

Background information

The FSI is a small charity that specialises in supporting other small charities across the UK. We achieve this through our extensive Learning programme, offering free and heavily subsidised access to online videos and toolkits, webinars, training days, 1:1 advice; and our Influencing programme, which includes Small Charity Week, the Small Charity Index and research and policy work.

Our consultancy service is our mission-based enterprise, providing specialised support for charities in our key areas of expertise:

- Governance, Strategy & Planning;
- Fundraising/Income Diversification, and
- Impact

Our approach is based on our 10-year history of working closely with small charities; above all we are pragmatic and flexible and understand the need for practical, implementable solutions. Our team have experience in working with charities large and small so are able to translate best practice approaches to the reality of working in a small organization with limited resource and capacity.

We have successfully delivered projects that are self-funded by charities, as well as those supported by the OCS-funded 'Local Sustainability Fund', Comic Relief 'Core Strengths', Power to Change, the Young Foundation's 'Communities Can', BLF 'Reaching Communities/Building Capacity' and HLF 'Resilient Heritage'.

Our development support offer

We will offer a fundraising/income diversification review, which will include the following activities (although we will adapt to the needs of each charity):

- Diagnostic visit – half day onsite with charity to better understand their needs, the wider context of our work with them, early identification of strengths, budgets and capacity to undertake fund development and income diversification activities. This will include a thorough review of the charity's financial position including a review of their balance sheet, and the charity's understanding of this, to ensure that proposed actions are resource appropriate.
- Remote research activity including review of charity plans and documents, environmental scan.
- Plan and facilitate an interactive session using the Appreciative Inquiry (AI) model. The focus of the session will be tailored based on the diagnostic meeting but would generally include a mixture of facilitation (to inform the

report) and training (to build skills and understanding around different types of income/fundraising). We also include a Treasure Mapping exercise to identify existing and potential sources of support, connections and influencers.

- Prepare report and action plan to cover the following areas:
 - a) Fundraising/income strengths and weaknesses including benchmarking current activity, competitor analysis
 - b) Opportunities and threats in the external funding environment
 - c) Options appraisal for potential fundraising audiences/key income methods and recommended areas to grow/develop over the short and longer term (usually 3-5 years).
 - d) 12-month implementation/action plan including recommendations relating to existing skills and capacity and areas for development.

Ongoing support with implementation in the three months following the report via monthly call or skype. Again, this can be flexible depending on the charity's needs but typically involves a blend of advice and mentoring support. We will also signpost to relevant low cost/free training and support from the FSI's learning programme.

This would require 6 days of input from the FSI, which can be delivered to a flexible timetable (in our experience, usually dependent on scheduling from the charity's side for onsite days). The minimum period we can complete the work in is 4 weeks from diagnostic meeting, the maximum we would recommend is 3 months from diagnostic meeting to completion of report.

Limitations – we have no geographic limitations and will accept referrals from all regions.

How do I know if this provider is right for my charity?

The FSI is ideally placed when the charity is uncertain about how to approach diversifying their income and working towards more sustainable fundraising strategies. We often work with clients who have experienced (or will be facing) cuts to statutory income and are not sure where best to apply their limited resources and capacity to explore new income streams. We can help to identify areas to diversify into and provide recommendations and hands-on support to successfully explore new funding streams, whether this is readying for a new commissioning/contracting environment, developing new fundraising streams or considering a mission-based enterprise.

You may also find our support helpful if you have identified an area to diversify your income into (e.g. community, individual giving, enterprise) but require support and advice on the tactical planning and how best to approach/resource your efforts.

We are probably not the right organisation if your charity is looking at social finance or investment: we can work with you to improve impact measurement and reporting (including SROI analysis) but are not best placed to advise on securing income or investment through these routes.

Input needed from you

- ½ day diagnostic with staff or trustee leading on project
- 1 day with trustees and key staff for appreciative inquiry day
- Review call to discuss and agree final draft of report and recommendations/priorities
- Participation in follow up support (on an as needed basis)