



## Developing a Fundraising Strategy for Small Groups

### What is a Fundraising Strategy?

It is often assumed that a fundraising strategy is a sophisticated document that is put together by a professional fundraiser, but that doesn't have to be the case. Put simply, a fundraising strategy is a written plan which details future projects for your group and how you intend to fund them. It helps you to plan for the future, identify actions and timescales and possible funding sources for your work.

The strategy is an internal document for your organisation, so it is up to you how detailed you make the plan and it should be appropriate to your funding needs. If your requirements are very straightforward you may only need one side of A4, but if you have more complex requirements, such as ongoing costs or a large capital project, you will probably need a larger document.

The strategy should cover a timescale that is appropriate to your organisation. Looking ahead 2 to 3 years should give a good overall picture without being too vague. The strategy is intended to be a working document and, in particular, the Action Plan and Opportunity Appraisal should be updated on a regular basis.

### Case for Support

Why should anyone give money to your group? You need to detail the reasons why a potential funder should support your cause rather than any of the many other worthwhile causes that approach them. In order to do this you need to write and agree an easy to understand and engaging statement that builds your case for support.

This should include:

- The problem, issue or need you are trying to address.
- Your solution to this problem (project / service)
- The difference your project or service will make
- What will happen if your project or service doesn't take place?
- Why your organisation is best placed to deliver.

If you deliver a number of different projects that deal with different issues you will need a statement for each project.

## Content

The content of each fundraising strategy will vary depending on complexity of project, amount of funding required etc. but each strategy will have some common features.

As a minimum you should include the following:

### Introduction

- Description of your group's aims and objectives
- Description of your group's legal and management structure
- Description of current activities and how they are funded

### Case for Support Statement

- As above

### Future plans

- Identify your plans for the future – are you planning to sustain existing services, or expand or contract?
- What are your priorities for this future work?
- How much funding do you realistically need for each area of work?
- When does your current funding run out? When do you need to apply for more?

### Opportunity Appraisal

- What are the realistic opportunities for your group to secure the resources it needs?
- More information is below

### Action Plan & Resources

- An action plan should detail the actions you will carry out in relation to raising funds
- The plan should include details of who will carry out the action and by when.
- Any resources needed to carry out the action need to be identified
- See the template below

## Opportunity Appraisal

When you have a good idea of the future plans for your organisation you can begin to research and appraise the opportunities that are available to your organisation. We have identified eight areas of support you may want to tap into. Use each area as a heading in your fundraising strategy:

## **Grants**

There are many organisations that give grants; from Trusts and Foundations to European Grant programmes. Our Factsheet on Identifying Funding Opportunities can help.

## **Corporate Giving**

Businesses can contribute in a number of ways, including cash donations but don't forget in-kind donations of goods and services.

## **Individual Giving**

Whether large or small, regular or one off, donations from individuals can be an important part of a funding mix as they show local support for a project.

## **Fees & Charges**

Can you charge a membership fee or fee for attending your project, if you already charge can you increase the amount charged or number of people that pay.

## **Community Fundraising**

From Auctions to Zip-wires (and everything in-between) community fundraising is a mainstay for many organisations. What do you do now? Can you grow your income?

## **Volunteering**

Could some of the services you offer be delivered by volunteers? Remember to count any volunteer time as an in-kind donation.

## **Contracts**

You may be able to bid for contracts from Local or Central Government which will enable you to deliver your services.

## **Loans / Social Investment**

Is your organisation ready to take on a loan or social investment?

## **Getting further support**

Northumberland CVA has access to a wide range of resources to help you with monitoring and evaluation. For more information, advice and support please email [enquire@northumberlandcva.org.uk](mailto:enquire@northumberlandcva.org.uk) or call 01670 858688.

Northumberland CVA, 107 and 109 Station Road, Ashington, NE 63 8RS  
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### Example Action Plan

<b>Project:</b>	Village hall renovation: Roof repairs £1,500; Insulation £1,000; New windows & doors £5,500; New Kitchen £9,700; Heating system £4,500. Total £22,200				
<b><u>Funding Source</u></b>	<b><u>Amount</u></b>	<b><u>Additional info, resources required etc.</u></b>	<b><u>Deadline</u></b>	<b><u>Who</u></b>	<b><u>By when</u></b>
Windfarm Community Benefit Fund	£3,500	Interested in supporting energy efficiency so application will focus on insulation, new heating system and windows & doors	31 <sup>st</sup> Aug	AP	15 <sup>th</sup> Aug
Sir James Knott Trust	£3,500	Contribution to whole project	18 <sup>th</sup> June	AP	1 <sup>st</sup> June
Awards for All	£9,700	Applying specifically for new kitchen	ongoing	AP	30 <sup>th</sup> Sept
NCC Community Chest	£4,000	Contribution to whole project	4 <sup>th</sup> Sept	AP	15 <sup>th</sup> Aug
Hog Roast	£500+	Annual event on first Saturday of August organised by events committee. Usually raise over £1000 profit of which £500 goes towards hall insurance. £600 required to book hog roast.		JW	
Reserves	£1,000	Need to take proposal to committee to allocate up to £1000 from reserves. Final amount will depend on success of hog roast.	21 <sup>st</sup> May	MD	21 <sup>st</sup> May
Total	£22,200				

<b>Project:</b>					
<b><u>Funding Source</u></b>	<b><u>Amount</u></b>	<b><u>Additional info, resources required etc.</u></b>	<b><u>Deadline</u></b>	<b><u>Who</u></b>	<b><u>By when</u></b>
<b>Total</b>					