being fit for fundraising
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being fit for fundraising.

where to start with no time or resources?

It’s a common question asked by creatives when the topic of fundraising comes up. Where do you start when there’s so much else to do?

Without dedicated time and resources, generating revenue to support your creative work can seem like an impossible task. The trick is to start small. Set yourself an achievable goal so that you can road test your fundraising efforts. Build from there, seeking a slightly bigger target with each campaign.

Follow these simple steps to kick-start your fundraising.

1. Start small. You could begin with $5,000 or even $2,000. Set that as your target. There’s no need to bite off more than you can chew.

2. Think about the specific project or cause you want to raise money for. What will resonate with your audience? Make that the focus of your first campaign.

3. Compile a database of your supporters. It costs nothing to start accumulating this data and it can build into a sizeable resource.

4. Use your networks. Do you have Facebook, LinkedIn, Instagram and Twitter profiles? When you combine those numbers, they can add up to a sizeable and useful community of potential donors.

5. If you’re selling tickets, add an optional donation amount to the point of sale process and suggest the size of a donation.

6. Do you have a donations page on your website? Usually a simple plug-in will suffice for the back end. Ask your web designer to set it up for you.

7. Start building a reference list of possible donors, sponsors, trusts and foundations.

8. If you have a board of directors, put fundraising on the agenda for the next meeting. Meet with your Chair about mobilising the board to assist your campaign.

9. Brainstorm the names of three people you think could assist with planning your campaign: for instance, an industry colleague, a supporter of your work and local business owner. Take them for coffee and share your plans.

10. Has anyone donated or supported you in the past? Reconnect with them and talk about your future plans.

11. Choose one avenue to pursue (philanthropy, sponsorship, crowdfunding etc) which you think suits your situation best. Learn all you can about that avenue and specialise.

12. Check your Deductible Gift Recipient (DGR) status. If you can’t offer a tax deduction, check out the Australian Cultural Fund and/or the Documentary Australia Foundation.
13. Add a fundraising component to an existing event. Do you have an exhibition opening coming up? Launch your appeal there. Piggybacking it onto an existing commitment can save you time and connect you better with your supporters.

14. Plan the next end of financial year appeal. Add times and dates to your calendar, and do some rough calculations on what the costs will be.

15. Make it clear to your audience/attendees/followers that you accept donations. Make it prominent in your website and online profiles and visible if you have a physical space.

16. If you have a physical space, think about prominent donation boxes. Use an iPad on a stand at the exit to collect EFTPOS donations and contact details. Use roaming volunteers at events with tablets and Point of Sale software to collect donations.

17. Think about who from around you could be an effective fundraising mentor.

18. Make sure there are processes in place for capturing customer/supporter contact data and adding this to your database.

19. Read relevant articles and books: Amanda Palmer’s The Art of Asking is a great place to start.

20. Sign up to the e-newsletters for Create NSW, Australia Council and Creative Partnerships Australia. Look out for events they run which can boost your knowledge on the topic.

**TIP.**

The trick is to start small. Set yourself an achievable goal so that you can road test your fundraising efforts.

FURTHER READING

- How to start your crowdfunding campaign – The basics from Pozible
- Philanthropy and private giving 101 – An overview from Creative Partnerships Australia
- ‘How To’ for Corporate Partnership and Sponsorship Proposals – Useful guide from Circuit West, with templates for corporate sponsorship proposals
- Case Study: BAMM - Bank Art Museum Moree
how to identify which fundraising method is best for you

This article will help you determine which fundraising method is best for you. Choose an option that suits your strengths to improve your chance of success.

Know your audience
What sort of people engage with your work? What stage of life are they in? What socio-economic background are they from? Understanding your audience can help you choose the best fundraising approach. If your work attracts a strong local audience, business sponsorship might be worth pursuing. If your audience is global, an online crowdfunding campaign or a Patreon account might help reach them. Think strategically about which approach best suits your customer base.

Find a cause
It can be difficult to motivate supporters to give to long-term projects. Think about small projects with a short-term need. For example, scholarships for young artists, new pieces of capital equipment, touring work nationally or internationally are good examples of short-term projects that can attract interest from supporters.

Look to your competitors for inspiration
What approaches are other organisations taking? Look at individual creatives and organisations around the country and around the world. They may be using fundraising methods you could adapt.

Are you looking to raise a lot of money or regular small amounts?
If you need to fund a major project or refurbishment, look for support from major donors or philanthropic trusts and foundations. If you’re trying to build your fundraising skills, a series of small campaigns will be more effective.

Does your work lend itself to a certain method or medium?
Audiences can be tracked and measured, and you can use this information to build up a regular donor base. Visual arts organisations can find it more difficult to mobilise regular attendees, so individual art lovers may be the focus of their fundraising efforts. Screen content producers can find good support using online platforms that showcase trailers. It’s all about finding the right medium.

Specialise in one fundraising method
Once you’ve found the method that’s right for you, build up your expertise in this area. This can be more lucrative in the long run than trying to raise funds in multiple ways without building momentum or skills in one area.
Understand the costs and timeframes associated with fundraising

To save time and money, automate as many processes and procedures as possible – particularly if you’re dealing with a lot of donors at once via crowdfunding. Scenario planning will help you compare the costs of various fundraising options. Estimate how long it might take to generate the funds you want, and be realistic: if you’re soliciting large donations from individuals, your timetable may not coincide with theirs.

The pros and cons

This fact sheet, produced by Creative Partnerships Australia, details the advantages and pitfalls of each fundraising method.

TIP.

understanding your audience can help you choose the best fundraising approach.

FURTHER READING

How to raise money for an arts organization – Blog post from US fundraiser Mary Cahalane
Arts fundraising and the culture of asking – Caroline Sharpen on Australia’s culture of philanthropy.
Creative Partnerships Australia – It’s always a good idea to talk your options over with an expert. CPA offers free one-on-one consultations with the NSW State Manager.
How to receive tax deductible donations

Many donors seek tax deductions for their contributions. To offer tax deductions, you must be endorsed as a Deductible Gift Recipient, or partner with an organisation that is.

To offer a tax deduction, organisations must be endorsed by the Australian Taxation Office as a Deductible Gift Recipient. Individuals need to be supported by an organisation which has Deductible Gift Recipient status, or use a platform such as the Australian Cultural Fund or Documentary Australia Foundation. These platforms are designed to enable organisations to offer tax deductible donations for creative projects.

Tax deductible donations include sums of money over $2, property, cultural or heritage items. It is always best to seek advice from a tax professional. You can also view the Australian Taxation Office’s advice on the topic here.

Organisations

There are two ways organisations can apply for Deductible Gift Recipient status.

Public libraries, public museums and public art galleries can register as a charity with the Australian Charities and Not-for-profits Commission. They can then apply for Deductible Gift Recipient endorsement with the Australian Taxation Office.

Other cultural organisations can apply for inclusion in the Register of Cultural Organisations – a register of organisations whose principle purpose is the promotion of literature, music, a performing art, a visual art, a craft, design, film, video, television, radio, community arts, Aboriginal arts or movable cultural heritage. This register is currently administered by the Australian Department of Communications and the Arts. Once included, the Department notifies the Australian Taxation Office which endorses the applicant for Deductible Gift Recipient status.

The Register of Cultural Organisations is commonly used by creative organisations to secure Deductible Gift Recipient status. The eligibility criteria are complex. You will need to maintain a public fund to receive tax deductible gifts and donations. The fund needs to be administered by a committee of “responsible people”, meaning people who – because they hold a public office or position in the community – have a degree of responsibility to the community as a whole.

From 1 July 2019, administration of the Register of Cultural Organisations will transfer to the Australian Charities and Not-for-profits Commission. To apply, you’ll need to invest time and resources. Start by reading the Department of Communications and the Arts’ guide, available here.
Individuals
Individual creatives can’t obtain Deductible Gift Recipient status but there are other ways they can offer tax deductibility for donations. These include:

- **The Australian Cultural Fund** – administered by Creative Partnerships Australia, this crowdfunding platform enables individuals to offer tax deductible donations for *creative projects*.

- **The Documentary Australia Foundation** – this platform facilitates tax deductible donations for approved *documentary projects*.

- Individuals can sign an auspicing arrangement with an organisation with Deductible Gift Recipient status. Auspicing arrangements vary in terms of the levels of service provided, including reporting and administration. Different fees and restrictions apply, so do your research. A useful guide to auspicing arrangements, created by Justice Connect, is available [here](#). Download a sample *auspice agreement template* from ArtsLaw.

**A NSW EXAMPLE: THEATRE NETWORKS NSW.**

Dr Jane Kreis of Theatre Network NSW has been through the process of getting Deductible Gift Recipient status.

> It is not something to take on lightly. It does open up new opportunities for philanthropic sources of funding and donations. If this is a core part of your future planning then our advice is to set aside time and, where possible, resources to prepare your application. My top tip, apart from working through all the documentation in fine detail, would be to find a DGR buddy: an organisation that has recently gone through the process and who you can get in touch with when you come across something you’re not sure about.

**FURTHER READING**

- **What is tax deductibility and why do I care?** – An introductory video from the Australian Cultural Fund
- **How DAF makes a difference** – Video on the work of the Documentary Australia Foundation
- **Registering a Cultural Organisation** – A quick guide from the Funding Centre
- **Case Study: Bus Stop Films**
Your fundraising ambitions need to align with your overall strategic plan. Follow these steps to make fundraising central to your organisation.

Creative organisations must have a strategic plan in place, which sets out the activities and projects they are going to pursue. They also need fundraising strategies to help pay for these activities and projects. Their strategic plan and fundraising strategies need to reinforce each other.

This article explains how to detail your fundraising plans throughout the strategic planning process and make fundraising central to your organisation.

**Designate responsibility at board level**

Strategic planning is a board responsibility that involves considerable input from staff and management. If you plan to generate funds from sponsorship, philanthropy and other non-government sources, your board’s involvement is crucial. Set up a fundraising sub-committee and invite board members with fundraising experience to join it. This committee can help you set achievable fundraising targets. Ask for strategic input to help achieve them.

**Provide detailed budget forecasts**

All strategic plans contain budget forecasts, which outline expenses and income over the life of the strategic plan. Include detailed notes about your plans for achieving these forecasts. If you’re forecasting an increase in philanthropic income, for example, you need to assure the reader that you have plans for reaching those targets.

**Include fundraising in your goals, strategies and key performance indicators**

These are critical components of any strategic plan. They spell out exactly how you’re going to achieve your vision and what steps you’ll take to do so. Your fundraising ambitions should be represented in this section. Explain your fundraising targets, your strategies for achieving them, and outline who has responsibility for pursuing them.

**Start with a vision**

Many strategic planning processes start with a big picture vision guided by the organisation’s management and board. Don’t limit your thinking at this stage. Think big and then consider how much money will be needed to realise that vision. Plans can always be scaled back, but there’s value in the strategic thinking that results from this process.
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Consider a separate fundraising plan as an attachment
If you’re pursuing a major project with a large stretch goal for non-government income, it’s a good idea to prepare a separate fundraising plan that provides a high level of detail. (A stretch goal is an additional goal you set for your campaign in case you exceed your initial funding goal). This could take the form of a prospectus document, which you could also share with potential donors and/or sponsors to encourage donations.

Common pitfalls
If you are putting together a strategic plan for a funding application, avoid these pitfalls.

• Don’t make your fundraising targets too ambitious – If you forecast sponsorship income at $500,000, and the previous year you raised $50,000, this will require further explanation in your strategic plan, particularly if your organisation has no track record of raising funds at those levels.

• Don’t forget to outline fundraising tasks – Explain how each fundraising task will be undertaken. The bigger the fundraising task, the more detailed the explanation needed. Being comprehensive adds credence to your overall plan.

• Don’t forget to delegate responsibility for fundraising – Explain who is going to be responsible for meeting the fundraising target and what their background is. This will help to build confidence in your overall strategic plan.

A NSW EXAMPLE: URBAN THEATRE PROJECTS.
Dr Rob Lang, Chair of Urban Theatre Projects, talks about the strategic importance of fundraising:

“ Our board sees fundraising as fundamental to the organisation’s purpose, so we ensure our strategic planning processes include a focus on this. Our donors are interested in investing in work that has a wider social impact. For this reason, we find ways to connect them directly with our process and the people who are part of that process, whether that be artists or members of the community, so that they see and hear the story for themselves – first hand. ”

FURTHER READING
Strategic Plan Framework – From the Australia Council for the Arts
The importance of Strategic Planning for Fundraising Success – Blog post by Mena Gainpaulsingh at Purposeful Fundraising
Financing Not Fundraising: Connect Money to Your Strategic Plan – Post by Nell Edgington on Social Velocity
The Nonprofit Fundraising Strategic Plan Guide – Blog post from The Every Action Team
Case Study: 4A Centre for Contemporary Asian Art
Case Study: BAMM - Bank Art Museum Moree
Getting board members to donate can set a great example for other people in your organisation to follow, creating a culture of giving.

Board members provide strategic guidance and ongoing support, and can be a valuable source of donations.

For many boards, the subject of providing financial support to the arts organisation they help govern is never even raised. Follow these steps to start a conversation about contributing financially.

**Step one: Discuss an approach with your Chair**

You and your Chair should agree on the benefits of asking board members to donate. Your Chair may wish to lead by example, as a way of kickstarting the conversation. Talk to them about when and how to bring the topic up with other board members.

**Step two: Start a conversation about roles and responsibilities**

Speak to board members about their roles and responsibilities. By acknowledging the work they already do, you can position donation as one of many potential board membership activities.

Use this conversation to gain consensus from board members about expectations for giving. Discuss the different ways they can give – not just money, but time, resources and services. This [board paper template](#) will help you to set the agenda.

**Step three: Be respectful**

Not every board member is in a position to contribute financially. Give them other ways to contribute to your fundraising efforts. Can they lead a fundraising event? Can they organise your end of financial year appeal? By involving every board member in fundraising, this helps reinforce a culture of giving no matter what people’s personal situations might be.

**Step four: Focus on a short-term goal**

Having a short-term cause to rally your board around can galvanise efforts and make board members feel they’ve contributed to something worthwhile.

**Step five: Remind them of the power of their networks**

Encourage board members to ask their contacts to donate. Often, encouragement is all that’s needed to unlock contributions from people who may be happy to give, but simply haven’t been asked yet.

**Step six: Follow up board meetings with one-on-one conversations**

Once you’ve discussed the roles and responsibilities of the board as a group, either you or your Chair should have individual conversations with each board member. Ask them how they would like to contribute and make sure they know their contribution is appreciated.
Step seven: Make them feel connected to the work they are contributing to

Establish a personal connection between each board member and the work you do. Start by asking, “What motivates you to be on this board?” If you understand their motivation, you can explain their role in assisting the work that is meaningful to them.

Step eight: Make it easy to donate

Make sure they don’t have to jump through too many hoops to provide their gift by providing multiple ways of contributing. Set suggested amounts, for example, and reinforce what you’re able to achieve with their support.

Step nine: Say ‘thank you’

Make sure they know their gift is appreciated.

A NSW EXAMPLE: FOUR WINDS FESTIVAL.

CEO of the Four Winds Festival, David Francis talks about the need to engage each board member on their own terms:

“The involvement of individual board members is underpinned by a clear understanding of their comfort zone in relation to fundraising and making an ‘ask’. For instance, some may be willing to host an event and set the context for the ask but don’t wish to make an ask themselves. In this case, the actual ask might be made by the Executive Director supported by the Artistic Director. Some board members are fantastic at the individual ask ‘behind the scenes’ and are happy to pick up the phone to talk with a loyal supporter or a long-term prospect.”

not every board member is in a position to contribute financially. Give them other ways to contribute to your fundraising efforts.
engage your board in fundraising with this board paper template

To increase your board’s engagement in fundraising, this board paper template will help you to set the agenda.

DATE OF BOARD MEETING:

Agenda Item #:

Agenda Item: Board's role in fundraising

Purpose: for decision

Sponsor: (For instance, the Chair)

Draft Resolution: That the board review its level of engagement in the organisation’s fundraising efforts and review/develop a fundraising strategy with clear actions and targets.

Executive Summary: Strong board engagement with fundraising is a common feature of financially sustainable arts, screen and cultural organisations. Create NSW is encouraging the boards of funded organisations to review their fundraising strategies and work towards a target for income generation from non-government sources.

Background: Create NSW's funding guidelines specifically require applicants to source income from other sources, such as sponsorship, philanthropy, donations and from their own activities. This requirement is increasingly common across funding agencies. Analysis of the financial health of funded organisations shows that those with ongoing and diverse income streams, which are not largely dependent on government funding, are resilient and can withstand unforeseen financial shocks. This is a sound risk management strategy.

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- Understanding the lead times needed to generate financial support, as these can be lengthy
- Clarifying roles and responsibilities of all board members in relation to fundraising and to growing the organisation’s donor base
- Recruiting a fundraising professional to mentor the board and staff
- Discussing donations from board members and how board members can leverage further donations.

**Recommendation:** That the board review its engagement in the organisation’s fundraising efforts and review/develop a fundraising strategy with clear actions and targets.

**Issues:** (In this section, note any issues relating to the organisation’s specific situation. Where strategic, financial or governance implications arise as a result of adopting this resolution, they should be listed here. List any major risks which could arise as a result of adopting this resolution and outline how they will mitigated.)

**Management Responsibility:** Chief Executive Officer/General Manager

**Signed:**
Chief Executive Officer

Chair
CREATING NEW INCOME

**how** to set up a donor database

Boost your fundraising efforts by creating a database of donors. Collecting information about your donors will help you to plan more effective fundraising campaigns. This article explains what you should track and why.

What data do you need?

**Individual** creatives should collect:

- Basic demographic data: age, gender, occupation, etc.
- Contact details: address, phone number, email address, social media accounts

This will help you build a profile of your donors. It's important to keep this information up-to-date and accurate so you can communicate in a timely manner.

**Organisations** should collect a little more data:

- Advanced demographic data: marital status, employment status, household income, etc.
- Giving history: Keep track of when and how much they first gave, their most recent donation, the frequency of their donations, what prompts them to give, the total given over time, and other causes supported.
- Communications history: Keep track of when they were last contacted, their preferred method for communications and the time they took to respond. When communicating via email or online newsletters, keep track of click-through and open rates.

At a minimum, capture names, addresses and emails and get into the habit of communicating with supporters regularly. The more deeply you engage with them, the more you will learn. Make sure you continue to add relevant information to your database.

Where should you store this information?

If you're starting to build your database, a simple spreadsheet will do. This will allow you to sort and filter your donors by variables such as age, gender or location.

Once your database has grown too big for a spreadsheet, consider investing in a Customer Relationship Management system. There are many options – look for one that integrates with your payment and accounting systems.

**TIP.**

**categorise** your donors into smaller segments and personalise your communications to suit.
What should you do with this data?

You can use data about your donors to boost your fundraising efforts in the following ways.

- **Segment your database** – it’s hard to speak to multiple audiences at once. Categorise your donors into smaller segments and personalise your communications to suit.

- **Look for the hero donors** – who has given more than the average? Do any large amounts stand out among the data? You should build a relationship with these donors.

- **Spot patterns** – did donations spike after a certain event? Did one appeal work well with female donors? Once you spot the patterns, you can plan activities with the goal of repeating these successes.

What about privacy?

The Australian Privacy Principles are contained within the *Privacy Act (1988).* In general terms, the Act covers organisations with an annual turnover of more than $3 million. Even if your organisation is under this threshold, it’s useful to review the Australian Privacy Principles regarding direct marketing to understand best practice in collecting personal data. A useful guide is provided by the Australian Charities and Not-for-profit Commission [here](#).

It’s good practice to ask permission from donors to receive ongoing communications from you. Consider writing privacy guidelines to show donors that you take the use of personal data seriously. For an arts industry perspective, Arts Law has a useful summary [here](#).

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**A NSW EXAMPLE: GONDWANA CHOIRS.**

Francis Greep, Development & Communications Manager at Gondwana Choirs, explains the value of collecting data:

> "The easiest way to think about the importance of having robust data is to imagine that you are starting a new job and all you have is a single spreadsheet of information. What do you do with this? How do you begin a conversation when you have nothing to guide you? Implementing a Customer Relationship Management system (Zoho) has changed my life. I have giving records, donation areas, auto-generated tax receipts, and a record of emails opened at my disposal. I can add fields to capture more information – events attended, tickets purchased, spouse’s name. I can send an email to people who gave last year but not this year. It becomes addictive when you have the correct tools at your disposal!"

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**FURTHER READING**

- **Fundraising nightmare: the cost of donor acquisition** – An introduction to key donor metrics such as Donor Acquisition Cost and Lifetime Value
- **The Ultimate Guide to Donor Data Management** – A useful pictorial guide by Bloomerang
- **Mythbusted: Not-for-profit Databases** – A guide from Connected Up
- **Case Study: Bus Stop Films**
- **Case Study: Studio A**
how to find a fundraising mentor

The right mentor can guide you through your fundraising journey. In this article, you will learn how to find the right mentor and get the most out of your relationship with them.

A mentor is a person who has achieved what you want to achieve and is willing to help you do the same. It is important to choose someone who has walked the path you’re heading down. They should be experienced in whichever method of fundraising you’re tackling, whether that’s philanthropy, sponsorship or crowdfunding.

Search widely for a person with the right set of skills
Look for someone who has successfully raised funds. This could be someone from the arts and screen industry, or it could be someone from another industry who can bring a fresh perspective. Be clear about what you’re trying to achieve. This will help you narrow down the choices of who is best suited to you.

Get to know them
Don’t jump straight in with a request for mentoring. Read articles about your potential mentor. Follow them on social media. If they speak in public, go to their events. Introduce yourself and get to know them. It’s more likely to be a successful mentoring relationship if you know and like each other first.

Set goals and parameters
Be clear about what you’re asking of a mentor. What are you trying to achieve? How long will it take? What’s the time commitment you’re asking from your potential mentor? Make sure this is all set out before you start. Make a soft approach, like a phone call or chat over coffee, to raise the subject. If they respond positively, follow up promptly with a detailed written request. Suggest a trial period to ensure the arrangement works for both of you. Make it clear if you’re asking for free mentoring or if you’re prepared to pay. Either might be possible, but don’t assume mentoring is free.

A mentor won’t do the work for you
A mentor will guide you, talk through your options and make recommendations, but it’s not their job to achieve your goal, particularly in the field of fundraising.

Don’t expect them to share their contacts
If your potential mentor is an active fundraiser, they may not be able to share the contact details of their donors with you. Be aware of these limitations, and be prepared to establish your own connections to meet your fundraising targets.
Setting meetings and being accountable is your responsibility – not your mentor’s

If you’re meeting monthly, you have to arrange the meeting and ensure you’re punctual and prepared. Your mentor will want to see what progress you’ve made between meetings, and you’ve got to be accountable for these actions. If you’ve done no work since the last meeting, it’s a missed opportunity and a waste of your mentor’s time.

Understand what your mentor gets out of mentoring you

A worthwhile mentorship is a two-way street. Understand what your mentor gets out of their relationship with you and help provide that experience for them. In most cases, mentors will work with you because they like you and they want to give something back. Let them know they’re appreciated and acknowledge them wherever possible. Take an interest in their interests or what they’re working on – they may enjoy sharing information and having an ongoing dialogue about those topics.

Mentoring programs

Organisations such as the Australia Council and Creative Partnerships Australia offer mentoring programs on an annual basis. These are competitive and have specific entry requirements. You could also try the NSW Department of Industries Business Connect program. It has a creative business specialist dedicated to helping creative practitioners in NSW.

Mentoring programs are also offered through Corporate Foundations or Corporate Social Responsibility programs that specifically cater to not-for-profits managers and leaders.

A NSW EXAMPLE: PRIVATE SECTOR SUPPORT.

Caroline Sharpen, an expert in private sector support for arts organisations and a mentor, gives her opinion on what makes a fundraising mentorship work:

“One of the most important things is valuing your mentor’s time and proactively managing the relationship. It usually comes down to doing what you say you’re going to do and communicating well. You need to take responsibility for setting the agenda, closing the loop on previous conversations, showing them you’re invested in making progress and honouring the relationship.”

FURTHER READING

How to Find (and Keep) a Mentor in 10 Not-So-Easy Steps – Blog post by writer Jeff Goins

Linden New Art on integrating fundraising with gallery programs – Case study from Creative Partnerships Australia

The Art of Asking – Amanda Palmer’s book on raising funds from fans has become a must-read for many creatives

Case Study: Studio A