

Identifying A Role

Before we can start the research we must identify our need. Do we want to make contact with people who are going to be:

A prospective patron?

A new (appeals) committee member?

A potential big gift supporter?

or

A networker - someone who will open doors and make introductions for us?

Each one of these different functions entails a slightly different approach to slightly different people. It's important to keep in mind why we are researching and identifying potential new friends and how we are going to use their time, their money, their skills or their influence.

Finding The Prospect

Researching and identifying local people with power and influence. These can fall into several different categories:

County families with a traditional commitment to the area - usually a connection with the land - they may be titled people;

Retired people who have moved into the area;

Successful local entrepreneurs;

Media, entertainment and show business people.

Sources Of Information

You will probably already know many, if not most, of the local shakers and movers in your own area. And there is bound to be someone in your group who knows of someone of wealth and influence who has just moved in, or a local company which has just landed a big export order or government contract.

Sources of listed information include directories such as Debrett's Peerage; Who's Who; The Trustees Handbook; The Livery Companies Guide; and even the Yellow Gardens Book. Information on successful local companies can be got from Jordan's Top Private Companies; Dun and Bradstreet publications; Corporate Register and your local press.

Researching The Prospect

You can buy in specialised research. Many professional fundraisers working in national organisations work in this way, buying in bespoke research for individual projects.

For example - if the National Trust is given a house in Launceston which needs £3 million spent on restoration, it will commission specialised research to discover - say - 100 millionaires with a known connection to Launceston or North Cornwall and/or an interest in heritage and conservation. This research is very expensive - typically costing between £3,000 and £5,000.

Another bought-in route is through a specialised mailing list. There are list-brokers who will sell you the names of local company directors with an interest in, for example, history/ conservation/ antiques and/or a track record of charitable giving. This is a much more economical option than bespoke research and will typically cost around £500 for about 1,000 names.

There is a good list-broker in Penzance who seems to have a better grasp of the needs of the voluntary sector than most other direct mail houses.

Or you can do your own research using your own dedicated volunteers. This route has several advantages in that it is low cost and the work is carried out by people who are committed to your organisation. The downside is that because the work is being done by volunteers in their spare time, the task can seem endless.

Making Contact

Once you have identified the people you think might prove to be suitable donors, patrons or appeal committee members you have to work out how best to attract them. Some people will respond to an invitation to an open day, or special event held at your museum (charity/organisation/school) - try to extend this invitation through someone who can approach your prospect personally, rather than sending a written invitation. At all stages of this process remember that it's much better to have personal contact than making a telephone calls or writing a letter.

The reason we have called this article 'Making New Friends' is that is exactly the way in which to approach the business of attracting wealthy and influential people to your cause - by making friends. It's part of what we now call 'Relationship Fundraising'. In other words, if you are hoping that someone will become a patron, make a substantial donation or commit a lot of time to your organisation, they have to get to know and like you first. And it may take a long time to build up your relationship before you ask that person to commit themselves to the role you hope they will fulfil.

Useful Addresses

Pat Thorne

Sunrise Publishers Ltd.
Tel: 01840 261237

City of London Directory & Liveries Guide

City Press
42 North Station Road
Colchester
Essex
CO1 1RB

Contains the names and home addresses of all the members of City of London Livery Companies

Dun & Bradstreet Ltd

Holmers Farm Way
High Wycombe
Buckinghamshire
HP12 4UL

Publishes a number of useful directories including Key British Enterprises - which should be available in local Business Library

Corporates Register

Hemington Scott Publishing Ltd
City Innovation Centre
26-31 Whisking Street
London
EC1R 0BP

The most up to date directory of information on quoted companies and their major shareholders. Again, it should be available in a business library.

Targeting The Powerful

The Association for Information Management
Information House
20-24 Old Street
London
EC1V 9AP

The professional guide to researching powerful and influential people - recently published and full of interesting information - ask your local library

Debrett's Peerage Ltd

73-77 Britannia Road
London
SW6 2JY

Publishes People of Today - a useful source of information on contemporary people of influence

National Association of Volunteer Bureaux

St Peter's College
College Road
Saltley
Birmingham
West Midlands
B8 3TE

Can provide you with the address of your nearest volunteer bureau which is one starting point for recruiting new volunteers