

gifted®

Exceptional fundraising partnerships



Telling your fundraising story

In any fundraising endeavour, narrative matters. Too many charities fall at the first hurdle because they rush to ask for gifts before they have developed a clear and persuasive case for support.

Drafting a well argued, securely evidenced case for support is the first step in nearly all fundraising projects. Without this, potential givers will find it difficult to grasp exactly what you're trying to accomplish or the benefits you're promising to deliver. So, unless you can share your vision by telling a story that inspires others to get involved, fundraising success is likely to remain firmly out of reach. Here's our guide to creating a narrative that captures the substance and the spirit of what you want to achieve.

Making your case

First, set the scene by providing a little background to your organisation and the good work it undertakes. Potential givers need to be reassured that your reputation is trustworthy and that your activities have real charitable impact. This means talking about your major achievements, the number of beneficiaries you support, as well as giving key statistics or quotations that substantiate and sharpen your case.

Next, demonstrate the need, without being 'needy'. Aside from global emergency appeals resulting from war, famine or natural disasters, in our experience people are rarely moved by charities telling tales of woe and despair. You'll have a much more captive audience if you express your purpose using the language of opportunity and possibility. And, rather than making potential givers feel overwhelmed by the problem, you're more likely to convince them that their support will make a real difference to you delivering your charitable goals.

Finally, tell people what your vision for the future is and how you've set about shaping it. People need to appreciate exactly what the benefits are, whether these relate to solving global

healthcare problems, transforming education or providing desperately needed community space in your local area.

Client focus

Warwick Independent Schools Foundation's One Campus+ Campaign and Treetops' ground-breaking plan for a residential, end of life unit in South Derbyshire, are two recent examples of projects underpinned by a compelling case for support.

At Warwick, the narrative has been built on the concept of adding the plus factor; or the extra level of benefits afforded by a £4 million top-up of the £42 million project to create one outstanding campus. The opportunity for givers to capitalise on a major strategic investment with additional facilities and resources is easy to grasp - and from a design perspective, the *Plus* symbol visually reinforces the potential impact of the Campaign.

The approach at Treetops has been to champion the case for patient choice and make living, dying and remembering the very best experience it can be. Rather than focusing on alarming NHS statistics and overstretched services, the story here has been all about possibility. Offering 12 new, in-patient beds means alleviating pressures on hospital wards, but more significantly, prioritising and responding to the deepest wishes of individuals and their families.

**ONE
CAMPUS
+PLUS**

TREETOPS
HOSPICE CARE
where every day counts

New appointment

A Home of Rest for Elephants



The Southern Thailand Elephant Foundation (STEF) was established in 2017 to work alongside its sister charity in Thailand, supporting projects that promote education and

advance elephant health and welfare in the south of the country. The first major project for STEF is to create a Home of Rest for Elephants in a 6.5-acre jungle land plot at Ban Ton Sae, about 12km from Phuket. Gifted has been appointed to help secure the funding for this project, through applications to suitable grant-makers nationally and internationally. Director, Amy Stevens, says, *'Animal welfare is a great passion of mine, so I'm honoured to be working with the team at STEF on this fantastic project. Building the sanctuary in Thailand will enable the Foundation to achieve incredible impact for a relatively low level of investment, making this a really exciting partnership to be involved in.'*

New appointment

Kissing it Better

Inspirational. Transformational. Innovative. These are just a few of the powerful words used by donors, supporters and the media to describe the work of Kissing It Better – a pioneering charity which provides comfort to some of society's most vulnerable elderly citizens, whilst giving life-changing experiences to young people. This partnership, between old and young; between those who face the challenges of illness and isolation and those embarking upon their adult lives, sits right at the heart of the organisation's work throughout the UK. The charity has built a tremendous reputation for running creative, ambitious programmes that connect school and college students with the elderly in their community. In tackling the issues of loneliness, isolation and depression in hospitals and care homes, Kissing It Better's mission is one which ought to attract serious interest from major grant-makers – and we're delighted to be supporting the charity in its efforts to boost this important income stream.



Kissing it Better

New appointment

Fair Action

Fair Action is a fast-growing and increasingly influential charity which is dedicated to reducing all forms of discrimination, breaking down social barriers and promoting social inclusion, through sport. Formerly known as Fair Football, the charity has already delivered educational programmes to more than 1,500 young people and is now seeking to form partnerships with professional football clubs and other influential organisations across the country. The charity is keen to change perceptions, beliefs and behaviour, so that children learn to challenge prejudice and discrimination within their communities. Along with education programmes, they also fund relevant and contemporary research to develop pragmatic solutions that work. Gifted's Director, Chris Goldie, says *'Fair Action has the potential to be the UK's most effective anti-discrimination charity and we are thrilled to be working with them to develop fundraising partnerships that will extend their influence to every corner of the country'.*



2018 Cathedrals Conference



This year, Manchester was the venue for the Sacred Space: Common Ground, National Cathedrals Conference, where delegates gathered to explore new opportunities, share best practice and celebrate achievements

within the Church of England. Alongside sessions covering current theological issues, the two-day programme included workshops led by experts from the worlds of politics, government, media and the arts. Fundraising, too, was on the agenda with a workshop jointly delivered by Philip Baker and Caroline Gee of EdenTree Investment Management and Gifted Chief Executive, Andrew Day. Caroline said, *'Andrew's practical fundraising experience gave a powerful perspective for the Cathedral leaders seeking to create endowment funds, that are ethically focused and underpinned by sustainable fundraising practice.'*

Setting up a sustainable legacy programme

Designing an appropriate legacy giving programme can transform the future of your organisation, providing the sort of financial security you never thought possible.



All too often, though, charities begin by focusing a legacy narrative on the 'taboo' subject of death. To motivate potential givers, a legacy giving programme should be driven by 'life'. Successful campaigns thrive on a positive outlook; one that focuses on the impact of a future gift and the sense of empowerment this can generate. The idea that our 'final gift' offers some aspect of immortality, can also be a powerful driver when someone makes a bequest. There's a sense of being able to influence a future where beliefs live on and values are perpetuated, long after we are gone.

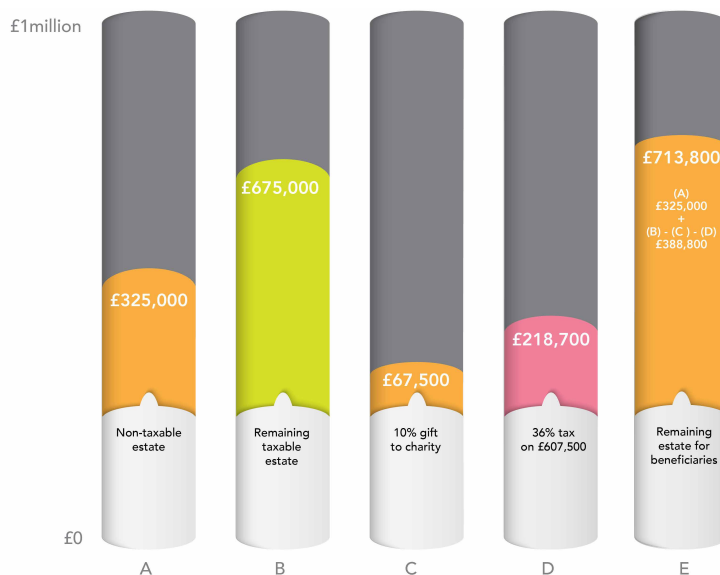
Understand | Inspire | Steward

Creating a legacy programme that's just right for your organisation isn't easy. You'll need to work hard at understanding and cultivating your supporter base, developing an inspirational concept that includes appropriate recognition and stewarding your givers throughout their journey with you.

The days of being able to describe a 'typical' legacy donor are long gone. Changing work and income patterns, coupled with frequent amendments to UK tax laws, means that individuals of all ages and backgrounds are now making wills and considering the most tax-efficient options for managing their finances, long-term. Thankfully, the UK leads the global stage in will-making, with 49% of all adults having a valid will in 2015. This offers an ideal opportunity for charities to explore their potential for legacy gifts that benefit both themselves and their donors.

As the diagram here shows, by utilising the reduction in Inheritance Tax rate, an individual is able to support their favourite charity or charities, whilst also leaving a significant amount to their loved ones. In this example, on a £1 million estate the beneficiaries receive only £16,200 less when a £67,500 gift is left to charity than if no charitable gift is made. This is because when a 10% gift is made to a charity in a will, the remaining taxable estate is calculated only after the gift has been made.

In our experience, it's highly unlikely that tax benefits alone will inspire someone to leave a legacy gift. Charities that take the time to cultivate their donors and build lasting



relationships, are always more successful in securing the 'ultimate gift' from individuals who have probably been supporting them on a regular basis. And, because we know that on average, people change their will three years before dying, it's critical to invest the effort in thoughtful stewardship once a bequest has been made. Whether this involves membership of an exclusive 'club', invitations to VIP events or a personal letter from the organisation's leader every year – charities that genuinely take care of their legacy givers are far less likely to see them drift away and choose a more 'deserving' cause to support.

IDPE corporate partner



In our work with schools across the UK, we recognise the significant benefit the Institute of Development Professionals in Education (IDPE) brings in supporting development staff and improving fundraising standards. As an IDPE corporate partner, Gifted takes an active role in providing training through the IDPE regional networks. Our Directors are enjoying the opportunity to support an array of schools and colleges in managing the fundraising mix; whether this involves boosting annual revenue streams, building sustainable endowment funds or taking the critical first steps to launch a major capital campaign.



New appointment

Airey Neave Trust

For nearly forty years, since the murder of Airey Neave by the IRA at the gates of the Palace of Westminster, the charitable trust established thanks to the spontaneous philanthropic response of the public, has been quietly and effectively supporting important research



into counter terrorism. When considering the future direction of the charity, trustees resolved to engage Gifted to provide an objective assessment of the options available; advice and guidance which addressed the future programme of activity, ongoing governance and fundraising strategy.



New appointment

Horris Hill School

A leader in boys' prep school education since its founding in 1888, Horris Hill has benefited from the generosity of a large endowed estate. With over 70 acres on the Berkshire/Hampshire border, the school provides an unrivalled setting for the growth and development of boys in their early years. However, to remain at the forefront of boys' prep school education, continued investment is needed to develop its facilities. Gifted has been appointed to conduct a Fundraising Review to identify a clear strategy and devise an Action Plan for the successful completion of the Theatre Appeal; strengthening the Bursary Fund and increasing Alumni engagement.

gifted®

Gifted Philanthropy Ltd
www.giftedphilanthropy.com

Leeds
0113 350 1337

Leamington Spa
01926 674137

London
020 3627 3437