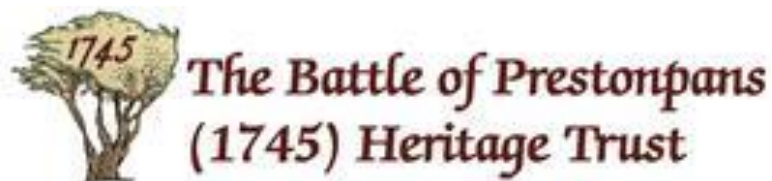




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# Fundraising Development Report and Recommendations



January 2022

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## BACKGROUND AND METHODOLOGY

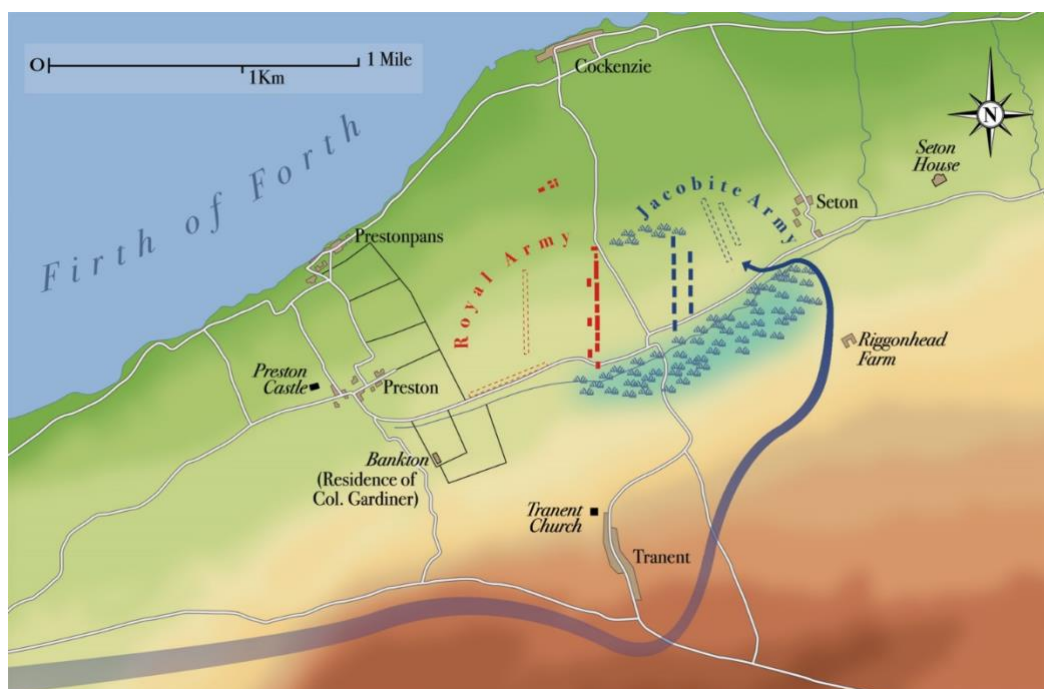
### Historical Background

The Battle of Prestonpans was an event of international significance, and its story combines fascinating personalities, dramatic events, sacrifice and heroism, and a rich cultural legacy. It has sustained popular interest over three centuries and continues to do so today.

Since 2006 the Battle of Prestonpans (1745) Heritage Trust has worked to protect, promote and continue that legacy, working towards the creation of a world-class living history centre: The Battle of Prestonpans: Jacobite History Centre. It is the firm intention of The Trust to create this centre on the battlefield itself and in doing so support the regeneration of the local area and promote human welfare including recreation and other leisure pursuits for the community at large.

### Further Background

The Battle of Prestonpans took place on the 20<sup>th</sup> and 21 September 1745<sup>1</sup> near Prestonpans, East Lothian. It was the first battle of the last Jacobite rising.



<sup>1</sup> A detailed timeline for the Battle of Prestonpans 1745 is illustrated at [The Battle – Battle of Prestonpans 1745](#).

The opposing sides of the Highland Army of Prince Charles (Bonnie Prince Charlie) and The Royal Troops of King George II were led by Prince Charles, Lord George Murray and Sir John Cope respectively.

The Royal Army troops were inadequately trained and suffered a humiliating defeat under Cope. Casualties were high with an estimated three hundred killed, four to five hundred wounded and between fourteen to fifteen hundred captured. Only one hundred and seventy of the foot soldiers were unharmed. The Highlanders' losses were significantly less with approximately thirty killed and seventy wounded<sup>2</sup>.

### The Trust

The Battle of Prestonpans (1745) Heritage Trust exists to preserve the heritage of the significant battle that played a crucial part in Scotland's history.

Key activities to date have been the creation of the Battle of Prestonpans Tapestry, where three hundred and five panels were embroidered by over two hundred volunteers. The tapestry has featured in over eighty exhibitions since its inception. There have been ten re-enactment battles, work conducted with schools and the Trust has now secured a temporary museum in Prestonpans Townhall, due to open in 2022, which has been leased for five years.

### The Vision



A Living History Museum

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<sup>2</sup> [Battle of Prestonpans \(britishbattles.com\)](http://britishbattles.com)

The Trust's vision is: *to create a permanent visitor attraction which presents the battle and its legacy in immersive and engaging exhibition spaces, providing a permanent home for The Prestonpans Tapestry and a hub for maximising the cultural potential of the Trust's activities.*

Since 2006 the Trust have worked hard to ensure that the site remains a historical priority, with new signage, school trips, tours and thousands of visitors. The amazing tapestry that has been viewed at over eighty exhibitions is a valuable asset; however, it has no permanent home.

Public demand has pushed the project forward, both from schools and the benefit to the local community from national and international tourism. Land has been secured within the new Blindwells housing project. The housing project will accommodate one thousand six hundred new homes, a new primary school, shops and restaurants. The land will ensure that the Heritage Museum will be based right in the heart of the new community.

### **The Project Brief**

BTA has been asked to provide support for The Battle of Prestonpans (1745) Heritage Trust through the production of a Fundraising Development Report and Recommendations. Principally this report provides our expert opinion on the likelihood of success of a major (c.£10m) Capital Fundraising Appeal for a Heritage Centre building with recommendations for future activity.

### **Methodology**

This document is the Report of the Fundraising Feasibility Study undertaken between December 2021 and January 2022 by the BTA Consultancy team of:

- Bruce Tait, Director and Capital Appeal Specialist
- Ruperta Melville, Trust Specialist
- Mhairi Cameron, Strategic Specialist

It includes an evaluation of The Battle of Prestonpans (1745) Heritage Trust's current fundraising activities and resources and their readiness for a Capital Appeal. We have also assessed opportunities to develop enhanced fundraising activity in pursuit of significant levels of donated income. Our process has included reviews of documentation, research, interviews with Board members and scoping of prospects. We undertook and include a SWOT Analysis and a Fundraising RAG Checklist.

Our research has been supported by discussions with:

- John Home-Robertson
- Herbert Coutts MBE
- Dr Arran Johnston

## Parameters and Outcomes

There are set clear parameters for this Appeal, they are:

- That the timescale for the Capital Appeal would be 24 – 30 months
- That the Appeal income target was £10m (£8m on build and £2m endowment fund)
- That £1.25m would be allocated to spend on the Capital Appeal
- That the build process would take 18-24 months
- The launch of the new centre would take place in 2026.

BTA's clear aim was therefore to identify one of three outcomes:

- A. That the Appeal is not feasible
- B. That the Appeal is feasible
- C. That the Appeal is feasible, but with contingencies that must be addressed.

Our findings and recommendations are included in the following Report.

## CURRENT FUNDRAISING AT THE BATTLE OF PRESTONPANS (1745) HERITAGE TRUST

Fundraising at The Battle of Prestonpans (1745) Heritage Trust has typically come from three sources: Trusts and Grants, General Donations, and Tapestry Exhibitions. Additionally, the Trust receives membership fees each year however, these are restricted and cannot be accessed by Trustees.

2021 accounts show revenue of £140,225, of this £124,478 was restricted and £15,747 was unrestricted. Unrestricted income was made up of £1,655 in general donations, miscellaneous income of £5,908 and, tapestry exhibitions of £5,908.

Examples of additional funding have been for the 275<sup>th</sup> Anniversary Fund which garnered £113,000.

### Trusts and Grants Support

Most of the income generated over the last two years has come from Trust and Grants. This income has come mostly from the National Lottery Heritage Fund to support smaller campaigns. Additionally, there has been support from VisitScotland and sporadically a few smaller Trusts such as:

- Event Scotland
- Bord na Gaidhig
- ELC Salt of the Earth

There is already a relationship with some key funders, such as the National Lottery Heritage Fund. The relationship is currently managed by the Board of Directors and lead by John Home-Robertson and Dr Arran Johnston. There is no doubt that the Trustees have the expertise and ability to represent the aims and ambitions of the organisation and will be a vital source of information moving forward.

### Corporate Support

The Trust has, with the support of East Lothian Council, entered into an agreement with Hargreaves [Blindwells] Limited to develop a high-quality Living History Centre and museum at Blindwells which is scheduled to open in 2027. Plans have been discussed and will include a small lochan and a walk down to visit the Bonnie Prince Charlie statue.

Hargreaves have expressed an interest in sponsoring the Bonnie Prince Charlie Statue. However no formal discussion have taken place as yet.

The commissioning of a statue of Bonnie Prince Charlie is of significant importance. Although Bonnie Prince Charlie is extremely well known throughout Scotland and much farther afield, currently only one equestrian statue of him exists in the United Kingdom and that is in Derby.

To mark the site of Charles Edward Stuart's greatest victory, that of the Battle of Prestonpans, an iconic new statue is to be sculpted for the battlefield.

A maquette will be created in the first instance, with two sculptors currently under consideration: Sandy Stoddart and Alan Herriott.

Apart from the opportunity with Hargreaves, no relationships are currently in place that may lead to corporate funding or fundraising support.

## Major Donors

This is a key area of interest for The Battle of Prestonpans (1745) Heritage Trust for two reasons:

- This is a strong area of interest and background for the Board.
- The Board of The Battle of Prestonpans (1745) Heritage Trust has access to high-profile philanthropists throughout Scotland and the potential to garner support from Scottish ex-pats in London, the US, and elsewhere.

To date, there has been no methodical major donor prospecting, cultivation activity, solicitation of gifts, or donations made. However the Trusts Patrons are extremely influential, some are personal philanthropists and most certainly have access to major donors. The Trust's list of patrons is enviable, which is why a Major Donor Campaign would be key to the success of the campaign.

Examples of this would be:

- The Duke of Atholl
- Marquess of Lothian
- The Earl of Home

There are also the Clan Chieftains, who will have a personal interest in the project along with extensive networks. Their scope for input would be fully explored within a Major Donor Scoping Report, which we would recommend happens alongside a Trusts and Grants Scoping Report.

## Friends

The Battle of Prestonpans (1745) Heritage Trust currently has circa two hundred Friends subscribed to it. Although not all pay a membership, as volunteer stitchers receive a free lifetime membership. This is a potential resource whilst building the pipeline of income, both through personal small to medium donations and their potential access to networks. The Major Donor Scoping Report would identify the level of potential income from this area.



## Recent Income Levels

A breakdown of income shows slight growth over the last year, with the most notable successes being Trust and Grants fundraising.

	2018/19	2019/20	2020/21
<b>Trusts and Grants</b>	£18,300	54,200	124,365
<b>General Donations</b>	29,120	19,460	1,655
<b>Tapestry Exhibits</b>	£7,304	0	£8,130
<b>Other Income</b>	£2,997	0	£5,908
<b>TOTAL</b>	<b>£57,721</b>	<b>£73,660</b>	<b>£140,058</b>

Notes on the last full year:

- Grants were increased due to the 275<sup>th</sup> anniversary and income for the Town Hall from an Adapt & Thrive application.
- There was also government covid support that we have not shown in our figures of £18,000.
- The 275th anniversary was a programme of events to commemorate 275 years since the battle took place. The event included a digital commemoration, the Victory, Hope, Ambition schools project and other interactive events to take part in. The event was supported by the National Lottery Heritage Fund and Bord na Gaidhig.

## THE BATTLE OF PRESTONPANS (1745) HERITAGE TRUST CAPITAL APPEAL READINESS CHECKLIST

This checklist provides our assessment of The Battle of Prestonpans (1745) Heritage Trust's capability in the key areas required for a successful Capital fundraising campaign. These gradings will continuously change and are meant to be an internal resource for your fundraising campaign.

Item	Yes/No/Other	Notes	RAG
<b>Registered Charity/SCIO</b>	Yes	Charity	Green
<b>Organisational evaluation</b>	Other	Highly regarded within the heritage sector, however less known to the public.	Yellow
<b>Fundraising Track Record</b>	No	Private fundraising is new to the organisation. Some success with a limited number of Trusts and Grants. Low levels of all other funding.	Red
<b>Annual Turnover</b>	£140K	While income has grown in the last year the annual turnover is very low, and funders may ask about the Trust's plans to successfully manage an income of £10m.	Red
<b>Income Streams Diverse</b>	No	Trust income accounts for 88.8% of the total income. While Trusts are going to be vital to the campaign, they cannot be the only source of income.	Yellow
<b>Reserves Level</b>	Other	There are small reserves, £91,382 which can be used for the Capital project. National Lottery Heritage Fund for the tapestry.	Yellow
<b>Are you specialists? Known Competitors</b>	Yes	Well known in their field and delivering high quality exhibitions to the general public. No known competitors in your area.	Green
<b>Governance</b>	Yes	Strong Board of Trustees that are well connected. There is excellent patronage and good scope for Major Donor networking.	Green
<b>Fundraising Senior Leadership</b>	No	There are no paid employees of the Trust. Current applications are made by members of the Board.	Red
<b>Fundraising/Experienced Staff</b>	No	There are no paid employees of the Trust, however the Trust does work with Dr Arran Johnston on a freelance basis.	Red
<b>Key Stakeholders</b>	Other	The Friends of Bonnie Prince Charlie are an excellent resource. Clan Chieftains and other related societies, such as the 1745 Society. There is also the Patronage which is of a high calibre.	Green
<b>Finance Systems and Monitoring</b>	Other	There is a qualified accountant that sits on the Board, however with a project of this size we would recommend further support.	Yellow

Item	Yes/No/Other	Notes	RAG
<b>Impact Reports and Evaluation</b>	Other	Feasibility study was produced in 2018 and detailed the potential scope and impact of the project	Green
<b>Trust Fundraising Experience</b>	Yes	Good recent Trust wins in support of the Tapestry and the 275 <sup>th</sup> Anniversary events. However resources and experience levels are low in this area for large capital fundraising.	Yellow
<b>Major Donor Experience</b>	No	An area for continuous development. Some contacts but more work needed - strategically and operationally.	Red
<b>Corporate</b>	No	No previous record of corporate support, however the local builder (Hargreaves) has indicated their interest in sponsoring the installation of a statue.	Red
<b>Projects Identified</b>	Other	The new Heritage Centre will be the main fundraising thrust but there are ongoing fundraising requirements that need to be considered, such as the maintenance of the Townhall project.	Yellow
<b>Budget Required</b>	Other	No formal budget has been produced as yet. Architectural drawings have been submitted for review; however costings have not been included. The build figure of £8million is a comparable figure to similar projects.	Red
<b>Clear Budget Expenditure Items</b>	No	While there has been a budget produced for ongoing costs of running the centre, there is no current budget for the build, with £8m being an estimate.	Red
<b>Marketing</b>	Other	Full fundraising prospectus has been created that has extensive information to draw from.	Yellow
<b>Database</b>	Yes	Excel spreadsheet of Friends Supporters which is around 200.	Red
<b>Social Media</b>	Other	5562 followers on Facebook with regular updates. For comparison Culloden Battlefield and Heritage Centre has 42K followers, however they have a building.	Yellow
<b>Website</b>	Other	Recently updated, clear and easy to follow. It will be a useful tool in a campaign.	Green
<b>Fundraising Strategy</b>	Other	None to date.	Red
<b>Case for Support</b>	Yes	An overarching Case for Support for the Appeal was created in 2018.	Green

## SWOT ANALYSIS

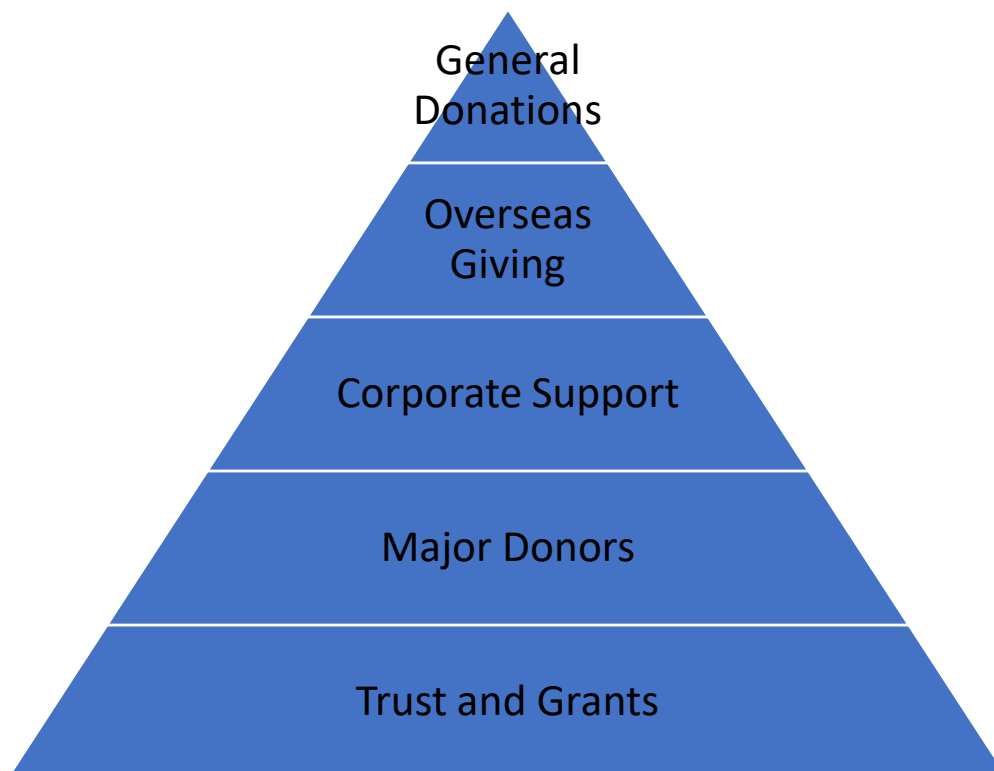
There are internal and external factors that will have an impact on your ability to raise money. Some of these factors will work to your advantage and help you to raise money. Others will represent challenges that hinder you, or that rule out certain types of fundraising altogether.

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• The history of the Battle of Prestonpans. It is such an important part of Scotland’s history.</li> <li>• The Battle of Prestonpans (1745) Heritage Trust has a good reputation within the heritage sector.</li> <li>• There is an engaged Board of Trustees who are behind the project.</li> <li>• The Board has excellent networks.</li> <li>• When people hear about the story of Prestonpans they are engaged and this would lend itself to continued support and further financial engagement.</li> <li>• Relationships have been built with major Trust and Grant Funds. Ongoing support from the National Lottery Heritage Fund and Visit Scotland.</li> <li>• A site has been secured via a local builder.</li> </ul>	<ul style="list-style-type: none"> <li>• Size presents challenges for ambitious growth plans/fundraising to support this.</li> <li>• There is no developed pipeline or strategy for Capital fundraising.</li> <li>• No track record of significant major gifts.</li> <li>• No track record of Corporate gifts.</li> <li>• Small supporter database.</li> <li>• Fundraised income is traditionally very low.</li> <li>• Rural – no central visibility.</li> <li>• Fundraising Capacity is an issue – the Board is active however not able to support the full Appeal.</li> <li>• No full budget has been produced with timings on how much income is required before the build can commence.</li> <li>• Limited budget for supporting the start of the Capital Appeal.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Opportunity to build and wield a strong Case for Support.</li> <li>• Build on existing relationships with current funders.</li> <li>• Untapped corporate support.</li> <li>• Untapped Major Donor support.</li> <li>• Networking opportunities via Friends Groups, other supporting groups such as the 1745 association, Royal Stuart Society, Clan leaders.</li> <li>• Overseas diaspora especially in the USA.</li> <li>• Media partnerships.</li> <li>• Development of an Appeal Board solely to focus on the campaign.</li> </ul>	<ul style="list-style-type: none"> <li>• Recession.</li> <li>• Covid Emergency Funding is still a priority for many Trusts.</li> <li>• Not engaging a Capital Appeal Fundraiser quickly enough.</li> <li>• Mixed asks from the same funder.</li> <li>• Not having a clear business plan quickly enough for seed funding.</li> </ul>

## 1. Key Headline Findings

- There is an excellent Fundraising Prospectus already in place which is a great source of information.
- No Capital Appeal Strategy is in place.
- The Capital Appeal budget needs to be developed as soon as possible to engage funders.
- The skills and experience to run this campaign do not currently exist within the organisation creating an urgent need to engage a Senior Capital Appeal Manager or the equivalent support from a specialist fundraising organisation.
- While there is great potential in Major Donor giving, a Scoping Report should be completed to identify all the potential givers and what approaches should be made.
- Scoping Report for Trusts and Grants should be completed to ensure all avenues of income in this area are exhausted.
- Scoping of overseas potential, such as the American Friends of British Art and similar organisations. Possible requirement to set up a 501C3 fundraising vehicle in the US.
- There is a need for a Capital Appeal Board to support the existing Board.
- Most fundraising streams are underdeveloped; however, this does give you a chance to present funders with a fresh funding opportunity.
- There are key opportunities for corporates at all levels to be involved.
- A post Appeal plan needs to be created.

### Hierarchy of Income



## RECOMMENDATIONS

### 1. The Development of Trusts and Grants

There is room to significantly grow this income and this would be a key area of a Capital Appeal campaign. Currently this area is underdeveloped with only one key Trust relationship, The National Lottery Heritage Fund.

Growth in this area would be reliant on some further investment to support the Capital Appeal lead, again this could be an inhouse staff member or from a specialist agency.

We would recommend a full Trusts and Grants Scoping Report to be conducted.

This Scoping Report would provide a breakdown of all of the Trusts and Grants that The Battle of Prestonpans (1745) Heritage Trust could approach for funding towards the upcoming Capital Appeal:

That report would include:

- Detailed profiles of relevant top funders which would include information on the application process, deadlines, key interests, exclusions, grant capacity, and contact information.
- An assessment of the total estimated potential income from all the charitable Trusts and Grants included in the report.

For example, Trusts we would expect to see on this report would include:

- Historic Environment Scotland
- The Gannochy Trust
- Gordon Fraser Charitable Trust
- Wm Mann Foundation
- The Wolfson Foundation

Part 1 of the report will provide a comprehensive list of all the Trusts and Grants that should be considered as potential prospects.

Part 2 will provide detailed profiles for each of these grant-makers, what the potential income from each could potentially be and what the gap in funding might be. Some funders are stronger candidates than others and will be ranked accordingly in this report.

### Resources required

- Budget for Trusts and Grants Scoping Report.
- A Heritage Trust Fundraiser or support from a specialist agency.

## 2. New Major Donor Campaign

The Board are in a strong position to launch a Major Donor campaign for the Heritage Centre. Primarily reviewing board members and patronages, shows there is immediate access to high net worth individuals.

The Board Members should work with either your Capital Appeal Manager or an agency to develop a prospect mapping exercise quickly. The major donors already associated with the Trust should be the first contacts, during the private stages of the campaign. While these individuals may be associated with the Trust, it is understood that these donors have not been cultivated and nurtured, so care may need to be taken to initiate the approaches and manage the engagements.

Bespoke approaches with opportunities for recognition and reward should be developed around a tier of support, at levels which would be agreed upon by the Board.

The arts and education sectors perform best at major donor engagement in the UK, whilst those in the health sector are generally less effective. However, almost all arts and education organisations operate a donor club, which is seen to be an important part of developing a pipeline of new relationships and creating broader awareness about the need for major gifts. This is something to consider post Capital Appeal.

Patrons are currently under-utilised in support of the Trust's fundraising and considering this approach may give a good channel to enable effective roles and use of the Battle of Prestonpans (1745) Heritage Trust's patrons and ambassadors.

### Benefits to donors

- Personalised relationship and closer connections.
- Access to experiences that money can't buy – opportunities to meet staff, connect with projects through small group visits, develop a sense of ownership, use of the Heritage Centre for events.
- Opportunities to meet and network with like-minded people.
- Flexibility for individuals to give through their company or private trust.
- Schedule of regular personalised communications to demonstrate the impact of their contribution.

### Benefits to Battle of Prestonpans (1745) Heritage Trust

- Tangible programme that can be marketed and publicised through the website, publications and mailings to increase awareness about the need for higher levels of support.
- High level of donor loyalty and reservoir of goodwill.
- Potential new source of income at a higher level, with a good return of investment.
- Structure for a planned stewardship programme of communications, visits and donor recognition.

- Opportunities to meet, listen and discuss projects directly with donors, understand what they seek from a relationship with Battle of Prestonpans (1745) Heritage Trust.

### Resources required

- A specialist Capital Appeal Fundraiser or a specialist agency
- Marketing, print and postage
- Major Donor event costs
- Ideally, having endorsement of Patron(s) with broad appeal to generate loyalty and attract support.

## 3. Corporate Fundraising

A process of sourcing leads with support of Board Members should be undertaken as soon as possible to identify a top list of prospects – this may require a lead-in time of twelve to eighteen months to secure larger-scale partnerships.

Elements of partnership proposals could encompass rewards similar to that of a Major Donor, such as special access to the site, naming of major areas of the museum, such as rooms. For medium to lower level donations other options to consider would be:

Sponsorship opportunities might include:

- Panels of the tapestry
- Paths outside
- Specific artwork
- Bespoke sponsorship recognition area, such as often seen ‘buy a brick’ campaign
- The Bonnie Prince Charlie Statue.

### Benefits to Corporates

- Access to experiences that money can’t buy - opportunities to meet staff, connect with projects through small group visits, develop a sense of ownership, use of the Heritage Centre for events.
- Publicity and long-term recognition at the site.

### Resources required

- A Capital Appeal Manager or a specialist agency would provide this resource.

## 4. Exploring Fundraising within the Scottish diaspora

Many overseas organisations have an affiliation with Scottish Heritage and would relish the opportunity to support an Appeal such as this. Like all income streams, we would recommend some detailed scoping of those opportunities. For example in the USA we would look to target organisations such as:



- American Friends of British Art
- Scottish Heritage USA
- Scottish American Society
- American Scottish Foundation
- Clan Societies and Associations
- Diaspora events – Highland Games and Clan Gatherings

Potentially a Scoping Report for this area would be recommended, that should include a mixture of organisations and individuals who should form a pipeline of approaches.

#### **Resources required**

- Budget for Overseas Fundraising Scoping Report
- Lead by the Capital Appeal Manager or a specialist agency.

### **5. Public Fundraising**

During the more public part of the Appeal, it would be worth considering engaging marketing expertise. They would be responsible for the creation of a mass donation campaign and a potential media partnership that would promote that Appeal.

This is a vital part of the campaign as it will raise awareness of the Heritage Centre and the importance of it being built. You are essentially marketing to your visitors.

Donations during this period would small to medium amounts, from individuals to local corporates and small trusts.

When to launch the public campaign is for the board to decide, but most campaigns would look to have secured over 60% or more of their income privately before going public.

#### **Benefits to Battle of Prestonpans (1745) Heritage Trust**

- Publicity for new Heritage Centre
- Engagement tool for the public to become involved
- Local ownership within a new community
- Potential for a future supporter club with individuals giving small amounts regularly.

#### **Resources required**

- Marketing expertise
- Lead by the Capital Appeal Manager or a specialist agency.

## CONCLUSION AND SUMMARY

The Battle of Prestonpans (1745) Heritage Centre undoubtedly has Capital fundraising potential. The fundraising proposition is strong and the detailed fundraising prospectus compelling. The Trust are also in a strong position to make approaches to potential Major Donors and Trust and Grants, however there is work to be done in that area.

We have outlined our recommendations within each identified fundraising stream above. There are however several key “building blocks” that must be addressed by the Trust before any fundraising begins. These will take time, and they will take investment.

**We would therefore determine that the Capital Appeal is feasible, but with contingencies that must be addressed.**

## 2. The Contingencies that must be addressed

### a. Research to establish the potential support for the appeal within the identified significant funder groups

We would strongly recommend the commissioning of the Trusts and Grants and Major Donor Scoping reports as a matter of urgency. The research will confirm if there are adequate financial resources within the potential audiences that would support you to meet the need. Experience shows that success is based on securing the following minimum levels:

- Top investment 15% of goal
- Top ten investments 50% of goal
- Next 50 –100 investments 40% of goal.

The only way to ascertain if you could achieve these gifts is by thorough research.

Once it has been determined that the target is achievable it is important to plan how to reach it in the time given. The development of a fundraising strategy will cover:

- Who to approach for donations
- Ways to approach potential donors – communications, events, etc.
- What resources will be required to deliver this fundraising
- Systems and processes that may need to be set up
- A guide to how long it will take

- Key performance indicators and milestones to measure success along the way.

With this in place the Battle of Prestonpans (1745) Heritage Trust will be in strong position to launch a campaign.

### **b. Decide who will undertake the Fundraising activity**

The skills and commitment of your board and volunteers will go a long way but won't get you to £10m. We would ask the board to consider the best way of resourcing the campaign, whether that is by hiring a Capital Appeals Manager, potentially supported by a Heritage Trusts Fundraiser, the commissioning of a specialist agency to manage the campaign, or a blend of both.

### **c. Funding the Campaign**

There will have to be funds available to begin the campaign, from research to employment of staff, in order to secure even seed funding, there must be some funding in place. You may want to consider the use of the reserves from the Tapestry Fund or work to find an initial donor to support the start of the campaign. You will also benefit from the production of an initial budget that will cover the costs of the campaign, it will determine when monies can be released and when monies need to be obtained for certain stages to move forward.

### **d. Consider appointing a Capital Appeal Board**

There is a considerable amount of work required by the board during a Capital Appeal, and it was noted that while the Board is extremely committed it would struggle to resource all the requirements needed, even with external or paid staff in post.

We recommend the recruitment of a Capital Appeal Board which would be in place for the lifespan of the appeal and would bring expertise and time. Some current Board members would of course be a core feature of that board. BTA can assist in the recruitment of the Capital Appeal Board if required.

### **e. Clarify the Build Cost**

As a priority it is important that the Board have a clear understanding of the build costs and can articulate them consistently. The current estimation of £8million costs + £2million endowment are estimates based on other similar builds. However, the cost of building materials over the last eighteen months has risen considerably and therefore it is vital that funders are giving up to date information.

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**BTA Consulting**  
**January 2022**