



# Funding Guides



## FUNDING GUIDE 8 : Launching the Appeal

This funding guide aims to provide you with some guidance on how to get your appeal launched successfully. You can only launch once to any audience, so make sure you have planned carefully, and that you aim to make a splash!

### BEFORE THE LAUNCH

The church council should have

- Agreed the plans for the project, including full debate, acknowledgement of any reservations or dissension, and agreement on a united front for the appeal
- Set up its committee structures with an appeal chair and treasurer (different from the church treasurer if possible) with clearly defined terms of reference
- Approved a business plan, a budget and a timetable
- Decided whether to employ a professional fund raiser (see below)
- Agreed a Press and Media Strategy
- Discussed its values with regard to fund raising e.g. use of gambling, receiving money from the National Lottery, use of interest-free loans

Production of an appeal leaflet

- The appeal leaflet should be attractive, concise and clear as to the aims of the appeal
- In its first paragraphs it should spell out the project vision, what needs it will fulfil and how much money is needed
- Background information should come later in the leaflet
- The leaflet should include clear information on how to respond with contact details and information on how a gift will be acknowledged and how to keep it anonymous if desired
- Professional design of the leaflet can be advantageous making it stand out. A best-case scenario is if a local design firm can be persuaded to do it for free, knowing that their details will be included and that every local business will receive a copy
- Even if professional help is not available, attention should be paid to
  - Including appropriate illustrations, pictures and graphics;
  - Avoidance of wordiness and use of white-space (proportion of unprinted paper);
  - Consistency with font styles and colours (two or three carefully applied is plenty)
- You should also produce a press release and circulate it to local media. Be sure to include a contact number and e-mail address so that they can call you if they are interested. If the press release is distributed in advance of the launch, put an embargo on it until the launch date (e.g. Embargoed until [date]).

### LAUNCHING THE APPEAL

To potential local donors

- These are more well-off individuals who might give upwards of £500 towards the appeal. They might live in the parish, or, if it is a deprived area, have businesses or offices located there.
- They can be identified through previous interest in the church or in other community initiatives, or through membership of community forums or philanthropic organisations (e.g. Round Table, Rotary, Towns Women's Guild)

- They should be approached before any events are organised by sending the appeal leaflet with a letter asking for an opportunity to explain the appeal, followed up by a phone call and, if invited, visit
- Visitors should be trained (maybe using role-play) on an open and friendly approach, how to enable a donation (with all necessary paper-work to hand and understood) and how to cope with a negative response
- All contacts to potential local donors should be completed before fund-raising events begin (to avoid the response that help has already been given through an event)

### **To the wider community**

- Households and businesses in the parish are sent a carefully-worded letter, giving details of a public launch meeting to be held in the near future plus the appeal leaflet
- This letter should also be sent to people who once lived in the parish but no longer do so, and to others who have links with the parish e.g. those who were baptised or married in the church or whose family members have been buried there.
- The launch event could take a variety of forms, but must be cheerful and positive in atmosphere. Short speeches (maximum five minutes!) may be made setting out the nature of the appeal. If the expertise is available, a short video or slide/PowerPoint presentation can be given, but again beware of excessive length. The event could be in the context of a special service or a major festival, or perhaps after a meal. Certainly refreshments and a festival atmosphere are important. People should get some fun out of your appeal.

Posters and graphs can be used to good advantage, for example breaking down the overall target to a human scale e.g. how the weekly equivalent of a newspaper or pint of beer will accumulate into large sums of money. A colourful and professional-looking appearance works wonders.

### **To local business**

Many people expect to do well with an appeal to local businesses, but are usually disappointed. The fact is that businesses get numerous unsolicited requests for grants or sponsorship and the smaller firms in particular may have a policy of consigning the whole lot to the bin. Unless you have a good relationship with particular firms, you will find this quite a tough nut to crack.

In particular, local businesses are often anxious about supporting churches

- For fear that they get associated with anything unpopular the church might do
- For fear of being seen to favour one local religious organisation over another

Different businesses may react differently to appeals

- Small businesses are more likely to offer help in kind (e.g. raffle prizes, discounts on building materials) than give a donation
- Medium size businesses (50+ employees) may want to put something back into their local community but prefer to do it through a community foundation rather than get involved with direct donations to appeals
- Branches of large businesses: these may once have been local small businesses, but have since been incorporated into large conglomerates, while keeping their original name. Local managers will be acting on an agreed policy and may have very little leeway to respond, however favourably they may look on a local appeal
- Large businesses and multi-nationals will usually have a policy of how to respond to an appeal and may often have a corporate foundation (see below for Corporate Giving)

The situation may be different if you have someone on board who knows the local business scene well and who has the confidence and persistence to follow up his or her contacts in person. If you do decide to do a cold mailing, your district council should be able to provide a list of local firms; alternatively you will find various directories at the main reference libraries.

- If possible, write to the Managing Director or Chief Executive by name
- You may find it helpful to ask for a specific amount, rather than making an open-ended appeal for “any contribution, large or small”. For a local business which does not normally

give money to church repairs, it may be easier to make a quick decision as to whether or not to respond to your appeal if a reasonable figure is suggested in your letter.

- Firms unwilling to give directly to the appeal may agree to sponsor an event, or to fund a leaflet, because of the publicity which they will receive. Make use of any local contacts you may have, such as the Chamber of Commerce, Rotary Club, etc.
- It is important to remember that the Gift Aid scheme is also available for corporate donors and there may be tax advantages for the company from this form of giving. Have your forms at the ready!

## Corporate Giving

The key is to make sure that people working for major corporations, who are members or friends of your church understand the ways that they can support an appeal through the companies they work for. These ways can include:

1. Individuals who work for a company can save through a Give as You Earn scheme into a CAF account. This giving is pre-tax for them.
  - a. Many companies match £ for £ the giving by their employees in this way: some with an upper limit of around £100/month.
  - b. Some companies also pay the small administration fee charged by CAF so that the combined giving (employee and employer) can be donated at a later date.
  - c. The employee usually has a CAF cheque book or card which he can use to donate to charities of their choosing with no restrictions put on by the employer.
  - d. Where a CAF cheque is used, the tax has already been eliminated at source, so these cheques cannot also be gift-aided by the recipient charity.
2. Corporate giving
  - a. In addition to 1 above, some companies often allow for employees to apply for one-off grants for charities in which they are personally active and involved. The employee involvement is generally either as a fund raiser for that charity (such as a sponsored walk/run) or some other time given (voluntarily helping in a youth club/old people's home) or similar personal involvement. For instance, one church member drives a van to the Ukraine for 10 days on a humanitarian aid trip and this qualifies for a grant.
  - b. In this case, the employee must apply for the grant, there is usually an upper limit (e.g. Diageo £1,000) and must show personal commitment. Usually this can be applied for every year.
3. Corporate Foundation
  - a. Like Grant making trusts, most Corporate Foundations have a particular aspect that they favour. If your project qualifies according to their criteria, then much larger grants can be made. However the projects themselves are likely to be both global and inspirational, such as the Diageo 'Water of Life' Campaign, which aims to provide one million people access to safe drinking water year on year until 2015. Where there is a very close correlation between the Corporate Vision and the need applied for this could be a major source of funding (in excess of £1Million) In this case you may expect close control and financial scrutiny by the Company.
  - b. Smaller grants, still consistent with the overall company theme may attract some investment. To find the themes and purpose of Corporate Foundations, read their pages on the Company Internet. Below are a few examples of Corporate Foundation pages.  
Diageo: <http://www.diageo.com/enrow/CorporateCitizenship/Communityandenvironment/DiageoFoundation/>  
Smith Kline Beecham: <http://www.gsk.com/community/criteria.htm>  
Tesco: <http://www.tescoreports.com/crreview08/community-progress3.html>

## **FUNDRAISING EVENTS (see also FG18: Fundraising Events)**

In most cases there will be locally organised events, ranging from the familiar coffee morning through to more ambitious and imaginative sponsored events. Provided that the requirements are clearly understood in the parish, it is surprising how willingly subscribers and event organisers appear and offer their ideas. The important thing is that the appeal committee offers help, avoiding repetition of events or a clash of dates.

Fundraising events are important, not only for the money they raise, but also for keeping a high profile for the appeal. A balance needs to be struck between encouraging free enterprise and making sure that events keep within agreed guidelines (e.g. gently discouraging a race-night if the church council has turned its back on gambling). All fundraising events should be accompanied by a plentiful supply of appeal leaflets and an up-to-date display on the progress of the project.

If the fund raising strategy envisages a number of events, it may be wise to have a separate committee or sub-committee to manage them. The committee should also keep a close eye on the cost of proposed events in terms of financial outlay and organisational effort. One village church appeal committee made a rule that any fundraising event in their one-year programme must aim to raise at least £500 and ideally not less than £1,000.

For example a proposed pantomime was ruled out because it would have involved an enormous amount of effort, and would have detracted from other fundraising events, but would probably have netted only about £100.

There is no limit to the variety of events which can be organised. An auction has often proved successful, preferably with a celebrity to conduct it. Proceeds might be divided 50/50 between the appeal and the donors of the objects being sold. Sponsored events of every description are usually popular, although not all are as imaginative as the cow pat guessing game used by a recent appeal. Part of a field was marked out in squares, and a cow was borrowed for the occasion. Sponsors selected one or more squares, the first to be marked (in obvious fashion) being the winner! Other ideas have included a scarecrow exhibition, model railway show, sponsored walks, Christmas tree festival, etc., etc. It is good to involve children, too. A novel idea from Swindon village was bungee jumping from the tower - for teddies! Chelmsford Cathedral teddies recently parachuted instead:



## **MARKETING PROMOTIONS**

Many marketing firms can provide suitably inscribed goods such as mugs, T-shirts, Christmas cards, etc. The initial cost can be high and you should look closely at the likely sales and eventual profit. Be very wary of dated goods such as calendars or diaries. Obviously these are valueless once they are out of date.

## **PROFESSIONAL FUNDRAISERS (See also FG2: Where to get help)**

Professionals may have their place in a very large appeal, but are otherwise most unlikely to be worthwhile for the medium or small appeal. Their fees and expenses must be paid from money raised, regardless of how much their efforts bring in. See FG2 for more information

## **GIFT AID (See also FG19 : Gift Aid)**

All appeal treasurers should be aware of the advantages of Gift Aid, which enables tax relief to be claimed even on small one-off contributions, provided the donor is a taxpayer.