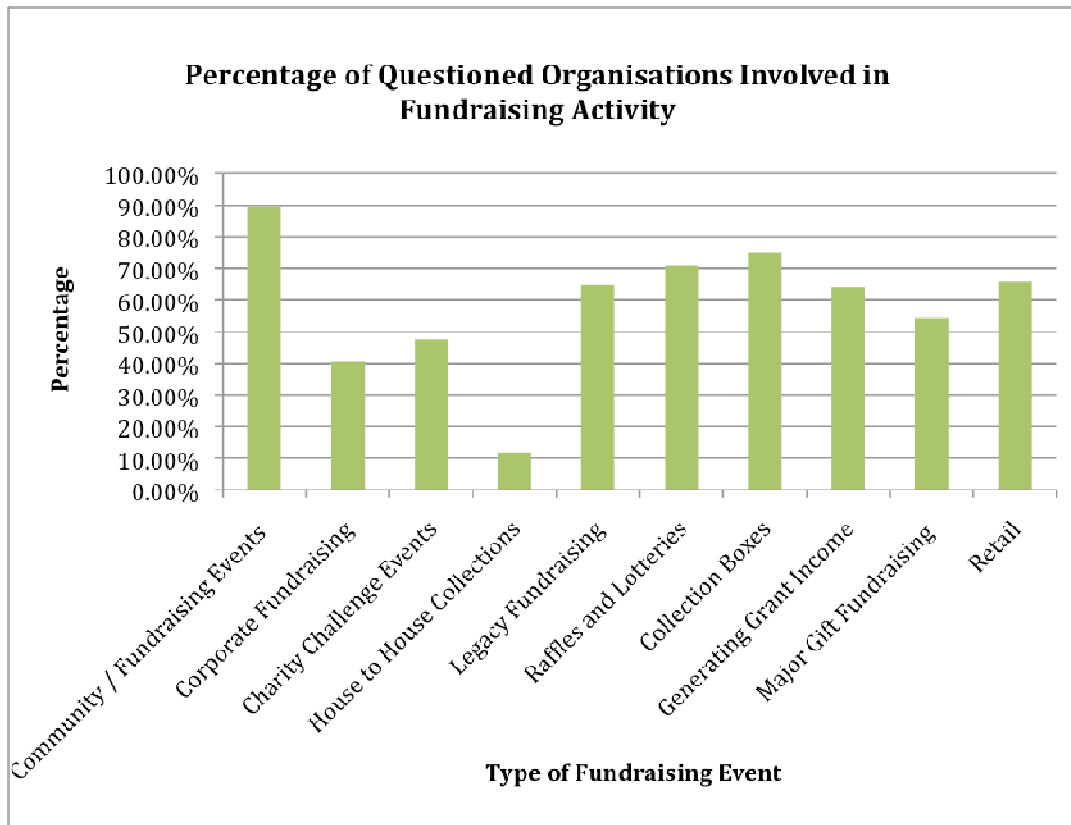
The scores in the graph above are weighted averages calculated from data summarising the number of organisations in a particular category. Each category represents how well placed an organisation is to communicate with potential funders or partners in a specific fundraising activity; comprehensive knowledge & practice, moderate knowledge & practice, ad-hoc knowledge and practice, little/no knowledge and practice. Correspondingly the weights applied are 3,2,1 and 0. From this, it follows: the scores illustrated in the graph above are representative of how well placed an organisation is to communicate with potential funders or partners in a specific fundraising activity.

## A.5



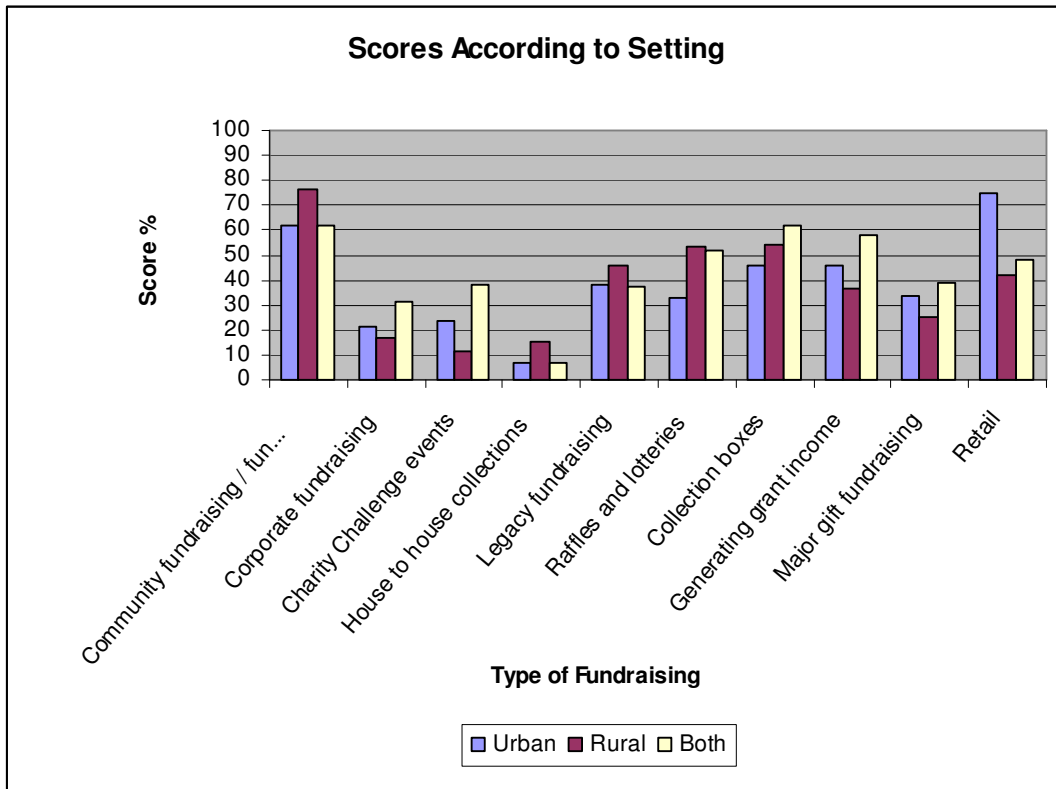
The scores values in the graph above are weighted averages calculated from data summarising the number of organisations in a particular category. Each category represents how well placed an organisation is to manage funder /partner relationships in a specific fundraising activity; comprehensive knowledge & practice, moderate knowledge & practice, ad-hoc knowledge and practice, little/no knowledge and practice. Correspondingly the weights applied are 3,2,1 and 0. From this, it follows: the scores illustrated in the graph above are representative of how well placed an organisation is to manage funder/partner relationships in a specific fundraising activity.

**A.6**



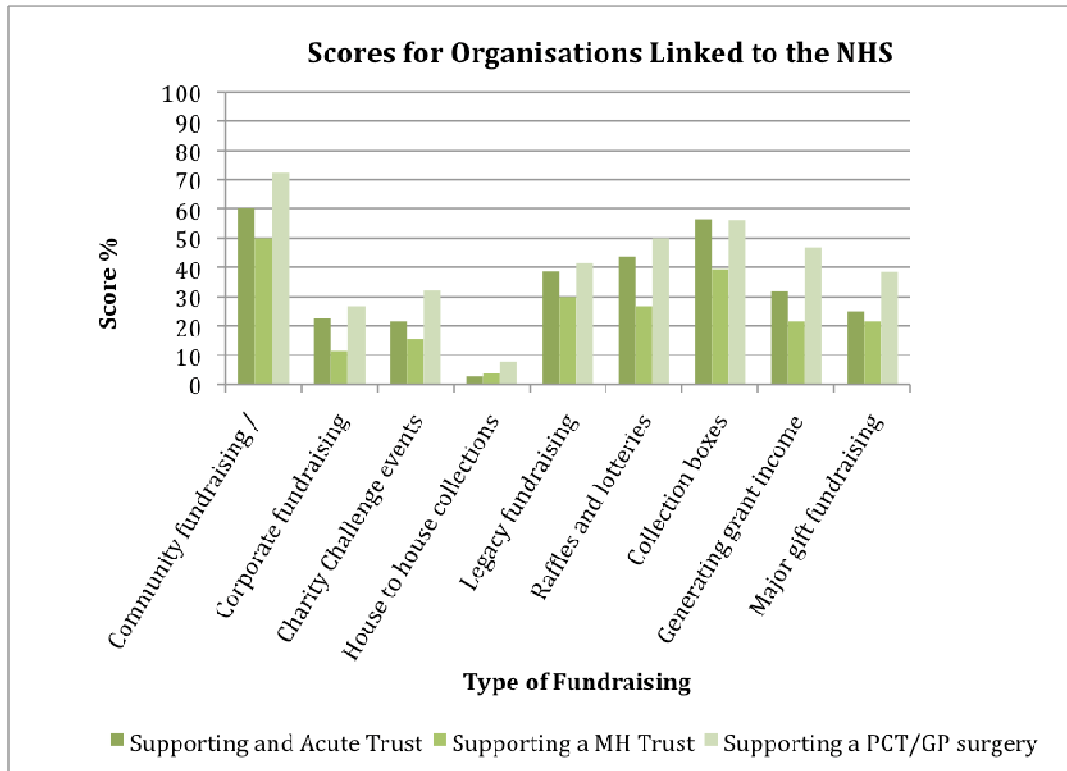
The graph above illustrates the percentage of organisations making atleast some use of a specific fundraising activity.

A.7



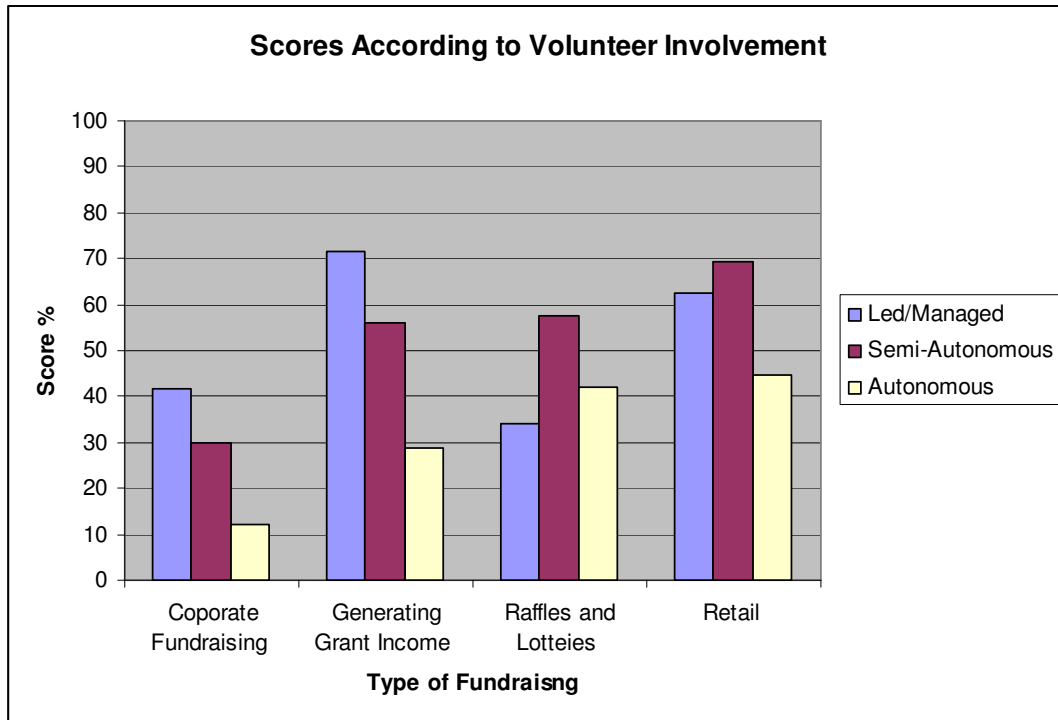
The scores in the graph above are weighted averages calculated from data summarising the number of organisations in a particular category. Each category represents the frequency at which a particular fundraising activity was carried out; Frequent, Some or None. Correspondingly, the weights applied are 2,1 and 0. From this it follows: the scores illustrated in the graph above are representative of how focused organisations are on a particular fundraising activity.

**A.8**



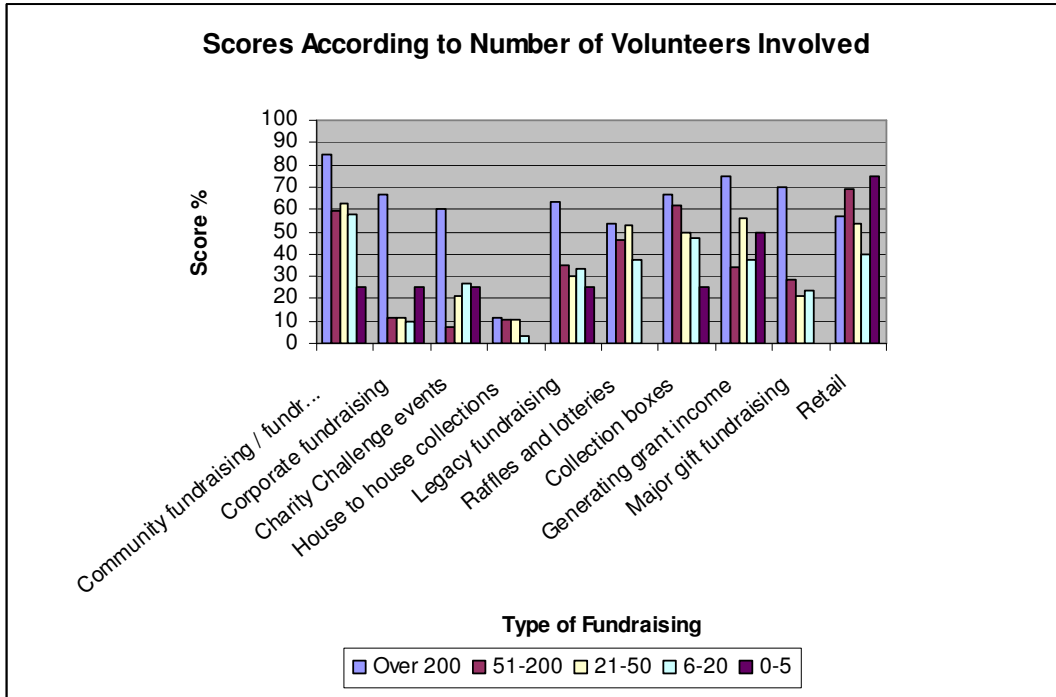
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**A.9**



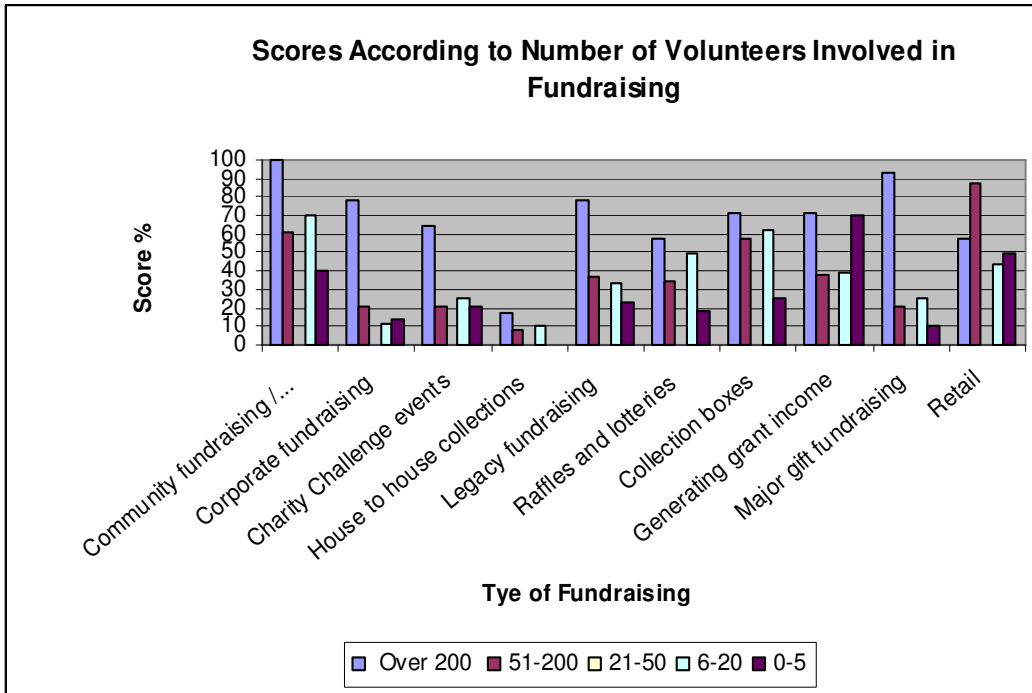
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**A.10**



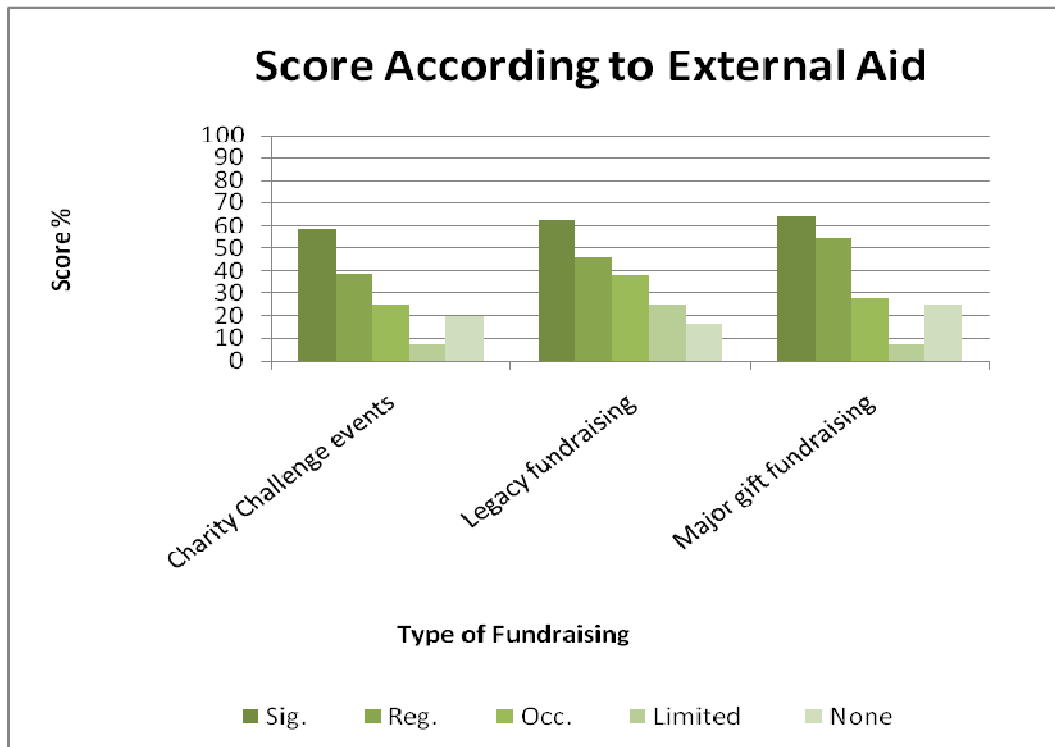
The scores in the graph above are weighted averages calculated from data summarising the number of organisations in a particular category. Each category represents the frequency at which a particular fundraising activity was carried out; Frequent, Some or None. Correspondingly, the weights applied are 2,1 and 0. From this it follows: the scores illustrated in the graph above are representative of how focused organisations are on a particular fundraising activity.

A.11



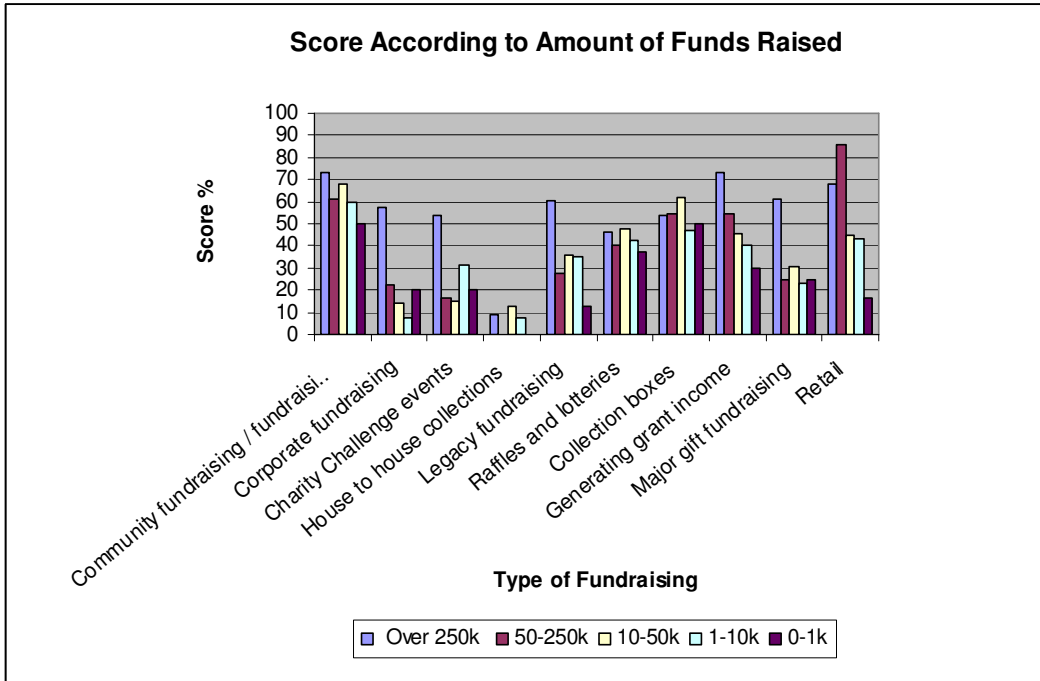
The scores in the graph above are weighted averages calculated from data summarising the number of organisations in a particular category. Each category represents the frequency at which a particular fundraising activity was carried out; Frequent, Some or None. Correspondingly, the weights applied are 2,1 and 0. From this it follows: the scores illustrated in the graph above are representative of how focused organisations are on a particular fundraising activity.

A.12



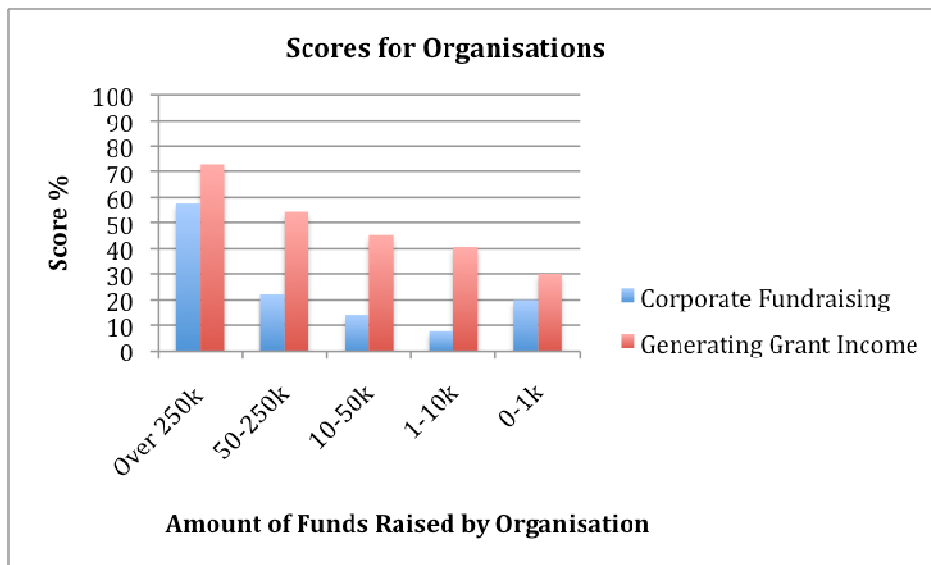
The scores in the graph above are weighted averages calculated from data summarising the number of organisations in a particular category. Each category represents the frequency at which a particular fundraising activity was carried out; Frequent, Some or None. Correspondingly, the weights applied are 2, 1 and 0. From this it follows: the scores illustrated in the graph above are representative of how focused organisations are on a particular fundraising activity.

**A.13**



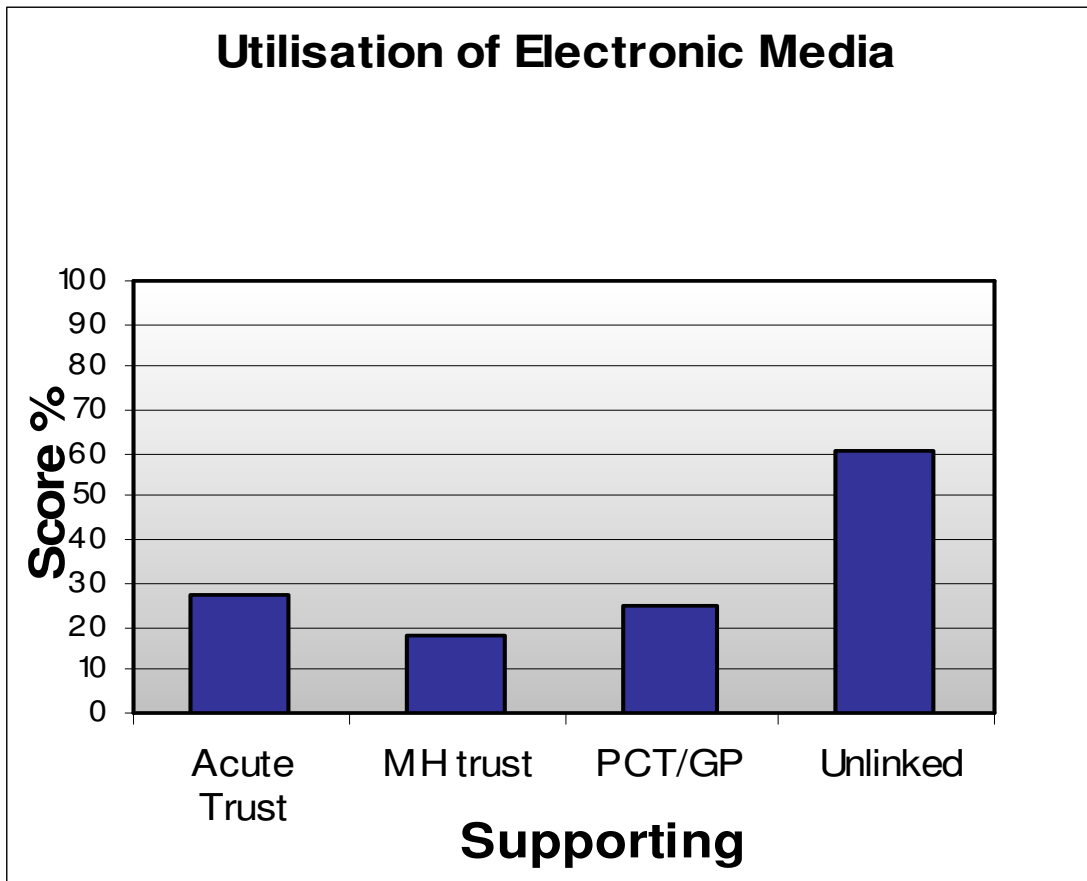
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**A.14**



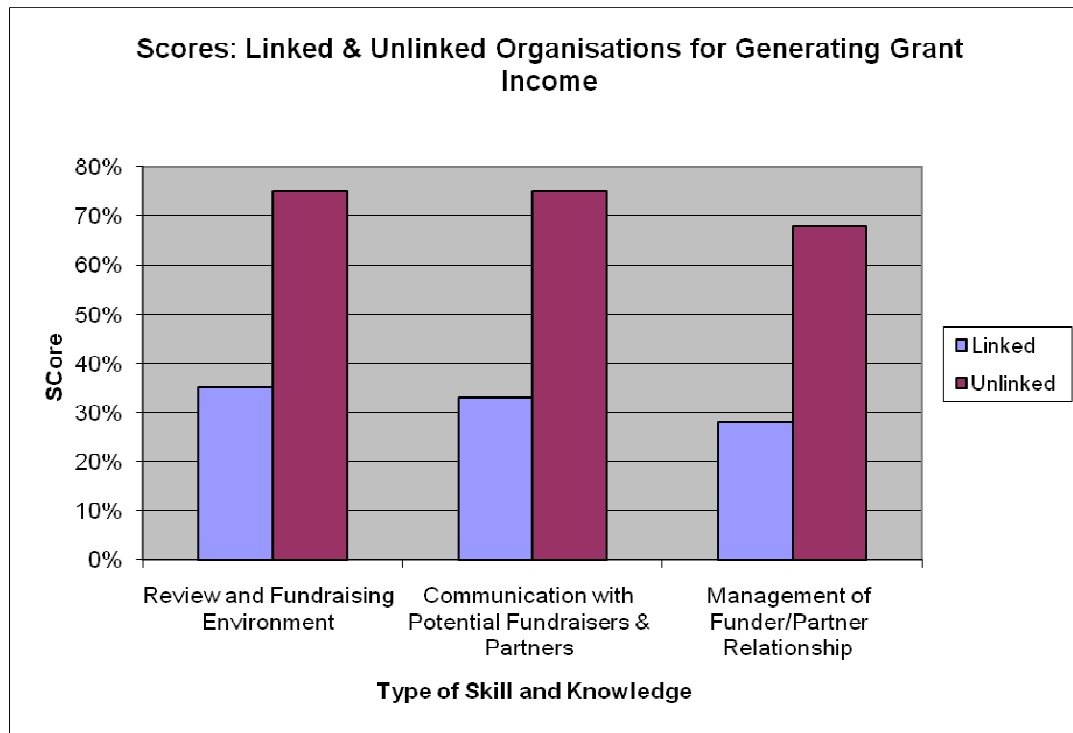
The scores in the graph above are weighted averages calculated from data summarising the number of organisations in a particular category. Each category represents the frequency at which a particular fundraising activity was carried out; Frequent, Some or None. Correspondingly, the weights applied are 2,1 and 0. From this it follows: the scores illustrated in the graph above are representative of how focused organisations are on a particular fundraising activity.

A.15



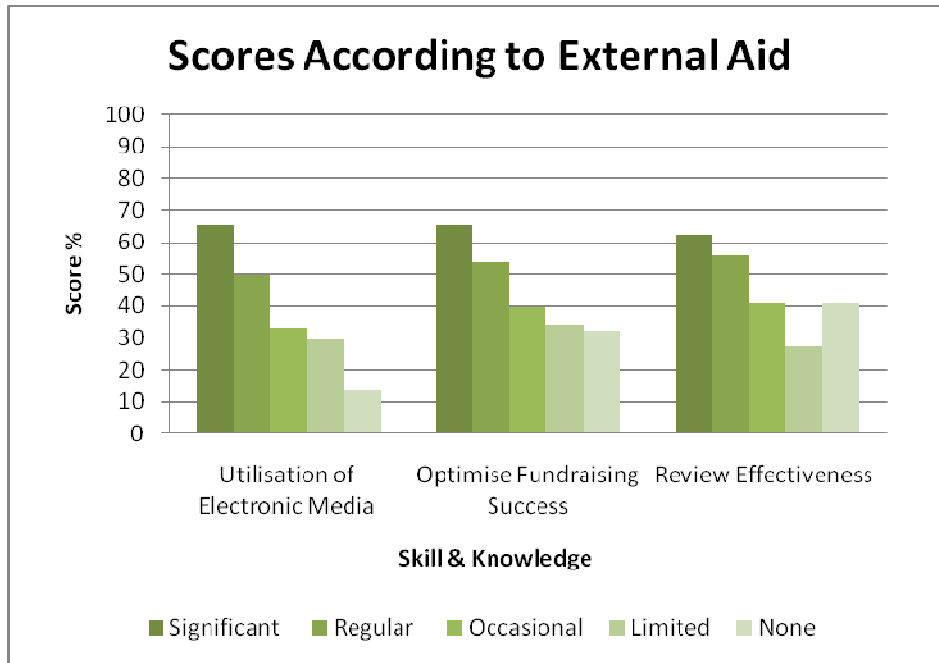
The scores values in the graph above are weighted averages calculated from data summarising the number of organisations in a particular category. Each category represents the extent to which an organisation utilises electronic media best suited to communicating to target donor groups; many media used, targeted to relevant groups; many media used, some targeting to relevant groups; some media used, targeted to relevant groups; some media used, some targeting to groups; limited/no media used overall. Correspondingly the weights applied are 4,3,2,1 and 0. From this, it follows: the scores illustrated in the graph above are representative of the extent to which organisations utilise electronic media best suited to communicating to target donor groups.

**A.16**



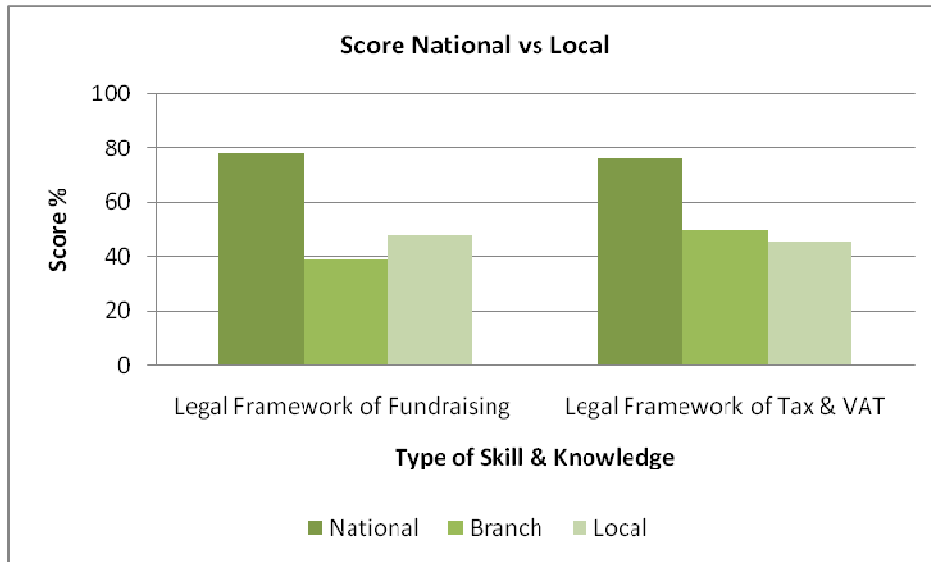
The score values in the graph above are weighted averages calculated from data summarising the number of organisations in a particular category. Each category represents how well placed an organisation is to review the fundraising environment, communicate with potential fundraisers/partners or manage funder /partner relationships; comprehensive knowledge & practice, moderate knowledge & practice, ad-hoc knowledge and practice, little/no knowledge and practice. Correspondingly the weights applied are 3,2,1 and 0. From this, it follows: the scores illustrated in the graph above are representative of the skills & knowledge discussed above.

**A.17**



The score values in the graph above are weighted averages calculated from data summarising the number of organisations in a particular category. Each category represents the extent to which an organisation utilises electronic media, optimise fundraising success and review effectiveness of volunteer fundraising activities. From this, it follows: the scores illustrated in the graph above are representative of the skills & knowledge discussed above.

**A.18**



The score values in the graph above are weighted averages calculated from data summarising the number of organisations in a particular category. Each category represents the grasp an organisation has on the legal framework of fundraising or on the legal framework of tax and VAT for corporate and individual giving. From this, it follows: the scores illustrated in the graph above are representative of the skills & knowledge discussed above.

## B. Further Statistics Supporting Local/National Organisations

The tables in this section list percentages that can be used to assess how focused National and Local organisations are at specific fundraising activities, given a certain amount of knowledge they possess with respect to that particular activity

The Left most column lists the fundraising activities. The middle column lists percentages related to National Organisations and the last Column on the right lists percentages related to local organisations.

The sub-column titled 'Frequent' lists the percentage of organisations that have moderate or comprehensive knowledge and practice making frequent use of a particular activity. The sub-column titled 'Some +' lists the percentage of organisations that have moderate or comprehensive knowledge and practice making at least some use of a particular activity. The column titled 'None' lists the percentage of organisations with little/no knowledge and practice making no use of a particular activity.

### B.1 Review Fundraising Environment in Specific Fundraising Activity

	National			Local		
	Frequent	Some +	None	Frequent	Some +	None
Community Fundraising	69%	92%	-	48%	96%	38%
Fundraising Events	69%	92%	-	50%	96%	29%
Corporate Fundraising	30%	100%	38%	29%	71%	94%
Major Gift Fundraising	67%	100%	25%	43%	71%	75%
Generating Grant Income	62%	100%	0%	44%	81%	92%

### B.2 Communicate to Potential Funders or Partners

	National			Local		
	Frequent	Some +	None	Frequent	Some +	None
Community Fundraising	69%	92%	0%	35%	96%	25%
Fundraising Events	75%	100%	0%	43%	95%	22%
Corporate Fundraising	30%	100%	0%	22%	67%	93%
Major Gift Fundraising	56%	100%	0%	29%	71%	71%
Generating Grant Income	62%	100%	0%	47%	76%	100%

### B.3 Manage Funder/Partner Relationships

	National			Local		
	Frequent	Some +	None	Frequent	Some +	None
Community Fundraising	70%	90%	0%	36%	95%	22%
Fundraising Events	70%	90%	0%	50%	95%	17%
Corporate Fundraising	38%	100%	0%	33%	83%	94%
Major Gift Fundraising	71%	100%	0%	50%	75%	72%
Generating Grant Income	70%	100%	0%	69%	81%	85%

### C.

The tables in this section list percentages that can be used to assess how focused organisations are at fundraising activities given their ability to carry out certain tasks; utilise electronic media; optimise fundraising success by collating and analysing donor/supporter data; review the effectiveness of volunteer fundraising activities and produce relevant reports; manage income, expenditure and return on investment for volunteer fundraising activities; grasp on legal framework of fundraising ; and grasp on legal framework of Tax and VAT for corporate and individual giving.

The Left most column lists the fundraising activities. The first middle column lists percentages related to organisations falling in the field Ra and the second middle column lists percentages related to organisations falling in the field Rb. The last column is related to the organisations falling in the field Rc.

The sub-column 'Frequent' lists the percentage of organisations in a particular field that make frequent use of a specific fundraising activity. Similarly the sub-column 'Some +' lists the percentage of organisations in a particular field who make at least some use of a specific fundraising activity. The sub-column 'None' lists the percentage of organisations in the field Rc who make no use of a specific fundraising activity.

### C.1 Utilisation of Electronic Media

	Ra		Rb		Rc
	Frequent	Some+	Frequent	Some+	None
Community Fundraising	44%	89%	58%	95%	14%
Corporate Fundraising	17%	58%	24%	59%	78%
Charity Challenge Events	17%	63%	29%	65%	63%
House to house collections	4%	21%	6%	19%	96%
Legacy Fundraising	16%	52%	28%	67%	31%
Raffles and Lotteries	19%	62%	28%	72%	17%
Collection Boxes	36%	60%	50%	67%	14%
Generating Grant Income	56%	81%	68%	89%	58%
Major Gift Fundraising	21%	46%	35%	59%	50%
Retail	46%	58%	50%	61%	26%
Average	28%	59%	38%	65%	45%

**Ra:** Organisations targeting relevant groups using at least some media

**Rb:** Organisations using many different types of media

**Rc:** Organisations that make limited/no use media use overall

### C.2 Optimising Fundraising Success

	Ra		Rb		Rc
	Frequent	Some	Frequent	Some+	None
Community Fundraising	40%	90%	52%	81%	11%
Corporate Fundraising	18%	35%	22%	57%	75%
Charity Challenge Events	12%	35%	20%	60%	77%
House to house collections	6%	13%	4%	13%	86%
Legacy Fundraising	29%	67%	20%	60%	35%
Raffles and Lotteries	22%	61%	24%	64%	24%
Collection Boxes	44%	67%	38%	58%	11%
Generating Grant Income	45%	70%	54%	77%	58%
Major Gift Fundraising	28%	61%	29%	50%	50%
Retail	62%	76%	50%	62%	31%
Average	31%	57%	31%	58%	46%

**Ra:** Organisations with at least partial ability in all areas of volunteer fundraising

**Rb:** Organisations with significant ability in at least some areas of volunteer fundraising

**Rc:** Organisations will limited ability overall

### C.3 Review Effectiveness of Volunteer Fundraising Activities and Produce Relevant Reports

	Ra		Rb		Rc
	Frequent	Some+	Frequent	Some+	None
Community Fundraising	40%	80%	19%	39%	10%
Corporate Fundraising	18%	27%	19%	52%	73%
Charity Challenge Events	18%	36%	17%	62%	71%
House to house collections	17%	33%	4%	11%	88%
Legacy Fundraising	20%	80%	17%	62%	42%
Raffles and Lotteries	33%	73%	27%	37%	32%
Collection Boxes	64%	86%	39%	57%	14%
Generating Grant Income	33%	60%	55%	77%	60%
Major Gift Fundraising	23%	54%	25%	61%	60%
Retail	64%	79%	52%	62%	21%
Average	30%	59%	25%	51%	50%

**Ra:** Organisations with all activities reviewed with at least limited report writing

**Rb:** Organisations that have at least some activities reviewed with associated report writing

**Rc:** Organisations with limited evaluation undertaken overall

### C.4 Capacity to Manage Income, Expenditure and Return on Investment for Volunteer Fundraising Activities

	Ra		Rb		Rc
	Frequent	Some +	Frequent	Some +	None
Community Fundraising	45%	90%	49%	87%	0%
Corporate Fundraising	9%	43%	19%	53%	71%
Charity Challenge Events	13%	42%	17%	54%	75%
House to House Collections	9%	13%	3%	10%	88%
Legacy Fundraising	19%	67%	20%	63%	45%
Raffles & Lotteries	27%	73%	28%	67%	15%
Collection Boxes	52%	78%	56%	92%	0%
Generating Grant Income	36%	68%	50%	71%	50%
Major Gift Fundraising	25%	63%	24%	55%	43%

**Ra:** At least partial capacity in all fundraising activities

**Rb:** Significant capacity in key or all fundraising activities

**Rc:** Limited Capacity

### C.5 Grasp on Legal Framework of Fundraising

	Frequent	Some+	None
Community Fundraising	45%	89%	23%
Corporate Fundraising	15%	54%	100%
Charity Challenge Events	15%	54%	75%
House to House Collections	3%	11%	80%
Legacy Fundraising	17%	66%	33%
Raffles & Lotteries	20%	65%	27%
Collection Boxes	38%	64%	23%
Generating Grant Income	49%	73%	86%
Major Gift Fundraising	21%	58%	50%
Retail	49%	63%	18%

### C.6 Legal Framework of Tax and VAT for Corporate and Individual Giving

	Frequent	Some+	None
Community Fundraising	46%	87%	7%
Corporate Fundraising	17%	60%	100%
Charity Challenge Events	17%	61%	90%
House to House Collections	3%	10%	100%
Legacy Fundraising	20%	69%	38%
Raffles & Lotteries	20%	74%	25%
Collection Boxes	40%	71%	15%
Generating Grant Income	43%	73%	89%
Major Gift Fundraising	24%	58%	60%
Retail	56%	67%	17%

## D.

The table in this section lists percentages that can be used to assess how focused linked and unlinked organisations are at Generating Grant Income activities given their ability to utilise electronic media.

The Left most column lists the type of organisation. The first middle column lists percentages related to organisations falling in the field Ra and the second middle column lists percentages related to organisations falling in the field Rb. The last column on the right is related to the organisations falling in the field Rc.

The sub-column 'Frequent' lists the percentage of organisations in a particular field that make frequent use of a specific fundraising activity. Similarly the sub-column 'Some +' lists the percentage of organisations in a particular field who make at least some use of a specific fundraising activity. The sub-column 'None' lists the percentage of organisations in the field Rc who make no use of a specific fundraising activity.

### D.1 Utilisation of Electronic Media

	Ra		Rb		Rc
	Frequent	Some+	Frequent	Some+	None
Linked	47%	73%	57%	86%	68%
Unlinked	67%	92%	75%	92%	20%

**Ra:** Organisations targeting relevant groups using at least some media

**Rb:** Organisations using many different types of media

**Rc:** Organisations that make limited/no use media use overall

## E.

The table in this section lists percentage the of total organisations of organisations that fall into categories Ra and Rb. The left most column lists the type of organisation (divided according to number of volunteers involved). The second column lists the percentages.

### E.1 Checks Prior Recruitment

	Percentage (Ra & Rb) of Total
Over 200	43%
51-200	82%
21-50	53%
6-20	48%
0-5	50%

Ra – Through recruitment and selection/matching processes in place

Rb- Includes an interview and/or taking up references

Rc – some checks undertaken for new volunteers

Rd – Limited checking undertaken overall

Re – No checks undertaken for any volunteers

## F.

### F.1

The tables in this section lists percentages that evaluate how focused organisations linked and unlinked to the NHS are at Generating Grant Income, given a certain amount of knowledge possessed (related to this activity). The Left most column lists the type of skills & knowledge . The middle column lists percentages related to linked organisations and the last column lists percentages related to unlinked organisations.

The sub-column titled 'Frequent' lists the percentage of organisations having moderate or comprehensive knowledge and practice making frequent use of a particular activity. The sub-column titled 'Some +' lists the percentage of organisations having moderate or comprehensive knowledge and practice making at least some use of a particular activity. The column titled 'None' lists the percentage of organisations with little/no knowledge and practice making no use of a particular activity.

	Linked			Unlinked		
	Frequent	Some +	None	Frequent	Some +	None
Review and Fundraising Environment	40%	80%	92%	69%	100%	100%
Communication with Potential Funders and partners	40%	73%	100%	38%	53%	100%
Management of Funder/Partner Relationship	46%	77%	80%	71%	100%	100%

### F.2 Scores for Skills & Knowledge Possessed by Organisations linked to PCT/GP surgery.

	A	B	C	D	E	F	G	H	I	J
Acute Trust	67	49	48	59	50	58	28	55	43	34
MH Trust	55	43	40	54	42	42	18	53	32	45
PCT/GP	49	35	35	57	38	38	25	39	21	26
Unlinked	64	68	75	77	65	61	60	63	52	55

Key:

A – Review Fundraising Environment                      G – Utilisation of Electronic Media

B – Communicate to Potential Funders/Partners    H - Capacity to Manage

C – Manage Funder/Partner Relationships      I – Optimise Fundraising Success

D - Preparation – Asking donors/supporters for help    J – Review Effectiveness

E – Grasp on Legal Framework of Funding

F - Grasp on Legal Framework of Tax and VAT

## G.

The tables in this section can be used to assess the affect of recruitment checks; ability to review environment, communicate to potential funders/partners and manage funder/partner relationships on the ability of organisations (divided according to volunteer involvement) to focus on particular fundraising activities.

### G.1 Relevant Scores

	Led/Managed	Deg Aut	Acc&Res
Recruitment Checks (ii)	76	72	49
Review Environment (iii)	70	57	34
Communicate to Potential Funders/Partners (iv)	72	59	29
Manage Funder/Partner Relationships (v)	75	56	26

### G.2

The Left most column lists the type of organisation. The middle column lists percentages related organisations with comprehensive recruitment checks and the last column on the right lists percentages for organisations with limited/no checks.

The sub-column titled 'Frequent' lists the percentage of organisations falling into a particular category that make frequent use of Generating Grant Income Activities. The sub-column titled 'Some +' lists the percentages of organisations that fall into a particular category that make frequent use of Generating Grant Income Activities. The column titled 'None' lists the percentage of organisations falling into a particular category that make no use of Generating Grant Income Activities.

	Organisations with Comprehensive Recruitment Checks		Organisations with Limited/No checks
	Frequent	Some +	None/Limited
All Organisations	49%	82%	79%
Non-Autonomous	60%	93%	80%
Fully Autonomous	13%	50%	78%

### G.3

The Left most column lists the fundraising activities. The middle column lists percentages related to Non-Autonomous Organisations and the last Column on the right lists percentages related to Autonomous Organisations.

The sub-column titled 'Frequent' lists the percentage of organisations that have moderate or comprehensive knowledge and practice making frequent use of a particular activity. The sub-column titled 'Some +' lists the percentage of organisations that have moderate or comprehensive knowledge and practice making at least some use of a particular activity. The column titled 'None' lists the percentage of organisations with little/no knowledge and practice making no use of a particular activity.

	Non - Autonomous			Autonomous		
	Frequent	Some+	None	Frequent	Some+	None
Review Environment	64%	96%	100%	17%	67%	89%
Communicate to Potential Funders/Partners	68%	96%	100%	14%	57%	100%
Manage Funder/Partner Relationships	71%	95%	75%	17%	67%	83%

### G.4 Relevant Scores

	Led Managed	Degree-Aut	Acc&Res
Legal Framework of Tax & Vat (vi)	80	41	41
Utilisation of Electronic Media (vii)	57	31	24
Capacity to Manage (viii)	78	45	45
Optimise Fundraising Success (ix)	68	34	29
Review effectiveness (x)	62	41	33

## Appendix 3 – Supporting analysis

### A. National, Branch and Local Groups

#### *Comment*

As 55 local organisations and 18 national organisations took part in this survey, statistics related to national organisations will tend to have a higher bias due to sample size.

- (i) Research and analysis carried out suggests that local organisations make limited use of many fundraising activities. On the other hand national organisations tend to be more focused on a wider range of activities. The graph in appendix section A.2 illustrates their scores for the following fundraising activities: Community Fundraising, Corporate Fundraising, Charity Challenge Events, House to House Collections, Major Gift Fundraising, Generating Grant Income, Collection Boxes, Legacy Fund-Raising and Retail. Local organisations have not obtained a higher score than any national organisation, for any fundraising activity

Only after exploring the overall capability of people involved in volunteer fundraising, does a clearer picture emerge as to why local organisations might have failed to perform as well as national organisations. Research and analysis carried out suggests that due to insufficient skills and knowledge, most local organisations do not have a platform, from which they can successfully carry out certain fundraising activities.

#### (ii)

##### (a) General Analysis

Local organisations, with an average score of 56%, have just below moderate knowledge and practice to review the fundraising environment. This score conceals how well placed local organisations are to review specific fundraising activities.

The graph in appendix section A.3 summarises information obtained from additional questions. It suggests that nearly all national organisations have at-least some significant knowledge and practice of all the fundraising activities illustrated. On the other hand, it suggests that most local organisations have no significant knowledge or practice of Corporate Fundraising, Major Gift Fundraising and Direct Marketing. Many local organisations do not have significant information about Generating Grant Income and Legacy Fundraising . These results fall in line with expectations. Also, most local organisations do not make frequent use of the above mentioned fundraising activities. On the other hand, local organisations have significant knowledge and practice of Community Fundraising/ Fundraising Events (of which they do make frequent use)

(b) Further Analysis

Except for Corporate Fundraising, most national organisations make frequent use of a fundraising activity if they have at least moderate knowledge and practice. Nearly all make some use. This is clear from the tables in the appendix section B.

Generally, local organisations are less focused than national organisations, even though they possess the same level of skills and knowledge. This hints; that there are other factors contributing to national organisations being more focused than local organisations. Variances in focus on different fundraising activities also support this. However, the statistics in appendix section B clearly suggest that relevant knowledge and skills are an important reason why organisations are able to focus on a certain fundraising activity. This is especially the case for certain types of fundraising activities; Corporate Fundraising, Major Gift Fundraising and Generating Grant Income.

For example, 94% of local organisations that had limited/no knowledge and practice to review the Corporate Fundraising environment made no use of corporate fundraising. Comparatively, less than 67% of organisations that had little/no knowledge and practice to review the community fundraising or fundraising environment made no use of community/fundraising events.

**(iii)**

(a) General Analysis

This section looks at the knowledge and skills related to how well placed an organisation is to communicate to potential funders or partners. Compared to a 76% score by national organisations, local organisations achieved a score of 48%. This relative difference in score is greater if the question is broken down according to type of fundraising activity. The results for this section are similar to those obtained in the previous section. They are summarised by the graph in appendix section A.4.

(b) Further Analysis

Except for Corporate Fundraising, most national organisations make frequent use of a fundraising activity if they have at least moderate knowledge and practice. Nearly all make some use. This is clear from the tables in the appendix section B.

Generally, local organisations are less focused than national organisations, even though they possess the same level of skills and knowledge. This hints; that there are other factors contributing to national organisations being more focused than local organisations. Variances in focus on different fundraising activities also support this. However, the statistics in appendix section B clearly suggest that relevant knowledge and skills are an important reason why organisations are able to focus on a certain fundraising activity. This is especially the case for certain types of fundraising activities; Corporate Fundraising, Major Gift Fundraising and Generating Grant Income.

**(iv)**

(a) General Analysis

This section looks at the knowledge and skills related to how well placed an organisation is to manage funder/partner relationships. The results for this section are similar to those of the previous sections. They are summarised by the graph in appendix section A.5.

(b) Further Analysis

Except for Corporate Fundraising, most national organisations make frequent use of a fundraising activity if they have at least moderate knowledge and practice. Nearly all make some use. This is clear from the tables in the appendix section B.

Generally, local organisations are less focused than national organisations, even though they possess the same level of skills and knowledge. This hints; that there are other factors contributing to national organisations being more focused than local organisations. Variances in focus on different fundraising activities also support this. However, the statistics in appendix section B clearly suggest that relevant knowledge and skills are an important reason why organisations are able to focus on a certain fundraising activity. This is especially the case for certain types of fundraising activities; Corporate Fundraising, Major Gift Fundraising and Generating Grant Income.

Values in the tables suggest that the ability of an organisation to manage the funder/partner relationships is slightly more important factor (compared two the other two discussed above) in determining how focused organisation are on these specific fundraising activities; Corporate Fundraising and Major Gift Fundraising.

**(v)**

(a) General Analysis

From the graph in section A.18 it is evident that national organisations have obtained a significantly higher score; indicating that they have a much better grasp on the legal framework of fundraising.

(b) Further Analysis

Statistics listed in the table in section C.5 probe deeper. An organisation's grasp on the legal framework of fundraising does not seem to be an important factor contributing to an organisation's focus on a particular activity except that of Generating Grant Income.

**(vi)**

(a) General analysis

From the graph in section A.18 it is evident that national organisations have obtained a significantly higher score; indicating that they have a much better grasp on the legal framework of tax & VAT for corporate and individual giving.

(b) Further analysis

Statistics listed in the table in section C.6 probe deeper. An organisation's grasp on the legal framework of tax & VAT for corporate and individual giving does not seem to be an important factor contributing to an organisation's focus on a particular activity except Generating Grant Income.

**(vii)**

(a) General Analysis

This section looks at the extent that an organisation utilises electronic media best suited to communicating to target donor groups. Local organisations have achieved a low score of 29%, comparatively national organisations have obtained a score of 67%. The table lists ratios that evaluate performance of these organisations.

Type of Organisation	Ra	Rb
National	72%	50%
Local	26%	17%

**Ra** – Ratio of organisations targeting relevant groups using at least some media t

**Rb**- Ratio of organisations using many different types of media

The ratios above suggest that relative to national organisations local groups do not make extensive use of electronic media. They also suggest that relative to national organisations local groups do not effectively target.

(b) Further Analysis

Over all, the table in appendix section C.1 does not help one determine how helpful electronic media is as a tool to support fundraising activity. However, percentages in the row titled Generating Grant Income do suggest that utilisation of electronic media could be an important factor enhancing an organisations focus on this particular activity (especially when many media are used).

There are some interesting variations in statistics. For example, 89% of organisations who target relevant groups using at east some media (Ra) also make use of community fundraising/fundraising events, and 95% of those who make use of many media (Rb) with at least some targeting also make

some use of community fundraising/fundraising events. However, only 14% of those who make limited/no media use (Rc) overall do not make use of any community fundraising/fundraising events. This might be because limited use of media is all that is required for community fundraising (maybe no media use is required at all). The answer might lie somewhere in between (not what the Ra, Rb statistics suggest in isolation). On the other hand, only 58% (Ra) and 59% (Rb) make at least some use of corporate fundraising but 78% (Rc) do not make any use of Corporate Fundraising. Why might this be? One plausible reason could be that significant media use is essential for most types of corporate fundraising activities but other factors are also essential and they have to be considered before a clearer picture is obtained.

**(viii)**

(a) General Analysis

Type of Organisation	Ra	Rb
National	33%	67%
Local	26%	26%

**Ra-** Ratio of Organisations with at least partial ability in all areas of volunteer fundraising

**Rb –** Ratio of organisations with significant ability in at least some areas of volunteer fundraising

This question looks at an organisation’s ability to optimise fundraising success by collating and analysing donor/supporter data. Relative to local organisations, national organisations have higher ratios. This clearly indicates that national organisations have a greater ability optimise fundraising success by collating and analysing donor/supporter data.

(b) Further Analysis

Over all, the table in the appendix section C.2 does not provide an indication as to how important optimising fundraising success by collating and analysing donor/supporter data is for supporting fundraising activity. However, statistics related to Retail and Collection Boxes do hint a relationship. Similar to the variation discussed in the previous section, there exists variation between Community Fundraising and Corporate Fundraising.

**(ix)**

(a) General Analysis

Type of Organisation	Ra	Rb
National	22%	83%
Local	26%	31%

**Ra** – Ratio of organisations with all activities reviewed with at least limited report writing

**Rb** – Ratio of organisations with at least some activities reviewed with associated report writing

This question looks at an organisation’s ability to review the effectiveness of volunteer fundraising activities and produce relevant reports. In contrast to previous patterns, local organisations have a higher Ra (but not significantly greater) than national organisations. National organisations have a significantly larger Rb. The ability to review with associated report writing might be a more important factor contributing to an organisation’s ability to focus on fundraising activities compared to the ability of organisations to review all activities. Further analysis is required.

(b) Further Analysis

Over all, the table in the appendix section C.3 does not help one determine the importance of reviewing the effectiveness of volunteer fundraising activities and producing relevant reports for supporting fundraising activity. However, statistics related to Retail and Collection Boxes do hint some relationship. Similar to the variation discussed in the previous sections, there exists a variation between Community Fundraising and Corporate Fundraising.

There is no significant divergence for results between Rb and Ra: so there is no indication that the ability to review with associated report writing is more important than the ability to review all fundraising activities.

**(x)** From the graph in appendix section A.2, this result is evident.

**(xi)** This is clearly evident from the graph in appendix section A.2.

## **B. Support: Urban, Rural and Both Settings**

- (i) Relevant scores are illustrated in appendix section A.7 and A.2. The scores in the former graph have smaller relative differences (i.e. differences in scores between urban setting, rural setting and both) compared to scores illustrated in the latter. Smaller differences in management practice and skills & knowledge possessed follow.

## **C. Support: Organisations Linked and Unlinked to the NHS**

- (i) The graph in appendix section A.8 indicates that organisations linked to the NHS only focus more on certain fundraising activities; Community Fundraising/ Fundraising Events and Collection Boxes. Those organisations supporting a MH trust have the lowest scores, obtaining a below average score for all types of fundraising except Community Fundraising/ Fundraising Events. From this, it is evident that there is significant room for improvement.
- (ii) Linked organisations are as focused as unlinked organisations for most fundraising activities except for Generating Grant Income. Around 87% of unlinked organisations carry out Generating Grant Income activities compared to 52% of linked organisations.
- (iii)
  - (a) General Analysis

The score illustrated on the graph in appendix section A.16 clearly supports this conclusion. Relative differences in these scores do hint that differences in skills & knowledge related to an organisation's ability to review the Generating Grant Income environment could be a possible reason for the contrast in focus.
  - (b) Further Analysis

The table in appendix section F.1 provides supplementary statistics. These statistics suggest that the ability of an organisation to review the fundraising environment; communicate to potential funders & partners; and manage funder/partner relationship; are important in determining their focus on Generating Grant Income activities. However, these statistics also suggest that other factors contribute to an organisations focus on this activity. Unlinked organisations (which have different characteristics to that of linked) are more focused; they have higher percentage values than linked organisations in the same category.

**(iv)**

(a) General Analysis

The graph in appendix section A.15 suggests that differences in the ability to effectively utilise electronic media could be a possible reason for unlinked organisations being considerably more focused on Generating Grant Income. Previous analysis also suggested that effective utilisation of electronic media could be an important factor enhancing an organisations focus on this particular activity.

(b) Further Analysis

The table in appendix section D.1 does not indicate that the use and effective targeting of electronic media by linked and unlinked organisations has a significant effect on their focus on Generating Grant Income activities. Statistics related to unlinked organisations denounce the necessity (only for unlinked organisations) of using electronic media to support Generating Grant Income Activities, as only 20% of unlinked organisations who make limited/no media use overall do not take part in Generating Grant Income activities. On the other hand 68% of linked organisations which make limited/no media use overall, do not take part in Generating Grant Income Activities. This indicates that utilisation of electronic media might be an important characteristic of linked organisations or that they require it to make use Generating Grant Income Activities. However, looking at other percentages one realises that a smaller percentage of linked organisations who target relevant groups or make use of many different types of media, make frequent use of Generating Grant Income Activities.

(v) The table in appendix section F.2 lists scores related to different types of skills& knowledge for organisations linked to Acute Trusts, MH Trusts, PCT/GP and also for those organisations that are unlinked. Organisations linked to the PCT/GP obtained the lowest score for eight out of ten skills & knowledge criteria in the questionnaire. This clearly supports the statement made.

## **D. Support: Volunteer Involvement and Responsibility**

(i) The scores in the graph, appendix section A.9, illustrate organisations are not managed by volunteers use Generating Grant Income activities twice as frequently as those that are.

**(ii)**

(a) General Analysis

Statistics provided in appendix section G.1 support the statement made.

(b) Further Analysis

Statistics in the table in appendix section G.2 indicate that recruitment checks are one characteristic of organisations that make frequent use of generating Grant Income activities.

It is clear that organisations focusing on Generating Grant Income activities have certain recruitment checks in place. All percentages in the last column of the table in this section are around 80 %; hinting that no matter what type of organisation; autonomous or non-autonomous, it is likely that if an organisation has limited/no checks in place, then it will also not be making use of Generating Grant Income activities. On the other hand 60% of non-autonomous organisations with comprehensive recruitment checks make frequent use of Generating Grant Income activities, compared to 13 % of fully autonomous organisations making frequent use of this fundraising activity. This hints that there might be other reasons why non-autonomous organisations are more focused on Generating Grant Income activities.

**(iii)**

(a) General Analysis

Statistics provided in appendix section G.1 support the statement made.

(b) Further Analysis

Statistics in the table in section G.3 suggest that the ability to review the fundraising environment (in this case Generating Grant Income) is important if an organisation wants to focus on that particular activity (similar to argument section (ii)). However, differences in statistics between autonomous and non-autonomous organisations; provided in the table, suggest that there are other important factors in determining an organisation's focus.

**(iv)**

(a) General Analysis

Statistics provided in appendix section G.1 support the statement made.

(b) Further Analysis

Statistics in the table in section G.3 suggest that the ability to communicate to potential funders/partners (in this case Generating Grant Income) is important if an organisation wants to focus on that particular activity (similar to argument section (ii)). However, differences in statistics between autonomous and non-autonomous organisation; provided in the table, suggest that there are other important factors in determining an organisation's focus.

**(v)**

(a) General Analysis

Statistics provided in appendix section G.1 support the statement made.

(b) Further Analysis

Statistics in the table in section G.3 suggest that the ability to communicate to potential funders/partners (in this case Generating Grant Income) is fairly important if an organisation wants to focus on that particular activity (similar to argument section (ii)). However, differences in statistics between autonomous and non-autonomous organisation; provided in the table, suggest that there are other important factors in determining an organisation's focus.

**(vi)** The statistics in appendix section G.4 support this statement. Further analysis is similar to section A. Look at appendix section C.6 for support statistics.

**(vii)** The statistics in appendix section G.4 support this statement. Further Analysis is similar to section A. Look at appendix section C.1 for support statistics.

**(viii)** The statistics in appendix section G.4 support this statement. Look at appendix section C.4 for support statistics.

**(ix)** The statistics in appendix section G.4 support this statement. Further Analysis is similar to section A. Look at appendix section C.2 for support statistics.

**(x)** The statistics in appendix section G.4 support this statement. Further Analysis is similar to section A. Look at appendix section C.3 for support statistics.

**(xi)** The scores illustrated on the graph in appendix section A.9 clearly support the statement made

## **E. Support: Number of Volunteers Involved**

**(i)** The graph in appendix section A.10 clearly supports the statements made.

**(ii), (iii), (iv), (v), (vi), (vii), (viii), (ix)**

For further analysis supporting (ii), (iii), (iv), (v), (vi), (vii), (viii), (ix) refer to section A. As 70% of organisations with over 200 organisations are national organisations and 72% of organisations with less than 200 volunteers are local organisations, analysis for this section is very similar to A.

## **F. Support: Number of Volunteers Involved in Fundraising**

**(i)** The graph in appendix section A.11 clearly supports the statement made.

**(ii), (iii), (iv), (v), (vi), (vii), (viii)**

For further analysis supporting (ii), (iii), (iv), (v), (vi), (vii), (viii) refer to section A. As 86% of organisations with over 200 organisations involved in fundraising are national organisations and around 70% of organisations with less than 200 volunteers involved in fundraising activities are local organisations, analysis for this section is very similar to that of A.

**(ix)**

**(a) General Analysis**

The graph in appendix section A.11 clearly supports the statement made.

**(b) Further Analysis**

At first glance the table in section E.1 suggests that considering the skills, experience and credentials of volunteer fundraisers might be an important management practice contributing to an organizations ability to carry out Retail fundraising activities. Further analysis does not provide any conclusive evidence in support of this statement.

**G. Support: Funds Raised by Others “in aid of” Organisation**

**(i)** The graph in appendix section A.12 clearly supports the statement made.

**(ii)** The graph in appendix section A.17 clearly supports the statement made.

**(iii)** The graph in appendix section A.17 clearly supports the statement made.

**(iv)** The graph in appendix section A.17 clearly supports the statement made.

**H. Support: Funds Raised in an Average Year**

**(i)** The graph in appendix section A.13 clearly supports the statement made.

**(ii)** The graph in appendix section A.13 clearly supports the statement made.

For further analysis supporting (ii), (iii), (iv), (v), (vi), (vii), (viii), (ix) refer to section A. As 71% of organisations which raise over 250 K are national organisations and 73% of organisations that raise less than 250 K are local organisations, analysis for this section is very similar to that of A.

**(x)** The graph in appendix section section A.14 supports the statement made

**(xi)** Organisations, which raise 51-200 K in an average year, make more frequent use of Retail fundraising activities than organizations falling in other categories (clearly illustrated in the graph in appendix

section A.13). This result is similar to a previous result for organizations with 51-200 volunteers. Two important questions have to be answered; Why is this the case? Are the majority of organizations falling in these two different categories the same? The answer to the second question is “no”. Only eight out of sixteen organisations with 51-200 volunteers involved in fundraising activities are organisations which raise 51-200 K in an average year.

## **I. Support: General Findings**

- (i)** From the graph in appendix section A.6 it is evident that more than 50% of organisations are involved in most fundraising activities, however only around 11% of organisations are involved in House to House collections, and less than half are involved in corporate fundraising and charity challenge events. More knowledge of the above mentioned fundraising events might help firms diversify and access untapped funding.
  - (ii)** Skills & knowledge directly related to a particular fundraising activity (e.g. ability to review the fundraising environment of a particular fundraising activity) are more important than indirectly related skills & knowledge such as the grasp on the legal framework of fundraising. This result is evident from numerous tables and graphs provided in this support document and the appendix.
  - (iii)** Statistics provided in this document hint that many factors (all those factors discussed in appendix chapter C) might contribute to an organisations focus on fundraising activities but have not provided any clear indication as to how important these actually are.
  - (iv)** Research indicates: other than the characteristics (skills& knowledge, and management practices) investigated in this report, other characteristics are important for a firm’s focus on fundraising activities.
  - (v)** Seventy one out of eighty-four organisations who answered this question have insurance cover for the organisation and volunteer fundraisers, and eighty one out of eight four have insurance cover for the organisation.
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