



**Association of  
independent  
Museums**

Helping Heritage  
Organisations Prosper

## Success Guides

### Successful Fundraising at Museums





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*Development Partners*

Front cover picture: London Transport Museum's annual dinner and auction, held at the Royal Opera House close by in Covent Garden.

# Successful Fundraising at Museums

It is now more necessary than ever to make sure that fundraising is taken seriously, with appropriate time and resources dedicated to the processes.

This fundraising guide is intended to help museums large and small to understand the current fundraising environment and to provide practical advice on how to kick-start or improve your fundraising activity.

The advice is aimed at all museum staff, since there is a role for everyone in the fundraising process, but it will be particularly relevant for those who have fundraising as their remit, and for senior staff and trustees.

## Fundraising today

The recent economic downturn has led to changes in the fundraising environment and in donating habits. Trusts are under pressure from reduced endowment returns and from organisations that seek to replace funding lost from statutory cuts. High-level individual donors are increasingly strategic in their donations, wanting to ensure the greatest impact from their gift. Companies have largely deserted corporate giving, and even sponsorship is on the decline.

This may all sound like bad news, but it is important to be aware of these changes so as to respond to them most effectively. There are few 'quick wins' these days, and to be successful museums need to

- Ensure they are 'fundraising fit'
- Get to know their potential donors
- Ask for support in the right way at the right time

The latest figures from Arts and Business show that in 2010/11 private investment in culture actually increased by 4% from the year before, standing at £686 million. This includes a 10% increase in support from trusts and foundations (despite the reduced endowment returns referred to above) and a 6% increase in individual giving but a 7% decline in business investment. This indicates that people are still giving, and in some sectors are

actually giving more. But competition between applicants is intense and many good projects are failing to receive the hoped-for support because others have made stronger applications, or because there is simply a lack of available funding.

It is now more necessary than ever to make sure that fundraising is taken seriously, with appropriate time and resources dedicated to the processes. This may sound intimidating for small museums, but with a strategic approach it needn't be. There is no 'one size fits all' in fundraising, and every museum has a unique and compelling story to tell.

## How to be 'fundraising fit'

Before embarking on a fundraising campaign, it is vital that the organisation as a whole is 'fundraising fit'. This means the organisation

- Has clear organisational and project aims
- Can harness the potential of its people
- Communicates effectively with a range of audiences
- Has systems to manage data and finances appropriately

These attributes will support a museum across all activities, not just fundraising, and so it is worth investing time in getting them right.



Banner demonstrating funding support at the National Maritime Museum, Cornwall.

### Clear organisation and project aims

The foundations of a fundraising campaign rest on a clarity of purpose for both the organisation and the project that you wish to fund. You will need:

- A business plan which lays out current/future aims
- A mission statement
- A financial plan which indicates a sustainable future
- Clear project objectives with realistic costings

These will enable the creation of a compelling 'Case for Support' for the fundraising campaign.



Guests at the launch of a patrons and ambassadors scheme at St Barbe Museum & Art Gallery, Lymington, Hampshire.



### People resources

The amount of staff resource allocated to fundraising will vary across AIM member organisations, with some having established development offices and many others incorporating fundraising within one or two individuals' job descriptions. Whilst there will be some highly skilled fundraisers out there, some museums may find that they have a lack of experience and expertise.

When embarking upon a fundraising campaign or developing sustainable fundraising activities, it will be necessary to review the current resource. Fundraising is a time-consuming activity and it is important to be realistic about what can be achieved within the existing staffing/volunteer levels. Could this be addressed by relieving an individual from other duties for a specific period? Or by bringing in the support of new volunteers with appropriate skills and time? Where funding allows, an organisation may choose to employ one or more dedicated fundraisers to drive the project forward. An alternative would be to use the

services of a fundraising consultancy to advise on strategy and implement fundraising activity for the period of the campaign.

### Training

A sound understanding of fundraising principles and activities is essential to underpin a successful fundraising campaign or programme. Training is available from a number of sources, including AIM workshops, and courses run by the Institute of Fundraising. The input of an experienced fundraiser to advise on strategy or priorities can also be invaluable.

Fundraising is not just the responsibility of the fundraisers, and it is advisable for the museum director and at least one or two trustees to attend training, so that there is a better understanding throughout the organisation. There are often specific training courses aimed at senior executives and trustees. This will enable those senior individuals to lead the campaign with confidence, and understand their own roles within the process.

The role of trustees in fundraising should not be underestimated. It is often their networks within the community and their links to grant-making trusts or high net worth individuals which make all the difference for successful fundraising approaches. Their leadership and support of the project is vital.

There can be a reluctance to share networks and open address books when trustees are not sure how these will be used. It is therefore imperative that a level of trust is established whereby trustees know how this information will be used, and that their relationships will not be compromised. Trustees also need to be assured that they are supported with research, cultivation advice and administration.

### Communications for fundraising

Assuming your organisation is working towards being 'fundraising fit', you will have worked out your mission statement and project aims. Alongside these, key messages which express the need for and the benefits of the project should be used consistently across all means of communication. All communications should be coordinated by one person as clear, consistent messages are vital for successful fundraising.

It is often helpful to write a 'Case for Support' which brings all of these messages together with other practical information to give a compelling case for fundraising.

Make a compelling case for your project – it must stand up against other organisations competing for funding.

### Going paperless

Fundraising communications are increasingly moving away from printed leaflets to digital media. The benefit of this is the lower cost in terms of printing, but this change in format and frequency of communication can feel

daunting for those for whom it is still new. The initial change-over and set up can be time-consuming, but in the long-term this should be quicker and cheaper.

It is really important to have an up to date website which reflects your organisation's mission and aims and is appropriate for your target audience. It should provide information about the project, as this will be the first port of call for many who wish to learn more. Where possible, it is sensible to have a separate web page for the project which can be updated as you go along, and signposted from other communications. Ensure that you have a 'donate now' button which leads to an online donation page and/or information on how to give. Even though this may not directly result in many donations, it indicates that you need help and are 'open for business' when it comes to fundraising.

An e-newsletter is an inexpensive way of updating supporters. These look most attractive in HTML format, where your website layout can be mirrored. If you do not have the skills to set this up yourself, this can be created by a web-designer and then edited and updated by your internal staff or volunteers.

Social media such as twitter and facebook are increasingly used across the sector, and can link in to the above. In smaller museums, these can often be the responsibility of volunteers, assuming they are given appropriate guidance on what you wish to communicate and when.

### Databases

Most museums will have their own way of collecting data relating to visitors and participants. This is a valuable resource as it provides the means to communicate with those who are already interested in the museum. However, due to data protection rules, you may only use that information to communicate with them if this was

## The Case for Support

- Museum's mission statement
- What is unique about the museum?
- Project need
- Project benefits
- Why now, and why us?
- Why not any other alternatives?
- Who is supporting the campaign?
- What will it cost and how much do you need?

**Arts Council England has funding streams dedicated to museums, and other funds which focus on arts activities within any organisation.**

made clear at the time that they provided their details. If you collect data for Gift Aid purposes, for example, but have not made it clear that this could also be used for communications, you cannot use their details for mailing them. Bearing this in mind, it is sensible to provide opt in 'tick boxes' on data collecting materials, even if you are not yet fundraising, so as to enable you to communicate in the future.

When going into a major fundraising campaign, consideration should be given as to how you will collect and manage the larger amounts of data that will be generated. It is likely that you will wish to record relationships, event invites and attendance, research, donations and reporting or stewardship deadlines.

If your current database is not up to the job, you may need to invest in a new one. However, the fundraising databases used by large organisations are expensive to buy and to maintain, so it is worth investigating exactly what can be achieved within your existing system before taking the plunge.

## Sources of funding

### Heritage Lottery Fund (HLF)

The HLF has a number of useful funding streams which provide support for projects which vary from the small-scale volunteer run activities to very large capital projects. Their priorities lie with learning, participation and conservation of heritage, and so applications to the HLF should demonstrate at least one of those aims.

Grant programmes are reviewed regularly and changes made to them. We recommend organisations visit [www.hlf.org.uk](http://www.hlf.org.uk) to explore the current funding streams most appropriate to them.

A major campaign is likely to seek the support of the HLF and so sufficient time should be allowed in the project

timetable to meet their requirements. Between Round 1 and Round 2 of an application, there is a 'development period' in which the museum must put together all of the information required at Round 2. Depending on the type of project, this may include an activity plan, a conservation plan, architectural plans developed to RIBA stage D and exhibition designs. It is possible to request funding at Round 1 to help with the costs associated with the development period. By Round 2, the HLF will need to be reassured that any funding gap has been closed, either by other funders or by underwriting, so that they can be confident that the project will go ahead. For further information, visit [www.hlf.org.uk](http://www.hlf.org.uk)

### Arts Council England (ACE)

Responsibility for museums in England was transferred from the Museum, Libraries & Archives Council to Arts Council England in 2011. They have taken on the Renaissance programme and the regional museums improvement and development agenda, including the Accreditation Standard and the Designation Scheme.

Arts Council England has funding streams dedicated to museums, and other funds which focus on arts activities within any organisation. To view their current grant programmes, visit [www.artscouncil.org.uk](http://www.artscouncil.org.uk)

### Museums Galleries Scotland and CyMAL

Museums Galleries Scotland is the strategic development body for museums and galleries in Scotland. It acts as the representative for Scotland's museums and galleries and custodian of Scotland's rich and diverse history. It offers grants of up to £30,000 for Accredited Museums. CyMAL: Museums Archives and Libraries Wales offers the same service for Welsh museums and a grant programme, although at the time of writing this was not open to applications.





A concert was held to raise funds at Enginuity, Ironbridge Gorge Museums.

The Northern Ireland Museums Council supports local museums through advice, training and two grant programmes for Accredited Museums, consisting of acquisitions, grants and a more general grant programme. For further information visit [www.museumsgalleriesscotland.org.uk](http://www.museumsgalleriesscotland.org.uk); [www.cymal.wales.gov.uk](http://www.cymal.wales.gov.uk) and [www.nimc.co.uk](http://www.nimc.co.uk)

### Trusts and Foundations

It has been estimated that there are in the region of 4,500 grant making trusts and foundations in the UK and that they give away around £3.9 billion

per year.<sup>1</sup> Grants from trusts and foundations to the cultural sector stand at £170 million, 24.8% of private income.<sup>2</sup> However, with government cuts across the charitable sector as a whole, many organisations are looking to fill the gaps with grants from charitable trusts, making the environment increasingly competitive.

The way in which trusts and foundations give is developing in response to the changing funding climate, and this is affecting not only what is funded but also methods of application and assessment. These adjustments include narrowing their criteria, scrutinising bids and applicant

<sup>1</sup> Directory of Social Change

<sup>2</sup> Arts & Business: Private Investment in Culture 2010/11



**Trusts and Foundations are an important source of funding for all types of projects, from the mainstream to the idiosyncratic.**

finances in greater detail, taking longer to make decisions, visiting applicant organisations and reducing individual grant amounts.

There is a level of concern within many larger trusts over whether applicant organisations are able to meet their funding target. This means that where in the past grant makers may have been happy to give a lead grant and to accept the fundraising plan put before them, they may wish to hold back until the funding gap is smaller and they can be certain that the proposed project will go ahead.

Where good projects might have attracted support relatively easily in the past, the competitive environment means that they need to stand out from the crowd, show tangible benefits and have a plan for future sustainability. Indeed, some major grant-makers will only consider projects that are 'ground-breaking' and pursue new ways of doing things. Loan finance, which enables the support of a larger number of projects by 'recycling' their funding once it has been repaid, is becoming more common.

## Applying to Trusts and Foundations

Trusts and Foundations are an important source of funding for all types of projects, from the mainstream to the idiosyncratic.

Each trust has a personality of its own. They have their own specific aims, and the trustees set their criteria and application process accordingly. To save time and resources, it is vital that these are adhered to.

Local trusts may have a greater propensity to give to their local causes and can be an important source of revenue if relationships are stewarded appropriately. Personal links can be just as important in trust funding decisions as they are for individuals making a gift.

## Research

The first step should always be research to produce a list of trusts that you think are most likely to fund your project. To do so, you can use a subscription search engine such as the Directory of Social Changes'

An annual art sale at the Fry Art Gallery, Saffron Walden, Essex provides a useful fundraising opportunity.



Trustfunding or a free search engine such as Guidestar. You can also look online at comparable organisations and see if they list their funders. Once you have a list, you can look in more detail by visiting individual trust websites, where available, and viewing their accounts on the charity commission website.

Make sure you meet their

- Criteria
- Deadlines
- Funding levels
- Application requirements

Check their list of excluded projects or activities and whether they allow unsolicited applications. Many trusts exclude projects which start before the grant is awarded. Benchmark your project against similar projects they have funded to get an idea of how much you might ask for.

Where possible, ring the correspondent to find out more or to discuss your project with them. This often elicits helpful information and also makes them aware of your project when it arrives on their desk.

### Organisational links

Circulate your list of potential trusts to your trustees and patrons to find out whether they know any of the grant-making trustees. These could be useful in giving your project an extra boost as it goes through the consideration process. Your link person may be able to mention the application at a social gathering, write the covering letter or send a copy direct to their contact. Every situation will be different and should be considered on an individual basis.

### Writing a trust application

Trust applications are very time-consuming as it is necessary to tailor them to each trust; without this investment, you are unlikely to receive a positive outcome.

Many of the larger trusts have their own application forms online which you must use when required. Others have a list of questions that they expect you to cover in the application, and the rest give very little guidance except perhaps the number of pages they are prepared to read. It is extremely important that you meet these basic requirements.

Every trust will have different priorities and it is necessary to bear this in mind when applying – is there a particular element of your project which would be of greater interest than the whole? Are they more passionate about history, architecture, education or the local community?

The length of the application will depend on the requirements of the trust and the complexity of the project you are putting forward. However, less is generally better than more.

Remember that this is a competitive environment and you will need your application to stand out. What is unique about your organisation?

Trusts are focussed on the outcomes of your project, so make it clear who or what will benefit and how, and why this is important.

Above all, do not forget to report back to your funders on the progress and achievements of your project. This will develop your relationship and stand you in good stead for future grant requests.

### Landfill Communities Fund (LCF)

This scheme enables operators of landfill sites to contribute money to projects that meet environmental objects contained in the Landfill Tax Regulations.

The Government saw the LCF as a way for Landfill Operators to create significant environmental benefits and to undertake projects which improve the lives of communities living near landfill sites.

## How to structure your application

- Information about your organisation
- The project: aims and outcomes
- The need: What research/consultation have you undertaken?  
Is your heritage in danger/inaccessible/poorly conserved or interpreted?
- Who or what will benefit from the project and how?
- Timing: Why now?
- Financials: Project costs/project income. Fundraising strategy? Who else has funded, who else are you applying to?
- Project timetable
- The Ask: What would you like them to fund? How much?  
Any particular element or a contribution to the whole?

Icons of London's transport surround guests at a corporate members' reception at London Transport Museum.



Only organisations located within a specific radius of a landfill site will be considered for funding, and this is usually up to 10 miles. The Entrust website ([www.entrust.org.uk](http://www.entrust.org.uk)) allows you to find out which funder is active in your area. The websites of the individual Landfill Operators usually have a 'postcode checker'; this enables you to find out whether you are within their target area.

The Landfill Operators vary in the breadth of their grant-making, with some limiting activity to strictly environmental causes. However, many include projects from cultural organisations which offer benefits to the community.

Grant amounts also vary, with some only having small grant programmes. Others will offer up to £75,000, or even more from the Biffa Award Flagship grants.

An idiosyncrasy of the landfill grants is the requirement on the applicant to pay back the landfill grant-maker 10%

of the grant requested. This must be paid to them by a third party funder, rather than the applicant organisation themselves. This means that a grant request of £50,000 will bring a net result of £45,000. The third party funding must be in place at the time of application. It may be possible to use a number of small donations to make up the third party contribution, such as donation box income, but this should be clarified with the landfill operator at the outset.

## Corporate giving and sponsorship

One of the most startling facts shown by the Arts & Business report has been the steady decline in business support of culture over the last five years, from £163.4 to £133.2 million. Even 2011, which Jeremy Hunt dubbed the 'year of corporate philanthropy' did not stem the receding tide.



Clearly the reduction in financial support is worrying for the short term but the loss of these relationships is a matter of considerable concern for the longer term. Arts & Business remains confident that business support will recover but key to that change will be clarity on when the economic downturn is judged by the business community to have bottomed out.

For many museums, spending time on seeking corporate donations will not be a sensible use of resources in the current climate. But we shouldn't write it off altogether. Individual relationships can often lead to a corporate contribution rather than an individual gift, and fundraisers should remain on the lookout for any such opportunities. It is hoped that this area will blossom again in future years, when small and medium-sized enterprises with a stake in the local community are likely to be the best bets for the non-national museums.

Gifts in kind or voluntary staff time are easier for businesses to swallow, and it is worth looking to your suppliers and contractors to see if there is anything they can give you as a freebie or as pro-bono work.

Sponsorship is a business investment rather than a philanthropic one. Again,

this is a difficult area in the current climate and for many it will only bear fruit through existing networks. Try looking at those local businesses who would have most to gain by aligning themselves with your organisation. Create a list of sponsorship benefits in advance of making an approach and keep within your limits. Make sure you don't offer too much for too little, and bear in mind that corporate sponsorships can be very time-consuming to deliver.

### Individuals

Individual giving is a growing area for museums as the need for fundraising in the cultural sector becomes better understood. However, this is another area of increasing competition as more organisations seek the support of wealthy patrons.

### High Net Worth Individuals and Mid-Givers

Prospective donors need to have both:

- Capacity to give
- Inclination to give to you

Either of these points on their own is not sufficient!

**Individual giving is a growing area for museums as the need for fundraising in the cultural sector becomes better understood.**



The Hancock Museum's 'Butterfly' donor wall.



**The best ways to engage with your potential donors will depend on their interests and on what your organisation can offer.**

Key to success is an understanding of why people give. Motivations will vary from person to person, but will generally be for a combination of the following reasons:

- Personal interest and often involvement in an organisation or project
- Personal connections (someone they know has given and/or has asked them to give)
- Status
- Feel good factor

You are most likely to be successful in your fundraising from high net worth individuals if they have both an interest in your aims and a personal connection. This is where your trustees and patrons are useful to provide these networks of connections.

### Engagement

Do not rush to ask a potential donor to give their support, but allow time for the relationship to develop. You are much more likely to get a positive response, and potentially a larger gift as well.

The best ways to engage with your potential donors will depend on their interests and on what your organisation can offer. It is not necessary to invest in big events, though these do come into their own if you wish to engage with large numbers of potential donors at the start of the process. Just as effective, if not more so, are more tailored approaches; perhaps a behind the scenes tour, an opportunity to meet with an expert curator or a small reception before or after a talk. Listen out for what other museums are doing and see if that would work for you too.

High net worth individuals are becoming increasingly strategic in their giving and many weigh up the proposed benefits of their gift against other projects that they are interested in. Ensure that your offer is attractive and meets their giving motivations. Would they like a room, building or

piece of equipment named after them in recognition, or would they prefer to remain anonymous? Would they like to pay for one element of the project outright, or contribute to the whole?

### Wealth screening

How do you start if you don't know who on your database has the capacity to make a substantial gift? A wealth screening agency can be helpful in analysing your database and extracting the most wealthy, enabling you to prioritise your resources. The first stage report is often free, and will tell you how many people on your database are in the higher wealth brackets. You can then decide whether you would like to drill down in more detail. There is also a 'new names' service which will supply you with the names of people with suitable interests living within a geographical area. This can be appropriate for very first stage engagement, such as invitation to an event, if you do not already have a database to work with.

### Legacies

According to the Department of Culture, Media & Sport (DCMS), 56% of adults give to charity every year, yet only 7% of us leave a legacy to charity in our wills. The government hopes to change behaviour with a 2011 budget initiative which reduces the inheritance tax rate (from 40% to 36%) for estates which leave at least 10% to a charitable cause. Whether this will be sufficient to change behaviour remains to be seen, but it is certainly becoming more usual to hear about legacy giving in the charitable sector and this higher profile is likely to have a knock-on effect.

How do you persuade people to leave a legacy to your museum? In many ways, this takes the same form as the cultivation of individual donors. The stronger the connection to the museum, the more likely the individual is to think of leaving a legacy to it when writing their will. Often someone who

## Cultivation of Individual Givers

- Research each individual's interests and motivations
- Engage individuals in a way that is meaningful to them and unique to your organisation
- Allow time for the relationship to develop
- Involve senior staff and trustees in the process
- Research to assess what level of 'ask' is appropriate
- Identify the right person to ask the potential donor
- Ask for support at the appropriate time
- Continue to steward the relationship after a gift has been made



Fundraising dinner at Ironbridge Gorge Museums, Shropshire for London livery companies.

has not been wealthy enough to donate during their lifetime will grant a legacy in their will; volunteers and friends often give in this way. It is important to provide information to the right people at the right time. This is where a legacy programme comes into play and the following ideas may help.

1. Make information available on your website about legacy giving and how this would benefit your organisation. Wherever possible, include case studies of those who have given a legacy and those who have pledged their support.
2. Include information about legacy giving in printed literature and e-newsletters, so that the museum comes to mind when an individual is ready to make their will.
3. Segmenting your database according to those who are older will give you a list of those more likely to be thinking about writing their wills. Using your segmented database, you can create opportunities to promote legacy giving.
4. Consider legacy wealth-screening your database, which will give you a list of those who have significant assets.
5. Carefully steward any individuals who let you know that they have listed the museum as a beneficiary in their will and try to build a relationship with their family.
6. Always recommend that individuals take legal advice when preparing their wills.

### Friends

Friends schemes remain the most important way that cultural organisations raise money from individuals, according to Arts & Business, accounting for 59% of the total in 2010/11. This should be taken with a pinch of salt since many organisations roll their Friends and season ticket schemes into one, making all season ticket holders a member of their Friends.

Two donations boxes, top, from Ironbridge Gorge Museums, and, below, at Cogges, Oxfordshire. Seeding the box with notes helps encourage giving.



Nevertheless, it is true that every museum should have a Friends scheme as it offers the opportunity to build loyalty as well as bring in extra unrestricted income. It provides a pool of names that have opted in to communication with your

organisation and have made a positive decision to be more closely involved. These people are not only useful as frequent visitors and ambassadors, but are more likely to become your volunteers and individual givers of the future.



## Setting up your Friends

Ideally, your Friends programme will be distinct from your season ticket scheme. It will involve people (or organisations) that pay a regular annual subscription to support the museum. In return the museum will offer low cost benefits that increase their knowledge of the museum's activities and encourage closer involvement. It is important to ensure that benefit costs do not become a significant burden – this should be a way of generating extra income, not creating new expense.

Benefits might include:

- Joining gift, such as a car sticker
- Priority booking for events
- Discounted tickets
- Private reception before or at an event
- Special events (charged for separately)
- Shop/café discount
- Friends e-newsletter

Building a Friends database may take a little time. You could start by emailing everyone on your current mailing lists, and then continue to encourage membership through a dedicated page on your website, social media and information at the admissions desk or at museum events. Don't rely too heavily on projected income from this source in the early stages, until you have an idea of how quickly membership is building.

Administration of a Friends scheme can be time-consuming and suitable systems will need to be in place to ensure that the process runs smoothly. How will you take their regular payments? How do you ensure that a reminder is sent for renewal at the right time?

Again, it is vital that your costs for systems, administration and membership benefits do not outweigh the income generated from the scheme.

## Donation boxes

Research has shown that the type and location of donation boxes makes a marked difference to the donations that are received. Despite the relatively high initial outlay, it is worth investing in a clear box which shows the donations inside (with some notes visible at the start of every day). You may like to experiment with the best location, but it should be a prominent position, probably near the entry and exit. Telling your supporters how you will use the money can motivate them to give, or to give a little more.

Training staff/volunteers to ask visitors for donations can have startling results.

## Gift Aid admission

If you charge for admission to your museum, you can claim Gift Aid on the ticket price.

If you are not already doing this, it is a quick way to boost your admission revenue. However, there are strict rules as to how this should be applied.

Your museum could ask visitors to make a voluntary donation that meets either of the following conditions:

- It is 10 per cent more than the normal admission fee
- It allows admission for at least a 12 month period

In either case, donations only qualify for Gift Aid when:

- The donations are supported by an appropriate Gift Aid declaration
- Visitors are offered a clear choice about whether they make a donation or pay the normal admission price
- The donor's right of entry is exactly the same as for visitors paying the normal admission price

**Telling your supporters how you will use the money can motivate them to give, or to give a little more.**



## Top Tips

- Prioritise
- Be focussed and outcomes orientated
- Research and be realistic about what can be raised
- Allow sufficient resource for fundraising staff and activities
- Give yourself as much time as possible – start now!
- Steward donors and advocates for long term benefits

### Gift Aid donations

Gift Aid can be claimed on donations from individuals, but not from trusts or companies. You can reclaim tax on the 'gross' equivalent of all donations where your donor has signed a Gift Aid declaration. Payments made in return for goods or services (e.g. raffle tickets or event admission) do not qualify. Museums can offer the donor a modest token in appreciation of their gift, but there are limits on the value of this benefit (see the HMRC website for details).

### Higher rate taxpayers

If a donor is a higher or additional rate taxpayer, they can claim relief equal to the difference between the higher rate of tax and the basic rate of tax. They can do this on their income tax return.

From April 2013, charities will claim Gift Aid online, or on the new ChR1 form. Claimants will need to provide the minimum information that is taken for each gift aid donor, namely their name, house number, postcode, date of payment (or last in series) and donation total.

### Gift Aid Small Donations Scheme

HMRC plans to introduce a new scheme in April 2013 for qualifying charities to claim a 'top-up payment' equivalent to Gift Aid on small cash donations. Charities will be able to claim for individual donations of £20 and less (for which it is difficult to obtain a gift aid declaration) totalling up to £5,000 – meaning a 'top-up payment' of up to £1,250.

For further information on Gift Aid, see the HMRC website.

### New approaches to fundraising – are they right for you?

The internet and new technologies have created additional platforms for fundraising. Used in the right way, they

can be an exciting way of reaching out to new audiences and potential donors. Both text giving and crowd fundraising, for example, can be great for projects that have emotive aims or with a wide base of support. Initiatives such as the Big Give also provide opportunities for match funding to boost your donors' contributions.

These platforms are not right for everyone, however, and you should not feel pressurised into pursuing them for the sake of covering all bases; this could easily lead to a dilution of your efforts and a reduction in fundraising returns.

### Further support

Trust research  
[www.trustfunding.org.uk](http://www.trustfunding.org.uk)  
[www.guidestar.org.uk](http://www.guidestar.org.uk)  
[www.charitycommission.gov.uk](http://www.charitycommission.gov.uk)

Landfill operator information  
[www.entrust.org.uk](http://www.entrust.org.uk)

HMRC – Gift Aid  
[www.hmrc.gov.uk/charities/gift\\_aid](http://www.hmrc.gov.uk/charities/gift_aid)

The Big Give  
[www.thebiggive.org.uk](http://www.thebiggive.org.uk)

Wealth screening  
[www.prospectingforgold.co.uk](http://www.prospectingforgold.co.uk)  
[www.wealthengine.com](http://www.wealthengine.com)

At Development Partners, we provide fundraising consultancy for the museums and heritage sector.

We support our clients' needs with tailored research, feasibility studies, fundraising and communication strategies and the implementation of fundraising campaigns.

For more than 12 years, we have provided consultancy to over 80 charitable organisations, unlocking funding for capital projects and revenue streams that enable our clients to flourish.

For further information, please visit our website at [www.development-partners.co.uk](http://www.development-partners.co.uk) or call us on 01869 351451.



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