

## VANTAGE – Philanthropy and Fundraising

Designed to address the structural and cultural changes that many organisations need to make at board and senior officer level to improve their fundraising capabilities and increase philanthropic giving, VANTAGE is Cultivate's unique development programme for governing bodies and senior managers.



### Programme Outline

*Cultivate has devised VANTAGE in recognition of the evident pressure on cultural organisations which have a heavy reliance on public funding. The convergence of reductions in Government spending, local authority budget decisions and the changes to NDPB funding programmes has led to a situation of marked insecurity for such organisations. The need to make the most of existing non-public income streams, and develop new sources, has become critically important for a substantial number of small, medium and large cultural organisations.*

*In planning this programme we have consulted with organisations in the cultural sector to establish the challenges facing them, and to determine how best those can be addressed in an effective, timely and value-for-money fashion.*

*In response to this VANTAGE has been designed specifically to focus on the role of Trustees and Senior Managers in creating, implementing and sustaining the philanthropy and fundraising efforts of organisations, as our consultations have identified this as the essential component in changing both the 'asking' and the 'giving' culture in which these organisations operate.*

*VANTAGE addresses the responsibility of trustees for raising income, focussing on the development of boards fit to meet that purpose, together with the creation of sustainable, medium- to long-term philanthropy and fundraising strategies. The programme is not directed to supporting development departments and fundraisers within organisations. The programme therefore*

### Objectives

- To enable organisations to identify what is needed to equip their boards for the current challenge of philanthropy and fundraising
- To improve existing skills at board and CEO level
- To assist in identifying gaps and recruiting trustees with necessary capabilities
- To build confidence in approaching philanthropic fundraising
- To enhance the sustainability of participating organisations by increasing the income from philanthropy and fundraising over the long term

## *Implementation*

The programme will deal with four technical aspects of philanthropy and fundraising: major single donations and legacies by corporate or individual donors; membership, friends and supporters programmes; venture philanthropy; and 'crowd-funding', 'text-giving' and other innovative techniques for attracting large numbers of small donations for specific activity.

## *Philanthropy & Fundraising Development*

### *Diagnosis*

The project will utilise a customised online survey supported by face-to-face consultation. Together, these complementary approaches will enable us swiftly to assemble the key fundamentals for each candidate organisation and provide data for subsequent analysis and the creation of customised development plans.

### *Cultivate Audit:*

- We will undertake an audit of each organisation's existing income potential from all funding sources, e.g. trusts & foundations, philanthropic gifts and legacies, fundraising events and corporate giving
- Research potential new opportunities including public funding, but with a specific focus on private sources including individual giving
- Establish the organisation's capacity to fundraise in terms of connections, skills, training needs, resources and budgets
- Identify the most relevant funding opportunities (projects, buildings, schemes etc.) for each organisation

### *Best fit analysis*

Following the results of the audit, Cultivate will work with each organisation in depth to identify a 'mixed economy' of philanthropy and fundraising methods ensuring that they are sustainable and relevant to the organisation, and include SMART objectives.

### *Campaign planning*

We will assess in each case the specific circumstances and needs of each organisation in the cohort, based on the data analysis, the findings from consultations with board members, staff and stakeholders.

## *Board Development*

The role of board members is critical in philanthropy and fundraising for cultural organisations, and is set to be all the more so as the pressure increases on public funding sources. Cultivate has extensive experience in voluntary board development and planning, setting up and reforming charitable companies, together with the direct experience of staff members as trustees and directors of charitable cultural enterprises.

### *Governance review*

Cultivate will review the constitution, memorandum and articles, board/trustee membership and board practice.

There will be an initial telephone meeting with Chair and/or key contact to agree programme, procedure and timetable.

One-to-one meetings with Chair and/or key contact will be held to discuss:

- Any key issues re recruitment and succession
- Procedure for skills audit
- Agenda for presentation to board following skills audit
- Timescale

We will facilitate a bespoke whole-board training day to tackle issues related to philanthropy and fundraising responsibilities, discuss knowledge and skills gaps, and agree practical actions for change.

### *Trustee skills audit*

A bespoke questionnaire will be distributed to all board members to assess their connections, expertise and skills, terms of service and contribution to the board. Comments will be invited on length of terms of service, recruitment and selection procedures.

### *Trustee consultation*

Conduct further telephone interviews with board members, depending on content of questionnaires and one-to-one meetings.

### *Board development plan*

- Summary of current board membership including skills and length of terms on board
- Define agreed terms of service and any amendments to Memorandum & Articles
- Matrix of skills, expertise and contribution appropriate for board
- Recruitment procedure and timescale
- Recruitment opportunities and criteria
- Details of content of recruitment and induction pack
- Code of good practice

We will produce an initial individually tailored plan for discussion with Chair and/or key contact followed by the presentation of a draft plan for endorsement at a board meeting. After 3 months we will follow-up with Chair and/or key contact to ensure implementation, and discuss any issues arising and review plan accordingly.

## VANTAGE Team

Cultivate will deploy the full range of resources and expertise necessary to fulfill the programme's objectives. Cultivate Executive Directors, Vanessa Rawlings-Jackson and Fred Brookes with Associate, Debbie Read will deliver the programme, drawing on a wealth of experience in the cultural sector. They will be supported by Cultivate's project management and administration team.

We will also draw on the expertise of our Business Development Associates, who have extensive experience brokering new stakeholder relationships and philanthropic opportunities across the cultural sector, working with organisations to develop realistic, achievable targets, building skills and confidence in philanthropy and fundraising capability, in particular individual giving. Specialist legal and financial input to the programme, where necessary, will be provided by Robert Nieri of Freeth Cartwright Solicitors and Geoffrey Horley of Chittenden Horley Accountants.

## Programme Criteria

*Organisations that would like to participate in the programme should meet the following criteria:*

- Formally constituted non-profit-distributing cultural organisations
- Have an identified need to increase philanthropy and fundraising income
- Clearly expressed willingness to participate in the programme
- Readiness to pay the participant fee as agreed
- Non-duplication of NPO KPIs, where relevant

If you would like to participate in the programme but are unsure whether you meet the above criteria, please contact Vanessa Rawlings-Jackson Email: [vanessa@cultivate-em.com](mailto:vanessa@cultivate-em.com)  
Telephone: 0115 852 4006

VANTAGE is supported by Arts Council England

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