Corporates
Major Gifts
Legacies
Generating Larger Donations
Fundraising for Archives
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
What is a major gift?

We make a living by what we get, but we make a life by what we give.

Winston Churchill

What is a corporate donor?
Major Donor/Corporate Fundraising Cycle

- Identification
- Establishing supporter relationships
- Maintaining & developing supporter relationships
- Making the ask
FINDING POTENTIAL CORPORATE / MAJOR GIVERS
Major Donor/Corporate Fundraising Cycle

- Donor Identification
- Establishing supporter relationships
- Making the ask
- Maintaining & developing supporter relationships
WHERE TO FIND FUNDING
Surrey's Richest 50 2012 - the worlds of finance, property, industry and entertainment collide

19:49 02 July 2012
Corporate social responsibility tops the agenda

00:00, 9 NOV 2007  UPDATED 02:42, 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 small minority appear to be over.

THE SURREY ECONOMY: ANNUAL REPORT & ACCOUNTS

THE SURREY CORPORATE SOCIAL RESPONSIBILITY INDEX

COMMISSIONED BY

HartBrown
# Research

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
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| 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

- Wealth identification
- People who have given large gifts
- Peer networking
WHY DO PEOPLE / CORPORATES GIVE
• The Communitarian
• The Devout
• The Investor
• The Socialite
• The Altruist
• The Repayer
• The Dynast
Major donor motivations

- Relationships
- Duty & responsibility
- Being a catalyst for change
- Belief in the cause
- Self actualisation
Business aims and objectives

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

Profit
ESTABLISHING A RELATIONSHIP
Major Donor/Corporate Fundraising Cycle

Identification

Establishing supporter relationships

Maintaining & developing supporter relationships

Making the ask
Needs Finding
MAKING THE ASK
Major Donor/Corporate Fundraising Cycle

- Identification
- Establishing supporter relationships
- Making the ask
- Maintaining & developing supporter relationships
# Making the ask

<table>
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<th>What</th>
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| Staff                        | • 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         | • 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 |
MAINTAINING & DEVELOPING THE RELATIONSHIP
Major Donor/Corporate Fundraising Cycle

- Identification
- Establishing supporter relationships
- Maintaining & developing supporter relationships
- Making the ask
• 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
Vision

Need → Solutions → Impact → Budget → Added Value

Values

Long-term Plan

Why
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Income</th>
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<tr>
<td>1990</td>
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<tr>
<td>2000</td>
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<tr>
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<td>4.00</td>
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<td>2050</td>
<td>5.16</td>
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</table>
Number of charitable estates by cause for September 2012 to current

Smee & Ford Legacy View
WHO LEAVES LEGACIES?
WHY & WHEN DO PEOPLE LEAVE LEGACIES?
DEVELOPING YOUR PLAN
Develop your legacy strategy

- **RESEARCH**
  - DATA ANALYSIS
  - CONTACT LIST
  - FOCUS GROUPS

- **COMMUNICATIONS**
  - LEAFLETS
  - WEBSITE
  - NEWSLETTERS
  - DIRECT MAIL

- **CULTIVATION EVENTS**

- **STEWARDSHIP**
  - DATABASE
  - THANKS
  - TAILORED COMMUNICATIONS & EVENTS
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