

RELATIONSHIP FUNDRAISING



the social change
nest

My background

- Culture and Communications degree
- Community arts / play centres / retail
- Music journalism
- Fundraiser since 2004
- Specialise in trusts / major gifts – covered all streams
- Trustee of a grant-giving trust




4 Stages

- Organisational readiness: clarify need, capacity and roles
- Prospect research and cultivation
- The ask
- The stewardship



Organisational readiness

- Mission statement / charitable aims
 - Structures / governance
 - Strategy, fundraising strategy
 - Accounts / management accounts / budgets
 - Policies: Safeguarding, EDI
 - Risk register
 - In line with public messaging
 - Case for support – elevator pitch
 - Capacity to cultivate and steward relationships
- 



Why do people give?

- To help
- To feel good about themselves
- Public recognition
- Guilt over their own wealth
- Gratitude
- In memory / honour of loved ones
- To be part of a movement
- To build a legacy
- Because they're asked



Who are your prospective donors – who gives?

- Private individuals
- Individuals through company giving schemes
- Individuals related to trust supporters
- Philanthropists
- Entrepreneurs
- Religious communities
- Social communities: gamers
- Sports communities: rugby
- School / university communities
- Parents / grandparents



Prospect research

- Peer charity websites (Our Supporters page) or annual reports
- Similar-ish charities
- Press coverage
- Existing supporters – corporates/ trusts
- Local contacts: friends, neighbours
- Local events
- Society pages
- Honours lists
- Rich List



What stage are your prospects at?


- Major gifts / grants almost always have the best ROI (ratio between time/energy/£ to £ raised)
- Note any connections – Peer introductions where possible
- Plan your approach – don't rush – where do you want the relationship to be 2 years from now
- What level are you hoping they'll give at? Segment your prospect pool into giving levels
- The return might be non-monetary: introductions, promotion, relationship building, supporter engagement, press coverage, community building, advocacy etc.
- GDPR compliance

➤ SEVEN STAGES OF A MAJOR GIFT PROSPECT

1. Identification
2. Research
3. Strategy
4. Cultivation
5. Solicitation
6. Negotiation
7. Stewardship



A long-term view

- What is your immediate need?
 - Is it best addressed through major donors, crowdfunding, events?
 - What is your 'supporter journey' plan for each level?
 - Don't treat donors like ATMs
 - If they give to Project A this year, do you have a plan for next year?
- 

Due diligence

As with any other supporters you are publicly aligning your brand with theirs and should carry out research to ensure your values align.

It is arguably better to miss an opportunity than to have to reverse out of a conversation that you initiated.



Case for Support = your pitch

- One document capturing the core of your organisational mission, aims, position and ambition and need.
- Why, who, what (and 'what if not'), where, when
- USP – what is unique or novel about what you want to do?
- Why you?
- What aspects can be packaged up for specific audiences?
- Can you confidently convey this verbally?



The Ask - preparation

- Confirm meeting logistics – punctuality
- Talk through your plan with a colleague – rehearse if needed
- Print out any materials the day before
- Have a Plan B and C
- Be prepared to *not* make the ask if the vibe isn't there



The Ask – what they might ask you

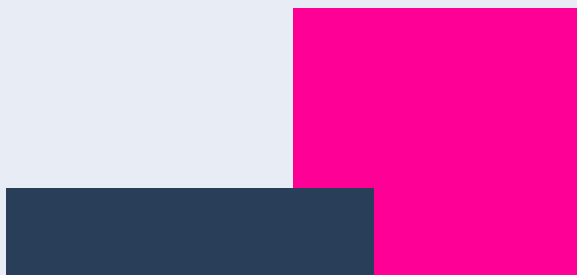
- Why – Why is this needed, and Why You
- Who will this help, and who are you
- What (and ‘what if not’) will happen
- Where will it happen
- When is this needed
- When will it be delivered
- How many beneficiaries / participants / clients
- How / how much will this help anyone – outcomes
- How much will it cost
- Supporting data
 - Statistics on local need
 - Case studies
 - Quotes



The Ask – tips on asking

- Clarify time-frame of meeting
- Be confident – you are doing good work and offering them a chance to be part of this
- Be alert and responsive to what they are telling you
- Talk through your organisation's need
- Let them talk as much as possible
- Explain exactly why your organisation needs funding
- Ask if they would like to join the mission, be a committed member of your community
- Suggest the giving level where you were hoping they'd come on board

Follow up

- Thank for the meeting
 - Provide answers to any questions
 - Confirm any support pledged
 - Provide routes to donate – bank details etc
 - Reminder of any forthcoming events or visits
 - Clarify who will be their point of contact
- 

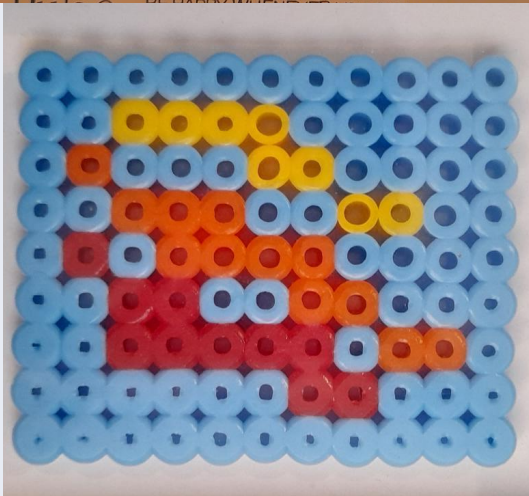
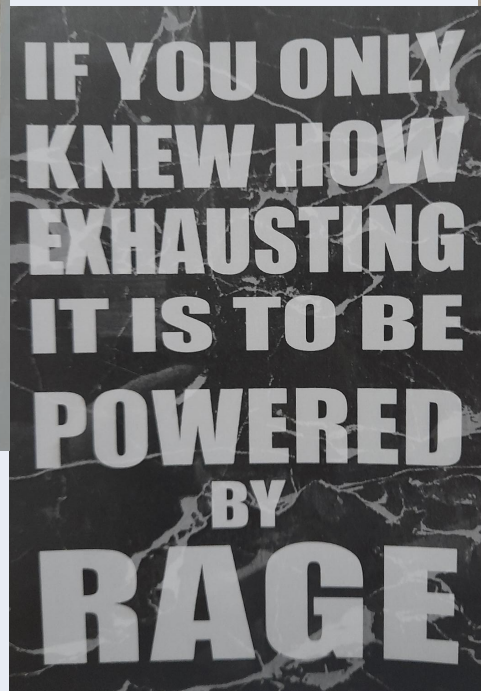
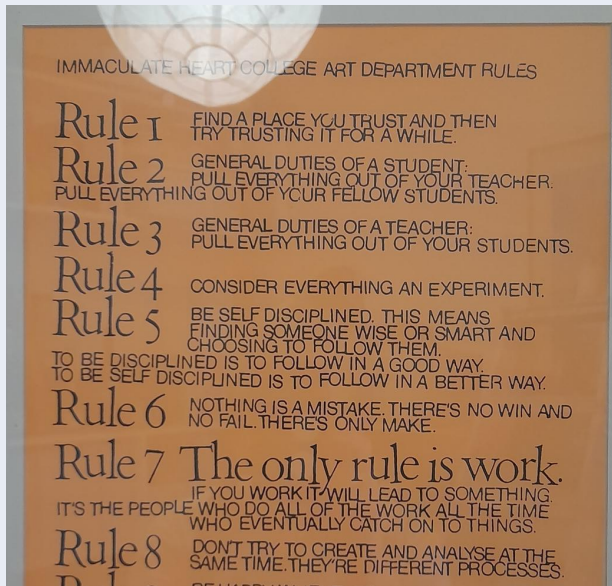


Stewardship

- Who is responsible for stewarding the supporter
- Clear expectations on outcomes
- Confirm reporting schedule
- Draft a rough schedule / comms calendar
- Minimum of 4-6 annual interactions
- What mini-updates can you send them
- What can you invite them to
- Authenticity
- Meaningful
- Good news stories
- Share your project's journey

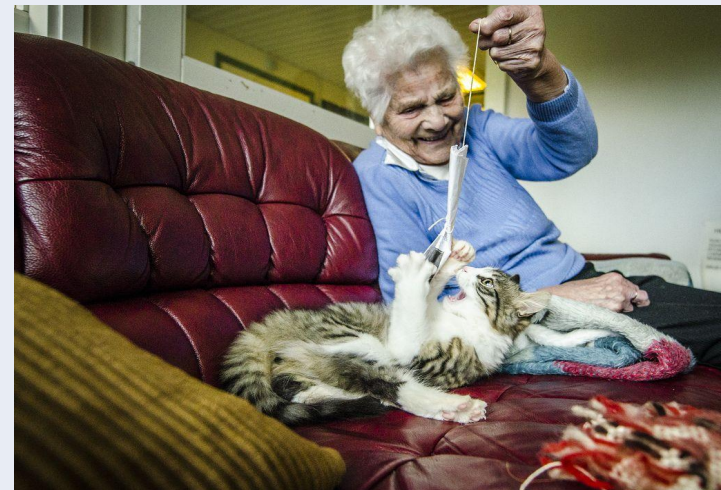
Thank You...

and remember our charity messaging...



Info sheet

- Sunday Times Rich List published in May!
- Useful links
- Case for support / elevator pitch – is there clarity and confidence in your messaging?
- Please treat donors – giving at any level – with the level of respect you would expect for yourself.



Please take a few
minutes to provide us
with feedback



the social change
nest

THANKS FOR COMING!



the social change
nest