



# Fundraising

*“Kingston Smith Fundraising and Management’s thorough and knowledgeable approach helped Lepra to review and refine its fundraising strategy.”*

*Isabel Cross, Director of Development, Lepra*

**Kingston Smith Fundraising and Management** works with charities, philanthropists and NGOs. We specialise in creating and implementing cost-effective strategies to help charities and NGOs understand their impact, fundraise and build sustainability.



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Fundraising  
and Management

# ***Fundraising is crucial for so many charities...***

**Kingston Smith Fundraising and Management** specialises in high value-low volume fundraising such as trusts, individuals, corporates and legacies. We can help by strengthening your charity's fundraising capacity and helping you match prospective donors' Wealth, Warmth and Access with your cause. Our Fundraising Readiness Checker will help you identify where you need help first and what kind of support you could expect from the KSFM team.

We often meet fundraisers who have been given The Sunday Times Rich List and been told to look there to solve their charity's income needs. However, the Rich List only really provides an inference of Wealth. To be truly effective in fundraising, you need to understand your prospects' Wealth, Warmth and Access, whether they're individuals, trusts, companies or organisations.

## ***Warmth***

Knowing a prospect's **warmth** to your cause is crucial to success. This interest will differ from prospect to prospect. A £10/month donor may respond to different aspects of your case for support and in different detail than a £50,000 grant maker. You can infer some warmth from past practice, either in your charity's records or in the public domain. It's also invaluable to create opportunities to ask donors what interests them.

## ***Wealth***

**Wealth**, or capacity to give i.e. having assets that can be transferred to charitable purposes is important, but only part of the story. Resources such as Rich Lists, grant-maker databases, or Companies House records can provide this information, as can your own donor database. We partner with WealthEngine to help you mine your own data assets.

## ***Access***

Wealth and Warmth aren't enough. The final element is having **access** to your prospect donors. At a basic level this is knowing their address, but success will revolve around multiple access points. Does anyone in your network know someone connected to the individual, trust, company or organisation? Can they make an introduction or give an endorsement? Who asks and how they ask can make or break a fundraising approach.

## Our Fundraising Readiness Checker can show how we can help you:

| Competency                                       | Where is your charity on these scales?      |  |
|--|---|--|
| <b>Clear and demonstrable need</b>               | No active beneficiaries                     | Quantified need with statistics and evidence   |
| <b>Organisation strategy</b>                     | No strategy or plan                         | Vision, clarity of purpose, objectives, targets, budgets                                   |
| <b>A positive image</b>                          | No online or offline presence               | Impact measured and clearly communicated   |
| <b>Strong leadership and networks</b>            | Disengaged trustees and senior staff        | Engaged and passionate trustees, senior staff, donors, and key influencers                 |
| <b>Potential donors</b>                          | No potential fundraising prospects          | Individual portfolios and realistic targets set/achievable                                 |
| <b>Internal organisation skills and capacity</b> | No fundraising experience                   | A successful track record of fundraising with active engaged leadership                    |
| <b>Financial Viability</b>                       | Limited or unrealistic budgets and accounts | Balanced income and expenditure statements. Healthy reserves with a robust reserves policy |

| What you can do   | How it helps you   |
|---|--|
| Develop a Case for Support backed up by facts and user feedback                   | Helps to make decisions about future activity and the value of current outcomes                  |
| Review the link between strategy and income generation with trustees/senior staff | A clear and compelling direction helps you plan and resource                                     |
| Better articulate the need so you resonate with funders' interests                | Persuading funders about your cause helps you attract funding                                    |
| Look for ways to involve the wider organisation in the task of fundraising        | Staff and trustees who really understand a charity are good for its beneficiaries                |
| Research and qualify your prospects, and filter out the suspects                  | Prioritising those more likely to give moves from transactional to relational fundraising        |
| Incorporate key personnel through training and mentoring                          | Skilled and keen fundraising staff should become the lifeblood of a charity                      |
| Improve financial competencies to present proposals that make sense to a donor    | Providing a clean bill of financial health helps you make plans and prove your worth to funders. |

## How can KSFM help?

We are a team of experienced fundraisers and pride ourselves in responding to your brief with creativity and skill. As a division of a top 20 UK firm of chartered accountants with over 750 charity clients, we benefit from detailed financial knowledge and experience of senior colleagues, as well as excellent support structures and ISO9001:2008 quality assurance accreditation.

## We provide

While there is no 'one-size-fits-all' approach to fundraising, there are important commonalities. We support a wide variety of not-for-profits in the UK and internationally, each with their own specific challenges. Despite their differences, we help each to succeed based on helping them better articulate what they need money for and understand who is likely to give it. We provide a range of services linked to the seven Fundraising Readiness Checker competencies. Responding to your brief, we will carefully review where your charity needs to develop, and create a bespoke programme. Our aim is for clients to improve their sustainability and increase in-house competencies. Typically clients ask for one or more of the following:

|  |                                    |
|--|------------------------------------|
| Case for support development             | Prospect research                  |
| Strategic reviews and fundraising audits | Mentoring services                 |
| Training and development                 | Bid-writing                        |
| Support to grow the fundraising team     | Annual accounts and budget reviews |

## We work with...

Recent clients have included traditional household name charities, international NGOs, cultural causes, health charities and educational establishments. We have helped them understand their impact, fundraise and build sustainability by reviewing strategies, undertaking feasibility studies, implementing new trusts and major donor fundraising programmes, mentoring department heads and providing interim fundraising support.

## Interested? We would like to meet you!

If it sounds like **KSFM** could add value to your work, we offer a popular (and entirely no obligation) **free consultancy session**. Get in touch with us at [fundraising@ks.co.uk](mailto:fundraising@ks.co.uk) or call **0207 566 3690**.