

# THE PERFECT FUNDRAISING PARTNERSHIP:

EQUIPPING CHARITIES AND SENIOR  
VOLUNTEERS TO TRANSFORM  
PHILANTHROPY PROGRAMMES

# FOREWORD: SIR TREVOR PEARS CMG



**Sir Trevor Pears CMG**  
Chairman,  
Pears Foundation



We are very pleased to be supporting this important piece of research, which speaks so powerfully to the challenges affecting charities and not-for-profit organisations in the UK today.

As an independent British family foundation, long term relationships and partnerships are at the heart of everything we do.

Getting the relationship right with senior volunteer fundraisers leads on to charities becoming more effective, and this can be truly transformational for them. We've seen this in action, but sadly we've also seen what happens when it doesn't work.

By learning from the shared experiences of professionals and volunteers, we hope this report will help charities and volunteers work better together towards achieving 'The Perfect Fundraising Partnership'.

I am also delighted to take this opportunity to congratulate Jeff and the wonderful Solid Management team on their twentieth anniversary and to thank them for their tremendous dedication and contribution to so many important causes across the voluntary sector. We have always valued (and enjoyed!) working with them and wish them continued success.

# FOREWORD: JEFF SHEAR



**Jeff Shear**  
Managing Director,  
Solid Management



**Solid Management &  
Consultancy Services Ltd**

Established in 1997, Solid Management has remained deliberately small. We employ five consultants, each of whom has years of experience leading fundraising teams and major appeals, and has personally solicited seven-figure gifts. This gives each of us a unique understanding of the challenges facing fundraising professionals, particularly in the philanthropy field. We focus on major gift fundraising, both in supporting existing programmes and in helping to establish appeals and new activities, often working closely with senior volunteers.

[www.solidmanagement.co.uk](http://www.solidmanagement.co.uk)

It is hard to believe that twenty years have gone by since Solid Management was set up. During that time, I have had the privilege of meeting many remarkable people and my respect for those involved with all aspects of fundraising has grown immeasurably.

Millions of people every day act on their desire to bring about positive change for people across the world, for our planet and for its resources. At a time when it feels that our wonderful vibrant and diverse voluntary sector is under attack, it is heartening to work with so many people who really make a difference.

One of the most exciting things I have witnessed in my career is the magic that happens when inspirational philanthropists and fundraisers forge a partnership that transforms the prospects of an organisation.

These partnerships can result in astonishing growth, while senior volunteers from all walks of life have found motivation and inspiration through engaging with causes that matter.

Solid Management has worked with many charities and senior volunteers on forging these meaningful relationships, so I am delighted that we are marking our 20th anniversary by producing this report. I hope it will provide an insight into this important area and equip charities with the tools they need to build stronger and more effective partnerships.

I am thrilled that so many people have taken part in this research and would like to thank everyone that has taken the time to contribute. In particular, I am grateful to my friend, Sir Trevor Pears, and to Pears Foundation for their wonderfully generous support as our sponsor and want to pay tribute to how effectively Pears Foundation works in partnership with the sector.

Finally, I would also like to thank my amazing Solid colleagues – Amanda, Jane, Carmel and Susan who are a credit to the sector. Without them, Solid Management wouldn't exist and I certainly wouldn't have enjoyed this journey so much. In every way, they inspire me and keep me going. Who knows, maybe for another twenty years?

# FOREWORD: EDWIN DRUMMOND



**Edwin Drummond**  
Chair, Volunteer Board  
Fundraising Special  
Interest Group  
Institute of Fundraising



As the charity sector grows increasingly competitive and fundraising regulations change, fundraisers must adapt their practices beyond traditional approaches, to find more innovative ways of working with supporters.

Having worked with volunteers throughout my fundraising career I am delighted that the Institute of Fundraising (IoF) Volunteer Board Fundraising (VBF) Special Interest Group (SIG) and Solid Management have been able to collaborate to undertake the sector's first research project into the use of senior volunteers in UK fundraising.

The IoF VBF SIG was set up in 2012 and has held a series of events and forums to offer people in the sector the opportunity to learn from expert speakers and meet other fundraisers working with, or exploring the use of, senior volunteers.

Since its formation, the SIG has been discussing the possibility of conducting a research project to understand more about working with senior volunteers. As this fundraising approach is seeing marked growth across the sector, we wanted to offer fundraisers the opportunity to share knowledge, experience and best practice with others, and to provide a practical toolkit to help people achieve success in all types of senior volunteer led fundraising.

We felt strongly that a report in this area would help to support our fellow fundraisers and offer guidance in an area that may be new to people or organisations. We are therefore very pleased to launch the report having had the opportunity to draw on the perspectives of both charity professionals and the volunteers themselves, giving us unique insight from some of the sector's leading philanthropists.

If you already work with senior volunteers, are looking to grow your senior volunteer network, or simply find this area of fundraising of interest, I hope the report, and its findings, will be of interest and help you and your charity.

Thank you again to all who took part, the wonderful team at Solid Management and all of the Volunteer Board Fundraising Special Interest Group members who have worked so hard to get this report off the ground.

**fundraising**

*noun /fʌndˌreɪzɪŋ/*

The action of seeking financial contributions from external sources for a charity.

**senior fundraising volunteer**

*noun /siːnjə fʌndˌreɪzɪŋ vɒl.ənˈtɪə/*

An individual who is perceived as having succeeded in their business or personal life, seeking financial contributions for a charity by making introductions to, and asking for support from, their personal network of family, friends and business contacts.

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“Never be embarrassed about asking for a gift for a charity that you believe in. Never criticise another charity but always be positive about the charity for which you are asking the gift. Always try and show exactly what the charity does and the benefits that it provides and the help that it gives. Look the donor in the eye and ask for the gift. The worse that can happen is that they say No!”

*Lord Levy*

“You can only transform your fundraising through transforming your networks; you can only transform your networks through senior volunteers.”

*Gemma Peters, King’s College London*

“I need a high degree of confidence in the professional team...to know that I can trust them with my relationships; and to ensure the money will be used in the correct way and that the projects are worthwhile.”

*Lord Fink*

# EXECUTIVE SUMMARY

The financial impact of senior volunteers on the charity sector has never been measured. Income generated in partnership with senior volunteers is not routinely tracked by charities or recorded in their accounts. However, anecdotal evidence suggests that their impact is significant.

Support from senior volunteers has been critical to the success of the most ambitious fundraising appeals in the UK in recent years, including King’s College London’s ‘World Questions/King’s Answers’ £500m appeal and Cancer Research UK’s £100m ‘Create the Change’ campaign for the Francis Crick Institute.

Our research draws on the perspectives of both charity professionals and senior volunteers, including some of the sector’s leading philanthropists. This gives us a unique insight into how to create partnerships with senior volunteers that really work.

The main findings are as follows:

## Peer-to-peer fundraising can bring remarkable growth and transformation

Fundraisers report that involving senior volunteers in relationship fundraising brings access to new prospects and increased income. Senior volunteers can help to build a pool of prospects for charities that have no history of relationship fundraising as well as enabling fundraisers to create deeper relationships with prospective donors. This in turn increases a charity’s networks and ultimately its income.

## ‘Cold’ approaches can work in volunteer recruitment

While the majority of senior volunteers get involved in fundraising because they have an existing involvement with the charity and are most likely to be recruited by other senior volunteers, the report shows that there are other routes to successful recruitment. Many senior volunteers become involved without having a prior relationship with a charity if they are passionate about a cause.

## Askers must be givers

Senior volunteers need to make a personally meaningful donation to a charity if they are to ask others for money. Both fundraisers and volunteers felt that meaningful giving by senior fundraising volunteers gave credibility.

## Volunteers don’t always enjoy asking for money

The majority of volunteers do not enjoy asking for money. Instead they cherish the unique and valuable role they can play. They rely heavily on support from fundraisers and senior leadership when asking for money.

## The balance can be hard to strike

Senior volunteers and charity staff can struggle to establish a working equilibrium, with misunderstandings and culture clashes occurring particularly over managing each other’s expectations. The success of these relationships can make the difference between the success and failure of the fundraising programme, so it is important to communicate clearly and establish expectations from both sides at the outset of the relationship.

## The future looks uncertain

Many senior volunteers are concerned about succession. They report that younger philanthropists appear to be less willing to engage their networks and help with asking, which could have serious consequences for charities’ ability to fulfil their missions in the future.



### Some of the most common structures for engaging senior volunteers are as follows:

#### Development/Appeal/Campaign Boards:

A group of volunteers, usually recruited and convened under the direction of a Chair, to endorse and support the delivery of a charity's fundraising campaign, appeal or project. Typically, the group is tasked with accessing members' networks and using their influence to secure significant donations and high level corporate partnerships and to maximise the impact of fundraising events and other opportunities.

#### Business Advisory/Industry Sector Groups:

A group of volunteers convened to deploy their expertise, networks and influence to provide and/or secure financial and other support for a charity from individuals and organisations within specific business/industry sectors. Support often includes professional advice which charities might otherwise have to pay for.

#### Giving Clubs:

Giving clubs bring together donors to support charities or projects with money and expertise. They usually have a Chair, who might convene a committee, to recruit new members. Members are expected to make a financial donation at a set level and are given access to a range of defined benefits, such as being invited to events where they can network, being listed in the charity's annual report and having opportunities to become more connected with the cause; they may be asked to lend their support as senior volunteers to recruit further members.

#### Giving Circles:

Giving circles are peer-led networks of donors who come together in small groups to support a specific project with money and expertise. Individuals are expected to make a financial donation (often at a set level) and in return are given detailed information about the project and work as a team with their peers to raise money.

#### Special Event Committees:

Special event committees are groups of volunteers, usually convened under the direction of a Chair, to support the organisation and delivery of a specific fundraising event for a charity. The event can be delivered either 'on behalf' of the charity or 'in aid' of the charity, and this depends on whether the charity or the committee is the official organiser of the event.

# INTRODUCTION

Voluntary fundraising was historically the lifeblood of the charity sector, with most charities endowed by individual philanthropists or supported by their founder's friends and family. Even today, when some charities and non-profit organisations are funded by local or national government, or have developed alternative income generation models to ensure self-sufficiency, an estimated 100,000<sup>1</sup>, rely on voluntary fundraising.

### What is senior volunteer fundraising?

Voluntary fundraising takes many forms, from individuals organising coffee mornings to celebrities delivering large-scale international fundraising galas. This report is concerned with a particular form of 'peer-to-peer' fundraising led by 'senior volunteers'. These volunteers are defined as successful people who are often donors or charity supporters, who seek financial contributions for a charity by making introductions to, and asking for support from, their personal network of family, friends and business contacts.

Peer-to-peer fundraising by senior volunteers can be transformational for a charity. As well as access to networks of wealth, influence and opportunity, credibility when asking for support and leverage to persuade and stretch donors, volunteers can lend powerful endorsement to an organisation. They are also able to draw on their experience in other areas of business or governance to challenge charities to perform better, more strategically and more effectively.

Over recent decades the importance of senior volunteer fundraising has been recognised more widely. Peer-to-peer fundraising by senior volunteers has become more formal and often managed more professionally.

The late Dr Henry Drucker, the first Development Director at Oxford University and founder of Oxford Philanthropic, pioneered this approach. He introduced new techniques based on the US system of fundraising through alumni networks. This approach helped shape the first major fundraising appeals led by senior volunteers; Great Ormond Street Hospital's £54m Wishing Well Appeal of the late 1980s and the NSPCC's £250m Full Stop Appeal of the late 1990s.

The current climate of austerity, together with the uncertainty of Brexit and rising demand for services across the charity sector, are all contributing to the need for fundraisers to raise more money and find new ways to maximise income. Alongside this, significant changes, including the establishment of the Fundraising Regulator, the new Fundraising Preference Service (FPS), as well as the incoming General Data Protection Regulation (GDPR) have introduced a new regulatory framework within which fundraisers have to operate.

This report shows that working with senior volunteers in order to establish and enhance philanthropy programmes could be the answer for many charities that hope to maximise income. When a partnership with a senior volunteer works well it can revolutionise a charity's fundraising, but caution is needed, because when it fails the damage can be long lasting.

**"You can achieve things with the help of senior volunteers that you simply can't with other areas of fundraising...they can achieve miracles for you through their experience, influence and energy."**

*Kath Abrahams, Diabetes UK*

This research aims to create a better understanding of how to develop partnerships with senior volunteers that really work, and to provide a toolkit that shares best practice to support successful and effective senior-volunteer-supported fundraising across the voluntary sector that is compliant with new regulations and meets the very highest standards of best practice. We hope the report will generate discussion, debate and further research.

<sup>1</sup>NCVO (2016) UK Civil Society Almanac 2016, London: NCVO.  
Mohan, J. and Breeze, B. (2015) The Logic of Charity: Great expectations in hard times, Basingstoke: Palgrave Macmillan.

“It is important for me to look people in the eye and be able to say ‘do as I do’ – big givers need big askers.”

Lloyd Dorfman CBE

“I’m rather pessimistic: the whole fundraising model has changed in the time I’ve been involved in fundraising. It’s much tougher asking for money, people renege on their commitments in a way they never used to and very few people are prepared to ask for money now - you see the same names again and again and no-one is coming up behind you. The new and young rich don’t want to give, they want to set up their own foundations and charities – they want to do their own thing, it’s a totally new model – a paradigm shift.”

Dame Vivien Duffield

# METHODOLOGY

In order to find out how fundraisers work with senior volunteers, and how senior volunteers experience working with charities, our research used a mixture of quantitative and qualitative methods. The quantitative data was gathered through carefully designed online questionnaires and the qualitative data was gathered via a series of face-to-face and telephone interviews.

Two online surveys were conducted between February and March 2017. The first survey was aimed at fundraisers with significant experience of working with senior volunteers and comprised 25 questions; the second was aimed at senior volunteers with significant experience of fundraising and comprised 26 questions. The questions were largely multiple choice, with the opportunity to provide further information where respondents could expand on their answers and provide examples and illustrations.

The survey was disseminated with help from the Institute of Fundraising’s Special Interest Group on Volunteer Board Fundraising. We received 163 valid responses from fundraisers and 34 from senior volunteers.

Most of the fundraisers who participated (82%) worked for large charities, those with an annual income in excess of £1m, as shown in the table. While these larger charities account for only 3% of charities in the UK, they receive over 80% of income<sup>2</sup> and are the most prolific fundraising organisations.

Interviews were conducted between April and June 2017 with 12 fundraisers and 12 senior volunteers to capture more detail through examples and case studies. The list of interview participants is on page 46. We interviewed only senior volunteers who had not completed the online survey, increasing the range of experiences and opinions reflected in the report.

Size of charity based on annual voluntary income	
Major (over £5m)	61%
Large (£1m-£5m)	21%
Medium (£500,000 - £1m)	10%
Small (under £500,000)	8%

<sup>2</sup>NCVO (2016) Civil Society Almanac

“Believing in the charity that you are asking for is essential as is having an understanding of the potential donor and being totally honest and sincere. Doing your homework and following up with the donor and establishing both a rapport and a relationship is not only the key to success but also makes it so much more rewarding.”

Lord Levy

“Most people find asking for money quite hard and a common problem on development boards is that members want to talk about anything but asking – they come up with suggestions, ideas and even query the strategy to avoid the task at hand. This is when development boards can go wrong. They need a lot of focus and direction from the Chair to keep them on track – and the Chair has to be clear about the strategy and what members have signed up to.”

Sir Vernon Ellis

“When I meet prospects and donors I like someone with me who has a detailed and thorough knowledge of the organisation and the project we are fundraising for, not to make the ask but to ensure we have all the relevant information and can answer any questions. I don’t want to be embarrassed – we are successful when we work together as a professional team.”

Dame Gail Ronson

# FINDINGS

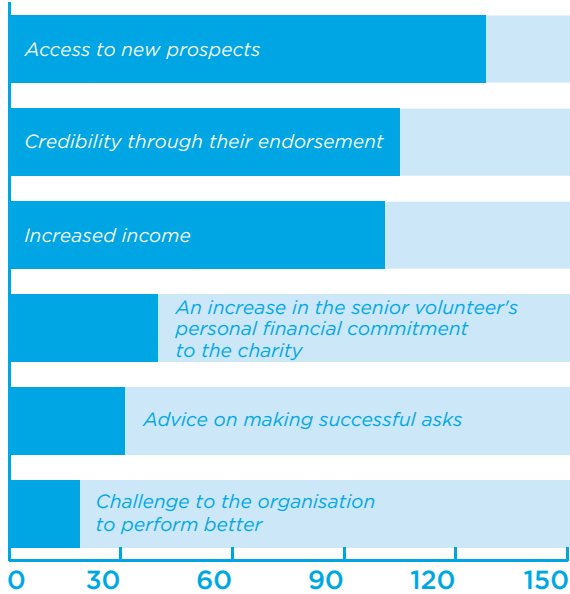
## 1. What benefits do senior volunteers bring?

Respondents said that senior volunteers bring the following benefits:

- access to new prospects
- advice on making successful asks
- credibility through endorsement
- increased income
- an increase in the senior volunteer’s personal commitment to the charity
- challenging charities to perform better.

Fundraisers most commonly ranked the top three benefits of involving senior volunteers as access to new prospects, credibility through their endorsement and increased income.

### 1.1. The benefits of involving senior volunteers in fundraising – Benefits ranked as top three by fundraisers surveyed



Several respondents noted that senior volunteers could help to build a pool of prospects for charities that had never undertaken major relationship fundraising before.

“I’ve worked with several charities where senior volunteers have kick-started a new major gift programme – it simply would not have been possible without having them to introduce potential donors who then went on to give themselves and to introduce others. Senior volunteers actually built a new income stream with a fantastic ROI.”  
*Sue Collins, Pancreatic Cancer UK*

Senior volunteers also prioritised access to new prospects and increased income as the main benefits of their involvement but also emphasised the advice they can give to making successful asks and the opportunity to increase their own personal commitment to the charity.

Both fundraisers and senior volunteers stated that volunteers’ knowledge of the people they approach enables them to ‘start the conversation from the right place,’ thus accelerating the fundraising process and maximising relationships.

“We can show how we align with what the donor wants. We don’t start with ‘here is what we do – aren’t we great?’ We start with ‘here is how we can support your goals’”  
*Volunteer survey respondent*

Senior volunteers recognised that their own experiences of being approached for donations gave them an important insight into what works and what doesn’t. They noted that they have the added credibility of not being ‘paid to say this’ when it comes to asking for support.

**Key finding:**  
**Committed senior volunteers involved in peer-to-peer fundraising have provided charities with invaluable knowledge and unique insights that enable successful relationship development, asking and stewardship of new and existing prospects and major donors. This increases the networks and the income of charities they work with.**



Discussion points:

■ Given the value of new prospects and increased income that senior volunteers bring to charities, it is surprising that very few organisations record data on their impact. The reliance on anecdotal evidence is unusual given the sector’s focus on analysis and performance management across other areas of fundraising. Fundraisers would benefit from developing systems to track and assess the progress of partnerships with senior volunteers. This could provide evidence for the efficacy of this form of fundraising.

■ From May 2018, all charities holding and processing personal data of individuals will have to comply with the new GDPR (General Data Protection Regulation). As is the case now, charities will need to have established a legal basis (either having secured the individual’s consent or a having defined a clear legitimate interest) to communicate with individuals and to undertake research on them. This does not stop senior volunteers reaching out to their networks and contacts in a personal capacity, but charities will need to ensure that in communicating with new prospective donors and processing their data (which includes the act of undertaking background research into their personal wealth and business connections) they are compliant with GDPR.

2. How are senior volunteers recruited?

Fundraisers reported that they find it easiest to source senior volunteers through people currently involved with the charity (83%) and through existing volunteers (80%). Senior volunteers commonly have other links to the charity, in some cases as beneficiaries. One respondent from a university noted that all their senior volunteers were alumni. Several interviewees reported the success of recruitment through an ‘initial connector’ – a passionate volunteer, who need not be an asker themselves, but who is effective at engaging, recruiting and developing senior volunteer fundraisers.

However, 44% of fundraisers reported that they had successfully recruited volunteers who were previously unknown to their charity through a carefully considered but ‘cold’ approach. This was

particularly successful when the potential volunteer had a known affiliation to the cause, but no known personal connection to that particular charity. One fundraiser noted that his charity approached ‘people identified but not selected for Trustee roles’ and both fundraisers and senior volunteers highlighted how executive search firms could help with successful volunteer recruitment. Widening the pool of prospective senior volunteers can only help to increase diversity.

“You need senior volunteers to have already bought into the mission, so it tends to be people who are existing donors ... If not existing donors, volunteers can be engaged through someone else associated with the charity such as a trustee. When we have gone the ‘cold’ route, it can be ‘too much too soon’, and in some cases they have reneged on their commitment because they haven’t fully bought into the cause.”  
*Charlotte Matier, Alzheimer’s Society*

Half of the senior volunteers who responded to the survey reported that they got involved with a charity because they were asked by another senior volunteer and 35% because they were asked by a staff member. 84% of senior volunteers added that they serve as a trustee to the charity they fundraise for and 81% help on an ad-hoc basis in their area of professional expertise as well as in fundraising.

50% of senior volunteers claim to have approached a charity proactively – with 32% saying they were affected by the cause and approached the charity and 18% reporting that they decided to become more involved following attending an event.

The overwhelming majority of senior volunteers (82%) reported that they have been involved for over five years with the charity they support. Several noted that they had founded the charities they fundraise for.

Key finding:  
**Senior volunteers are likely to get involved in fundraising if they have an existing involvement with the charity. They are most likely to be recruited by other senior volunteers. However, many also get involved without having had a prior relationship with, or individual connection to, a charity, where they have a genuine affiliation to the cause: in these instances ‘cold’ approaches have been successful or volunteers have proactively offered their involvement.**

Discussion points:

■ While it appears that approaching existing contacts remains the most successful way to recruit senior volunteers; the success of new ‘cold’ approaches, particularly those made by staff, is both surprising and encouraging. Further research about recruitment may reveal better ways to use executive search agencies and social media to improve senior volunteer recruitment. It is possible that these new routes will help charities to recruit a more diverse pool of senior volunteers.

■ Appropriate and thorough prospect research is the basis for identifying potential senior volunteers and making successful ‘cold’ approaches. While fundraisers should carefully consider how to do this research within the new regulatory environment, it has a vital role to play, as Dr Beth Breeze has detailed in her report ‘Good asking: the role of research in efficient, effective and enjoyable fundraising’.<sup>3</sup>

3. Why do senior volunteers get involved in fundraising?

Senior volunteers identified a number of personal benefits from their involvement in the fundraising process. These include finding out more about the cause, getting their contacts involved, meeting new people and attending interesting events. 42% identified the most important benefit simply as being able to make a practical difference to a charity they were passionate about in a way that wasn’t possible for other people.

When asked why they can help as fundraisers where others can’t, volunteers cited their access to networks of wealthy people as well as their credibility to ask (and ability to stretch) prospective donors, and their particular skills and experience as askers.

“I especially enjoy meeting the people who benefit from my support and the support I am able to leverage from my contacts. For me this brings incredible joy and reminds me of what a privilege it is for me to be able to both give and to fundraise.”  
*Lee Portnoi*

“It is important for me to look people in the eye and be able to say ‘do as I do’ – big givers need big askers.”  
*Lloyd Dorfman CBE*

When asked if they enjoy being involved in asking for money, senior volunteers’ responses varied. Over 60% said ‘no’ or ‘it depends’ and only 35% said they enjoyed it.

“You have to be passionate about the ‘product’ because there’s nothing enjoyable about asking for money – I ask because I am passionate or because I find it a personal challenge. You can only really be asking for one or two causes at a time to be credible.”  
*Dame Vivien Duffield*

73% of survey respondents and all the interviewees reported that they fundraise for more than one charity: the number ranged from two to eight. Several interviewees reported that they were involved in numerous charities as a direct result of how few effective volunteers were involved, and they felt obliged to help through fundraising.

<sup>3</sup>Breeze, B. (2017) Good Asking: The role of research in efficient, effective and enjoyable fundraising. Institute of Fundraising.

“It’s not hard to find people who would like to take on volunteering fundraising roles – but it’s very hard to find people who are experienced and bold enough to ask....it tends to be the same people; you see the same names again and again.”

*Sir Vernon Ellis*

Many interviewees did not see a conflict of interest in fundraising for several charities at the same time. They saw that being involved in a number of causes helped to broaden their networks, develop their expertise and learn from best practice. However, fundraisers felt differently, arguing that if a senior volunteer was going to be effective, he or she should only fundraise for one charity at a time.

“A good senior volunteer needs to be an ambassador – flying the flag for your organisation at all times, which means it’s hard for them to effectively do this for more than one organisation at a time.”

*Fundraiser survey respondent*

#### Key finding:

**The majority of senior volunteers claim not to enjoy asking for money, but they get involved in fundraising because they are passionate about the cause and understand that by fundraising that they can play a unique role. Most are involved as fundraisers for more than one charity and through their involvement enjoy the opportunities to get closer to the cause and beneficiaries, meet other people involved and attend interesting events.**

#### Discussion points:

■ In order to successfully recruit and motivate senior volunteers, the voluntary sector needs to recognise the unique impact they have, which means tracking and reporting achievements.

■ Fundraisers must recognise the discomfort that senior volunteers have about ‘making the ask’ and need to ensure that senior volunteers understand that the actual ask is just one step in the fundraising process. Senior volunteers can make an impact at many points on the donor journey, identifying

potential new supporters amongst their networks, making introductions and helping to host events. In situations where the fundraiser believes it is critical that a volunteer is involved in ‘making the ask’, the organisation needs to provide appropriate support and guidance.

■ Senior volunteers are clear about the benefits of fundraising for more than one charity; nevertheless, there is reluctance among fundraisers to recognise this. Fundraisers are naturally protective of their relationships with senior volunteers and donors, however broadening networks, developing expertise and sharing best practice should be valued as benefits for the sector.

#### 4. Do senior staff need to play a part in the relationship with senior volunteers?

All senior volunteers stressed the importance of having access to senior people within the charity, including the chief executive and other senior staff. Having a meaningful relationship was seen as critical to deepening their understanding of the charity’s strategy and the role of fundraising within it, as well as proof of being valued by senior people for their work and commitment to the charity. This engagement should be underpinned with genuine involvement with frontline staff and – where appropriate – beneficiaries.

“The quality of the professional staff team is critically important; an organisation doesn’t need many fundraising staff, but they need to be excellent and have robust efficient processes in place. However, the chief executive is most important to the relationship, the big donors often won’t ever meet the fundraisers – they will have a relationship with the chief executive and Chair, so these senior professionals need to be working closely with their senior volunteers.”

*Dame Vivien Duffield*

“I expect the organisations to which I give my time to be highly responsive. I expect a named senior person to support me in my efforts, but I also expect access to the chief executive.”

*Lee Portnoi*

Fundraisers also highlighted the vital role that senior staff play in maintaining and developing senior volunteer relationships. They identified their senior colleagues’ support as critical in helping to manage volunteer expectations and to improve long-term outcomes. Many fundraisers cited examples where the relationship with a senior volunteer had faltered because the organisation’s culture wasn’t aligned with the philanthropy programme. They also expressed concern that in some cases senior staff don’t understand how important their involvement is and expect fundraisers to ‘get on with it’, which can impair the depth and quality of relationships between charities and senior volunteers.

“In order to effectively manage relationships with senior volunteers, organisations need to recognise and celebrate what they can deliver with appropriate support and direction. This is only possible where philanthropy sits at the heart of an organisation and is embraced by its senior leadership.”

*Lucy Sargent, WWF*

Whilst senior volunteers could see having a relationship with individual fundraisers was important, they noted that the quality of these relationships varies greatly. It is heartening that 81% of volunteers believe that fundraisers have the experience and skills to support their fundraising success. It also emerged that senior volunteers feel more confident about becoming an asker if they firstly had good experiences as donors.

There is no doubt that genuine partnership is critical to success. Fundraisers want senior volunteers to be ‘part of the team’ and senior volunteers want to be ‘working towards the same goal in transparent relationships with the fundraising team’.

“If they can get the relationship right with us we have confidence they can get it right with our contacts....we need to know we are all on the same team.”

*Sir Trevor Pears*

“It is vital that volunteers are brought into the organisation’s objectives and strategy – without this there will not be genuine synergy and partnership with the staff team and in many cases, can lead to divergent thinking. When things get choppy, as they inevitably will, it is the shared objective and buy-in that allows for solutions to be found.... an up-front relationship based on trust and transparency is the most robust way to a successful partnership between staff and a volunteer.”

*Nick Booth MVO, The Royal Foundation*

Several volunteers noted the value of developing long-term relationships and expressed frustration at the high turnover of staff in the voluntary sector and the impact this has on building meaningful relationships.

“I need to work with people who get to know and understand how best to work with me, they have to be in it for the long-term if they expect me to be in it for the long-term.”

*Dame Gail Ronson*



**Key finding:**  
Senior staff within a charity must have a commitment to, and involvement in, senior volunteer fundraising as their support is critical to success; senior leaders need to create an organisational culture that recognises and embraces philanthropy and must take the time to develop personal relationships with senior volunteers. Senior volunteers have great confidence in the fundraisers they work with, but perform best when they have a genuine partnership and can develop a long-term relationship with paid staff.

**Discussion points:**  
■ Building a ‘genuine partnership’ means seeing senior volunteers as part of the ‘home team’ not as outsiders but as members who need an understanding of strategy and priorities, and easy access to information and resources. Maintaining this level of transparency may be difficult when sharing bad news, such as negative media coverage or a failed bid for funding. But being honest and open about both good and bad news will ultimately build trust between senior volunteers and the charity’s staff. As The Commission on the Donor Experience<sup>4</sup> concluded, an ‘approach that builds genuine, authentic relationships consistently over time is what puts organisations at the cutting edge’.

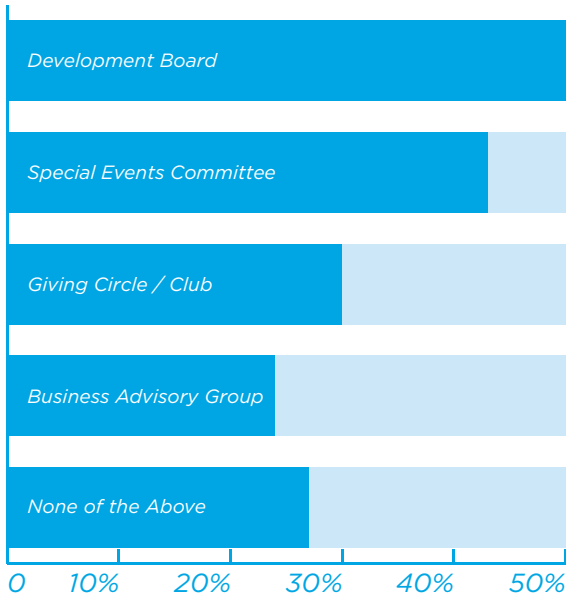
■ Volunteers want to develop long-term relationships with charity staff, including fundraisers, but this is challenging in a sector that experiences a high turnover of staff. The Commission on the Donor Experience highlighted this issue and made several recommendations relating to staff recruitment, retention and reward. Charities need to consider how they can retain fundraising talent as this will enable them to enhance these important relationships.

5. Are development boards and other formal structures the best way to involve a senior volunteer?

Fundraisers were asked whether their charities had created formal structures, such as a development board or a volunteer committee to engage senior volunteers. Half reported using development boards, while other popular approaches included giving

circles (30%), event committees (43%) and business advisory groups (24%). It should be noted that a quarter (27%) did not involve senior volunteers in any of these roles.

5.1. Formal senior volunteer fundraising structures in the charities surveyed – Employed by the charities of the fundraisers surveyed



Half of senior volunteers reported that they are a member of a fundraising board or committee and most (80%) considered them to be successful.

Assessments of the success of these formal structures varied, and opinion on the role of development boards was evenly split. The majority of fundraisers who worked with a development board reported that they had a positive impact on fundraising, and 14% cited their impact as ‘transformational’, exactly the same proportion as reported that their development board had ‘failed’.

Key factors that appear critical to success when establishing a formal structure include:

- **Recruiting a strong Chair:** As so much activity takes place outside of formal meetings, the Chair plays a vital role in keeping board members focused. The Chair should be someone with personal authority over his or her peers. He or she must lead by example and should be willing to make connections and asks before

they are formally appointed. He or she should also be willing to make a personally meaningful donation. A weak Chair will hold up progress and allow the board or committee to lose focus.

- **Setting expectations:** Clear terms of reference and individual job or role descriptions help to give clarity about roles and responsibilities and manage expectations. Senior volunteers need to fully understand what is expected of them before they agree to be involved.
- **Clarifying strategy:** Boards and committees are less likely to succeed if members are expected to define their own strategy.
- **Giving back-up and support:** Senior volunteers need to have dedicated support, e.g. setting up meetings, providing briefings, preparing letters to sign, delivered by experienced fundraisers.
- **Agreeing measurable and realistic targets:** Having a clear and time-limited income target keeps everyone working towards the same outcome.
- **Having fun:** Senior volunteers need to enjoy the experience of volunteering and good-humoured competition can improve performance.

“Volunteers need and often expect training, coaching and clear roles. Organisations can shy away from this on the basis that someone is a ‘volunteer’ and giving their time for free. In my experience this is false thinking and clarity upfront can greatly ease problems downstream. You are asking them to do a job - so tell them what it is and how they will be assessed/what success would look like (and not...)”  
Nick Booth MVO, The Royal Foundation

“It should be fun. I’ve worked with an appeal board that really got on with all the people they were working alongside. They felt they were involved in achieving something really significant while also having fun and getting a lot back from it.”  
Naomi Lyons, Prostate Cancer UK

“Really push yourself to decide whether you need a board. They will amplify what you want to do but can’t create something you cannot do yourself.”  
Gemma Peters, King’s College London

Many fundraisers reported that they found it easier to avoid formal structures and instead to work with senior volunteers on a 1:1 basis. This approach takes up less resource and can be less risky than the time and effort needed to establish and maintain a board or committee. Some fundraisers choose to work on a 1:1 basis with their volunteers on a small scale at first, before setting up a more formal structure. This approach allows them to ‘test’ senior volunteers before investing more time and effort. There were examples of fundraisers making use of senior volunteers’ personal skills to focus on specific activity, without insisting that they make the more serious commitment of joining a board or committee.

“Senior volunteers don’t need to take on significant formal roles to make a big difference to a charity’s fundraising success – something as simple as signing a letter to someone they know to endorse a project can mean the difference between the success and failure of a fundraising approach.”  
Lucy Sargent, WWF

<sup>4</sup>Cluff, A. (2017) The Commission on The Donor Experience, Project 09. Major Donors.

**Key finding:**  
**Senior volunteers can perform well in a formal structure as well as on a 1:1 basis with fundraisers. Keys to success include: a good relationship with the people they are working with (both their peers and fundraisers) and a clearly defined role with agreed expectations. If a charity sets up a board or committee, then the role of the Chair is vital.**

**Discussion point:**  
■ Charities need to weigh up the pros and cons of establishing formal structures, such as development boards, and working on a more informal or 1:1 basis with individual senior volunteers. Factors to consider include: the income target and timeline; resources and expertise; organisational culture and readiness. Just as important are the motivations, experience and resources of their senior volunteers and of course the organisation's access to potential new senior volunteers.

■ Charities must be clear at the outset about roles, responsibilities and expectations and explore how these are communicated at the start of a new relationship. There are many instances when charities expect a great deal from a senior volunteer, but haven't been explicit about this upfront. In these cases, fundraisers can become increasingly frustrated about the time and effort they are investing in a relationship. Senior volunteers can also feel let down either because they are being asked to do things they don't want to do, or because they feel that their offer to help isn't being used effectively.

6. Do senior volunteers give?

Giving and asking go hand in hand: a third (34%) of senior volunteers donate at least as much as they are asking for from others, and just under two-thirds (59%) make a financial contribution at a lower level than the donation they are asking others to make. Only two senior volunteers said that they do not give to the charity with which they are involved.

Senior volunteers can be involved at several stages in the donor journey, from making introductions and opening their networks, to being involved in 'making the ask'. A few fundraisers noted that when asking a senior volunteer to do something simple, such as

signing a letter or talking to prospects at an event, it wasn't relevant whether they had made a personal donation, but the majority agreed that when a volunteer is asking others to give, he or she only had credibility if they had made a donation themselves. Donors are able to use their giving as leverage to stretch prospective donors to increase their giving.

"You have to lead from the front and that means giving. I've been doing this most of my life and have built up a network of people who I support in their charitable work and who I know I can rely on to support me in mine. They trust what I'm involved in and give because it's me asking. The problem in the charity business today is that there are very few askers who can command respect because they are givers too."  
*Gerald Ronson CBE*

**Key finding:**  
**Senior volunteers need to be giving at a personally meaningful level to have the credibility to ask and stretch donors.**

**Discussion point:**  
■ Senior volunteers need to understand the importance of making a personally significant donation. This should be made clear at the point at which they are deciding whether to become more involved in the charity, with personal giving being included in the terms of reference or raised during discussions with the Chair or another senior volunteer. Charities should consider who is best placed to 'make the ask' of their existing and incoming senior volunteers.

7. Who do senior volunteers ask for donations?

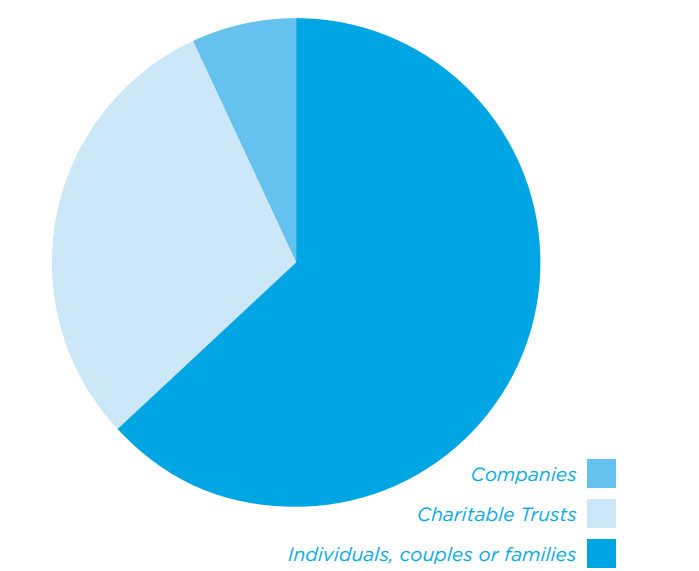
The majority of fundraisers noted that senior volunteers had helped to secure gifts from individuals (58%), with the number making approaches to charitable trusts accounting for 29% and companies just 13%. These results were

confirmed and amplified by senior volunteers, who reported that most of their asks were to an individual or a couple (63%), with 30% making asks to charitable trusts and just 7% reporting having approached companies.

"Corporate funds have almost vanished. Company chairmen can't give anymore - everything has to go through endless committees and be decided on by employee vote. I'm not in a position to influence that."  
*Dame Vivien Duffield*

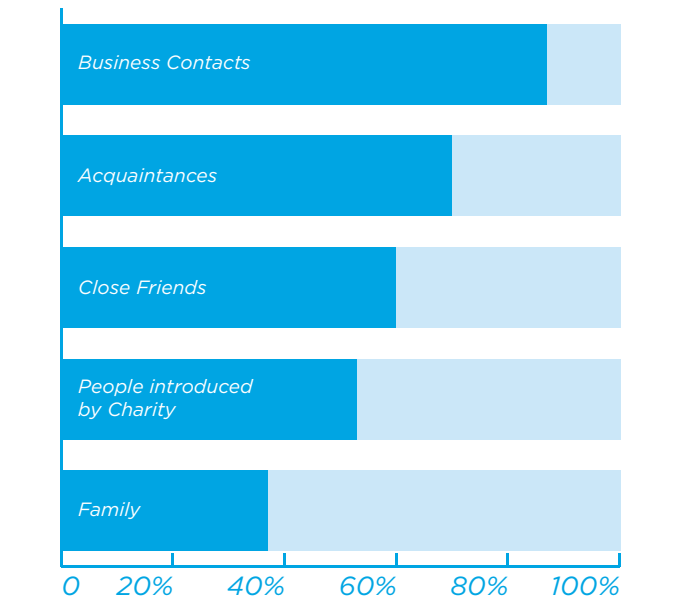
When asked what types of prospects they had approached, many more approached business contacts and people they identified as acquaintances rather than family members.

7.1 What type of donor do senior volunteers ask for gifts from?



"I continually worry about managing the charity's hopes and expectations. Whilst I probably have a reasonable contact list, it is always a challenge to work out whom to approach for what and when."  
*Sir Trevor Pears*

7.2 Who do volunteers approach for donations?



Senior volunteers noted how carefully they plan approaches, ensuring they are at the right level and appropriately timed. They reported feeling uncomfortable if pressured to make approaches that they thought would be unsuccessful.

"If I'm approaching a personal contact on behalf of a charity, I have to be sure it's with a proposition that works for both sides - that offers genuine synergy - otherwise I'm at risk of spoiling the relationship with my contacts and losing credibility."  
*Kate Hogg, Director of Beneficial Fundraising*

**Key finding:**  
**Senior volunteers are more active in approaching and securing gifts from individuals than from charitable trusts and companies. They also tend to fundraise from their business contacts, acquaintances and close friends, rather than from prospects introduced to them by the charity.**

Discussion points:

■ Senior volunteer approaches to companies are less frequent than to individuals, families and charitable trusts. Given the changing corporate landscape and the desire to secure 'business benefits' from charity partnerships, we should consider whether senior volunteers could do more to help increase corporate support for charities. It would be helpful to review examples of successful approaches and to consider the types of companies that might be particularly amenable to senior volunteer approaches.

8. Who 'makes the ask'?

Fundraising staff members are primarily responsible for asking for donations (in 98% of cases). However, senior volunteers and other staff members are also involved. Nearly half of fundraisers stated that other staff members are involved in asking for donations, with 95% noting the chief executive is involved and 36% citing service delivery colleagues. 78% of fundraisers report that volunteers are also involved.

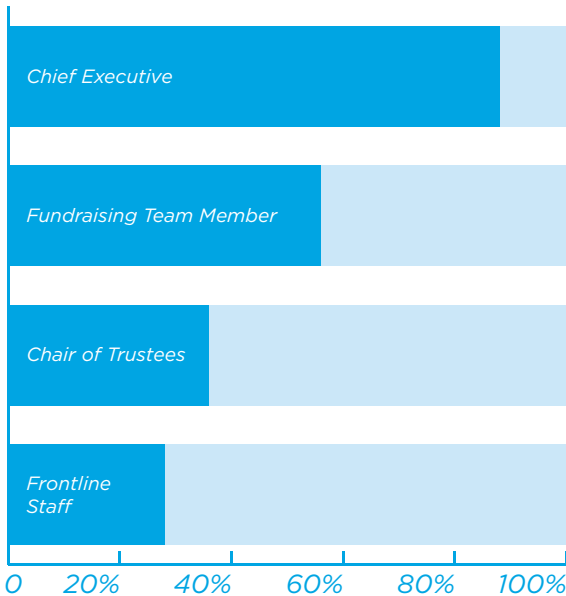
"Professional fundraisers bring in a vast amount themselves. Gone are the days when they are wholly reliant [on senior volunteers]... If professional fundraisers are good, it's enough to have a senior volunteer acting as a 'catalyst'."

Dame Vivien Duffield

Senior volunteers are usually accompanied by a member of paid staff when asking for money. Most (67%) of senior volunteers noted that the decision about whether they were accompanied by a member of staff depended on their knowledge of the prospective donor. When accompanied to meetings, 88% reported they had taken the chief executive, 56% a member of the fundraising team, 36% the

Chair of the charity and 28% by frontline staff. A fifth reported that they always go to meetings alone if asking for money.

8.1 If accompanied, who do volunteers take to ask meetings?



"It depends on how close I am to the potential donor as to whether I take someone to the meeting with me. I like to give them a number of well-prepared options and therefore need a very good brief."

Lloyd Dorfman CBE

Fundraisers reiterated the importance of briefing and guiding senior volunteers as well as other staff members. Where senior volunteers were nervous or reluctant about 'making the ask', then fundraisers reported that they often took that role in the meetings to ensure success.

"It depends on how close the senior volunteer is to a donor on whether they are comfortable making the ask. In my experience the closer they are, the more likely they are to look to the professional to actually make the ask in a meeting.... You have to know your volunteer and their comfort levels - sometimes they don't want to push too hard and can ask for too little when the professional team has primed someone for a significant gift."

Daniel Carmel-Brown, Jewish Care

41% of senior volunteers reported that the donation amount asked for in meetings varied. They rely on fundraisers to guide them, based on prospect research, experience and the specific requirements of the charity.

Almost all (97%) of volunteer fundraisers stated that their asks had at some point been successful. All interviewees reported that experience and confidence in 'making the ask' are key attributes of a good senior volunteer, but the fundraising team needs to give extensive help and support.

"Senior volunteers tend to do the chit chat and broader ask, while I, as representative of the organisation, would follow with the specific partnership ask, talking about the suggested donation amount, expected impact of the gift and detail of how they could get more involved. I draft all follow-up for the senior volunteer after the meeting and prompt them to make any necessary follow-up asks."

Laura Stebbing, Cherie Blair Foundation

**Key finding:** Fundraisers are primarily responsible for asking for donations, but senior volunteers and chief executives are significantly involved in the broader process of 'making the ask'. Successful asking relies heavily on detailed preparation, briefing, guidance and support from the fundraising team.

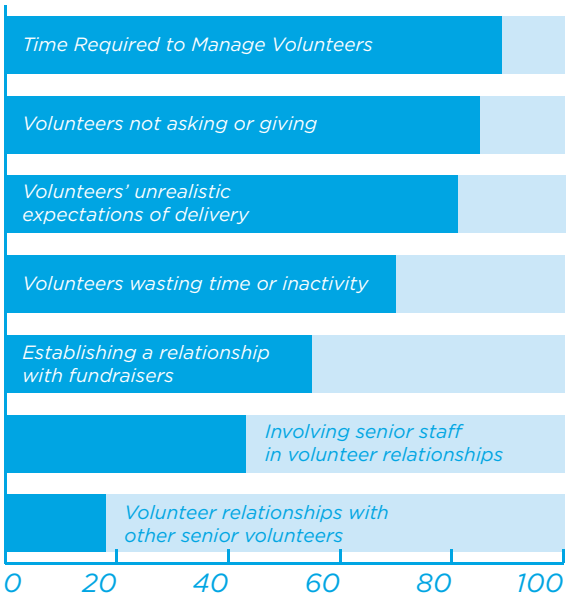
Discussion points:

■ Senior volunteers expect to receive briefings and many prefer to be accompanied to meetings. There is plenty of evidence to show that fundraisers are usually expected to 'make the ask'. Charities should consider how they can help build confidence among senior volunteers - particularly when they are uncomfortable with making the ask - perhaps by involving their peers to build confidence.

9. What are the main challenges for charities working with senior volunteers and for volunteers working with charities?

Fundraisers recognised that there are downsides to involving senior volunteers in fundraising. Their biggest challenges were the time required to manage and support volunteers, followed closely by frustration with volunteers either not helping in making asks, or not giving themselves and the unreasonable expectations that some senior volunteers have about the charity's ability to deliver.

9.1 Fundraisers: Challenges of working with senior volunteers - Challenges ranked as top three by fundraisers surveyed





Success depends on a significant time investment from both the fundraising team and from the charity's senior leadership. Senior volunteers' expectations - such as rapid responses to queries and demands for information or decisions - can be difficult to meet. Several interviewees noted that there can be a 'clash of cultures' when business leaders find themselves working as senior volunteers in charities.

“Senior volunteers can get frustrated with internal processes and lack of resources in charities. It is a balance of trying to manage their expectations whilst also pushing internally to explain that this [working with senior volunteers] is a great platform to make things happen more quickly. You don't want the volunteers to lose their momentum and energy, which can happen if you don't act quickly.”

*Charlotte Matier, Alzheimer's Society*

“I have found that larger charities are bound by stricter protocol, which can sometimes make it more challenging to achieve fundraising aims.”

*Ruwaida Randeree*

Fundraisers reported that senior volunteers were often unfamiliar with the fundraising process and the part they should play in it. They noted that this, along with a general lack of knowledge about the rules and regulations affecting charities, meant that senior volunteers sometimes risked the reputation of the charities they supported.

“I have had experiences where very enthusiastic volunteers have made asks without consulting and before we were ready, and as a result we had to deliver to very tight deadlines so as not to embarrass them. It makes the organisation look unprofessional, risking our reputation; the ask isn't delivered effectively and so has a high likelihood of failure; and it wastes staff time and is demoralising.”

*Fundraiser survey respondent*

Several references were made to difficulties in dealing with the 'egos' of senior volunteers; and while it was recognised that they are often highly successful leaders in their fields, their skills and approaches are not always directly transferable or appropriate in the charity sector.

“Often volunteers come from or work in different organisational cultures to the charities they support. This can be magnified by demographic differences with staff too. It is important that there is shared understanding and respect on both sides.”

*Nick Booth MVO, The Royal Foundation*

Senior volunteers said that their biggest difficulties were the lack of prospects, the charity's expectations that they would bring in supporters, the time commitment and the difficulty of explaining the cause and needs to their networks. In addition, several interviewees had struggled when the charity they supported wasn't transparent about its strategy or finances.

“Lack of honesty and transparency - charities and their staff can shy away from direct or difficult discussions with volunteers on the grounds they may lose their support. In my view an upfront relationship, based on trust and transparency, is the best and most robust way to a successful partnership between staff and volunteer.”

*Nick Booth MVO, The Royal Foundation*

“I am happy to introduce my networks to charities. With the best fundraising teams, I can move on once I have made the introduction, which is my preferred way, but this only happens in around 25% of the charities I am involved with. With the others I have to keep involved in the donor relationship and often have to take remedial action.”

*Lord Fink*

Senior volunteers found succession planning particularly challenging. Some felt that the task of finding peers willing to be involved in fundraising created too much pressure and others noted that they couldn't step away from their responsibilities because there was no 'next generation' of senior volunteers. Fundraisers reflected this concern.

“I would like to think there is a next generation of volunteers, but the reality is that I am not sure. There does not seem to be the commitment or the desire to want to do fundraising and there really needs to be a change in attitude and an understanding of the difference one can make in fundraising for charity.”

*Lord Levy*

“There seems to be a limited group [of senior volunteers] outside of the big London institutions and/or universities who have experience and get it. For many, there is a reluctance or discomfort with the role and we need to help them to up their game. They feel quite distanced from the reality of fundraising -and some of the slighter younger crowd -45-55 plus- keep suggesting alternative finance as the route they want to take rather than philanthropy.”

*Pamela Davis, RSPB*

**Key finding:**  
Both volunteers and fundraisers recognise the challenges of working together. For volunteers, a lack of openness and transparency (particularly relating to funding needs) from the charity stands out. For fundraisers, managing volunteers' sometimes-unrealistic expectations can be particularly difficult. Both fundraisers and senior volunteers said that the time required to build a partnership and the difficulty of finding new senior fundraising volunteers were particular concerns.

**Discussion points:**

■ Many of the challenges of working with senior volunteers can be avoided when senior volunteers understand the organisational and fundraising strategies and processes, and understand what is required of them. This understanding can be developed through carefully planned recruitment and a comprehensive induction.

■ Developing genuine partnerships depends on charities having a thorough understanding of their senior volunteers' motivations and expectations; and agreement that these are important to the organisation. Charities need to create open lines of communication with senior volunteers to keep them on the inside track and to ease the difficulty of sharing bad news.

■ Sometimes, despite the best intentions and significant investment on both sides, the partnership can prove too challenging to be effective. The sooner this is recognised, the easier it will be to re-shape or - if necessary - end the relationship.

■ Recruitment of senior volunteers is a constant and increasing challenge, particularly identifying the next generation of senior volunteers. Research is needed to increase understanding of millennial giving and the expectations of younger supporters. Recent experiences, such as the Institute of Imagination's next generation development board (in the case study below) show the potential of this approach.

**10. How can charities best support senior volunteers and how do volunteers want to be acknowledged and recognised?**

Senior volunteers reported that the most important thing they needed to be successful was a well-defined case for support, with 47% placing this at the top of their list.

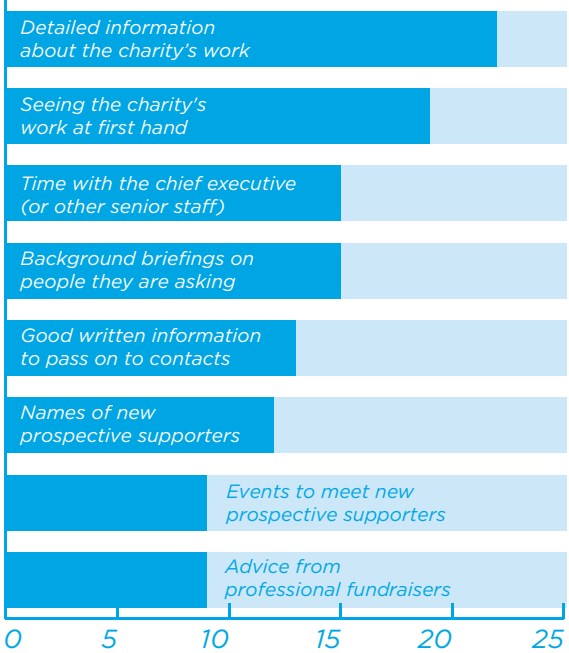
“I need a tangible, succinct ask line, a compelling case for support, and to know clearly what the money raised will be used for.”

Lord Fink

Other important factors included:

- Active involvement from the chief executive and other senior staff, Chair and Trustee Board
- Support and advice from the fundraising team
- Having prospective donors to approach along with useful information about them
- Opportunities to engage with the charity’s work and really understand its needs; and
- Opportunities to take prospective donors to see the charity’s work in action

10.1 The support volunteers need to ensure success  
- Requirements ranked as top three by volunteers surveyed



Senior volunteers really want to work in partnership with the fundraising team.

With time commitment cited as one of their biggest challenges, senior volunteers noted how important administrative support and strategic guidance from the fundraising team was to ‘make their jobs as easy as possible’, so that they could focus their energy on input that ‘can make a real difference’.

“They need dedicated resource, people whose role it is to work directly with them and access to senior staff, especially the chief executive. They need the trust that the charity will treat their contacts with respect...they need to know you will follow up in the way you said you would.”

Charlotte Matier, Alzheimer’s Society

“Senior volunteers need the professional team to support and direct them. Fundraisers need to do their research and be skilful in unlocking volunteers’ networks by prompting and guiding them on names and approaches; they need to do all the groundwork to make it as easy as possible for the volunteers to succeed.... You need to make them a genuine priority and give them the resources and access they need.”

Kate Hogg, Director of Beneficial Fundraising

“I work at a charity that has enormous potential for working with senior volunteers to access significant gifts, yet the...lack of understanding regarding the resources required makes it difficult to engage senior volunteers. Whilst organisations may have high expectation of funding from High Net Worth Individuals (HNWI), they do not always possess an understanding of the patience, commitment, planning and resources required to be successful.”

Fundraiser survey respondent

According to 48% of senior volunteers, the most effective way to make them feel valued and appreciated is through engagement with frontline staff as well as chances to see their work first hand and to meet beneficiaries. This helps them build their understanding of the cause, strategy and priorities, as well as improving their personal motivation. Fundraisers also recognised the importance of giving more formal thanks and recognition.

“Just like anyone else, volunteers have a wide range of motivators. Engagement and stewardship is therefore built by knowing what they want – access to ‘insider info’ via briefings and meetings; offering opportunities to meet peers; ensuring stewardship and delivery are excellent; building relationships across the organisation; demonstrating the impact of gifts etc.”

Sue Collins, Pancreatic Cancer UK

**Key finding:**  
Senior volunteers rely heavily on the support of the fundraising team to provide them with information and administrative support. Their time is hugely restricted and the charity needs to make their role as easy as possible. Senior volunteers expect to be acknowledged and recognised by being brought closer to the charity’s work, they value opportunities to see the charity’s work at first hand and to meet with frontline staff and beneficiaries.

- Discussion points:**
- How can charities make the best use of the limited time they have with volunteers and what opportunities do they have to engage and inspire volunteers about the work of the charity?
  - What are the best ways to acknowledge and recognise the contribution of senior volunteers who help with fundraising? Might some techniques used for major donors – such as impact reports and naming opportunities – also be appropriate for ‘major askers’?

“You need to be creative about recognition. Senior volunteers should get the recognition a major donor gets and more.... It’s not just about thanking (although that is important); it’s about recognising them as part of the team – keeping them on the inside track, giving them ‘behind the scenes opportunities’ not available to others, and ensuring they are the first to know about internal news (and never hear anything second-hand).”

Emma Whitcombe, MS Society

“We support our senior volunteers, regularly sending them information about the charity – not just updates against our charitable objectives, but also about our fundraising targets or any operational successes. We ask them at the outset what they are specifically interested in, and tailor our communications with that in mind. We also ask them for advice on things they are experts in and might find interesting (such as testing out a donor pitch on them and then keeping them posted on its success).”

Laura Stebbing, Cherie Blair Foundation

A long-term holistic approach to senior volunteer fundraising:

Approach

Jewish Care has benefitted from the input of senior volunteers since it was founded in 1990.

All of those who are involved with Jewish Care in a volunteer capacity play their part in fundraising. This includes the President, Honorary Presidents and Trustees, as well as a successful and vibrant Campaign Board and several events committees and advisory groups.

Each of those involved sees themselves as an ambassador for the charity, often engaging their friends and business contacts as:

- **Patrons** (minimum annual donation £12,500). There are now over 400 families who give as Patrons, each connected via a senior volunteer and stewarded by the fundraising team;
- **Investors in key capital projects.** Over the years transformational multi-million pound capital projects have been successfully delivered as a result of volunteer fundraising
- **Committee members.** Senior volunteers choose to get involved in a variety of committees, such as property project groups, community services, investment and marketing advisory groups
- **Fundraising event participants.**

Resources

The charity, with the active involvement of the chief executive, ensures robust partnerships between senior volunteers and the fundraising team. All formal boards and committees have clear terms of reference concerning senior volunteers' roles and responsibilities. Experienced members of the fundraising team provide administrative support to senior volunteers. Senior volunteers regularly visit the charity's services and receive briefings from senior service staff and the chief executive.

Impact

Of its £16m annual voluntary income target, approximately 50% is secured in partnership with senior volunteers. With a current capital campaign to raise £45m for a new care complex in Stanmore, efforts involving senior volunteers led by the President, Honorary Presidents and the Chairman, have already raised £40m.

Lessons

Although at times there can be a healthy tension between senior volunteers and the fundraising team, ultimately, they have a shared vision to provide the very best needs-led service.

“Jewish Care has benefitted from senior volunteers’ long-term sense of ownership, pride and connection to what Jewish Care does for their community. Our volunteers have been tremendously good at developing and nurturing long-term relationships by staying involved in the stewardship of donors; and we as professionals have focussed on making senior volunteers feel motivated and recognised over the years, so that the donations they have brought in have changed the landscape of what we can achieve. It is really important for the professionals to give significant time to build long-term meaningful relationships, subtle semi-friendships, with volunteers. But we now face challenges in engaging and growing the next generation of senior volunteers who have a different mentality, less time, less flexibility and importantly less leverage in making the ask.”

Daniel Carmel-Brown, Director of Fundraising





An appeal board for a major capital project:

Approach

Cancer Research UK (CRUK) launched its largest ever fundraising appeal in 2012, The ‘Create the Change’ Campaign raised £100m towards the construction of The Francis Crick Institute. To support the campaign CRUK formed a new dedicated appeal board chaired by Charles Manby, Senior Partner at Goldman Sachs. The board members were 19 philanthropists from a wide range of professional backgrounds. Each member committed to making donations, introducing the charity to their networks and bringing their personal expertise to the board.

Resources

The appeal board was given a formal induction pack including clear terms of reference. This gave them an overview of the project, costs and timeline, as well as an understanding of the overall fundraising strategy.

The board met quarterly for five years. Between meetings each member of the board was kept updated by a dedicated member of the fundraising team. The Chairman contacted the appeal board between meetings to ensure all members were informed, engaged and active. The charity’s senior leadership was involved and other operational teams also provided information and up-to-date campaign and project literature. Throughout the campaign the board was involved in ad-hoc events arranged by the fundraising team, the board and campaign supporters. Towards the end of the campaign, the charity arranged drinks for the board members and other ambassadors, to thank them for their involvement.

Impact

It is estimated that the board was instrumental in raising 75% of the £100m target. The Create the Change campaign received gifts across all fundraising disciplines; major giving, corporate, legacies and individual giving. In addition to raising vital funds, the board also helped CRUK to grow a new supporter base and to engage its existing supporters, creating new ways of working and developing best practice. Many of the board members are still involved with the charity, helping with the development of its next fundraising campaign.

Lessons

Recruiting a Chair was initially difficult, so the charity used an executive search agency. Although it took around a year, identifying the right person proved absolutely critical to success. Regular updates to board members played an important role in the campaign. They ensured that the board was properly informed and remained engaged with the project and campaign and avoided duplication with prospects.

“Create The Change set out to raise an unprecedented amount from major donors for CRUK. One essential element was collaboration. This was more than a successful fundraising campaign, it was a means of bringing people from different backgrounds together for a common goal. It was a great deal of work but that sense of collaboration between volunteer fundraisers, major donors, scientists and staff helped define the campaign and shape CRUK’s future fundraising plans.”

Melanie Alexander, Head of Philanthropy (Major Giving)



A development board to establish a major donor fundraising programme:

Approach

The development board came about with a little bit of luck. Pancreatic Cancer UK (PCUK) advertised for new trustees in The Times and attracted the attention of the Chair of KPMG, Simon Collins (whose father had died from pancreatic cancer). Simon joined as a Trustee, making clear that his motivation was to raise significant funds for the cause. He agreed that he would build a development fund board to raise £1m over three years for the charity’s existing programme of work. He approached his own contacts as well as people the charity had identified, and the board currently has a Co-Chair and five further members, with plans to recruit a further four in the next year.

The development fund board supports the charity’s programme of events and also develops its own events, programme visits and 1:1 meetings with donors. Members contribute to pitches and proposals wherever appropriate.

Resources

The PCUK development fund board has terms of reference and a clear brief for its members. They also receive a full induction to the charity which ensures that each member is clear on their objectives and ‘to do’ list. The fundraising team provides a strong and compelling case for support, which members can easily articulate to potential supporters and works alongside members to ensure they have everything they need. The board meets quarterly to review progress, share information and plan for joint activities. In early 2017 the charity recruited a Development Fund Board Manager. This staff member works across the charity to bring together the information, resources and engagement opportunities needed by the board. Members meet with the Development Fund Board Manager bi-monthly, with weekly calls and emails providing additional support.

Impact

The development board took the charity to another level. Simon and Co-Chair Stuart Fletcher’s strong leadership and commitment cannot be underestimated and the board is incredibly ambitious. Having successfully achieved its £1m target, the board is now committed to raising £10m over the next five years, and has managed to connect with people that otherwise the charity would have very little hope of engaging. The charity held a handful of very successful fundraising events that were attended by a hugely influential audience. These have resulted in several new gifts and introduced some new high-value supporters.

Lessons

PCUK has learned that the value of the board lies in its members’ genuine passion and commitment to talk about pancreatic cancer with and through their networks. The role of Development Fund Board Manager ensures all opportunities are explored and that the board has the resource it needs from PCUK.

“It does require a great deal of commitment from the board and also the staff team but the return can be transformational and as an organisation has helped us deliver a step change that we continue to see as we work with the board moving forward.”

Sue Collins, Director of Fundraising



## A special event committee to maximise a fundraising opportunity:

### Approach

A dedicated senior volunteer secured the opportunity for the MS Society to hold a Christmas Concert at St Paul's Cathedral in 2016, followed by a fundraising dinner in the Cathedral Crypt. This was the largest event in the charity's history, with over 2,000 tickets available for the concert and 250 spaces at the dinner, and it relied on the expertise and networks of senior volunteers for its success.

A Special Event Committee of six volunteers was created 18 months before the event, led by a Chair. This committee was responsible for securing sponsorship, finding all the performers and producing a concert brochure, as well as selling tickets. Committee members also sold tables at the fundraising dinner, secured auction prizes and delivered gifts-in-kind from suppliers to support the dinner. The Committee was kept deliberately small, but it recruited a 70-person strong virtual Invitations Committee, whose members were responsible for inviting a set number of guests to the concert and generally 'spreading the word'.

### Resources

On average, the Committee met every other month and was supported by two paid members of staff; the Head of Partnership Fundraising and the Special Events Manager, who was responsible for delivery of the event. Other members of the charity's fundraising team provided support as required, for example with corporate sponsorship approaches, as did the Director of Fundraising and the Director of the Stop MS Appeal. The Invitations Committee members were supported by a member of the main committee as well as the Special Events Manager – and were brought together before the concert to be thanked for their support.

### Impact

Due to the expertise, networks and tireless work of the Special Event Committee, the concert was attended by over 2,000 people, was broadcast on Classic FM and was viewed online more than 5,000 times. The dinner sold out and the auction was a great success. The event raised £570,000 and introduced a whole new audience – including a significant number of new major donors, prospects and senior volunteers – to the MS Society.

### Lessons

Significant reliance on the Committee occasionally led to tensions over 'ownership' of the event and decision-making. The MS Society would have benefitted from drafting terms of reference for the Committee, clarifying the roles and responsibilities of all involved, to carefully manage expectations and ensure appropriate resources were allocated. This is now done as a matter of course when working with senior volunteers.

**"The model of working with a small focused committee but recruiting a larger 'support committee' which works virtually so never meets, proved incredibly successful and we continue to use this model - it has unlocked much greater potential for our special events fundraising going forward."**

*Claire Murphy, Special Events Manager*



## A fundraising board to engage the next generation of philanthropists:

### Approach

The Institute of Imagination strives to 'disrupt and innovate' in every aspect of its work, including income generation. It created a next generation fundraising board specifically with and for the next generation of philanthropists. The remit, terms of reference and person specification were co-designed with a 21-year-old supporter whose family had previously supported the charity. As board chair, he invited his network (aged 20-35) to get involved. So far, he has recruited six members and is planning to recruit a total of ten.

Each member commits to a term of three years and a donation of £10,000 per year. 80% of that funding goes straight to unrestricted reserves, whilst the remaining 20% is held in a separate account for the board to direct. The board's focus is on using this funding to invest in income-generation activity that will deliver a greater return for the charity. The board is aiming to raise £1m in three years.

### Resources

The charity provides guidance, expertise, resource and mentoring to board members, and this learning opportunity is part of the offer to potential members.

The Director of Fundraising works with the board and members have a dedicated trustee liaison contact. The chief executive attends occasional meetings as needed. The board meets 3-4 times a year but members are in regular contact via a WhatsApp group. They receive inside information on the development of the Institute, are invited to attend finance and investment committee meetings and have a SamePage account (online collaboration software) so that they always have information about the charity at their fingertips. The board of trustees has oversight of members' activity but there is a genuine commitment to allowing the next generation board to have sufficient freedom so that any successes (or failures) can be genuinely claimed as members' own.

### Impact

All of the next generation board members had previously been approached by charities seeking to engage them and their network, but felt these approaches had been tokenistic and did not allow for genuine engagement and direction, in contrast to the Institute's offer. The creation of the next generation board has confirmed the brand as innovative and willing to push boundaries. However, the board was only launched in July 2016, so the impact on income has been limited to date.

### Lessons

The board members are not all based in London so it has been difficult to build a collective sense of momentum, but this is now beginning to develop; and the Institute of Imagination has learnt that cohesion takes time.

**"Working closely with the chair of the next gen board to shape a new way to engage the next generation of philanthropists has been an invaluable learning experience. Rather than trying to guess what they are seeking from their charitable engagement we have been able to create something that truly meets their needs as well as the needs of the Institute of Imagination – a genuine partnership approach. Critical to our success so far has been engaging the board of trustees and ensuring they are comfortable with us pushing the boundaries in terms of access and transparency. Whilst it is still early days we see huge potential with our next generation approach and are excited to see what they will deliver."**

*Jennifer Coleman, Director of Development*



“Far and away the most important attribute of a good senior volunteer is identification with the cause...but you also need to be professional and know your stuff: know the person you are targeting; know their business, their patterns of giving and the kind of things that interest them and be able to explain in specific detail what their money will be used for.”

*Lord Low CBE*

“I’ve had the privilege of working in the field of health and disability major gift fundraising for 20 years and from those very early invaluable observations there are three constants. A seasoned volunteer will always respect their fundraiser; they will encourage and support you and create a special bond. Affinity ultimately drives motivation and how you and your organisation inspire their affinity to action is key; it can be precarious, as with great wealth and influence comes great responsibility for both parties. Ultimately discretion and humbleness define great altruism. I think it’s rare, but when you discover them, you and your organisation will experience true altruistic magic.”

*John Harvey, Stroke Association*

# ACTION POINTS

We want this report to make a difference, so we have set out key actions for three audiences; fundraisers, senior volunteers and charities.

## For fundraisers:

- **Act with personal integrity:** Fundraisers are working with senior volunteers who trust them to make their involvement in the charity enjoyable and rewarding. Trust underpins every interaction. Senior volunteers trust fundraisers with their personal contacts and relationships, and trust that they will make the most of their precious time. Fundraisers must manage every interaction with care, avoiding any sense that they are pushing the senior volunteer too quickly, or making unreasonable demands.
- **Create a culture of philanthropy:** Fundraisers must become advocates for the benefits of relationship fundraising within their charity. Trustees, the chief executive, service staff and other colleagues need to understand and support the fundraising process and to recognise the unique role that senior volunteers can play. At times, senior volunteers can make difficult demands but if they are seen as integral to the charity’s fundraising success, then these challenges are outweighed by the benefits. Above all, charities must embark on these partnerships on the basis of mutual respect.
- **Allocate sufficient resources:** Partnerships cannot work without investment and fundraisers need to champion this within their charity. However, the resources needed are more than financial. Staff time will be vital, both for the fundraisers who manage individual relationships and for staff across the charity. In addition, good planning will improve the likelihood of success, with senior volunteers expecting the charity to have a detailed strategy and a compelling case for support in place. Additional resource may be needed for induction and training, preparing materials to support their activity and potentially to pay for extra events and recognition opportunities.

- **Consider appropriate structures:** Fundraisers need to weigh up whether they should introduce formal structures, such as boards and committees. This decision will depend on their charity’s income needs and targets, timelines and opportunities as well as the expertise available: the number of existing senior volunteers and the charity’s ability to reach to new ones. Whether or not fundraisers choose to introduce formal structures, all senior volunteers require active management. Fundraisers should build up strong 1:1 relationships with senior volunteers before considering establishing committees and boards.
- **Take a creative approach to recruitment:** Recruiting senior volunteers is likely to be one of the hardest challenges for charities that plan to introduce relationship fundraising. Creative approaches are needed and each fundraiser needs to remember that every time they engage a new senior volunteer they must take the greatest care. If all goes well that senior volunteer may go on to help many other charities.
- **Create opportunities for engagement:** Success depends on maintaining senior volunteers’ motivation and enthusiasm. This can best be delivered through opportunities to engage with beneficiaries and operational staff. Inside knowledge can also maintain momentum, but what is needed will depend on each individual’s interests and motivations.
- **Provide significant recognition:** Providing recognition will depend on what each senior volunteer would consider meaningful. Each person has different motivations and interests. It is vital that charities recognise the unique role that individual senior volunteers play and keep them briefed about the importance of their role in the fundraising, strategic, and operational successes of the charity. They must be regularly thanked and valued for their commitment as a partner in philanthropy.

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#### For senior volunteers:

- **Make personal donations:** Askers are best positioned once they have made a personally meaningful donation to the charity. This gives credibility to ask others and leverage to stretch prospective donors.
- **Engage in the cause:** Demonstrating a passion for the cause and a thorough understanding of the charity and, if appropriate, of a specific project, is vital to success. Senior volunteers will be expected to behave as ambassadors for the charity or charities that they support so they must be able to speak with authority about the charity's vision, strategy and goals. Becoming thoroughly engaged with a charity might include going through the accounts, meeting key staff and trustees and visiting services to see the charity's work at first-hand.
- **Articulate needs:** Before a senior volunteer commits to being involved, they should take time to understand the charity's fundraising process and their role within it. Success depends on their honesty about what they are prepared to do, the support they will need to feel confident and on the charity's ability to deliver this support. Being open about expectations and limitations will help the relationship to progress smoothly.
- **Build confidence:** It is vital that senior volunteers make introductions and connections to their personal networks. Delays are usually caused by a lack of confidence about how this will work and how they might feel. Every senior volunteer should feel able to take as much time as they need to test the charity, speak to other senior volunteers with experience and build up their confidence over time.
- **Work on relationships:** Senior volunteers should become part of the 'home team', sharing the highs and lows, successes and failures. Often this will depend on building relationships with individual fundraisers; sharing information, accepting guidance, trusting the fundraiser to deliver and working on the basis of mutual respect.

#### For charities:

- **Work collaboratively:** The sector needs to consider how charities can work in partnership to share their experiences of, and best practices in, senior volunteer fundraising. There might be a role for a forum that brings together volunteers for peer mentoring, development and training alongside the opportunity to share expertise and help develop the next generation.
- **Seek guidance on GDPR:** As the new regulations will be enforced from May 2018, which is fast approaching, charities should seek guidance on their processes for prospect research and senior volunteer networking to ensure they are compliant. These must be discussed at Trustee level, ensuring that both paid staff and senior volunteers can proceed with confidence, knowing that all activity is compliant.
- **Record and analyse data:** Finding ways to record data to track the progress and impact of fundraising partnerships with senior volunteers would help charities to develop, manage and assess this form of fundraising. It could provide evidence for the efficacy of this form of fundraising; and it would help to share best practice, enabling charities to learn from one another.
- **Engage the next generation:** The sector would benefit from further research into millennial giving and the interests, motivations and expectations of younger donors and volunteers. This research should explore how to increase the diversity of the senior volunteers of the future.
- **Work on retaining fundraisers:** Individual charities and the sector as a whole need to implement recent recommendations and develop innovative strategies to retain talented fundraisers. This will improve the quality of long-term partnerships with both donors and senior volunteers.

# FINAL WORD

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Successful partnership with senior volunteer fundraisers requires a supportive organisational culture that recognises and embraces the importance of philanthropy. When it works, the benefits to charities of all shapes and sizes are immense.

We would like to see more charities engaging senior volunteers in a myriad of ways, including helping in or with the fundraising process. By harnessing volunteers' passion and expertise, charities can access more support, more money and more opportunities.

Charities need to learn what works and what doesn't when working with senior volunteers. We hope this report goes a small way towards sharing best practice and highlights examples where relationships have flourished.

This report has shone a light onto the magic that happens when inspirational philanthropists and fundraisers forge a partnership to make a difference to a cause they are passionate about. This alchemy can genuinely transform a charity and bring huge satisfaction to a volunteer's life.

# RESOURCES

## Volunteer Board Fundraising Special Interest Group:

The IoF Volunteer Board Fundraising Special Interest Group (SIG) is dedicated to the issues identified and discussed in this report.

For further information on its discussion forums, events, resource library and plans for the future please visit: **[www.institute-of-fundraising.org.uk/groups/volunteer-board-fundraising/](http://www.institute-of-fundraising.org.uk/groups/volunteer-board-fundraising/)**

## Solid Management:

Solid Management provides consultancy support for charities working with senior volunteers and delivers a range of training courses to support fundraisers.

For further information please visit: **[www.solidmanagement.co.uk](http://www.solidmanagement.co.uk)**

## Suggested / reading:

**Richer Lives: why rich people give.** *Beth Breeze & Theresa Lloyd (2013)* published by the Directory of Social Change

In-depth research that provides wonderful detailed insight into the interests and motivations of philanthropists and therefore senior volunteers.

**Good Asking: the role of research in efficient, effective and enjoyable fundraising** *Beth Breeze (2017)* published by The Institute of Fundraising

A strong case for the importance of prospect research to fundraising success.

**The Commission on the Donor Experience: Project 09. Major Donors** *Angela Cluff (2017)*

Provides recommendations to improve major donor fundraising including how to address issues of staff retention.

**Major Donor Fundraising** *Margaret M. Holman & Lucy Sargent (2006)* published by the Directory of Social Change

Part of 'The Fundraising Series' it provides an excellent overview of major donor fundraising and specifically addresses how to create an organisational culture to support philanthropy.

**10 Critical Factors in Fundraising: The little green book for Chief Executive Officers** *Terry J. Johnson (2011)* published by JTJ Publishing

A 'crash-course' in the art of fundraising specially written for chief executives but relevant for charity trustees and other senior leaders.

**Yours for the Asking: an indispensable guide to fundraising and management** *Raynold Levy (2009)* published by Wiley & Sons

A detailed handbook on fundraising that aims to dispel discomfort in asking, particularly relevant for senior leaders of charities and non-profit organisations.

**Recruiting and Training Fundraising Volunteers** *Linda Lysakowski (2005)* published by Wiley

An AFP 'Non-profit Essential', this is a practical guide on working with volunteers covering recruitment, induction and training.

**The Philanthropy Reader** *Michael Moody & Beth Breeze (2016)* published by Routledge

Philosophical questions, history, critiques of approaches – a thorough academic study of philanthropy.

**Giving Is Good For You: why Britain should be bothered and give more** *John Nickson (2013)* published by Biteback Publishing Ltd

A compelling argument for all in society, but particularly the wealthy, to give more money and more time to important causes.

**Asking: a 59 minute guide to everything board members, volunteers, and staff must know to secure the gift** *Jerold Panas (2012)* published by Emerson & Church

A practical guide that takes the fear out of making the ask and guides readers step-by-step through the process.

**Ask Without Fear!** *Marc A. Pitman (2008)* published by Tremendous Life Books

A great training resource that clearly outlines the process of fundraising and aims to build the confidence of all staff and volunteers who are involved in 'making the ask'.

Template:  
Development Board/Committee Terms  
of Reference & Job Descriptions

**Define objectives of the board/committee:**  
To lead a fundraising appeal by advising on/engaging prospective individual, trust and corporate donors to support the charity to achieve the appeal target. The appeal target is to raise £XX by XXXX to fund XXXXX.

**Define individual members' commitments** *(terms of office, max. number of members etc.):*

- To provide individual and collaborative leadership for the fundraising appeal
- To take collective responsibility for the fundraising target and work with the charity to support and advise on its strategy
- To attend and contribute to meetings
- To act as ambassadors of the charity within their business and social networks
- To host/attend and invite others to events introducing new prospects
- To make a financial contribution to the appeal (to the best of their personal capacity)
- To cultivate and approach prospective donors in their networks, asking for donations or supporting the charity in asking
- To update the fundraising team on progress of fundraising meetings and asks
- To keep updated on the work of the charity, and work within its wider objectives
- To maintain the charity's reputation – paying due care and attention to an obligation of confidentiality

**Define organisational commitments to the board/committee:**

- To provide all members with a personal point of contact and support (account manager)
- To provide induction and ongoing updates on the work of the charity – and access to senior leadership
- To provide administrative/secretarial support to the Board and specifically to members in their fundraising approaches
- To professionally manage relationships with prospects and supporters introduced by the Board
- To provide networking and engagement opportunities (through a programme of events)

**Define the role of the Chair:**  
The Chair will be responsible for convening the board (clarify if this includes recruiting board members), leading, inspiring and motivating its members to deliver effectively. He or she will operate at the very highest level in their field (ideally business/private sector); be highly networked and ideally have experience on a fundraising board. They will have a connection to the cause and a commitment to the organisation and fundraising strategy (which they will advise on).

Clarify the time commitment required monthly by the chair and who will be their relationship manager within the organisation.

**Define how the board/committee will work:**  
(regularity of meetings; support between meetings; circulation of minutes and lines of communication; clarification of the time requirement of members and the chair)

**Define how the Board/Committee fits within the wider structure of the organisation:**  
(what are the reporting/governance lines, will there be any ex-officio members from the Trustee Board or staff team on the Board/Committee, will there be a review process for individual members or the board as a whole?)



With thanks to

Those who advised on research methodology:

- Dr Beth Breeze, *Director of the Centre for Philanthropy, University of Kent*
- Daniel Fluskey, *Head of Policy & Research, Institute of Fundraising*

Interview participants:

- |                        |  |
|------------------------|--|
| ■ Lloyd Dorfman CBE    | ■ Kath Abrahams, <i>Director of Fundraising &amp; Marketing, Diabetes UK</i>   |
| ■ Dame Vivien Duffield | ■ Nick Booth MVO, <i>Chief Executive, The Royal Foundation of The Duke &amp; Duchess of Cambridge and Prince Harry</i> |
| ■ Sir Vernon Ellis     | ■ Daniel Carmel-Brown, <i>Director of Fundraising &amp; Marketing, Jewish Care</i>                                     |
| ■ The Lord Fink        | ■ Sue Collins, <i>Director of Fundraising, Pancreatic Cancer UK</i>  |
| ■ Katherine Hogg       | ■ Pamela Davis, <i>Director of Development, RSPB</i>   |
| ■ The Lord Levy        | ■ John Harvey, <i>Head of Philanthropy, Stroke Association</i>   |
| ■ The Lord Low CBE     | ■ Naomi Lyons, <i>Head of Major Giving, Prostate Cancer UK</i>   |
| ■ Sir Trevor Pears CMG | ■ Charlotte Matier, <i>Head of Appeal, Alzheimer’s Society</i>   |
| ■ Lee Portnoi          | ■ Gemma Peters, <i>Executive Director of Fundraising, Kings College London</i>   |
| ■ Ruwaida Randeree     | ■ Lucy Sargent, <i>Head of Major Gifts, WWF UK</i>   |
| ■ Dame Gail Ronson     | ■ Laura Stebbing, <i>Fundraising and Partnerships Director, Cherie Blair Foundation</i>                                |
| ■ Gerald Ronson CBE    | ■ Emma Whitcombe, <i>Director of Philanthropy &amp; Partnerships, MS Society</i>                                       |

We are very grateful to those who completed the online surveys. Survey participants were offered the opportunity to include their names or remain anonymous.

Senior volunteers (13 of 34):

- Robin Bidwell CBE
- James Burchell
- David Butter
- Nicholas Ferguson CBE
- Stuart Glyn
- Steven Lewis
- Lord Mendelsohn
- Stephen Moss CBE
- Humphrey Norrington OBE
- Jonathan Owen
- Karina Robinson
- Andrew Sykes
- Rebecca Tinsley

Professional fundraisers (72 of 163):

- Sian Bartram, The Royal Foundation
- Katherine Bates, Fight for Peace
- Antony Berry, Kew Foundation
- Mark Bishop, The National Trust for Scotland
- Laura Blake, Teach First
- Kimberley Blanc, Marie Curie
- Alan Bolchover, Outward Bound Trust
- Valerie Boulet, Kings College London
- Hayley Bradbury, Safe Haven for Donkeys
- Melanie Breiter, CIAT
- Christine Cartland, Scout Association
- Jennifer Cormack, The Royal Society
- Katie Daley, The Prince’s Trust
- Pam Davis, RSPB
- Russell Delew, The London Community Foundation
- Emma Derham, Refuge
- Edwin Drummond, Royal Marsden Cancer Charity
- Emma Edwards, Marie Curie
- Jenny Edwards, Action Medical Research
- Brita Fernandez Schmidt, Women for Women International
- Kate Ferrie, MS Society
- Gemma Fleet, MS Society
- Sophie Garrett, NSPCC
- Sandy Gravette, Dementia UK

- Veronica Hallas, Cancer Research UK
- Wanda Hamilton, RNIB
- Christine Harris, CPotential
- Katharine Hoare, Marie Curie
- James Holland, National Autistic Society
- Emily Hoogstraten, Breast Cancer Care
- Sophie Hurndall, Refugee Council
- Nick Irving, Cancer Research UK
- Julia Jenkins, Cobalt
- Kyle Johnson, Prince’s Trust
- Triona Larkin, Brain & Spine Foundation
- Emma Lawson-De Roeck, St John’s Hospice
- Thomas Lawson, Leap Confronting Conflict
- Marianne Lingwood, Volunteering Matters
- Lauren Lloyd, Sussex Community Foundation
- Laura Lundy, NSPCC
- Natalie Machta, Norwood
- Matthew Maginn, Great Ormond Street Hospital Children’s Charity
- L Marazzi, St John’s Hospice
- Simon Marsh, LSE
- Veronica Martin, Powerlist Foundation
- Cathy Mathews-Brookshire, Bloodwise
- Marnie Middlemiss, The Roundhouse Trust
- Ross Miller, Missing People
- Fiona Miller Smith, Barts Charity
- Deborah Myers, National Gallery
- Claire O’Connor, MS Society
- Mike Palfreman, Haven House
- Matthew Patten, Diabetes UK
- Sophie Pilgrim, Cancer Research UK
- Michelle Quittenton, Nightingale Hammerson
- Reta Robinson, St Mungo’s
- Kate Saltrick, Marie Curie
- Lucy Sargent, WWF
- Gemma Shaw, Y Care International
- Henry Shelford, Missing People
- Anne Shinkwin, Cystic Fibrosis Trust
- Katie Simmons, Diabetes UK
- Helen Stack, 10:10
- Paul Stein, MQ: Transforming Mental Health
- Debbie Stevens, English National Ballet
- Natasha Sweet, Bletchley Park Trust
- Amy Sweeting, IWM
- Angie Turner, The Children’s Trust
- Andy Watts, Arthritis Care
- Joanne Williams, Mencap
- Ian Wilson, Alzheimer’s Research UK
- Norma Young, St Ann’s Hospice

**THE PERFECT FUNDRAISING PARTNERSHIP:**  
EQUIPPING CHARITIES AND SENIOR VOLUNTEERS  
TO TRANSFORM PHILANTHROPY PROGRAMMES  
A report by Solid Management & Consultancy Services Ltd

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