

The National Archives

fundraising
for
archives



Corporates
Major Gifts
Legacies



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The National Archives

Generating Larger Donations

Fundraising for Archives



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Aim of Today

You will have the knowledge to begin to implement high-value fundraising in your own organisation.

This morning: Major Gifts and Corporate Funding

- An introduction to major giving
- Finding potential major givers
- Understanding major giving
- Establishing the relationship
- Making the ask
- Maintaining and developing supporter relationships

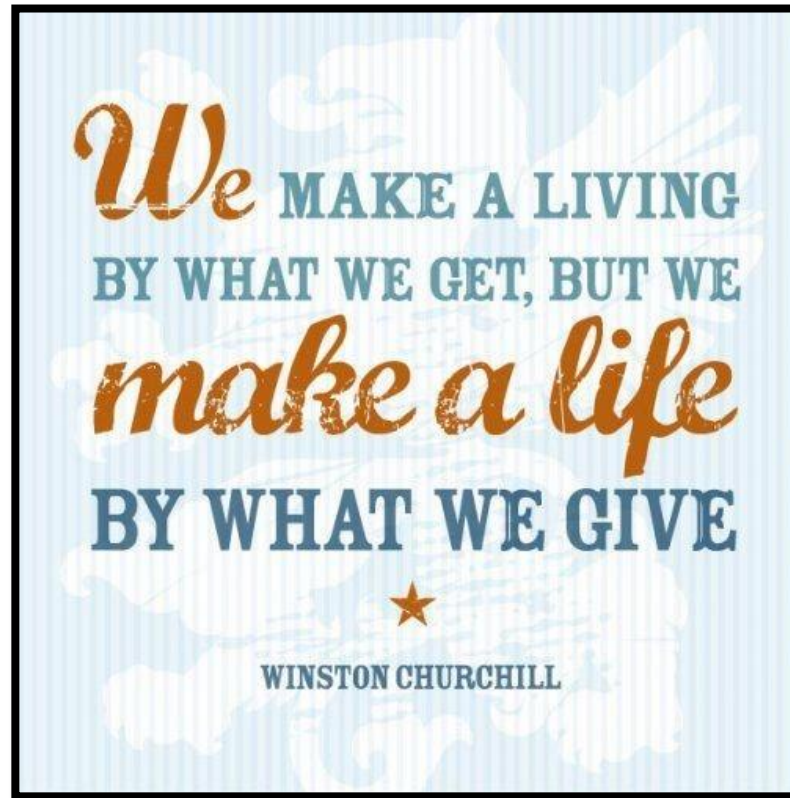
UNDERSTANDING MAJOR GIVING / CORPORATE FUNDING



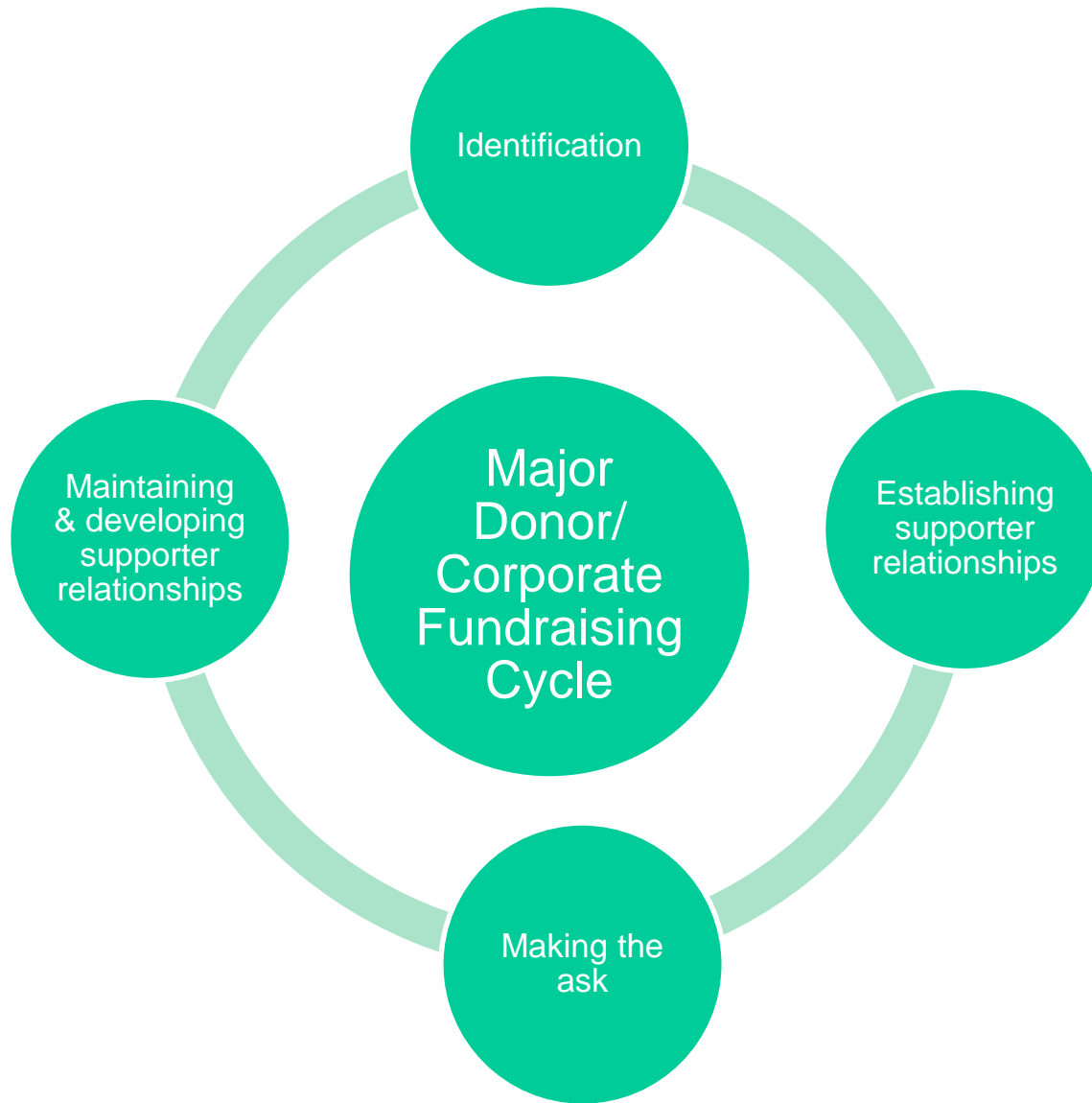
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What is a major gift?



What is a corporate donor?

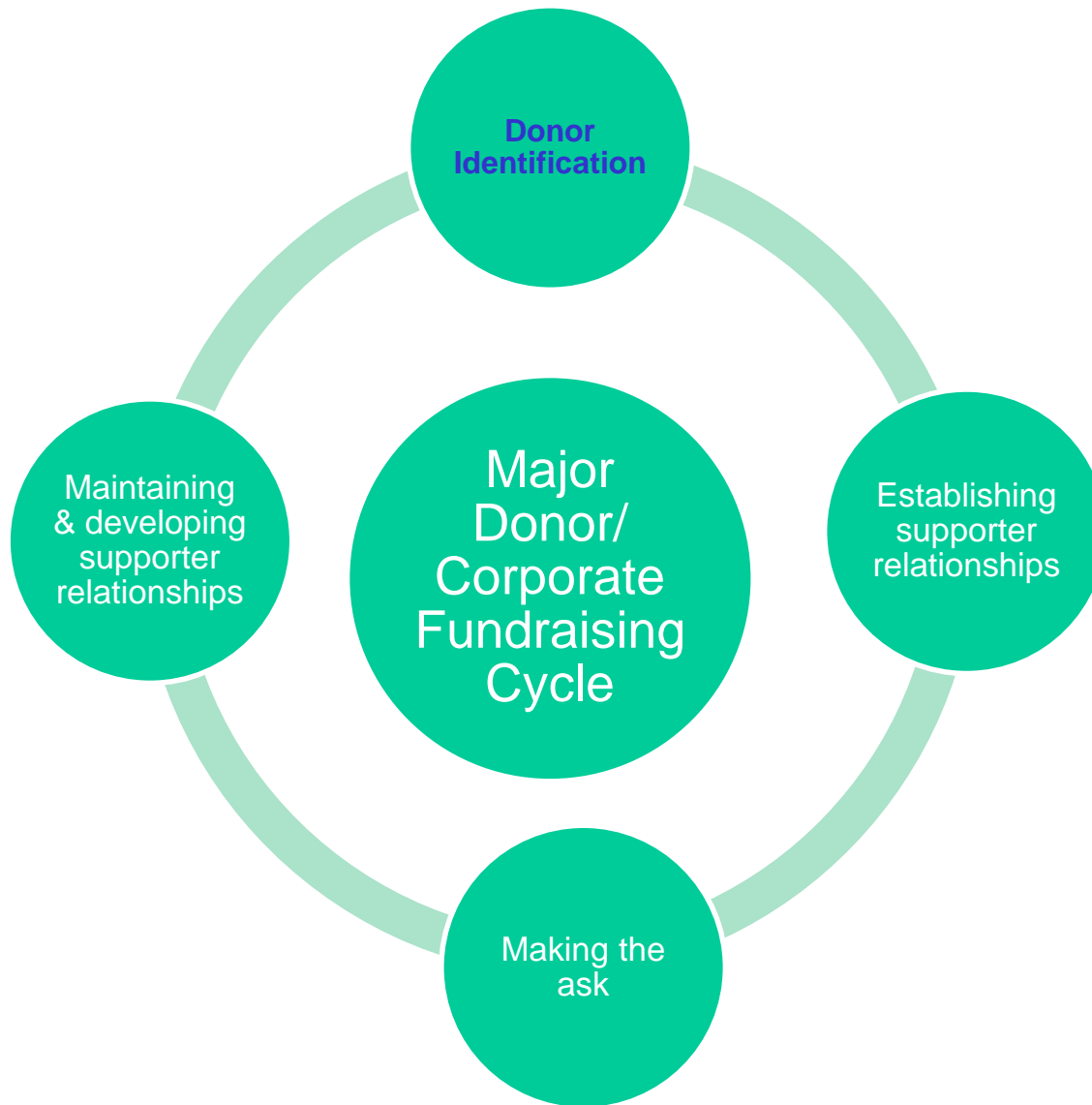


FINDING POTENTIAL CORPORATE / MAJOR GIVERS



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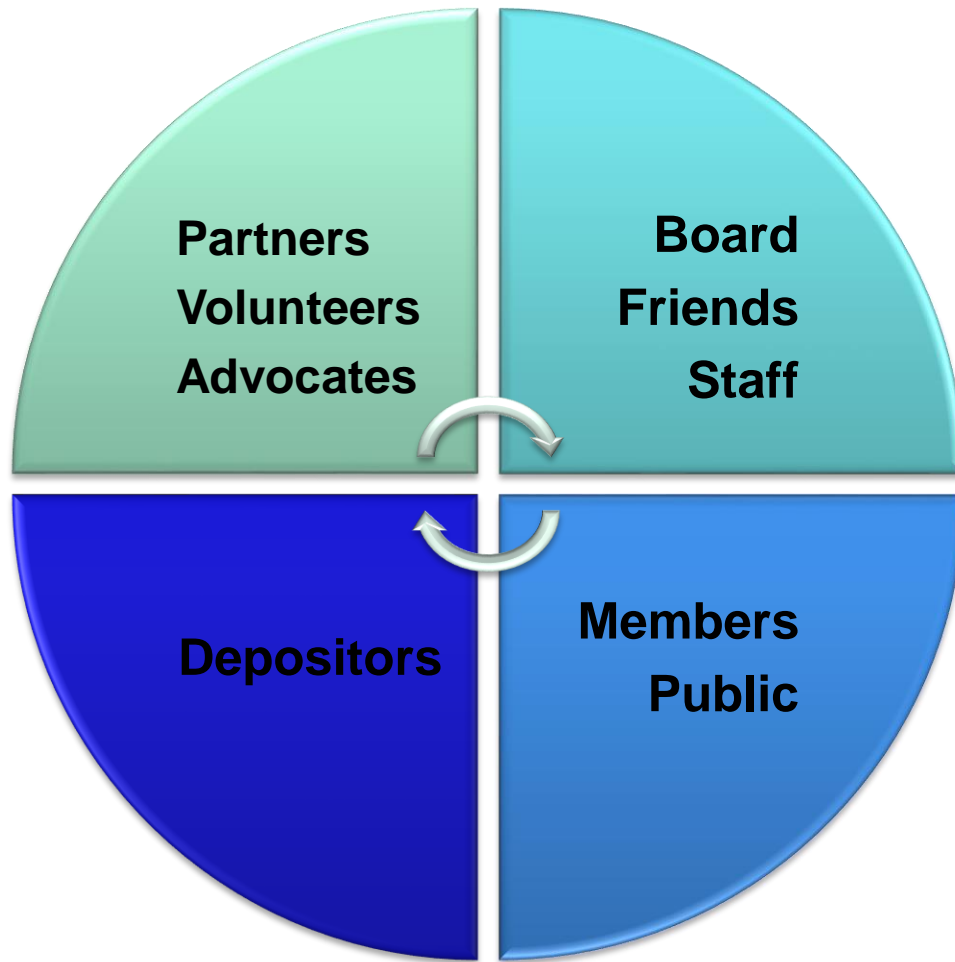








WHERE TO FIND FUNDING



GIVING TO HERITAGE



SURREY LIFE

Home Out & About Food & Drink Homes & Gardens People Education Style Motoring Photos Competitions

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FUNDING CENTRAL

The smart guide to over 4,000 grants, contracts and loans



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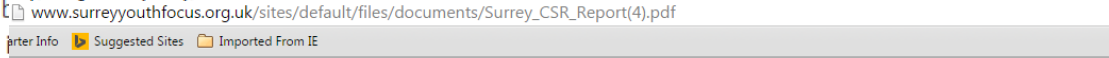
TRENDING CLANDON PARK FIRE ZANE GBANGBOLA M3 ALWAYS THE SUN FATHER'S DAY

Guildford Woking

Corporate social responsibility tops the agenda

00:00, 9 NOV 2007 | UPDATED 00:42, 3 JUL 2013 | BY GETSURREY

THE days when a company focused purely on the nuts and bolts of running its business leaving any involvement in ethical or community issues to a very slim minority appear to be over.



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THE SURREY ECONOMY: ANNUAL REPORT & ACCOUNTS

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THE days when a company focused purely on the nuts and bolts of running its business leaving any involvement in ethical or community issues to a very slim

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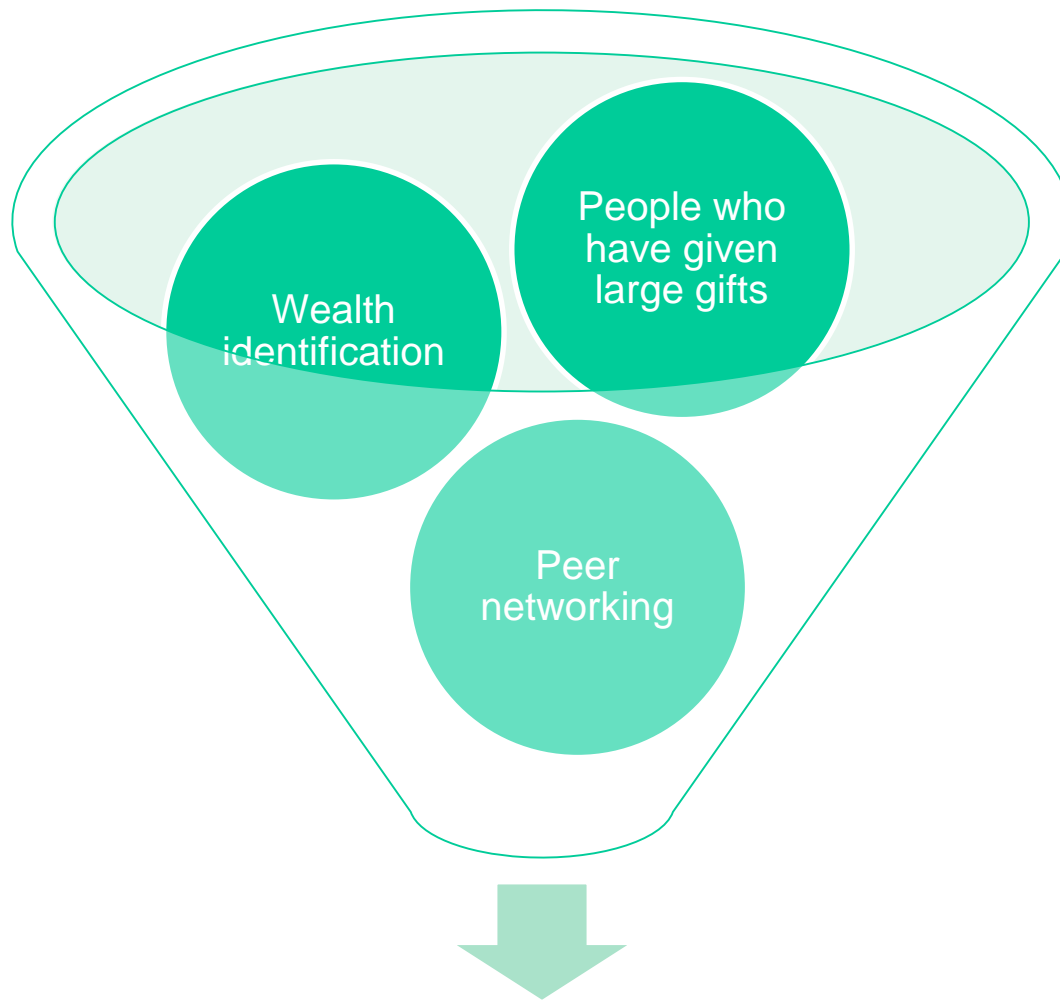
Research

Who	What
Organisation	External desk research Recording information in a prospect file according to data protection guidelines Creating a biography of all prospects, listing interests, details of charitable giving, business interests, connection to organisation
Trustees and other supporters who know the individual	Internal research. Providing insight and additional information and knowledge of attitudes and enthusiasms not widely available beyond his/her circles

Narrowing the list

Is it possible to 'rank' your prospects by considering (or even scoring) them against these three, equally important, categories?

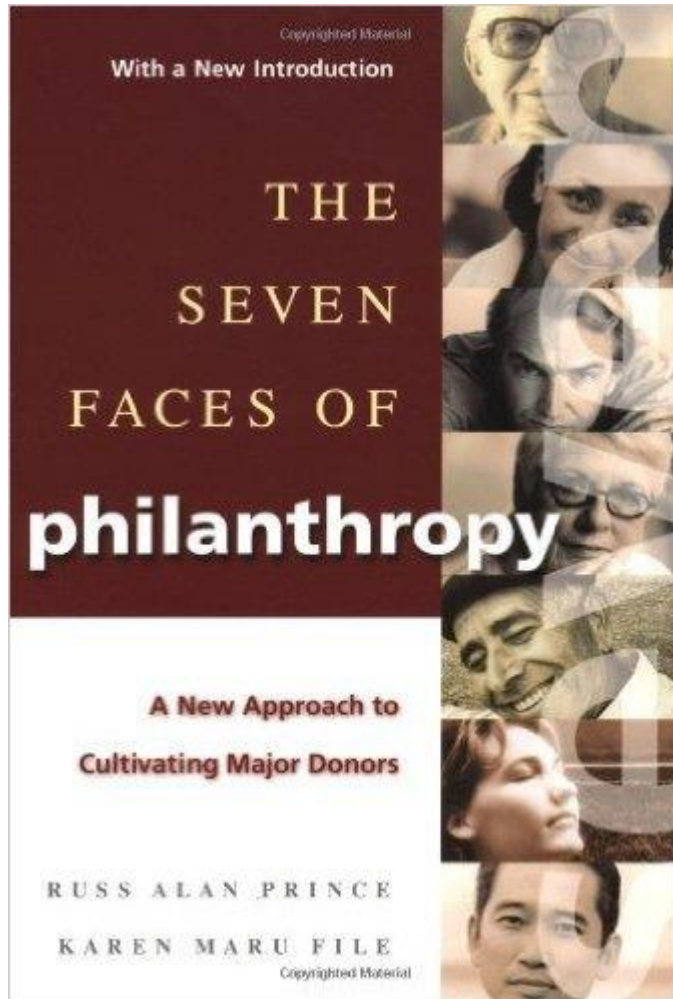
- Ability to give (what size donation might they be capable of?)
- Interest in cause (what evidence do you have that they might be interested in your cause?)
- Links to your organisation (Do you know them well? Has someone connected to the organisation met them? Are they aware of you?)



Prospect pipeline

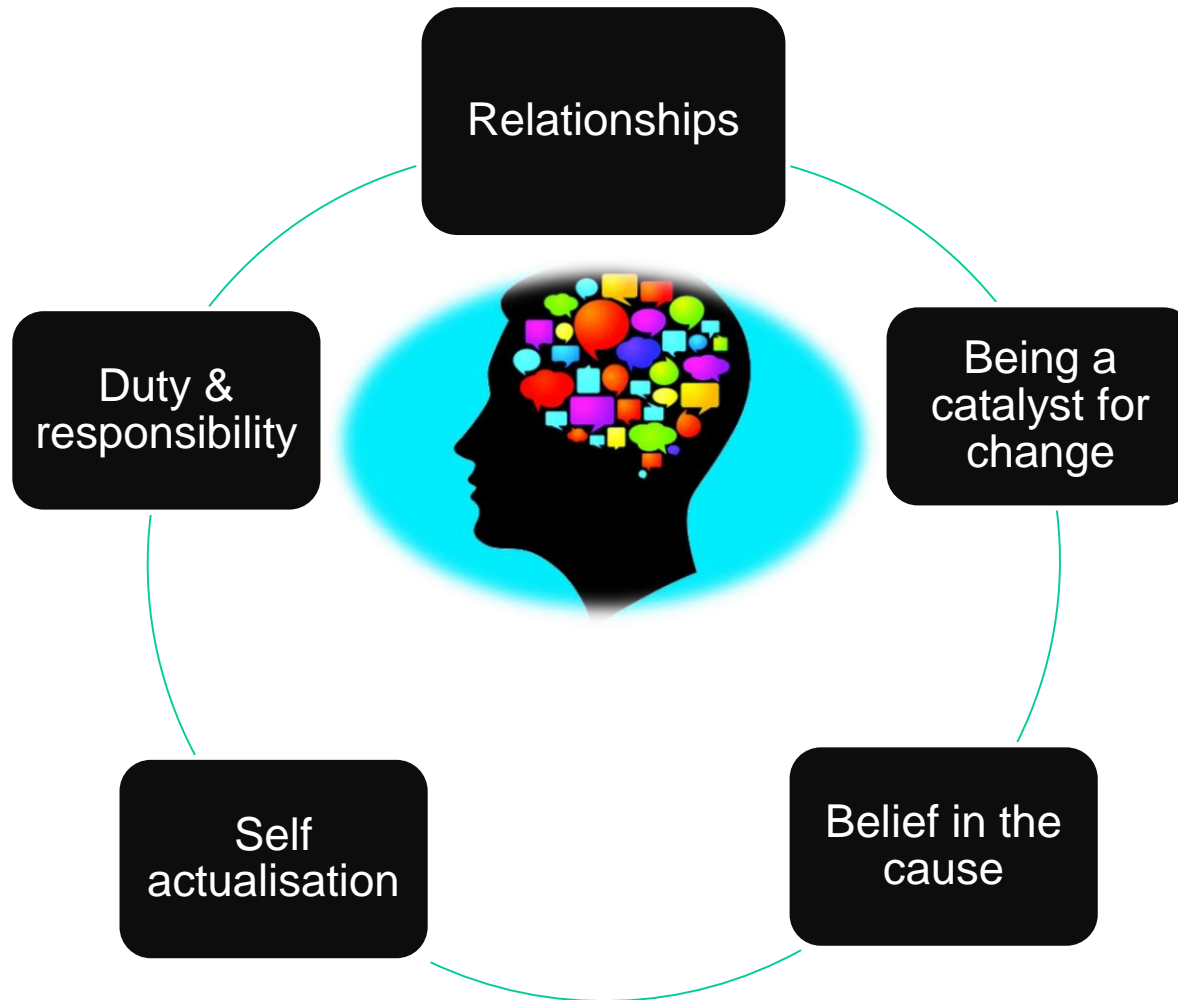


WHY DO PEOPLE / CORPORATES GIVE



- **The Communitarian**
- **The Devout**
- **The Investor**
- **The Socialite**
- **The Altruist**
- **The Repayer**
- **The Dynast**

Major donor motivations



Business aims and objectives

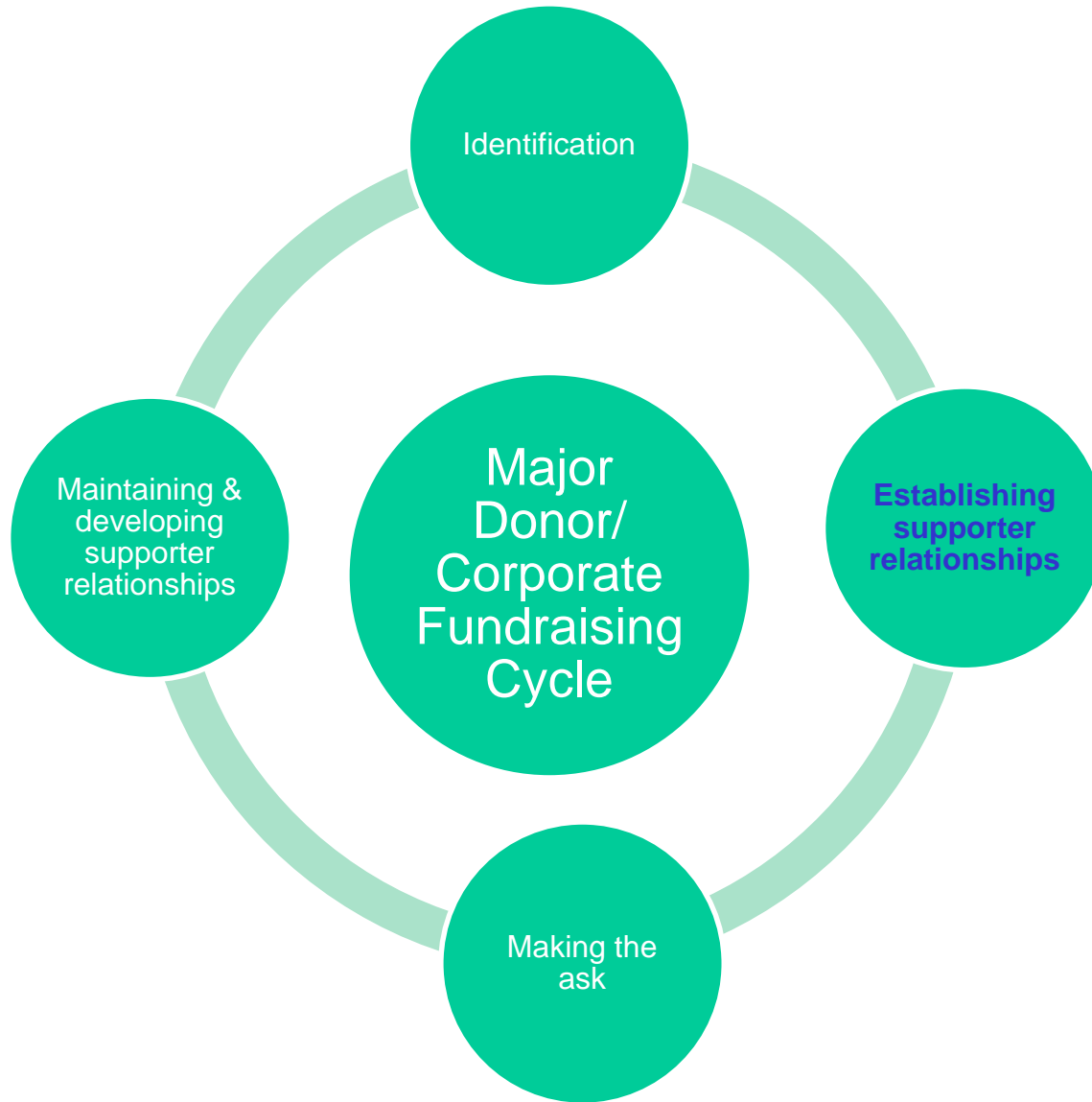


ESTABLISHING A RELATIONSHIP

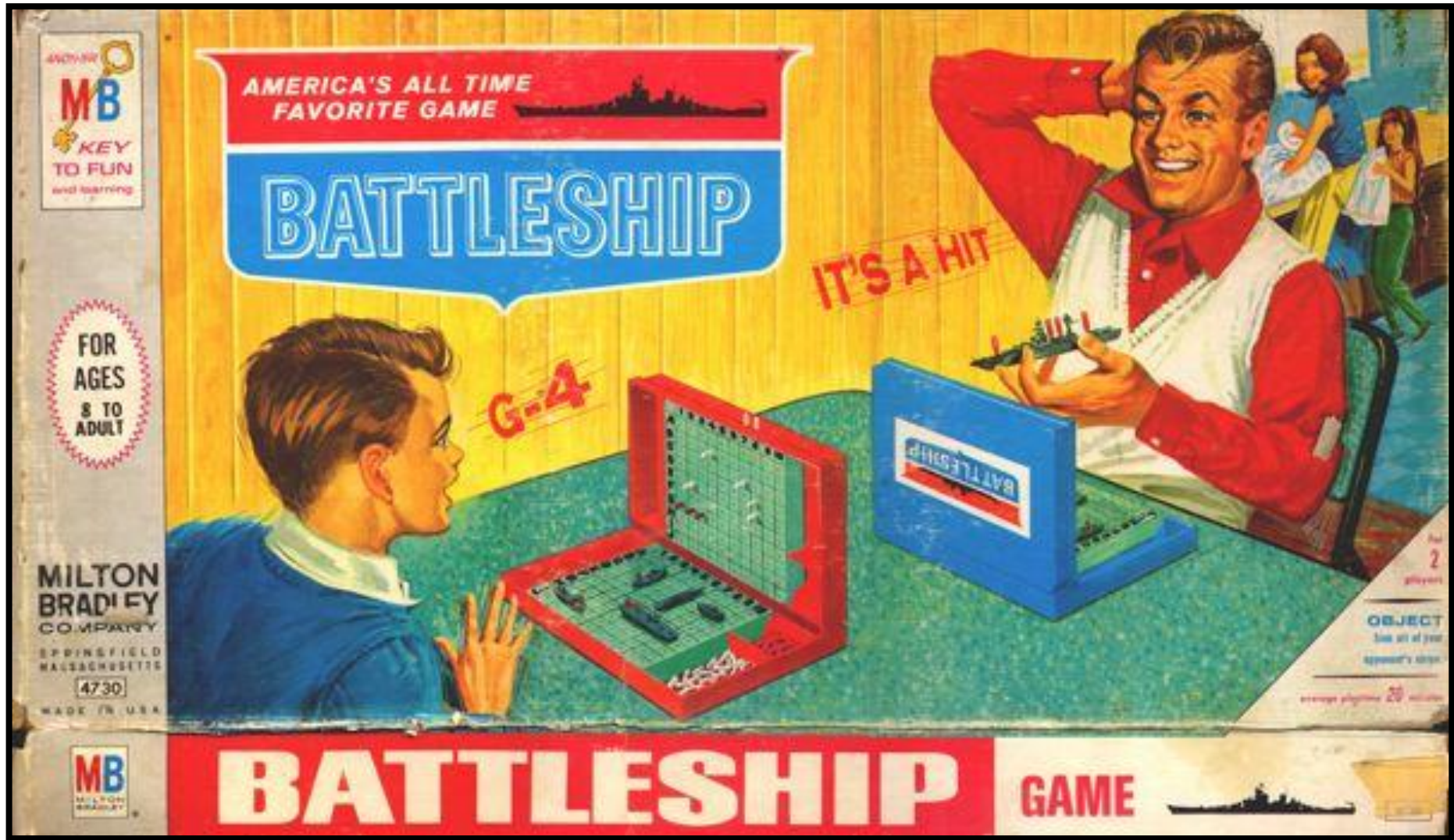


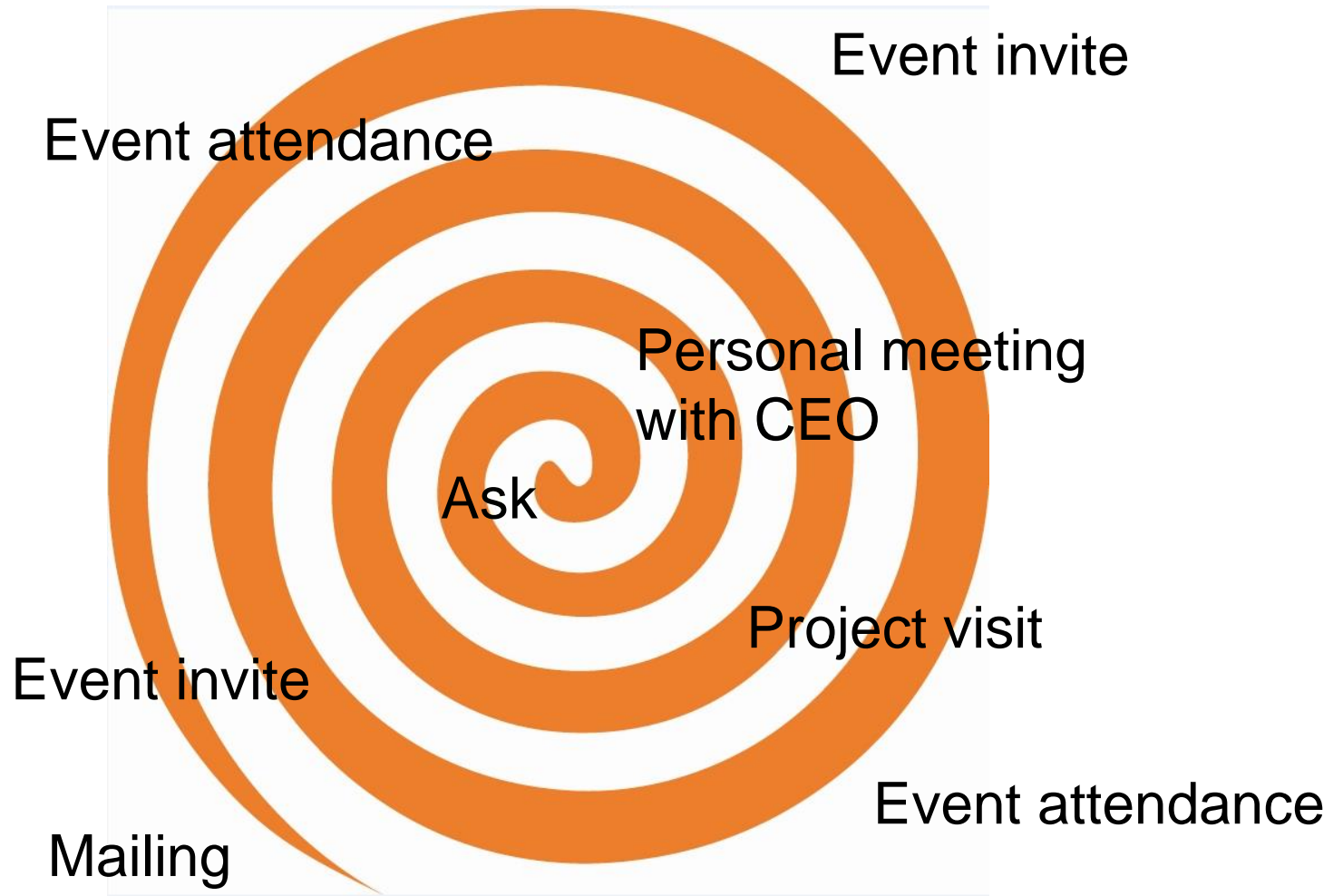
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Needs Finding



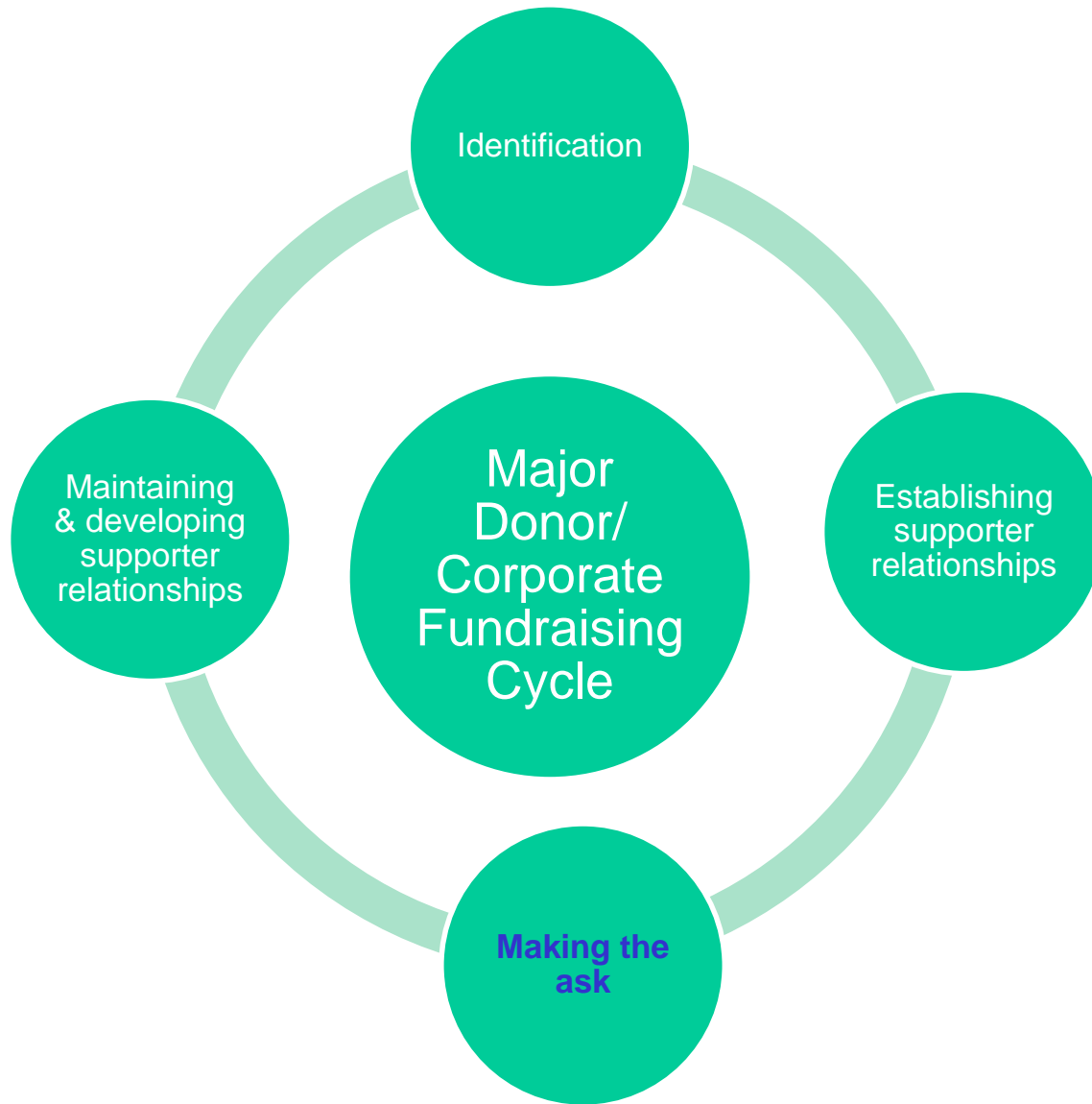


MAKING THE ASK



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Making the ask

Who	What
Staff	<ul style="list-style-type: none">• Supports the volunteer during the ask with a major donor• Can make the major donor ask when a volunteer is unavailable. A member of staff should always make the corporate ask – a corporate ask is a business transaction, nothing should be offered that cannot be delivered!• Makes sure the prospects objections and conditions are heard and responded to• Ensures follow up happens swiftly after the meeting
Trustee or supporter	<ul style="list-style-type: none">• Performs a stewarding role when facilitating corporate relationships.• Makes the ask of major donor—as the person most likely to satisfy the four key criteria

With thanks to =mc The Management Centre



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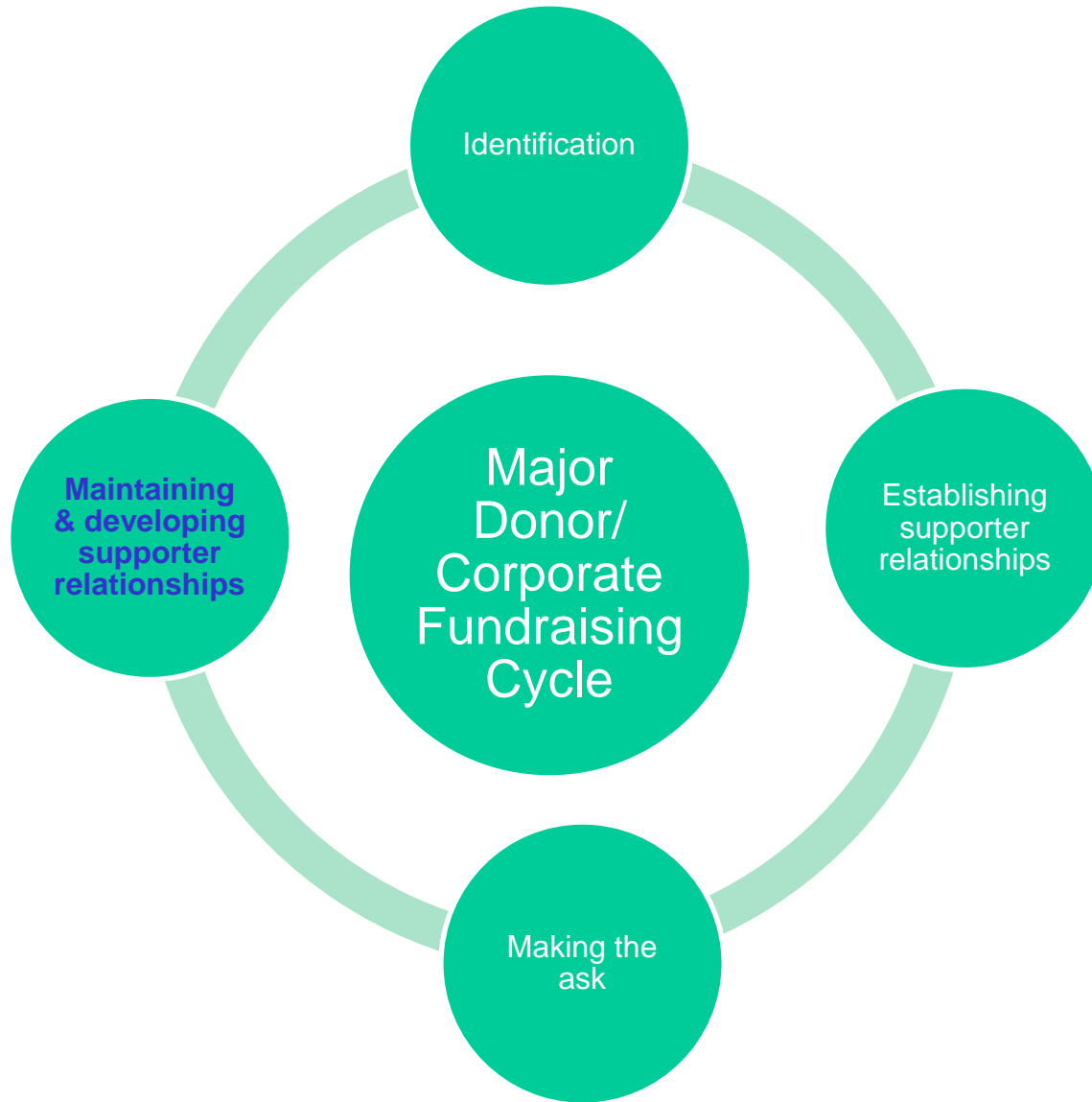


MAINTAINING & DEVELOPING THE RELATIONSHIP



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- Process gifts efficiently and promptly.
- Write thank you letters.
- Publicly acknowledge them as donors.
- Name things after major donors.
- Invite them to events
- Take people to see them
- Send reports, updates, photographs and other items about the projects they are supporting.
- Develop a special area of your website with project updates
- Remember and recognise events that are special to them
- Ask them not just for their money
- Personalise communications as much as you can
- Let your donors hear directly from people they have helped

Top Tips from CASE

https://www.case.org/Publications_and_Products/Fundraising_Fundamentals_Intro/Fundraising_Fundamentals_section_7/Fundraising_Fundamentals_section_710.html

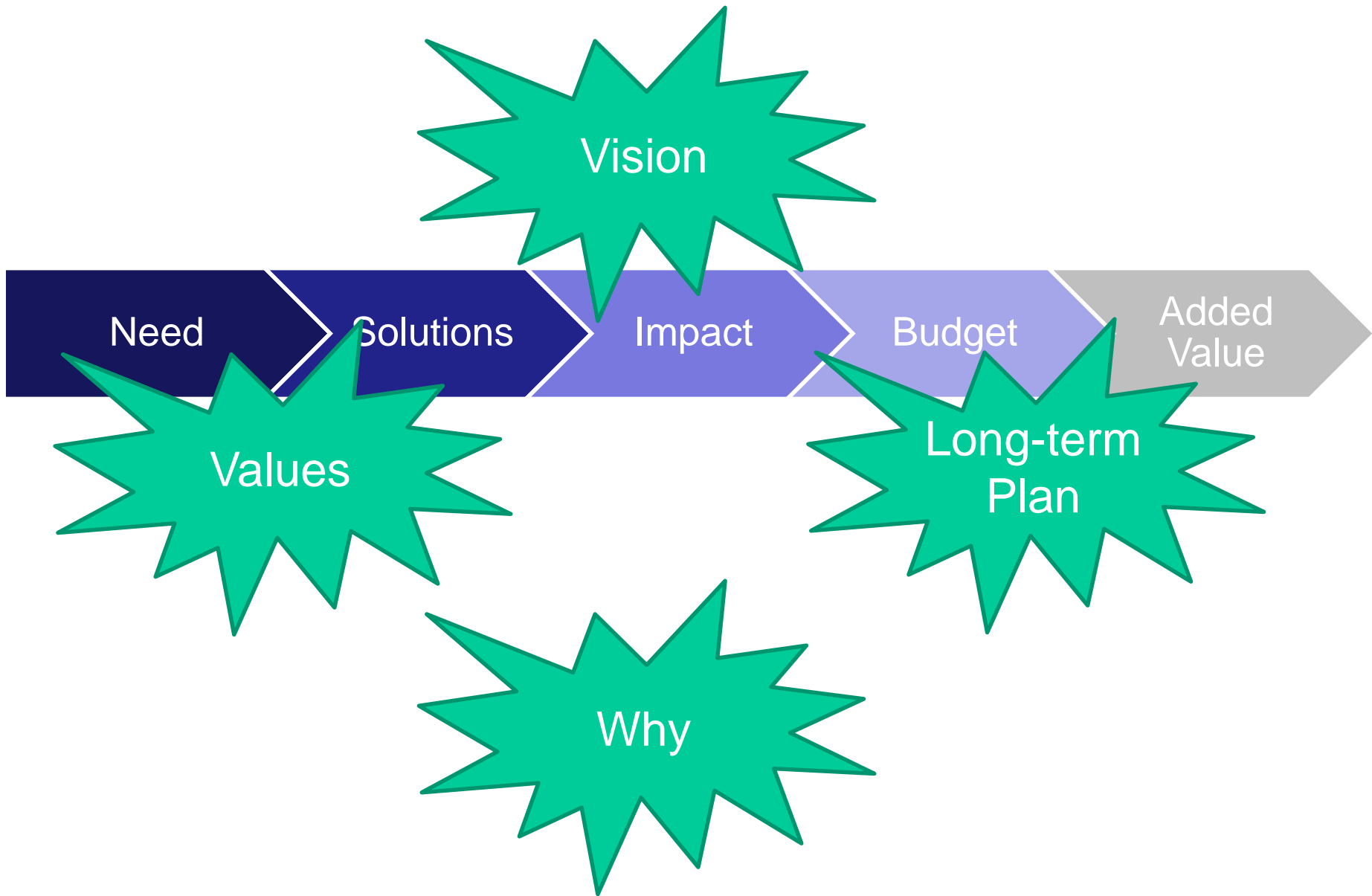


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LUNCH



This afternoon: Legacies

- Welcome, introductions, background
- Who leaves legacies?
- Why do people leave legacies?

Break

- Developing your 'drip-drip' strategy
- Developing your materials
- Some basic legal info

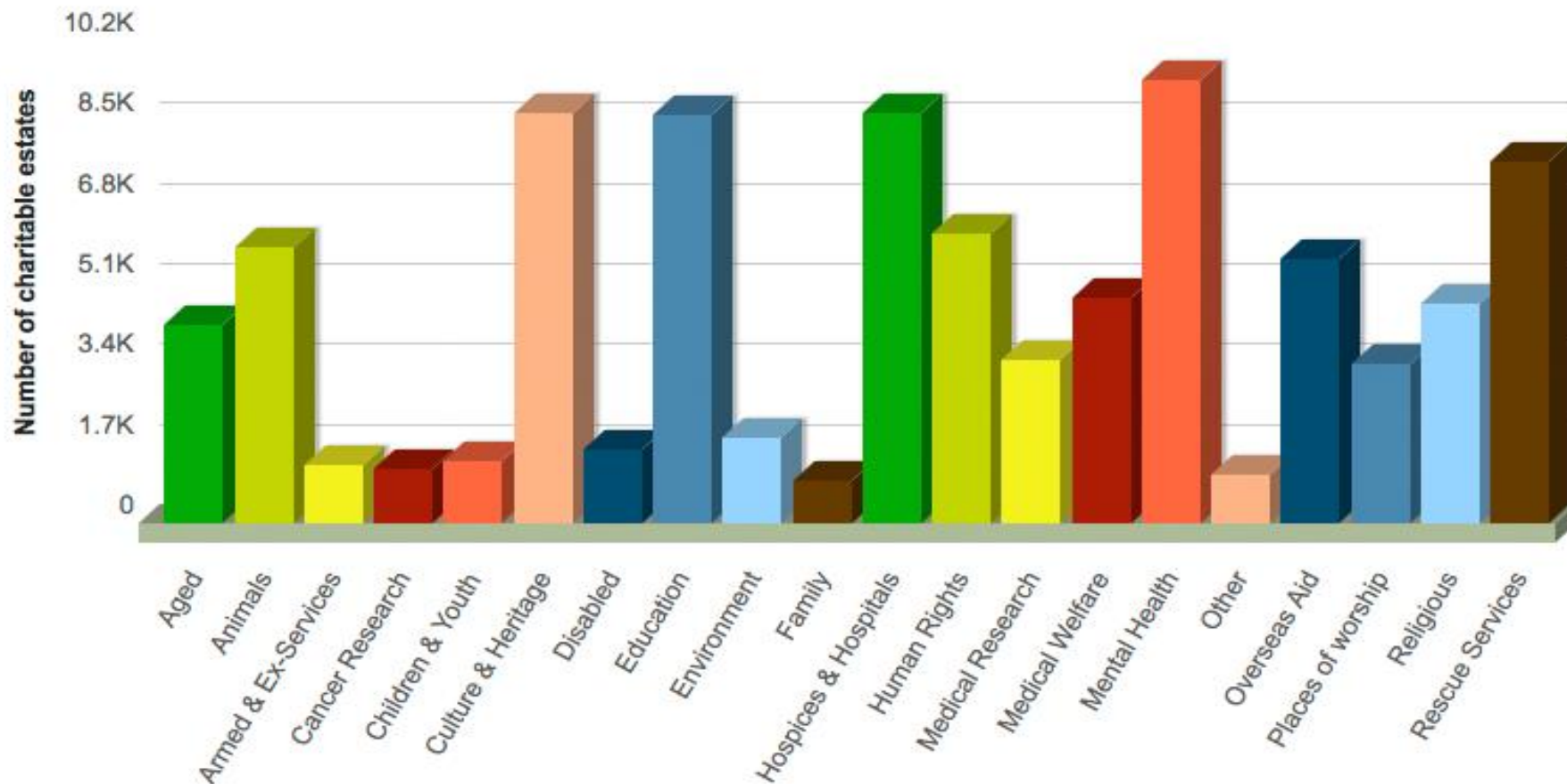
Lunch

Total legacy income 2010 – 2050

£bn, 2012 constant prices



Number of charitable estates by cause for September 2012 to current



Smee & Ford Legacy View

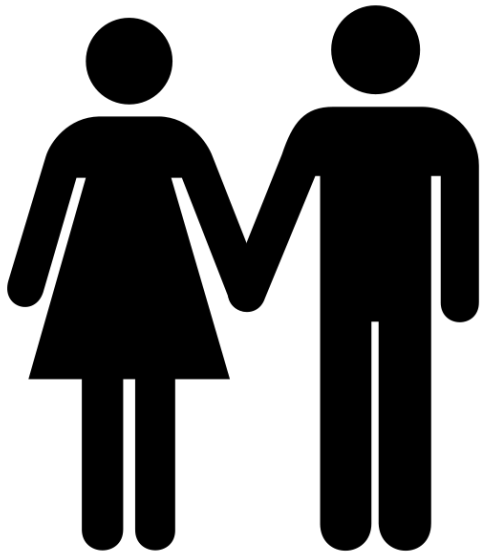
WHO LEAVES LEGACIES?



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WHY & WHEN DO PEOPLE LEAVE LEGACIES?

Life
experience

Reciprocity

Symbolic
Immortality

In memory

Social
influence

DEVELOPING YOUR PLAN



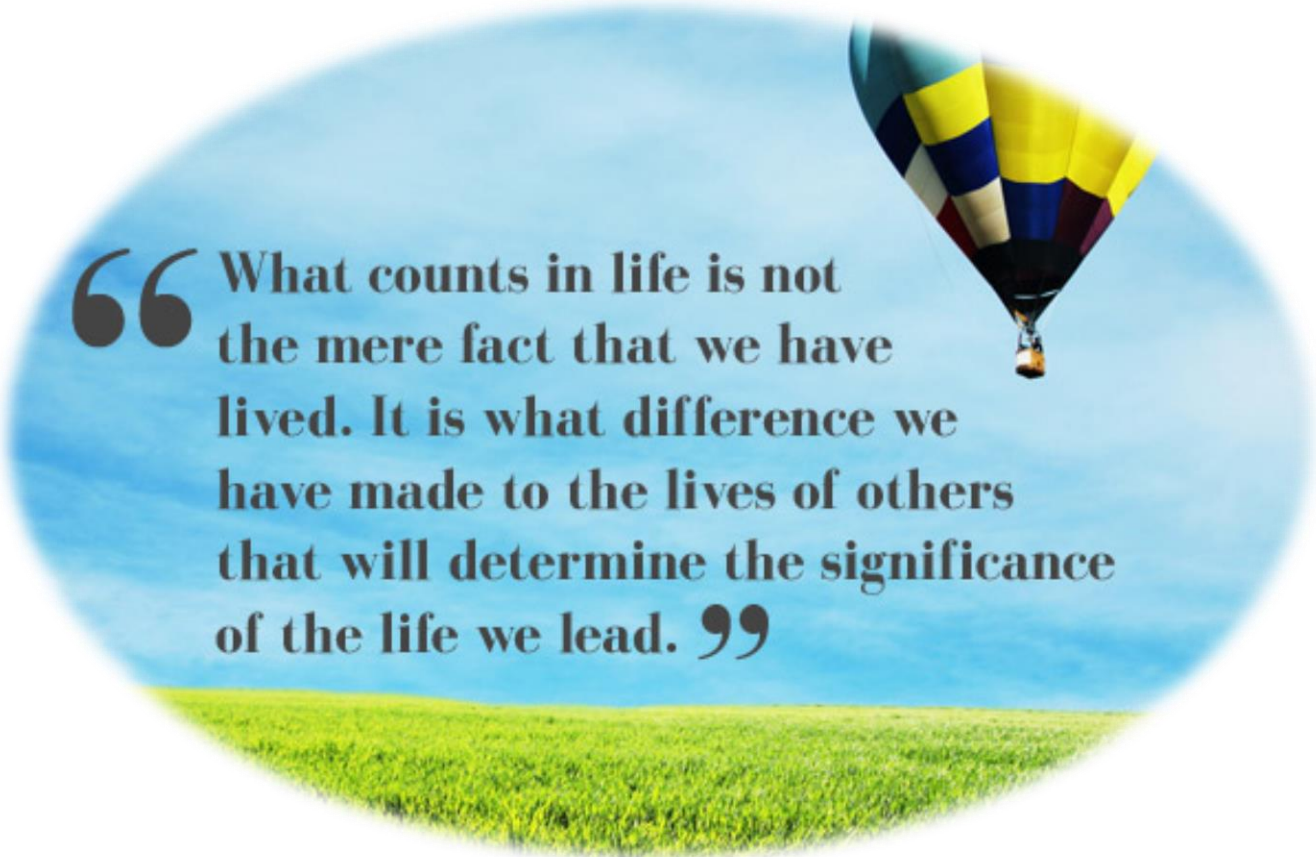
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Develop your legacy strategy



WHAT MAKES A GREAT LEGACY COMMUNICATION?



“What counts in life is not the mere fact that we have lived. It is what difference we have made to the lives of others that will determine the significance of the life we lead.”

Establishing and retaining legacy relationships



SOME BASIC LEGAL CONSIDERATIONS...

- Do you have the legal structure to accept legacies (tax effectively) e.g. a registered charity?
(<http://www.nationalarchives.gov.uk/archives-sector/development-trusts.htm>)
- Will you accept specific items as part of the collection?
- Can you accept/do you encourage restricted gifts?
- Are you aware of the primary forms of legacy (residuary and pecuniary) and the differences between them?
- See IOF's Code of Practice for more information



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