

Irish

Life & Permanent plc

Making a Successful Fundraising Pitch

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My Company- My Role

- **IL&P** : Life insurance and Retail banking
 - : Formed from the mergers of Irish Life, Irish Permanent and TSB Bank
 - : More than 5,000 employees; 100 branches; focus on Ireland

- **CR** : New role created March 2005
 - : Brief to develop a comprehensive group CR programme
 - : CR v CSR
 - : Corporate values
 - : Personal commitments

Community Involvement

- **Major Programmes**
- **Support for Staff Charities**
- **Discretionary fund**
- **Volunteering**

Making a Successful Pitch

Rule No 1: Know your own organisation

- What you do incl. positioning
- Why you do it?
- Track record and reputation
- People involved

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Rule No 2: Know your target organisation

- Publicly available information
- Funding policy
- Current commitments

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Rule No 3: Look for a fit between the two

- Where is the common ground?
- Is the “chemistry” right?
- Comparative size and scale
- How will BOTH parties benefit?

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Rule No 4: Target the right person

- Can be difficult to identify (centralised v decentralised)
- Top down v Bottom up
- Individual v Committee
- Face to face v Written

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Rule No 5: Be clear about what you are asking for

- What are your needs? (not just funding)
- How do you think the target organisation can help?
- Does your need fit any current programme?
- Is there a new opportunity for the organisation?

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Rule No 6: Keep it focused and engaging

- Tailor the content to the organisation
- Brochures, annual reports, CD's, DVDs, posters etc
- Tell a story
- Don't overplay the need (head v heart)
- Keep an eye on the clock!

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Rule No 7: Try to build a relationship

- Be open and honest
- Take a long- term view
- First pitches are not always successful
- If unsuccessful, try to finish on good terms
- Keep in touch

Making a Successful Pitch

Rule No 8: Give feedback on results

- **It's about impact!**
- **How were funds used?**
- **Tangible results**

A View of the voluntary sector

- **Small number of big players, many small organisations (corporate v community)**
- **Lots of unsung heroes!**
- **Difficult to get a clear picture**
- **Competitive!**
- **Great for learning key life skills!**