

Changing More Lives - 2011

A New Approach to Funding

APPEALS THINK TANK GUIDE

OVERVIEW

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We want to turn the traditional British fund-raising approach on its head...

OUR CAUSE...

- ✱ The need is **DESPERATE** (*see our shocking handout "So What?"*)
- ✱ Our Projects **WORK** (*see our video "Proof of the Pudding"*)
- ✱ **CONTINUITY** with the Children is built in (*see details of The March Club and thoughts on 'Structure' in section 3 of this Guide*).

OUR UNIQUE PROPOSITION...

- ✱ **NO** donor money spent on fund-raising or administration
- ✱ Unique scope for Donor **INVOLVEMENT** and identification
- ✱ **COSTS** kept low by use of Independent School and MoD premises
- ✱ Projects **STAFFED** by Service-Trained personnel

OUR NEEDS...

- ✱ A **RELIABLE** annual income stream
- ✱ **NO** fund-raising costs
- ✱ Maximise our **TIME** spent on helping the children

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THE BOND CONCEPT

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Some Initial Random Thoughts...

We could set up a range of bespoke Endowment Bonds - or similar - with a different title and relevant tax structure for each...

TAILORED FOR...

✱ **HRIs (Hugely Rich Individuals)**

...Some of whom might rather like to be recognised and involved in their own philanthropy. (Giving shares would also obviously save great piles of Capital Gains Tax!)

✱ **Companies with (or without) a high CSR rating**

...and/or a need for increased respectability. Contributions should come out of their advertising and promotional budgets - their so-called "charitable" funds are dispensed in £5 units - mostly on a rather miserly 'once only' basis (aren't we generous etc...)

✱ **Grant-Giving Charitable Trusts**

...Some of which seem to have "run out of purpose"

✱ **Personal (Family) Trusts**

... And reduce or eliminate their "small donation" costs

✱ **Capital Syndicates**

... of successful folk who want to enjoy their involvement

✱ **Subscriber Syndicates**

... Paying in quarterly to achieve a full 'Bond', in the meantime supporting the Project Programme

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STRUCTURE AND SPONSOR BENEFITS

3

How might the Bond Concept work...

Some thoughts and options are...

- ✱ **Minimum gross capital sum needed** - between £130,000 and £150,000 per school package...?
- ✱ **To produce a net income** (@ 6% of capital) to the Foundation of **£10,000 pa** to fund a Project Programme for 12 children at one selected inner-city school each year.
- ✱ **These “Bonds” (or whatever) can be identified as the donor wishes** (eg ‘The Fred Boggins March Foundation Bond’ ‘Vodafone Hackney Free Endowment’ ‘Ormersfield Park Trust’ etc).
- ✱ **Cost to donor discounted by various tax allowances** and the fact that March Foundation has no appeals or admin costs.
- ✱ **Capital sum invested** through March Foundation nominated investment house or as agreed with donor.
- ✱ **Donor involvement can include** - selection of area and/or school; attendance before, during and/or after each Project; presentations to children; March Club assistance; or just signing the initial cheque!
- ✱ **Options to include** making over the capital sum to March Foundation at the outset; reviewing after five year interval; leaving in a Will; option of selling to a new donor etc. etc.