

Individual Giving – resource list

Summary

This resource list provides details of guidance and help available to support charities and not-for-profit groups in developing their individual-giving fundraising. It contains links to sources of support and introductory guidance on topics relating to individual giving.

Who is this resource for?

This resource list is intended for anyone working or volunteering for a not-for-profit theatre starting on their individual fundraising journey.

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Individual Giving

Individual giving is when a person gives a gift or a donation to charity. This donation might be a one-off payment, regular giving or a gift in their Will (legacy).

There are a variety of methods that you can use to fundraise from individuals such as fundraising events, annual giving schemes, collections, lotteries, online campaigns and legacies. Before undertaking any fundraising activity, you should take time to think about which methods are most appropriate for your organisation. Consider who your target audiences are, how best to reach and inspire them to donate and what resources you have available or need to find to carry out your identified activities.

Individual giving is a big topic. It includes legal and regulatory aspects and should be linked to your wider fundraising and communication strategies. While this may seem daunting, help is available to guide you through these topics and this resource list will point you to some introductory guidance.

Advice from the Fundraising Regulator

Fundraising by charities, and organisations with entirely or predominantly charitable objectives, such as Community Interest Companies, is regulated by the Fundraising Regulator through the Code of Fundraising Practice. Charities and CICs must fundraise in a legal, open, honest and respectful way, and they should follow the rules set out in the code.

The Code of Fundraising Practice sets out the standards that apply to fundraising generally and specific fundraising methods:

- [Code of Fundraising Practice](#)

The Fundraising Regulator also produces a range of guidance to support best practice in fundraising, including methods associated with individual giving:

- [Guidance on Fundraising Topics](#)

Additional support for Trustees

If you are a Trustee of a charity, you will find that your charity regulator also has guidance on your responsibilities in relation to fundraising and how to develop best practice.

From the Charity Commission (England and Wales)

- [Charity Fundraising](#)

From the Charity Commission (Northern Ireland)

- [Fundraising](#)

From the Scottish Charity Regulator (OSCR)

- [Fundraising Guidance](#)

Chartered Institute of Fundraising

The Chartered Institute of Fundraising is the professional membership body for fundraising. It represents and champions the work of fundraisers and provides advice and support. To access their full range of services you would need to become a member, but they do provide a range of free guidance and resources which you can find on the link below:

- [Chartered Institute of Fundraising Guidance and Resources](#)

Main types of Individual Giving Fundraising

Low-level Friends schemes: often a marketing initiative rather than fundraising, to encourage audience loyalty and increased engagement.

Mid-level annual giving/patron schemes: aimed at loyal audience members with the capacity to give more. They tend to be a mix of philanthropy and benefits, with an emphasis on showing the impact of a gift, and different gift levels linked to benefits, like priority booking, invitations to backstage events, e-newsletters etc.

Giving syndicates: created to support a specific initiative e.g. a production or an education project. People giving as part of a syndicate are made to feel closely connected to and involved with the particular project they are supporting.

Major donors: people making significant size gifts (whatever size that is for your organisation), usually for a specific project, with very individual, personalised stewardship.

Events: from quiz nights to galas, raffles to auctions, targeted at existing donors and used to engage new ones and reach a wider audience.

Online Fundraising Platforms

Whichever type of fundraising you are doing with your audience, enabling individuals to support you through online methods is likely to be a key part of your individual giving fundraising strategy. The main benefits of using online fundraising platforms include reaching more people and greater cost effectiveness than traditional methods of fundraising, convenience for both fundraisers and donors, enhanced sharing capabilities to link with your social media, and interactive tools that allow you to track progress and engage supporters.

There are very many different fundraising platforms which have multiple features and functions. You can use them to collect straightforward one-off or recurring donations, to hold online raffles and auctions, to run match funding and crowdfunding campaigns and much more. They each have different pricing structures. We have included some links below to help you consider which platform might be right for you:

- [Charity Digital - What do you need from a fundraising platform?](#)

- [Charity Digital - The best online fundraising platforms for charities](#) (accurate November 2024).
- [Charity Excellence - Charity online fundraising platforms](#)

You will need to do your research and pick the platform that best serves your organisation's needs, your audience needs and your budget.

High-profile fundraising organisations such as JustGiving, GoFundMe and Crowdfunder also provide guidance on how to use their platforms effectively and how to get the most from your fundraising campaigns. We have put a selection of their links below:

- [Crowdfunder for charities](#)
- [Crowdfunder Knowledge Hub](#)
- [GoFundMe Fundraising Tips](#)
- [GoFundMe Help Centre](#)
- [JustGiving Resources for Charities](#)

Creating effective fundraising campaigns

To make your fundraising campaigns effective you need to understand your audience, their motivations and connection with your organisation, and design an engaging and targeted campaign.

You could use the Audience Agency's Audiences Spectrum to understand more about your audience. This tool is a geo-demographic profiling and targeting tool which segments the UK population by their attitudes towards culture. While there are charges for some of Audience Agency's services you can access some information for free on the link below:

- [Audiences Spectrum](#)

There is a wide range of guidance available to help you communicate effectively with audiences and create engaging campaigns. We have listed three resources below from Apollo Fundraising to help you avoid three common fundraising curses (knowledge, embarrassment and being boring):

- [The Curse of Knowledge](#)
- [The Curse of Embarrassment](#)
- [The Curse of Boring](#)

Once you receive a donation don't forget the importance of saying thank you, as this is crucial in building a relationship with your donor as explained in this short video:

- [Making your 'Thank Yous' Super](#)

Arts Marketing Association has a free resource centre called [Culture Hive](#) that includes many resources that will support individual giving campaigns, looking at

understanding audiences, use of digital and specific campaigning methods and communication.

You can find a programme of curated resources that follow a structured process for building your brand, understanding and building audiences and improving communication here: [Culture Hive Shared Ambition resources](#)

Data protection

It is important that your fundraising is compliant with data protection regulations. Here are some links to resources to help you comply with your obligations:

- The Information Commissioner's Office is the regulatory body responsible for data protection in the UK. They have a library of resources covering different aspects of data protection and regulations relating to electronic communications: [Advice for organisations](#)
- Guidance from the Fundraising Regulator about how data protection relates to fundraising: [GDPR briefing for fundraising](#)
- Guidance from the Chartered Institute of Fundraising about GDPR and fundraising - [GDPR - The essentials](#)

Gift Aid

Make sure that you maximise your donations by claiming Gift Aid. For some introductory information on how Gift Aid operates you can look at the following guidance:

- The Charity Finance Group helps voluntary organisations with all aspects of financial management and they have a simple [Gift Aid guide](#)
- The Chartered Institute of Fundraising also has a guide – [CIOF Gift Aid](#).
- HMRC overview, with links to more detailed guidance on specific scenarios - [HMRC Claiming Gift Aid as a charity or CASC](#)

Please note, if you are setting up a giving scheme with benefits, depending on their value, you may not be able to claim Gift Aid on the entire amount. Some theatres avoid this by ensuring the commercial value of the benefits they give does not exceed the Gift Aid rules, others split the given amount into a "donation" portion and a "benefits" payment. There may be VAT implications too. You should liaise with your finance person/accountant when devising your giving scheme.

General sector support

There are support organisations that provide advice and information to community groups and charities, including help with fundraising. We have put links to the national support bodies below.

For England – National Council for Voluntary Organisations [NCVO](#)

For Scotland – Scottish Council for Voluntary Organisations [SCVO](#)

For Northern Ireland – Northern Ireland Council for Voluntary Action [NICVA](#)

For Wales – Wales Council for Voluntary Action

[WCVA](#)

For Co-operatives across the UK

[Co-operatives UK](#)

These organisations are membership bodies but do provide some guidance and information for free.

There may also be a voluntary support organisation local to your local area or region that can provide advice and information.

In Wales, local organisations form a network called the [Third Sector Support Wales](#) and while its resources are written for organisations in Wales, much of the content is also applicable to organisations in England. If you are based in Wales, you can use the website to find your local support body and access a free resource centre called the [Knowledge Hub](#), which includes guidance on individual giving methods of fundraising. You will need to register via the website to access the free resources.

The role of Theatres Trust

Theatres Trust is the national advisory public body for theatres and is a statutory consultee on theatres in the planning system. We provide a free advice service for anyone looking to save, restore or revive theatres or undertake a capital project in an existing theatre, including governance advice.

Contact us at info@theatrestrust.org.uk with information about your theatre and how we can help.

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