

Fundraising Strategy



The following fundraising strategy template has been developed through funding from the Local Network Fund (a pot of money which was available to groups working with Children and Young People, but which has now closed). In West Yorkshire LNF funding, initially provided by the Department of Education and Skills, has been administered by the Community Foundation for working with children and young people to plan their fundraising more effectively, enabling them to continue to provide projects and activities for children and young people.

Your fundraising strategy should help you to know where you are now and where you want to be in the future and how you can find the resources to get from A to B.

Where you are now
A



Where you want to be in the future
B

Your draft fundraising plan

So, have a go at putting together your own fundraising plan using the following template. If you are unsure how to complete each section there are web links to help you.

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Part : Aims and Objectives in Fundraising Strategy

Aims – describe the overall aims of your organisation, try to do this in one sentence, you might include: what is the purpose of your group, who do you target or benefit, where and what issue do you aim to deal with e.g. “to improve the wellbeing of children on the Mixendon estate”. You might break down your overall aim into more specific aims e.g “to improve children’s self-esteem”, “to increase parenting skills of parents on the estate”, “to enable children to have a voice”

Overall aim:

Specific aims:

1.

2.

3.

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Objectives are practical activities which will help you to achieve your aims. Consider each of your specific aims and make a list of ways in which your organisation might meet them e.g provide information, set up support groups, run activities, campaign. If we take the aim: “to increase children’s self esteem”, our objective (or way in which we will meet are aim) may be “to provide out-of-school activities in drama and sport” or “provide a drop in centre for parents with a play facility for the children”

Objective 1:

Which aim will this help to achieve?

Objective 2:

Which aim will this help to achieve?

Objective 3:

Which aim will this help to achieve?

For further help clarifying your aims and objectives please look at to the “aims and objectives” web page

http://fit4funding.org.uk/help_and_advice/preparation/aims_and_objectives/ :

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Part : Where You Are Now

Planning your strategy well, means you need to be clear about where you are now. In the box below, describe your organisation, including your legal status, your history - why, how and when were you set up; your context - where you are based or what issue you deal with e.g. some facts about your estate or people you support; any past achievements e.g projects you have run successfully; numbers of volunteers you involve or children you have supported.

List the activities and/or services you provide e.g. a gym club for 5-9 year olds who lack the opportunity to get involved in physical activity, every Wednesday evening for 2 hours a week during term time at the local community centre run by a qualified sessional tutor.

Include the resources you have e.g. volunteers, sessional workers, staff, an office, use of a school hall, your own building, equipment. Have you any income e.g grants or fees, things you charge for. Find out how long they will last and what they are for. The following headings may help:

History - why, how and when did you start?

List your past achievements

Where do you operate (geographical area, name and describe it)

What services and activities do you provide?

What is your legal status? What policies and procedures have you in place e.g. health and safety, child safeguarding policy

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What resources do you have?

Anything else?

For further help please look at the “Organisational Checklist” webpage:
http://fit4funding.org.uk/help_and_advice/preparation/checklist/

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Part : Future Plans

Decide what you want to do next e.g. continue the activities you have mentioned above, you may want to expand an activity to run an extra night or open an activity up to more children, or do something different or in addition. You may have a new activity you want to run over the summer or a project you want to develop in the long term.

List each existing activity and decide if you want this to continue or expand. List any new activities you want to do, and indicate when you would want to do these and for how long - you can't always do everything at once, put them into priority order.

Things we do now:

Activity/project 1 (keep going, expand?)

Activity/project 2

Activity/project 3

Additional things we want to do:

Activity/project 1

Activity/project 2

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Take each activity you want to continue or develop and outline it. Include a description of the activity, who it will benefit, when you want to run it, how, who it will benefit (it's outcomes - the changes it will make e.g. to achieve which of your above aims).

You will need to be clear about how you know it is needed and wanted. Include a time-scale and the resources you would need. e.g. you might want to expand the football training to include Wednesday nights on the school astro-turf, over 34 weeks of the year, enabling 20 more children to get involved, you will need a fee for the use of the astro-turf and cover the training costs of a new coach, their volunteer expenses and CRB check and the printing costs of a publicity leaflet your volunteer has offered to produce.

Go back to your aims and objectives and consider how the activity will help you to meet one of your objectives e.g. "increase children's self-esteem" and "develop their physical abilities" by being involved in a team game".

Finally decide how you would show that children have got involved in your activity/project and how they have benefited e.g. through signing in sheets and a scrap book showing children interacting with each other with confidence.

Activity/project 1 - name:

Project outline: what will you do, where, when, how?

Target group: who will benefit and how many?

How do you know there is a need? How do you know your target group will use the activity/project?

Does your activity fit with a local or national strategy (e.g. your local crime strategy or government target e.g. 5 outcomes for children and young people)

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What objective will this fulfill. What benefits will those who take part gain from the activity.

How will you measure who uses the activity/project and how it benefits them?

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Part 4: Budgeting

For each of your activities/projects you will need a budget. Make sure that your budget covers all the resources you need to run your activity or project effectively. In your activity budget estimate the costs of all the resources you need. Indicate any resources you don't need to raise funding for e.g. you may have funding from elsewhere for parts of your budget. You will then know how much you need to raise and for what

Activity/project costs:	how calculated	estimated cost
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Please use form on next page.

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	Cost in £s
Staff and volunteers:	
salaries (incl NI, etc)	
sessional worker hours	
volunteers expenses	
travel	
training/recruitment	
CRB checks	
coaching costs	
participants:	
travel	
childcare	
allowances	
aids/adaptations	
kit	
Other costs:	
insurance	
room hire	
equipment/materials - purchase or hire	
equipment storage	
stationary	
publicity, printing/photocopying	
postage	
telephone/internet	
administration	
utilities	
other costs	

Total cost

Larger funders may cover the costs of your indirect project costs, see Full Cost Recovery webpage: http://fit4funding.org.uk/help_and_advice/preparation/full_cost_recovery_wycas/

If you are requesting some funding from elsewhere or already have some costs covered, you will need to show this and show how much you are requesting from a particular funder.

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Part 5: Getting the Money

Finally, you need to identify which funders would fund your activities/projects. You will need to research a wide range of funders. Look closely at their criteria to make sure you are eligible, check their deadlines, the amount they give and for what. Note down which funder's you will approach for which activities/projects, how you need to apply to them, who will apply and by when. You might approach more than one funder for a particular project.

Activity/project 1:

Possible funder - why is this an appropriate funder (refer to funder's guidelines), what will it fund, how should you apply, who will apply and by when?

Activity/project 2:

Activity/project 3:

For funding information and searches look at Funding section at webpage:

http://fit4funding.org.uk/help_and_advice/funding/

and use the Funding Search facility at webpage:

http://www.fit4funding.org.uk/misc/funding_search_grantnet/

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Part : Making Your Strategy Happen

Fundraising tasks – decide how you will manage your fundraising – through a group who will meet for a one-off period of time etc and decide who will do what, and by when e.g. do you need to prioritise your activities, outline your activities in more detail, research funders, approach funders by a certain date, get advice etc

Task

Who

When

Review

You will need to review how your fundraising is progressing and make amendments to your plan on a regular basis. Look at what you have achieved, the changes you need to make to your plan - including your tasks above. If you are having problems e.g you are thinking of going for a contract but don't know anything about this, within your plan decide who will research this and by when. If your application to a funder has been unsuccessful, what should you do and so on. Your plan will always change as your needs change and your environment changes.

Developing a fundraising plan is included in fit4funding's "funding and fundraising for the voluntary and community sector" which is a 30 hour OCN accredited course aimed at groups new to fundraising. The course is face to face, but is also being developed on line, contact fit4funding for further details.