

In order to ask people for money for your campaign (the redevelopment of the museum) you need to build a relationship with them. Some of your trustees will have direct or indirect contacts with local, wealthy people, through business, through their other networks (WI, golf club, Rotary, Round Table).

You need to start building a relationship on behalf of the museum with those people. Cultivating people is exactly like growing plants. You plant a seed; you give it everything which it needs to produce fruit – water, heat, soil, love; you talk to it – and when the fruit is ripe, you pick it. Here’s how to do it with people.



The numbered points below are grouped to match broadly the flow diagram boxes above.

1. You need a database so that you can keep track of all the people whose contact details you get.
2. Gather data from your trustees about who their contacts are. Start to research them and record their interests, background.
3. Ask each trustee to make a commitment: they will get in touch with each of their contacts and invite them to visit the museum, informally, to see all the good work that you do but also how you need to develop. If they will not/cannot do this, they should make an introduction to the person who is able to show them round the museum (and you need to identify who that will be). Note, this will be less successful than if they make contact and do the show round themselves - this is about relationships and closeness. Whoever is going to do the show round, share the research with them so that they can talk about what the target is interested in. Each visit need not be long – half an hour would be sufficient. They should keep the Committee informed when they’re doing this.
4. Let all staff and volunteers know that this is happening. Neither the visitor nor the Trustee should be asked to pay for their admission (if you need this ratified by the board, make sure that you do so).
5. Update the database to say that they’ve been round and record anything of significance which occurs.
6. Finalise your Case for Support which details your redevelopment and what it will achieve.

7. Organise a second “approach”. The purpose of this is to start to paint a picture of what the future will be like, when the redevelopment has happened. For this you need plans, pictures and your Case for Support. Your options are
  - Invite all the contacts who’ve had a show round the museum, and their trustee contacts, to an informal meeting at the museum to look at the plans. At this meeting, have a dialogue, don’t just tell people what your plan is, ask them what they think. This is about starting to engage them in your business. Plan the meeting so that you present a verbal Case for Support - a maximum of *three* key things you put across about the redevelopment. Do not ask for any money at this stage, you’re still in cultivation mode.
  - Send them information by post –Invite their comments, engage them in your thinking. Do not ask for any money at this stage.
8. Record in the spreadsheets who attends, who declines, and anything of significance.
9. Organise an exclusive event for those people who have had the show round and been informed of your future plans. Your options are
  - doing it at someone’s house
  - doing it in the museum if you’ve got a really good exhibition and the numbers you anticipate can be accommodated.
  - doing it somewhere else
10. It needs to be a social occasion (drinks and perhaps food), where people can chat comfortably. All trustees and staff need to be present to mingle. At some point there needs to be a speech by someone who is a figurehead for the museum. This should be someone who can front your fundraising campaign, endorsing it with a few well-chosen words which you will include in your Case for Support, and (of course) who will attend this event.
11. At the event, your figurehead needs to introduce the idea of fundraising. If people have accepted this invitation, having had one or two previous contacts, they should know what to expect. Whoever makes the speech needs to indicate to people how much you’re trying to raise as well as how they can donate. Make it easy for people – have your bank details ready so that they can make direct payments. Include a direct debit mandate in case they will find it easier to donate quarterly. Additionally, ensure that all trustees and staff are badged so that the speaker can refer would-be donors to a badged person to discuss it more.
12. Record in the database who attended, who declined and any significant discussions.
13. After the event write to everyone who attended to thank them and include again any documentation which will make it easier for them to donate.
14. Write to all those who didn’t attend, and again include the donation documentation, unless they have specifically sated that they don’t want to donate.
15. Review your success and report back to the board.

