

Welcome to

VANTAGE FUNDRAISING

Building Your Fundraising Future



Vantage Fundraising

04

A Warm Welcome

An Introduction to Vantage Fundraising from Director, Nick Ryan.

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Meet who you'll be working with on your fundraising journey.

'The Case for Support produced by Vantage Fundraising transformed the strategy and momentum of our charity.'

- Paul Harbinson, CEO, The Sir Stanley Matthews Foundation



A VERY WARM WELCOME

WELCOME TO VANTAGE FUNDRAISING, A CONSULTANCY FOCUSED ON SMALL AND MEDIUM-SIZED CHARITIES.

We know that for the vast majority of you, money spent on services needs to prove its worth ASAP. It's why we've spent the last few years working out strategies to overcome the issues faced by small and medium charities like yours.

We'll make sure you never waste money on elaborate fundraising strategies that are rarely acted on. Instead, we'll provide you with strategic direction, the experience of our multi-expert teams, and a promise of our dedication to your cause.

We haven't got all the answers, we'd never claim to eliminate all risk from fundraising, but we will work with you to overcome the problems your charity faces within a budget commensurate with where you are.

We know each charity is different, just as every member of a family has their unique characteristics and personality.

We know how hard the climb to the top of the mountain can be for charities like yours, and how breathtaking the vista is from the vantage point of the summit.

We love building organisations, working alongside dedicated people and taking some of the strain off their shoulders. Hopefully, we can do the same for you.

Welcome to Vantage Fundraising.



Nick Ryan, Director, MCI OF DipM FCIM FRSA

*We'll make sure you
never waste money
on elaborate
fundraising
strategies that are
rarely acted on.*

WHERE YOU ARE

WE KNOW WE DON'T KNOW YOU VERY WELL YET, BUT...
WHAT IF WE TOLD YOU YOU'VE BEEN DOING IT ALL WRONG?



If your organisation is struggling to raise regular income, it's quite probably because you've been trying to do everything by the book. The way charities like yours are 'supposed' to do things.

The way it's always been done.



DOES THIS SOUND FAMILIAR TO YOU?



You set up a charity because you want to help others.



Your charity needs to raise money to help those people.



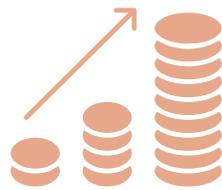
You craft the perfect ad and hire an amazing fundraiser.



Money trickles in, but you worry, as this wasn't the return you expected from your superstar.



YES?



YES?



YES?



YES?

WHAT IF WE TOLD YOU YOUR MONEY WORRIES ARE BECAUSE YOUR FUNDRAISING *SUPERSTAR* DOESN'T ACTUALLY EXIST?



↓ THIS IS WHY ↓

If you were to ask the average charity CEO or Fundraising Director about their dream hire, what would they say?

A super performing fundraiser with a staggering performance ratio of...

20:1



Don't get us wrong, it is possible to get a 20:1 return. We've done it ourselves at times. However, it should never be seen a benchmark.

It's not the norm.

HOW COME?

Findings from the Institute of Fundraising revealed that even with vast resources and their pick of top fundraisers, the biggest UK charities average returns of 3:1. This often increased to 5:1 with the inclusion of Legacy Fundraising, but their ROI was certainly nowhere near 20:1.

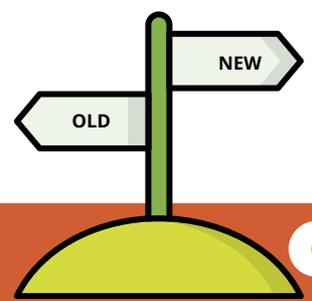
www.cifc.co.uk/Fundratios14.html

WHAT DOES THAT MEAN FOR YOU?

So, if blue chip charities are only achieving 5:1 at best, and that's with the cream of the fundraiser crop, what can you, as a SME, hope for?

Should you continue to write those amazing adverts, cross your fingers, and hope that one of those elite fundraisers joins your charity?

Or is it time to try something new?



HERE'S WHY WHAT YOU'RE DOING ISN'T WORKING

IN CASE WE HAVEN'T YET BEEN CLEAR ENOUGH -
IT'S TIME TO GIVE UP ON THE IDEA OF THAT SUPERSTAR, AND JOIN
↓ US ON THE NEW PATH TO LONG TERM, FUNDRAISING SUCCESS ↓



YOU

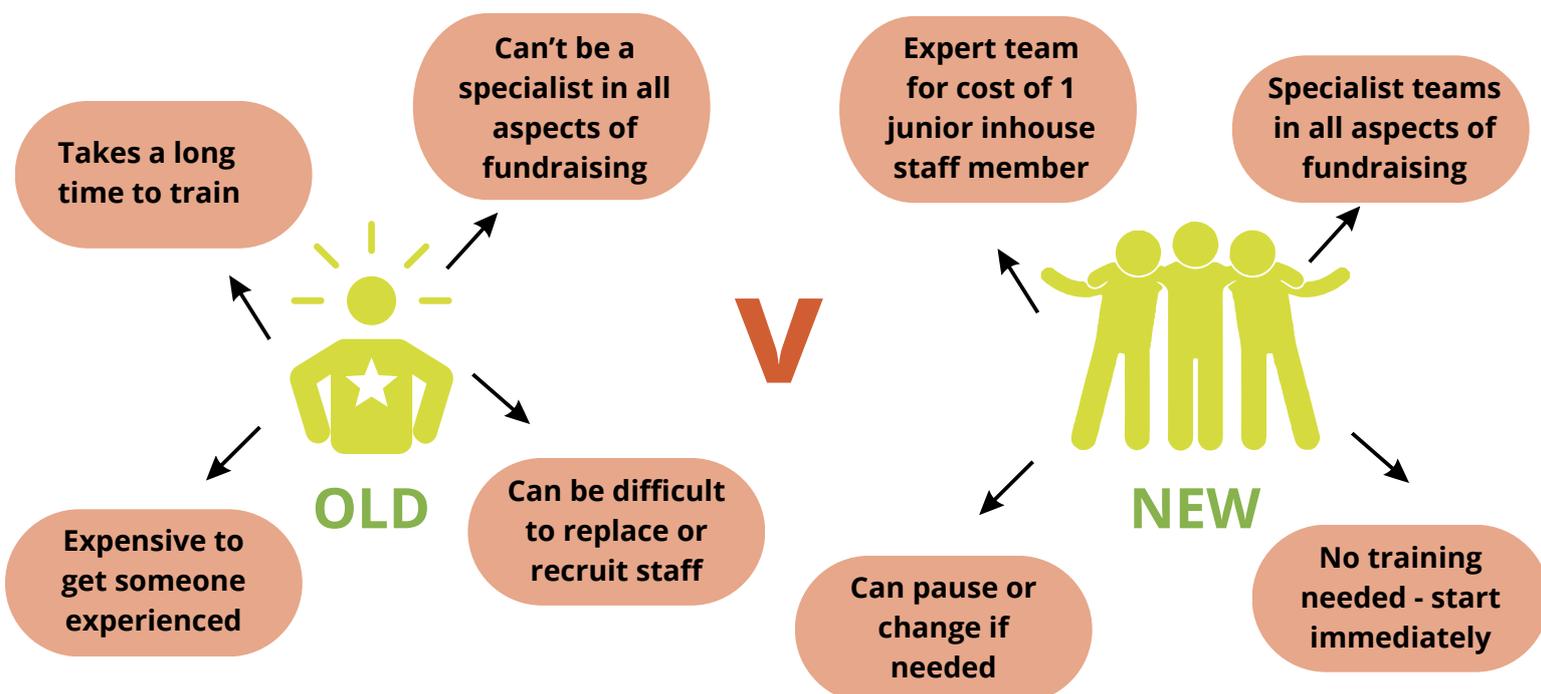
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What might this new fundraising pathway look like for *your* charity?

At Vantage Fundraising, our unique blend of attributes ensures we can deliver significant value to small and medium-sized charities like yours.

Our new pathway is forged from **Expertise** and **Economies of Scale**.





WHY YOU NEED US

BY NOW YOU'LL HOPEFULLY AGREE WITH US THAT THE SENSIBLE WAY FORWARD IS TO HAVE A TEAM OF EXPERTS WORKING TOWARDS YOUR FUNDRAISING GOALS.

Your next question might be how does it work? How **exactly** will we find you those much needed funds?

IT'S ALL ABOUT...

Economies

of

Scale

Small-medium charities spend **35-38%** of their income on grant applications, compared to big charities who only have to spend **16%.***

With us, you can enjoy similar **economies of scale**. We'll provide you a team matched to your needs, for the same cost as employing an in-house junior fundraiser - we're levelling the playing field. We are as committed as an in-house team, without bringing the hassle of having to find us desk space!

Junior staff handle smaller bids, freeing up senior members for larger, strategic opportunities - tailored, effective approaches at every level & dedicated researchers dive deep to uncover new insights. The cost of databases, directories, & back-office support is spread across our team, making your investment go further.

*Barnard, H. 2022, 'Giving pains: The cost of grant-making Assessing the cost of foundation funding applications'

WHERE TO START: THE FIRST MILESTONE

WE'LL PROVIDE YOU WITH THE FUNDRAISING BLOCKS YOU NEED, AND GUIDE YOU ON YOUR JOURNEY TO FUNDRAISING SUCCESS



Fundraising Blocks

We see our different fundraising services as blocks - blocks that form your sustenance packs on your ascent to the summit of your fundraising success. Charities have different needs and different blocks missing from their fundraising strategy.

After an initial discovery call, we'll advise you on which fundraising blocks are the most essential for your immediate needs. We'll also determine whether any blocks you've already implemented need restoring or switching out.



Nick Ryan, Director,
MCIOF DipM FCIM
FRSA

So, where should you start? Which block comes *first*?

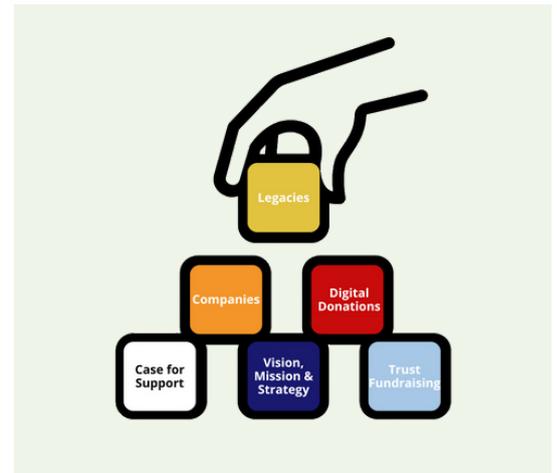
The First Milestone

Our First Milestone model is a basic set of income-generation functions that pretty much every charity should be running. We normally find that if charities have some blocks in place already, most stop short for a variety of reasons, including being successful in one area and assuming that is it, or not realising that there is more to be done.



A SUGGESTED FIRST SET OF BLOCKS:

Case for Support (one-off)
Vision Mission & Strategy (one-off)
Trust Fundraising (2 blocks)
Companies (1 block)
Digital Donations (1 block)
Legacies (one-off)



In case you're thinking, that makes total sense, but how much is all that going to cost? Don't worry - **it doesn't all happen at once!**

Blocks are in £2k-per-month amounts and we aim to build one block at a time.

For example, after the **Case for Support** and **Vision, Mission and Strategy** have been completed, you might invest £2k a month for a **Trust Fundraising** block. Money gained from Trust grants can then pay for a **Company Fundraising** block to be added to the existing **Trust Fundraising** block.

Do you have to choose *those* blocks?

No, all charities are different. Your aims and goals will be different to others, and your budget will be unique to your organisation. The above is a recommended starting point. It's a proven path to follow. We'll advise on the most crucial and promising fundraising opportunities for your organisation and ensure they fit within your budget.

In addition to adopting your goals as our own, we'll always respect your budget.

We want you to have a bespoke and customised fundraising mix that you can add to or change as your charity grows.

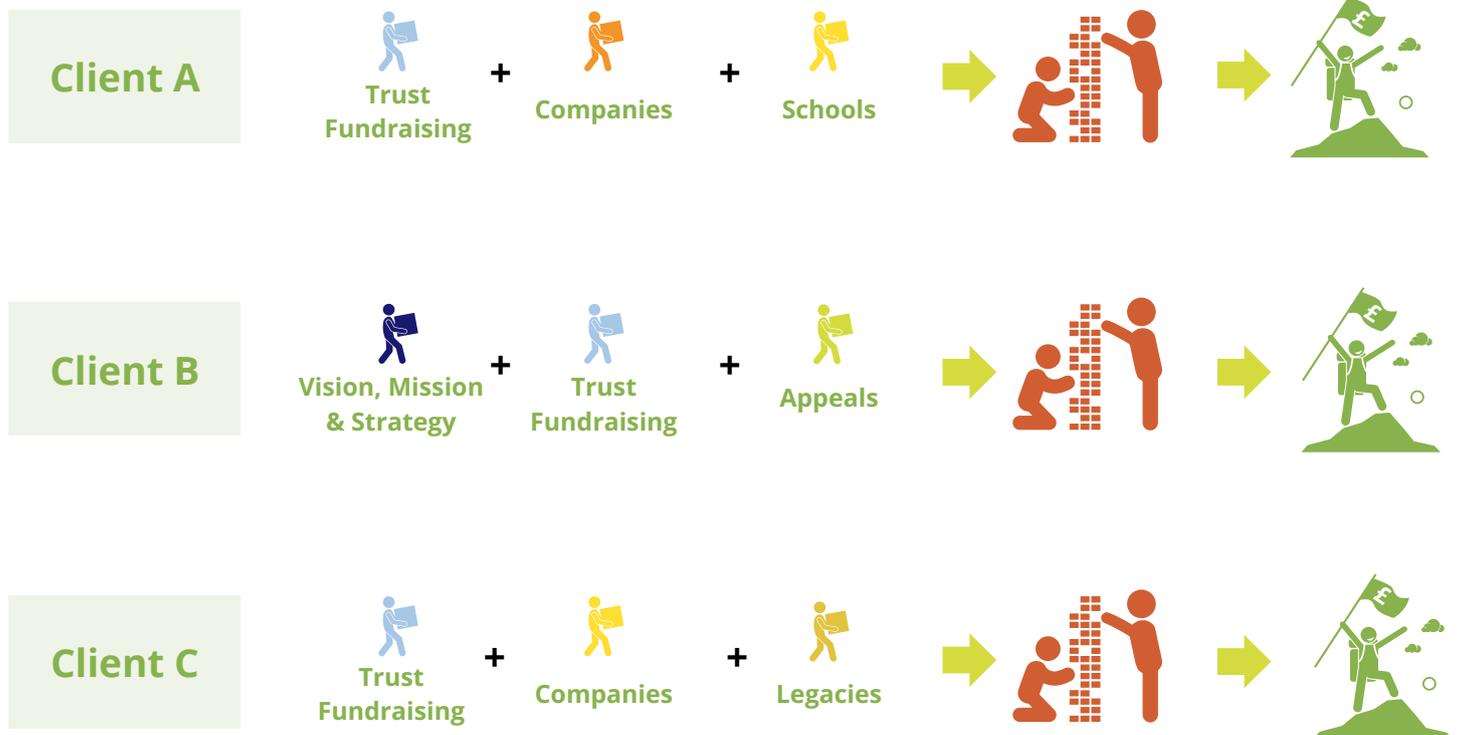
We offer a flexible approach that is invaluable for small and medium charities — you can easily pause or cancel our services should you need to. We are also always at the end of the phone to advise and answer your questions.

OUR MIX AND MATCH MODEL

By now, you'll have an idea of where you are on your fundraising journey. You might have identified which fundraising blocks you have already implemented, and which others you may need going forwards.

YOU CAN FIND MORE INFORMATION ABOUT OUR FUNDRAISING BLOCKS AND SERVICES ON PAGE 13.

Below, are some examples of how our clients have ***mixed and matched*** our services to create a fundraising journey that works for them.





DO YOU KNOW YOUR NUMBERS?

WE KNOW YOU STARTED YOUR CHARITY SO YOU COULD HELP PEOPLE...

But, do you know exactly *how many* people need your help? And, *how much* that is going to cost?

Are you a cancer charity, or maybe an animal rescue charity? Perhaps you're trying to help teenagers who struggle with their mental health, or help victims of certain crimes?

Do you know how many of those potential beneficiaries exist across the UK?

Let's use the mental health charity as an example:

There are around 8 million young people aged between 16-25 in the UK*. NHS England data shows that 1 in 5 young people currently have a diagnosed mental illness. It would take many millions of pounds in income to get the needed help for all of those young potential beneficiaries.

Some large mental health charities may be able to make a dent in the amount of aid required to help that many young people, but as a small to medium charity, you will face a big challenge.

If you are a charity with high aspirations, but a modest income, you will need to be clear on the income goal you are trying to achieve. Growing your income from below £500,000 (the annual income of several teen mental health charities) to the many millions of pounds needed to help all those you want to reach, means that you'll need to implement more fundraising blocks than you might think.

*www.ibisworld.com

Your mission will potentially take several years and you may need to build to 100 blocks or more. How will you fund that?

OUR MOST POPULAR FUNDRAISING BLOCKS



Vision, Mission and Strategy

We take a deep dive into your charity's goals and refresh or reformulate as needed.

These clear and streamlined foundations will pave the way for fundraising success, and for the prosperity of your charity as a whole.

£1,250



Trust Fundraising

We create proposal templates, identify potential funders that perfectly match your mission, and launch a focused six-month fundraising campaign.

When we exceed 20:1 returns, it's often in the first few years of a client investing in this block.

£2,000 per month



Companies

Our hands on corporate fundraising involves creating engaging corporate fundraising materials and a bespoke list of potential company partners. We'll nurture and grow relationships with these supporters to cultivate impactful contributions.

£2,000 per month



Schools Fundraising Programme

A great option if your charity has links to a school, our unique Schools Initiative starts by creating engaging materials aligned with your charity's mission, to educate pupils and set the stage for them to significantly boost your organisation's funding.

Sourcing school: £500

Materials: £1,500

3-Month Campaign: £1,000 per month



Legacy Fundraising

We sculpt a powerful legacy proposition that resonates, strategically reviewing audience analysis and pinpointing the perfect pitch for your potential legators. We then craft a cutting-edge legacy marketing strategy, aimed at significantly amplifying your legacy income.

£4,750



Digital Donations

We'll evaluate your current digital fundraising methods, and create a strategic plan to increase online donations. We map out immediate and future-facing digital strategies, optimising your online donation platforms for peak performance. Our integration of comprehensive marketing and donor engagement campaigns will ensure success. **£1,250 set up fee, then £1,000 per month**



Appeals

We design and implement expansive annual fundraising campaigns, spanning simple mailers to complex, multifaceted activities. We recommend two donations requests per year to maximise engagement and impact.

£1,250 per appeal



High Net Worth Individuals

This initiative involves identifying potential high-net-worth donors, creating necessary materials tailored to their interests, and testing fundraising propositions with an exclusive group of potential supporters.

**£2,000 per month
(allow 3 months to access long-term potential)**



“I found the Vision, Mission and Strategic Objectives session with Nick and my trustees to be really helpful. The debate in between the agreements was so useful for me. I felt very supported and left energised for the next stage.”

- Brett Parker, CEO, Potential

Consultancy, Mentoring and Strategy

As well as our core services, we also offer transformative services in areas such as consultancy and mentoring, events management, writing your fundraising strategy and setting up your in-house fundraising department.

Consultancy experience:

Immerse yourself in a transformative one-day Consultancy Experience with a top-tier fundraiser at your side. This is a chance to have your pressing questions answered, your materials and operations audited for excellence, and your team, regardless of its size, trained by our experts.

£500

Mentoring:

Set a new benchmark for success and empower your in-house fundraiser, with personalised mentoring from a sector expert.

£1,000 per month

Fundraising Strategy Write-up:

Our Fundraising Strategy Write-up will forge the path to success for your organisation. We'll analyse societal and sector-specific trends, conduct thorough SWOT analyses, and pinpoint strategic focus areas. The result? A tactical, timeline-driven plan equipped with success metrics and risk management strategies.

£2,500

Fundraising Office Set-up

Setting up an effective fundraising office can be a game-changer, and we're here to guide you every step of the way. We can advise you on implementing necessary systems (like CRM) and assist in the recruitment of the right talent, ensuring your charity has solid foundations.

£1,500

Events Strategy:

Our Events Strategy Service will amplify awareness and support for your cause. We specialise in creating programmes that resonate and raise funds, to ensure that each event is not just an occasion, but a milestone in development for your organisation.

£5,000

Events Delivery:

We also have an experienced Events Associate who will actively manage and run your event for you.

£POA

DO WE COST THE EARTH?

WE WORK WITH CHARITIES WITH A RANGE OF INCOMES AND BUDGETS. IF WE THINK A PARTICULAR SERVICE WON'T BENEFIT YOUR CHARITY, THEN WE WILL TELL YOU.

At the end of last year we were approached by Veterans With Dogs to help them raise much needed funds for their beneficiaries.

We would normally recommend our Starter Trust Fundraising block as a solid starting point, but this was out of their budget at the time. Instead, for £1,250 we put in for a range of easy to apply for grants, to bring in some quick money, with the idea that they could then reinvest whatever was brought in, into further fundraising activities.

We're delighted to say that within 3 months we brought in £20k for them.

That's a ROI of 16:1!

The charity is now in a position to invest in more fundraising blocks to bring in even more money, and ensure a stable future for their organisation.

You might now be thinking, well that's lovely for them, but my charity can't even spare £1k. Don't worry - we can still help you!

HERE'S HOW WE CAN HELP YOU WITH A BUDGET OF:

£250



1/2 day of Consultancy

One of our expert fundraisers will answer your questions and advise you on next steps.

£500



1 day Consultancy Experience

Have your questions answered in more depth, your materials and operations audited for excellence, and your team, regardless of its size, trained by our experts.

£1250



Small Mailer Applications (as above)

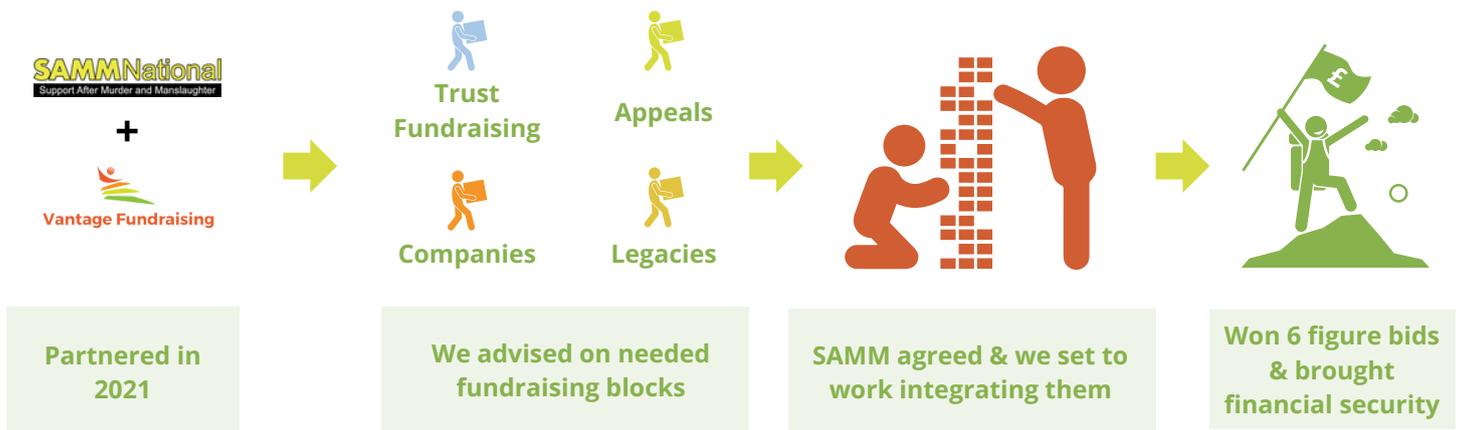
or

Vision, Mission & Strategy

We take a deep dive into your charity's goals and refresh or reformulate as needed.

CLIENT CASE STUDY: SAMM NATIONAL

SAMM'S CLIMB TO FUNDRAISING SUCCESS & A STABLE FUTURE



"We've tried professional fundraisers before and have had no success. Since employing Vantage Fundraising, we have had numerous grants including nearly half a million pounds from the National Lottery and City Bridge Trust. They are now doing legacy and corporate fundraising, with our turnover and impact rising rapidly."

Jo Early, CEO, SAMM National

Background

SAMM National, an organisation dedicated to providing crucial support to individuals grappling with profound loss due to murder or manslaughter, faced substantial challenges in increasing their fundraising efforts. With a turnover stalled at £100,000 and previous attempts at fundraising yielding little success, SAMM National approached us to find a breakthrough.

Challenge

The sensitive nature of SAMM's cause presented unique fundraising challenges. They had worked with professional fundraisers before, who had woefully under-delivered, leaving their CEO sceptical at our chances of success. Our new strategy had to deliver tangible results.

Our Approach

Recognising the potential in SAMM's mission and the importance of their work, we implemented a tailored strategy beginning with our starter Trust programme. This approach, known for high returns albeit with initial slow progress, was a calculated risk aimed at building a solid foundation for SAMM's fundraising capabilities.

Turning Point

We extended our support for SAMM beyond our initial agreement while we waited for the responses to our applications. That decision marked the beginning of a significant turnaround. Our inspiring new Case for Support, and consistent outflow of applications, began to yield substantial grants, progressively increasing in size and frequency.

Results

Our strategic decision to focus on competitive, large bids, enhanced by refinements in impact measurements, culminated in a transformative grant that not only doubled SAMM's turnover but also secured three years of financial stability.

Beyond Funding

After embedding several new services as a result of the successful funding, Jo commissioned us to run a Vision, Mission, and Strategic Objectives session. This enabled a further new Case for Support to be written, and larger, more significant bids are now in the pipeline.

We have implemented legacy and corporate fundraising in the last year and begun an annual appeal. This has led to more people being helped, and the CEO has been able to step back from front-line activities, and build the charity as befits her role. Being able to focus on her real role of CEO rather than trying to do everything, Jo now advises ministers and mayors, and appears on mainstream media.

I'm delighted we've been able to help SAMM National achieve, fundamental change that has empowered them to continue and expand their invaluable work. Their journey, fuelled by our support, has not just paved a clear path forward but also eased their financial worries. Jo, their CEO, can now channel her energy into the heart of their mission - touching more lives and expanding their reach.

This transformation fills me with particular pleasure. It's not just about the strategic planning or the partnership; it's about the deep connection we forge with each charity we support. We're more than just allies; we're united in our cause, hand in hand, desperate to see them soar. Witnessing SAMM National ascend to new heights is a testament to what we can achieve together. Through sharing their story, I hope to shine a light on the profound impact of our collective efforts and inspire you to dream of the heights we can reach together.



Nick Ryan, Director, MCIOf
DipM FCIM FRSA

HOW TO WORK WITH US

Our Fundraising Process

All charities are different, and therefore your funding journey needs to be tailored to your specific needs.

You may benefit from our Vision, Mission and Strategy service, need the long term efforts of Trust Fundraising, or task us with setting up an event or your fundraising office.

Book a call

Contact us to arrange an informal 30 minute exploratory call. We will determine how we can best help your organisation and discuss ways forward.

Proposal

We will put together a bespoke Proposal for your charity, detailing exactly how we will raise support for you. This will include detailed Strategic Approaches and Support Options.

The First Milestone

Once you have signed with us, and your essential needs have been identified, our team will begin to prepare and introduce your first fundraising block.

Future Blocks

Once funding from the first block has been received, we will explore investing in and introducing the next set of crucial funding blocks. These can include sourcing funds from Companies, Schools, Digital Donations, Appeals, Legacies, and High Net Worth Individuals.

Reporting

You will receive monthly reports of all approaches made as well as a forecast of expected income. In addition, we can attend board meetings and provide information when and as needed.

THE VANTAGE FUNDRAISING TEAM

Whatever your need, our expertise will always save you valuable time and money.

The Vantage Fundraising team is made up of a close knit group of experts each bringing deep knowledge and experience of our field. We work together to meet your challenges with innovative solutions, and champion your mission with passion and precision.

We work with you as part of your team; your performance metrics, are communicated every week to everyone at Vantage, so your goals *really are* our goals.

MEET SOME OF OUR KEY PLAYERS



Nick Ryan DIRECTOR

Starting his fundraising career at Help the Aged, and NSPCC, Nick brings a wealth of experience in fundraising across various sectors.

He was the founder and CEO of Schools Funding Network, which he ran for six years before setting up Vantage Fundraising.



Rebecca Mellor
HEAD OF DEVELOPMENT



Laura Davis
TRUSTS



Barbara Ahland
TRUSTS



Jonathan Catherall
TRUSTS



Nigel Tailyour
TRUSTS & COMPANIES



Muhanna Chowdhury
BUSINESS DEVELOPMENT
MANAGER



Veronica Martin, OBE
HIGH NET WORTH INDIVIDUALS



Wendy Pigeon
LEGACIES

'Vantage Fundraising wrote our latest fundraising appeal, resulting in a return three times better than previous in-house efforts.'

- Louise de Winter, CEO, The Urology Foundation

'Vantage Fundraising has shown what is possible with the fundraising strategy they wrote for us. As a result, we are now in the middle of developing and integrating four new fundraising disciplines over the next three years with their help.'

- David Botha, Executive Director, The Royal College of Radiologists



Vantage Fundraising

Get in touch, we'd love to hear from you:

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