**Citizens Advice in Dorset**

**Background to a fundraising strategy**

**Introduction**

Following the recent rationalisation of the Dorset Local Citizens Advice(LCA) offices from five centres to three, (Bridport, Central and East Dorset and Purbeck), and the approval of a county wide contract from the local authority to give a 3 plus 2 year grant to Citizens Advice Dorset (CAiD) for the delivery of its services, the need for some specialist fundraising expertise to provide additional income has been identified. Strategically, the service is facing challenging times in terms of the security of its long term core funding, which demands that more effort is put into other sources of income generation. The Dorset Council grant is less than the current overall cost of running existing provision, and there is no allowance for inflation built in to the grant. Additionally there is currently no co-ordinated infrastructure to implement and develop a fundraising strategy. Faced with these challenges, the CAiD Board has recently approved the development of an enhanced income generation function. To achieve this, the existing activity will be supplemented by the appointment of a dedicated fundraiser.

**Current position**

Over the last few years individual LCAs have pursued separate activities for fundraising. This has been focussed on either local grant opportunities or broader national grants via CA national or other grants that have been identified. At the moment there are two staff, both part time, one in Central and one in East Dorset and Purbeck. Bridport has no dedicated staff. Their work is supported by the LCA managers. The work of the two staff members has focussed primarily on responding to grant opportunities the government or other large quasi-governmental agencies have made available. These have tended to be large, complex, often multi agency, and required significant amounts of time and effort in bid writing and co-ordination. While the bids have often yielded results, there is no evidence that that they have been evaluated in terms of the opportunity costs in getting funding. Elsewhere, LCAs have separately bid for money in an ad hoc, opportunistic way, largely for much smaller scale, time limited grants. This activity may have partially benefited the core costs, but tend to generate additional work for the staff teams over and above their day to day tasks. In sum, there is little contribution to the core. Another problem is that the expertise of the team is limited to grants, rather than any other type of income generation. There is an identified need to diversify the income generation to explore donor development, digital fundraising, legacy fundraising etc.

**Strategic Environment**

A detailed SWOT analysis of the Service has been undertaken and will be available to the successful candidate. Some headlines from this are:

* Dorset Citizens Advice is located in a very rural area, characterised by high levels of rural isolation and discrete pockets of high deprivation. Access to some of those in need is challenging.
* It is a successful charity with a very high profile and positive image. However, it suffers from poor brand awareness and a belief that it is an extension of government services rather than a charity.
* The range of advice services is broad, as is the spread of available advice across the county, into rural communities. There are several other agencies who also provide advice which can overlap with CA services; however, CA has a pre-eminent position around debt advice.
* The current cost of living crisis is significantly increasing demand and this will increase over the next year and possibly beyond, this creates both pressures in existing services, but also opportunities for sponsorship and donation.
* The county has a large number of SMEs whose track record in corporate responsibility is mixed at best. However there is a disproportionately large population of High Net Worth Individuals (HNWIs) to gain access to.
* CAiD has the opportunity to develop a pre-existing Friends group who were located in one of the LCA areas but which could be re-purposed to support income generation in different ways.
* The trustees of the three LCAs are also available to provide support.

**Aims and objectives**

Although it is recognised that the fundraising market is extremely competitive, the CAiD Board recognise that we need to take our income generation effort to another level. To achieve this the Board wish to recruit a professional fundraiser, as part of a centralised fundraising function, that would achieve the following objectives, co-ordinated across the three LCAs:

* develop and implement a strategy for individual and corporate supporter recruitment and development
* oversee corporate fundraising, including employee giving and matched giving from employers
* motivate and facilitate supporters to maximise the funds they raise
* inspire new supporters to raise money, while maintaining and developing relationships with existing supporters
* raise awareness of the charity and its work at local level
* develop and coordinate web-based fundraising
* support the recruitment, organisation and management of volunteers to carry out various income generation functions within the charity
* manage and update databases to record donor contact and preference information.

In addition the postholder would be expected to contribute to researching and targeting charitable trusts.

**Summary**

CAiD is a vital part of the advice and guidance service available to people in Dorset, and this is recognised by the County Council and the other town and parish councils around the county. It has an excellent reputation, and in the current social and economic climate its services are in high demand. However, the grant contract with the County which started October 2021 contains real threats to maintaining existing levels of support. CAiD is therefore looking to a fundraiser to make up the shortfall in core funding, and build an income generation infrastructure to take the charity forward.