The National Archives

fundraising for archives
heritage lottery fund

Fundraising for Archives
Bringing Fundraising to Life
Bringing Fundraising to Life

Fundraising for Archives
Timings & Content

- Time management
- Is your service ready for fundraising?
- **Morning refreshments available**
- How to find funders (part I)
- **Lunch**
- How to find funders (part II)
- **Afternoon refreshments available**
- Talking to funders
- Finish
- **Fundraising Surgery**
Aim of Today
Let's get going...
Time Flies
What did you do yesterday?
Time Management

<table>
<thead>
<tr>
<th>Importance</th>
<th>Urgency</th>
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<tbody>
<tr>
<td>Low</td>
<td>Low</td>
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<tr>
<td>High</td>
<td>High</td>
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**High Importance, Low Urgency:**
- Preparation, planning, prevention, relationship building, personal development

**High Importance, High Urgency:**
- Crisis, pressing issues, deadlines, meetings

**Low Importance, Low Urgency:**
- Trivia, some phone calls, time wasters

**Low Importance, High Urgency:**
- Interruptions, some mail, social media
Is your organisation ready for fundraising?
Change

Organisational Capacity for Change

- Trustworthy Leadership
- Capable Champions
- Agreed Objectives and Milestones
- Involved Mid Management
- Trusting Followers
What’s important when communicating

- Increase Market Share
- Increase Sales
- Increase Brand Awareness
- Improve Customer Satisfaction/Experience
- Find new markets
- Expand Product or service lines
- Improve employee satisfaction
- Generate new Revenue Sources
- Reduce operational costs
- Expand Product or service lines
- Improve employee satisfaction
- Generate new Revenue Sources

Budget
Communicating Effectively

Key Drivers

Information Required

Relationship owner

Networks
Learning without reflection is a waste. Reflection without learning is dangerous.

Confucius

meetville.com
How to find funders....
Data Protection

• If you process and hold information about people, such as donors and service users, you are legally obliged to protect that data. Under the Data Protection Act, you must:

• Only collect information when you need it for a specific reason
• Keep it private
• Only hold as much information as you need
• Keep it for only as long as you need it
• Allow the subject of the data to see it whenever requested
Finding Funders: Individual Givers

- Planned Giver
  - Major Donor
  - Advocate (gives & recommends)
  - Sustainer
  - Multiple Giver
  - One-time Giver
  - Prospect
  - Suspect
One of our largest major donors initially made a one-off donation of £100. Without information from an external contact, we would never have known he had the potential to give a six figure sum annually.

IOF Major Gift Fundraising Report 2013
Corporate Funding

• Who do you know

• What does your organisation stand for: Mission, Vision, Values

• Which companies do you have a synergy with?
What do you have to trade with
Business aims and objectives

- **Increase Market Share**
- **Increase Sales**
- **Increase Brand Awareness**
- **Improve Customer Satisfaction/Experience**
- **Find new markets**
- **Expand Product or service lines**
- **Improve employee satisfaction**
- **Generate new Revenue Sources**
- **Reduce operational costs**
- **Increase networking with partners**

**Profit**
Major donor motivations

- Relationships
- Duty & responsibility
- Being a catalyst for change
- Self actualisation
- Belief in the cause
# Trust & Foundations

- Funding Central  
  [http://www.fundingcentral.org.uk/default.aspx](http://www.fundingcentral.org.uk/default.aspx)
- Giving to heritage  
  [http://www.theheritagealliance.org.uk/gth/](http://www.theheritagealliance.org.uk/gth/)
- Grant Finder  
  [http://www.idoxgrantfinder.co.uk/](http://www.idoxgrantfinder.co.uk/)

<table>
<thead>
<tr>
<th>Which of the following areas of work best describe what you do?</th>
<th>How would you describe what you do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select as many activities as appropriate:</td>
<td>Which of these headings best describes the area(s) that your organisation is involved with? Select as many as apply.</td>
</tr>
<tr>
<td>- Advice and information</td>
<td>- Addressing inequalities</td>
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<tr>
<td>- Arts and cultural activities</td>
<td>- Addressing unemployment</td>
</tr>
<tr>
<td>- Awareness raising</td>
<td>- Infrastructure support</td>
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<tr>
<td>- Campaigning</td>
<td>- Promoting community cohesion</td>
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<tr>
<td>- Capacity building</td>
<td>- Promoting education and learning</td>
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<tr>
<td>- Conducting research</td>
<td>- Promoting human rights</td>
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<tr>
<td>- Education and teaching</td>
<td>- Promoting religion and religious activity</td>
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<tr>
<td>- Environmental projects</td>
<td>- Promoting volunteering</td>
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<tr>
<td>- Equipment</td>
<td>- Protecting the environment and animals</td>
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<tr>
<td>- Events and workshops</td>
<td>- Providing social relief and care</td>
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<tr>
<td>- General community benefit</td>
<td>- Regenerating areas</td>
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<tr>
<td>- Healthcare</td>
<td>- Supporting families</td>
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<tr>
<td>- Organised sport and activities</td>
<td>- Supporting healthcare sector</td>
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<tr>
<td>- Promoting equal opportunities</td>
<td>- Supporting international aid and overseas development</td>
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<tr>
<td>- Providing services</td>
<td>- Supporting medical research</td>
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<tr>
<td>- Refurbishment</td>
<td>- Supporting social research</td>
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<tr>
<td>- Regular meetings</td>
<td>- Supporting sport and recreational activities</td>
</tr>
<tr>
<td>- Rehabilitation</td>
<td>- Tackling crime and victimisation</td>
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<tr>
<td>- Skills development</td>
<td>- Tackling discrimination</td>
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<tr>
<td>- Social relief</td>
<td>- Working in the arts or heritage</td>
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<tr>
<td>- Training</td>
<td>- Working with older people</td>
</tr>
<tr>
<td>- Other</td>
<td>- Working with people with disabilities</td>
</tr>
<tr>
<td></td>
<td>- Working with young people</td>
</tr>
<tr>
<td></td>
<td>- Other</td>
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In Summary

- To find new funders look at existing users/supporters?
- When looking at cold prospects look at what the drivers of the prospect would be – could you demonstrate a synergy with them?
- Try and establish a link with them – stakeholder mapping, peer to peer approach, cultivation events
- Approach – via contact or personally – ideally not by letter
- Follow up
## Opening the conversation

<table>
<thead>
<tr>
<th>Stage</th>
<th>Subevents</th>
<th>Example</th>
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| Opening                | Both parties identify themselves                      | • Ken: Hello, Ken Reilly  
• Val: Hi Ken this is Val Martin from Lambington County Record. (If Val knows Ken she will ask how is)                       |
|                        | Greetings are reciprocated                             |                                                                                                                                       |
| Permission to proceed  | Purpose & tone of conversation are established         | • Val: I wonder if you have 5 minutes to give me the benefit of your advice?  
• Ken: Sure, how can I help?  
• (Or I’m tied up at the moment can you call back in an hour)                                                                  |
| Business               | Substance of conversation                              | • Val: We are working on a plan to ensure future financial resilience. We have been working on understanding how our organisation can add value to local business objective. I’ve drawn up a proposal but would really appreciate some feedback on it, before I go public with it. I wonder whether I could send it to you, then we could meet (Coffee on me) and briefly discuss it?  
• Ken: I’d be happy to look at, please send it over                                                                                  |
| Feedback               | Signal business is concluded                           | • Val: That’s fantastic Ken I really appreciate your time  
• Ken: No problem I’ll be in touch when I’ve had a chance to look at it                                                             |
Needs Finding: Open Questions

[Comic of two birds discussing marriage]

WHAT DO YOU THINK BEING MARRIED TO ME WOULD BE LIKE?

HAROLD WONDERS WHY HE CAN NEVER TIE THE KNOT
Active Listening

The biggest communication problem is we do not listen to understand.
We listen to reply.
Active Listening

“Listening is not a technique. It’s a way of being. It’s about attention and awareness and genuinely wanting to hear someone else’s story.”
Active Listening Behaviours

- Don’t interrupt
- Show empathy
- Paraphrase what’s been said
- Show interest by making eye contact
- Avoid distracting actions or gestures
- Exhibit affirmative head nods and appropriate facial expressions
- Ask questions
Milestones & Momentum

- Database established
- Fundraising strategy written
- Income resilience included in approved department strategy
- Establish fundraising identity
- Recruit fundraising volunteers to fill resource/skills gaps
- Write core cases for support
- Research and identify funding prospects
- Prospect list established
- Plan a cultivation event
Next Steps
Thank You
The National Archives

Fundraising for Archives