

The fundraising plan

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**helping you
to help others**



Welcome from Angus Roy, Charity Director, Ecclesiastical

www.benefactgroup.com

Introducing

**Gill Jolly,
DSC Associate Trainer &
Director of Achieve Consultants Ltd**



**Cathy Shimmin
DSC Senior Training Consultant
who will be assisting with the Q&A**

'The fundraising plan'

Today we'll be looking at:

- **Some basic principles**
- **The importance of a plan**
- **Pre-planning**
- **Components of the plan**

Then a Q&A session

First Things First

- Are you clear why you want money and how much?
- What are you trying to overcome? (what's the problem, the issue, etc.)
- What difference will a donors support make – what will it achieve?

Successful fundraising

- It's about a two way relationship
- We need to understand our potential donor's motivations
- Satisfied donors will give again, give at a higher level and encourage others to give

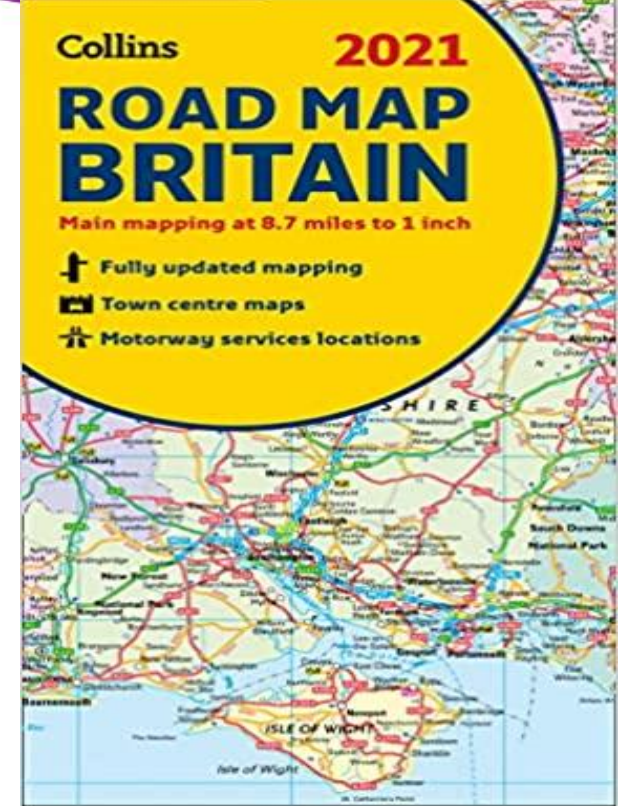


The fundraising plan

It's our route map to take us from where we are to where we want to be.

If we don't have a plan we won't:

- Fulfil objectives
- Use resources wisely
- Be able to achieve our funding goals
- Be able to provide much needed service/facilities.



The importance of a fundraising plan

- Keeps us on track
- Help us achieve our goals & objectives
- Enables us to say 'no'!
- Gives the organisation and other funders confidence
- Lots of others....

IMPORTANT

**PERMISSION TO
RUN AROUND**

LIKE A

**HEADLESS CHICKEN
Is Denied**



Where are we now?



- This applies to both our funding, our sources and methods we are using and the results
- What about the resources we have to generate income
- What skills, knowledge & experience do the people involved have?
- And importantly what about our organisational funding needs – have these changed?
- If so do we need more or less cash?

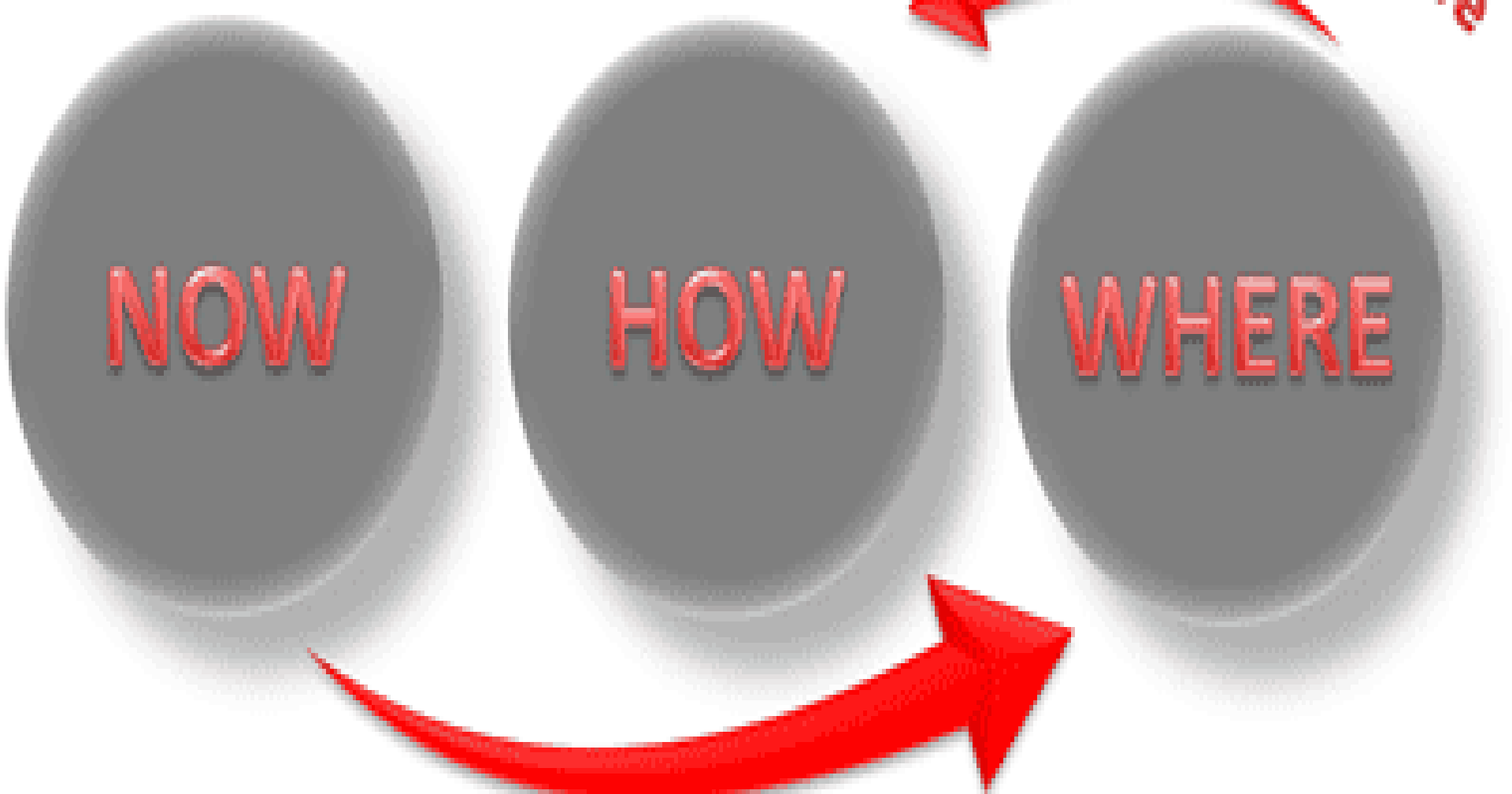
How do we get there

NOW

HOW

WHERE

What future do we want



What are the objectives of your fundraising plan?



Raise money!

Retain more of our current supporters?

Increase the value of our donations and grants?

Diversify our income sources?

Innovate and try some new fundraising techniques

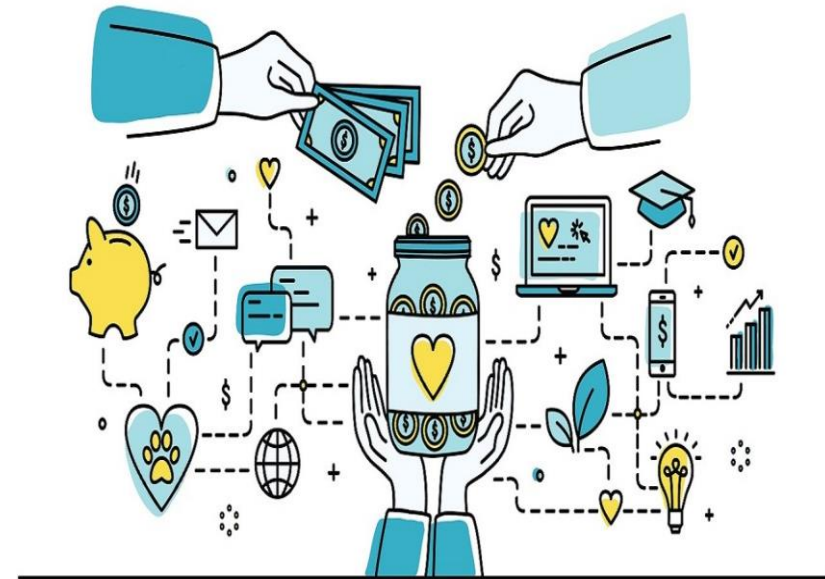
Your fundraising mix

- Low Risk Income Stream/s
- Cost Efficient Fundraising
- Acceptable to Organisation
- Realistic Implementation
- Restricted vs Unrestricted Income.



Funding sources

To help with sustainability, a fundraising plan should have a mixed portfolio of sources and different methods/techniques to tap into those



NOTE:

Sources and tactics (i.e. methods and FR techniques) is the subject of next webinar on 13th Jan.

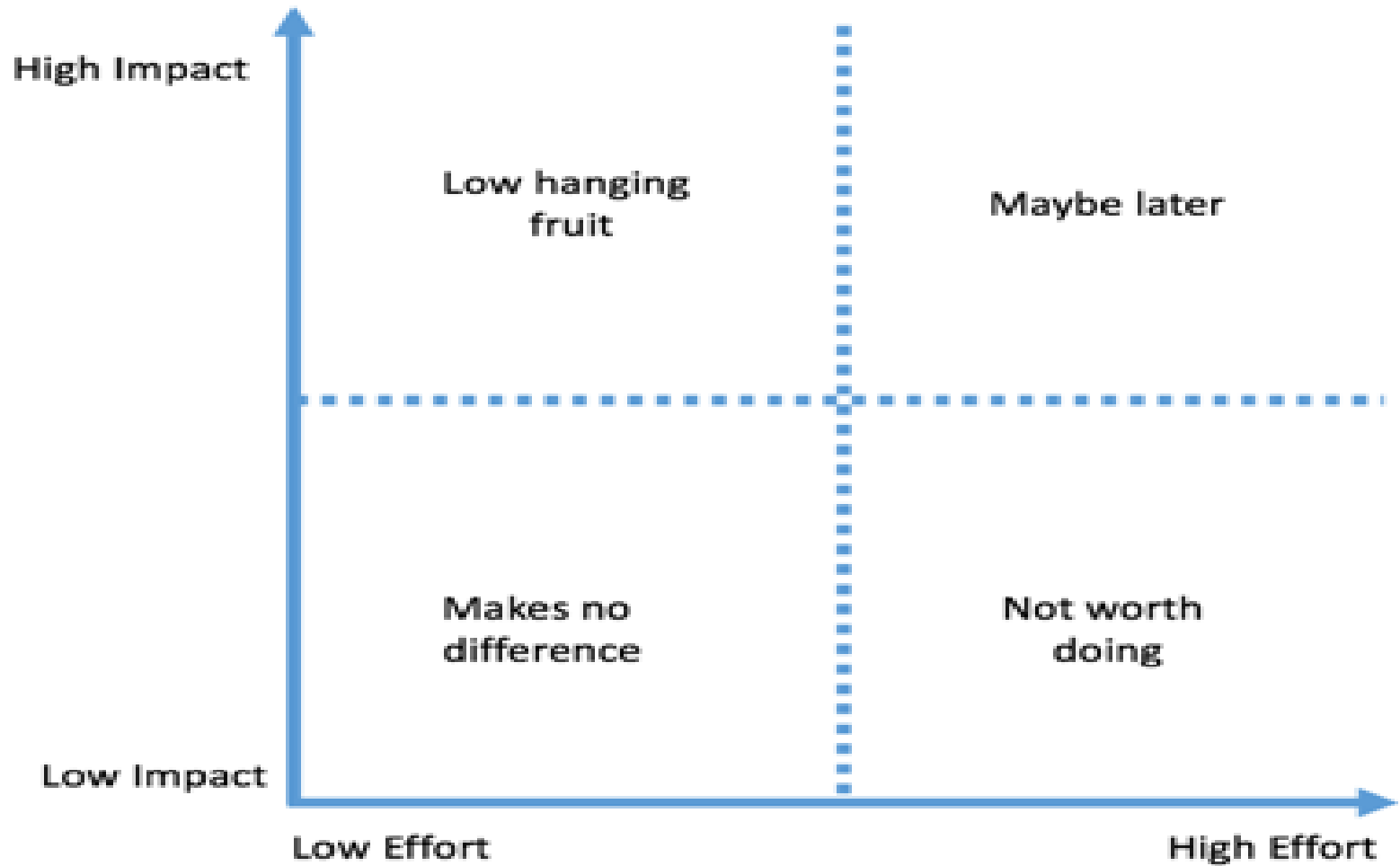
Quick wins or long-term gains



Low-hanging fruit



Prioritisation



New areas and activities?



Fundraising, promotional and/or campaigning technique

		Existing	New
Target group or audience	Existing	<p>Improve existing approach</p> <p>Least risky</p>	<p>Try out new techniques on existing supporters</p> <p>Intermediate risk</p>
	New	<p>Extend existing techniques to new groups</p> <p>Intermediate risk</p>	<p>Try out new techniques with new groups</p> <p>Most risky</p>



Who and what will you need to be successful?



A vital part of the plan

- Income
 - Expenditure.
-
- Best case / ambitious / optimistic
 - Worst case / cautious / pessimistic
 - Realistic.



Roles and responsibilities around fundraising



- Everyone across the organisation has a role in fundraising
- Direct FR staff and volunteers
- Other staff and volunteers
- Trustees and advisers
- Donors and supporters.



Your fundraising plan



1. Undertake a fundraising review (where are we now & how did we get here!)
2. Be clear on your fundraising goals/aims and objectives
3. Know what you are raising money for and why
4. Understand who your current audience/donors/supporters are
5. Identify sources for funds and the tactics (methods/techniques) for securing them
6. Identify any gaps (4 & 5 above)
7. Estimate your fundraising income and costs – work out the ROI
8. Develop a timeline for the different activities that comprise your fundraising
9. Monitor whilst you implement your plan
10. Evaluate at the end of the time period.



Develop a fundraising plan and increase your chances of success.

Thank you

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A graphic featuring two overlapping circles. The left circle is orange and contains a white letter 'Q'. The right circle is dark grey and contains a white letter 'A'. A small white circle with a dark grey ampersand '&' is positioned between the two circles, overlapping both.

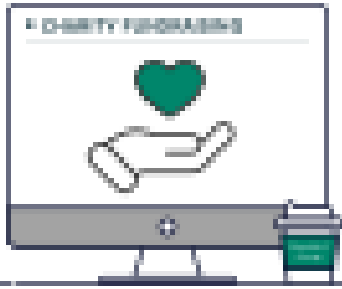
Q & A

Next Steps



More fundraising support and resources from Benefact Group can be found at

www.benefactgroup.com



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<https://fundsonline.org.uk/>

<https://www.dsc.org.uk/training/>

<https://www.dsc.org.uk/publication/the-complete-fundraising-handbook/>

<https://www.dsc.org.uk/publication/the-directory-of-grant-making-trusts-2020-21/>

<https://www.dsc.org.uk/training/in-house-training/>



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