

Fundraising Strategy Development Programme

This programme will be delivered in-house via 3 x 3 hour workshops to voluntary and community organisations in Hertfordshire. It is for charities and other not for profit groups who have no fundraising strategy or plan in place, or for those where the strategy is out of date or no longer fit for purpose.

Why is a fundraising strategy important?

- To make your charity more sustainable – ensuring that you have plans to generate income to cover all overheads and running costs
- To identify all potential sources of income and opportunities to diversify
- To provide a framework to support decision-making around funding and business opportunities. Will help you to stick to your vision rather than chase pots of money.

Who should participate?

It is important that all the key people involved in income generation for the organisation are involved – so we recommend that each organisation forms a group that includes:

- Trustees/directors
- The CEO/most senior manager
- Other managers/staff/volunteers who have a fundraising role (or might have in the future)

Here is an outline of what will be covered in each session and what pre-work the organisation will need to do to prepare for each one. The exact way in which the sessions are facilitated will be tailored to each organisation's needs and experience.

Workshop 1: Understanding the Organisation and its Needs

Pre -work:

- Provide advisor with copies of relevant existing documents e.g. business plan, fundraising strategy, copies of accounts for past two years and budget for current/coming year
- Respond to a list of questions to think about and discuss prior to first workshop – successes, failures, strengths, weaknesses, who else is doing the same or similar work locally etc

Workshop programme:

- Defining the need – income required for maintaining current services, expansion, key changes/adaptations etc.
- Analysis/discussion of the organisation's current position – here we may use techniques such as SWOT, PEST etc.
- Audit of current sources of income

Outcomes:

- Gain better collective understanding of current position
- Define needs and aims for fundraising linked to organisational strategy

Workshop 2: Choosing Fundraising Methods

Pre-work:

- Identify fundraising targets/requirements if not already in place
- Identify what (if any) budget and resources are available for fundraising
- Register with Herts.Community fundraising database

Workshop programme:

- Discuss targets and budgets
- Review of current and potential fundraising methods including potential requirements, constraints, pros and cons, best practice and any legal requirements
- Identify most appropriate methods/income sources for the organisation in line with budget, organisation strategy, current needs and timescales including the potential to start/grow earned income (trading or contracting)
- Discuss requirements for Workshop 3 and identify any activities the organisation will need to undertake in order to be able to make the most of the next session e.g. trust/foundation research, identify events they want to piggyback/participate in.

Outcomes:

- Identify appropriate range of fundraising methods
- Identify SMART goals for each method for short and long term

Workshop 3: Developing the Plan

Pre-work:

- Activities as identified at end of Workshop 2
- Discuss plans with board to get feedback/buy in

Workshop programme:

- Discuss any feedback from board on chosen methods and amend accordingly
- Using template provided, start to flesh out a 12 month plan of activity
- Discuss and identify appropriate measures to track success
- Discuss timescales for review and construct appropriate monitoring sheet for the organisation to use

Outcomes:

- A bespoke fundraising plan including methods, targets, activities required and measures of success

Total cost including preparation = £350 plus travel expenses