

Fundraising Strategy and Applications

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Sources of Income

- Statutory:
- Trusts and Foundation:
- Individuals: cash gifts, committed gifts, legacies
- Major donors: cash gifts, shares, property
- Companies: in kind gifts, cash
- Earned income: mostly from government, also from trading like selling training or publications

Suggested Headings for a fundraising strategy

- 1) Introduction including what the organisation does and it's legal status
- 2) Background
 - Organisation's vision, mission, aims and core values
- 3) List of major achievements of the organisation in terms of fundraising
- 4) SWOT analysis and analysis of trends and external factors
- 5) Review of current funding situation including a detailed analysis of the last 3 years
- 6) An analysis of each type of funding i.e. statutory, charitable trusts, individual donors and corporate outlining the motivations of each type
- 7) Areas for development in the short, medium and long term (refer to areas explored of which the organisation has previously not accessed)
- 8) Resources required to implement the plan
- 9) Financial Management and IT systems
- 10) Monitoring and Evaluation of the plan
- 11) Projected three year budgets

Fundraising Application

- One-page Executive Summary
- Introduction
- Organisational Structure
- Who the project helps
- How we help
- Why we need a xyz project
- What our project has achieved to date
- What we would like the project to achieve in the future and how we will carry these objectives out
- What difference will this project make to the community
- Budget and shortfalls
- Monitoring and Evaluation
- How xyz Trust/Foundation can help our organisation (list things that the grant will fund)

What makes fundraising successful

- Focus on the quality of the relationship: ongoing communicating
- Impact assessment
- Service user involvement in the development of the programmes
- Reporting
- Managing expectations: quality and value of work (charities are professional but can use volunteers)

The Eight Steps to Major Donor Income

- Identify
- Research
- Plan
- Involve
- Ask
- Close
- Thank
- Steward