



## Increasing Individual Giving

### 3. Writing a Fundraising Plan



## Writing a Fundraising Plan

- As with all planning, a fundraising plan needs to fit in with other plans
- The writing of the plan is therefore an iterative process, involving revision not only as other plans become clear, but also as others feed in their ideas
- The questions asked during the writing of the Fundraising Plan may help you to write plans for other areas



# Writing a Fundraising Plan

1. The Fundraising Goal
2. What approaches (methods) will you use
3. The human targets (prospects)
  - Research (capacity)
  - Cultivate (affinity)
  - Ask and Thank



- 1. The Fundraising Goal:** What are you trying to achieve? How much do you need to raise? When do you need it by and can you break it down into a timeline? What exactly will the money achieve – outputs as well as outcomes? What will it cost to raise this money (you'll probably have to come back to this question once you've done the rest of your planning)?
- 2. What approaches (methods) will you use:** In this section should consider applications to grants and foundations; local authority funding; individuals (both high net worth and lower level) by direct donation or legacies/bequests; payroll giving; online giving; existing resources. If you decide that some of them are not appropriate, write down why.
- 3. The Human Targets (prospects)**

**Research:** For individual giving, who are you going to target? Whose details do you already have? Segment them in your database (see section 5) as far as possible, by wealth, family situation, work history, groups they belong to and whether they have supported you in the past? Where can you find them? How can you reach them? Then extend the network – who else do they know? What other groups of people might be interested (think about your emotional appeal)? What do you know about them? How much will they be able to give (capacity)?

**Cultivate:** In the long term, giving is based on trust. The ideal is to get to a point where someone knows you so well that whatever you ask they will give, because you've already invested in the relationship; you've cultivated them and they know they've been cultivated. Cultivation takes time and the more you want, the longer this step will take. The closer you are to people, the more likely they are to give to an organisation simply because you ask them. The more a person feels an affinity with

# Writing a Fundraising Plan

4. The Case for Support and the Call to Action
5. The Communications Plan
6. Recognition, incentives and rewards
7. What are the right systems?
8. Do you have the right people?
9. Evaluation



**4. The Case for Support:** Be as compelling as possible; inspire people to become passionate about your cause. Appeal to something emotional in people's lives. Be relevant, personalise and connect with your supporters' behaviours and interests. Tell them what you want, why, what impact it will make, how much it will cost and how they can help.

The Case for Support is very important – there are six slides following this which contain more detail

**5. The Communications Plan:** What methods, how often? Will you include online, social media? Will it be primarily written word or will pictures have the greatest impact? Most people need to hear about something three times before they act – that's the way our brains work.

Crucially, don't forget to include thanking people. One formal thank you should come from the person who made the ask, but another should come from the highest executive of the organisation outlining the benefits that will be achieved with the donation.

Who will write *about* you, who will retweet on your behalf, who will publicise you? Who's already writing, publishing or broadcasting about things which are close to your cause (radio, TV, student newspapers)? Your plan should include updates as well as further calls to action.

Eventually this section should include a calendar of what needs to be done when. Think about creating a sense of urgency in your communications through using deadlines, calendars and countdowns

## 4. The Case for Support

- Is written for donors
- Clearly illustrates mission and vision for the future
- Tells donors why you need funding and what outcomes you are seeking
- Offers strong reasons why they should donate to your organisation



**The Case for Support** is the most important document you will write and should form the basis of *all* your communications and requests for donation.

Great case statements include a mix of both emotionally compelling stories and descriptions of the work you are doing, as well as cold, hard facts that back up your claim to be a positive force in the world. Once you've written it you can use it for trusts and foundation applications, major donors, small donors etc

## 4. The Case for Support

### a) An Emotional Opening

- Donors will use the first paragraph of your case statement to decide whether or not the rest of the document is worth reading.
- ✗ Avoid “Our organization was founded in 1942 by...”
- ✓ Use “Michael was hungry, desperate, and alone, until he found us.”



Use your opening to pack an emotional punch.

Avoid the temptation to start with something like, “Our organization was founded in 1942 by...” (this does not tell people that you’re a force for good in the world, merely that you take a long time to do things)

Instead start with something which establishes an emotional connection. The example above is exaggerated for effect but the point is, your organisation is changing lives, making a difference.

## 4. The Case for Support

### b) Your Mission, Vision and History

- Why does your organisation exist?
- Why should people care?
- What is your big, bold vision for the future?
- Give a brief summary of the founding of your organisation and a short history of its work to date



## 4. The Case for Support

### c) Your Work, its Outcomes and Impact

- Tell the reader what programmes you are currently running. Explain each concisely.
- Show proof that what you are doing is worthwhile.
- Use statistics and charts, but more importantly, tell the stories of those you have helped, use testimonials, and then back those up with the numbers



In proving that what you do is worthwhile you might use testimonials, quotes from those who have participated in your programmes or the endorsement of other organisations who are recognised as leaders in their field. For example, if you were seeking funding to carry on running a child protection activity aimed at volunteers, you might seek endorsement of your programme from the NSPCC and then publish a quote from them.

## 4. The Case for Support

### d) Financial Needs and How to Support

- How much money do you need to raise?
- What will it be used for?
- Why do you need to raise it *now*?
- Give your reader different ways to support your efforts – payroll giving; annual donations; planned giving (bequests)



## The Case for Support includes a **Call to Action** which is

- specific (please *donate £xxx*)
- timely (do it *now* or else X will happen)
- relevant (do it because you're *interested*)
- personal (we're asking *you* to do it)
- compelling (you're *helping* achieve X)

