

# 3rd Sector Mission Control

## Focus | Strategy | Fundraising

### **Benefact Group**

#### **How to ensure you are set up for fundraising success**

#### **Follow up answers to questions arising from 27<sup>th</sup> February webinar**

*Note: please be aware that these are generalised responses to themes which arose in the many questions posed before and at this webinar, intended as starting points.*

#### **We are a new charity and/or new to fundraising – where do we start?**

My advice would be to work quickly to understand how your organisational strategy (what your organisation does with the money) links to your fundraising strategy (what money your organisation needs to raise and how). Can you clearly portray your organisation's vision, mission and objectives as a "topline" to your organisational strategy? On the fundraising side, who are your key audiences, what messages do you want to get to them and how? Linking the two strategies together is an understanding about what changes as a result of your organisation's activities, and by extension the support you receive. I would suggest that ultimately your fundraising needs to be about helping your charity to achieve its mission.

#### **Where do we focus with limited resources and staff time? How can I be a successful fundraiser by myself?**

It is more important than ever with limited resources that you are strategic with your fundraising. You can't be all things to all people, or do everything, everywhere all at once! Small, locally focused organisations in particular should start with their own local community- build relationships, offer events and follow where the leads take you. This can include for example crowdfunding or connections with local businesses and grantmakers. As with all fundraising, focus on personal relationships, and good storytelling about your charity's impact.

#### **What are the best fundraising platforms/tech?**

Please bear in mind that this answer is intended as a starting point, and other providers may also serve you well!

Regarding CRMs, small to medium charities may want to look at [Beacon CRM](#), [Blackbaud eTapestry](#) and [Charitylog](#) as examples to compare against. Larger charities may want to consider [Donorfy](#), [Raiser's Edge NXT](#) and [Microsoft Dynamics 365](#). Major charities could also consider [Salesforce](#), [Blackbaud CRM](#) and [CiviCRM](#).

**[www.3rdsectormissioncontrol.co.uk](http://www.3rdsectormissioncontrol.co.uk)**

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As for giving and fundraising platforms, providers currently include [JustGiving](#), [Enthuse](#), [CAF Donate](#), [Raisely](#), [GivenGain](#), [GoFundMe](#), [Givey](#), [Givestar](#) and [Crowdfunder](#).

### **Can we use AI to develop our strategy? What is your opinion on investment in AI bid writing and fundraising?**

Yes, I believe that AI can be helpful in all areas of fundraising but can't completely replace the human touch and particularly our capacity for relationship building, which is such a central part of successful fundraising strategy development. Major grantmakers are increasingly understanding of the use of AI in funder seeking and application writing, and the Charity Excellence Framework has helpful tools on its website. AI may also be helpful in automating "back office" processes so that you can focus more on the human stuff!

Join the Benefact Group's webinar [FundrAlsing: How to improve fundraising opportunities](#) with AI on 03 April.

### **How do you start to access corporate fundraising?**

Start with research: which companies might match your size, location, values? Once you have prospects, begin to tailor your approach, focusing on what you can offer them in terms of activities and benefits, or how they can be involved. As with other areas of fundraising, this should be founded on strong relationship building and networking.

### **Do you have any advice about engaging major donors?**

Always start by doing thorough research! What are they interested in? Might they be interested in your cause? What values do they have? Do you have a way of reaching them? Who do you know who might know them? Who else have they supported?

Once you have identified your prospects, how can you build their engagement so that it is clear you do not see them merely as a cash machine? What can they come to? What can you show them? What can you tell them? What will their experience be? How can you build a proper personal relationship with them? What events can you invite them to? How can you deepen their involvement? With major donors, it's important to focus on the longer term, rather than expecting a quick return.

### **What is the best way to expand my philanthropist supporter's base?**

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Principally, the best way to expand your supporter base is through your current network of givers and supporters, as they will be your best peer advocates. Working with them, you should arm them with very clear information about your organisation's vision, mission and activities (its case for support) and focus on authentic personal stories on the difference your organisation has made. Think about your touchpoints – what events or activities can you invite them to? Again, this all takes time and requires strong relationship building.

## **What is the best way to ensure that we are protecting our data, including donor information?**

Start by setting up and implementing policies on this, including a focus on strong password writing, Multi Factor Authentication, virus protection, whether you might need to encrypt data, understanding cybersecurity, software updating, limiting access to privileged information, understanding GDPR, and regularly backing up your data.

Richard Sved  
13<sup>th</sup> March 2025