**Sample Funding Strategy Draft in development**

Some names have been removed as this is from a specific project – this is for a registered charity – this covers an 18 month period from June 25.

**Action Plan**

**A - Preparation**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Action**  | **By whom/when or timescale**  | **What might be required to achieve action?** | **Target Outcome**  | **What has been completed**  |
| Donor Database. Supporters Network. Review approach |  | Who are our supporters, how can we ‘nurture’ them into regular or ad hoc donors. Build on database  | Agreed approach is defined further in writing  |  |
| Draft a Volunteer Fundraiser Role Profile / Description | DM / June 25  | Draft role profile which can be used to recruit future volunteers to support community fundraising Look at where to promote e.g<https://volunteering.cvsce.org.uk/index-classic>  | Learning/development opportunity also for residents/people to develop skills, supported by DM [supervised by NS] | DM has completed role profile, met with NS and final version agreed to. Ready now to recruit volunteers. |
| Provide additional resources to support volunteers  | DM/July  | Information about suggested community fundraising events, ideas etc. | A ‘library’ of guidance with examples for volunteers to consider for their own fundraising activities  |  |

See also Development Tasks below

**B -Grants / Foundation Trusts**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Action**  | **By whom/when or timescale**  | **What might be required to achieve action?** | **Target Outcome**  | **What has been completed** |
| Continue to research prospects for Pipeline Tracker  | Ongoing – RP/DM | System is in placeContinue to assess opportunities and how they meet fundraising objectives | Prioritised and up to date list of opportunities and deadlines |  |
| Allocate time/resource to write and submit grants and sent appeal letters  | Ongoing – RP as lead. DM support NS | Up to date Tracker/Pipeline is reviewed and agreed to  | State / agreed to targets up to April 26 |  |

**C - Raise funds from running events / community fundraising.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Action**  | **By whom/when or timescale**  | **What might be required to achieve action?** | **Target Outcome**  | **What has been completed** |
| Develop several events to attract donations during next 12- 18 months [ with specific focus on fundraising] and separate ones for businesses**July 2025 – January 2027** | Fundraising sub groupOther Trustees Welcome StaffNew volunteers | Links with annual celebrations / local eventsExplore other possible fundraising events: Christmas Fair, BBQ,Links to Crowdfunding. | For everyone who attends, sponsors or gives their details in any way, add them to supporter [donor base] list and ask them for money in future mailshots as appropriate. [GDPR] |  |
| Have a focused approach with regards to developing and publishing a **calendar of events for 2026** [A – Z fundraising approach.] | Events committee ideally if new volunteers in place. | Example - Run raffle extravaganza leading to 300+ new names of donors added to Supporter donor base by July 2026 |  |  |
| Run a dinner/dance for wealthy givers in Area in partnership with 5 other organisations | by April 2026 | Start to organise the event | £10,000 target with £4,000 profit  |  |

**D - Corporates**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Action**  | **By whom/when or timescale**  | **What might be required to achieve action?** | **Target Outcome**  | **What has been completed** |
| Continue to liaise with local companies to raise funds for specific projects | Ongoing – NS/SCDM support  | Identify potential local companies and contact. follow up with phone calls, emailsUpdate companies listed on spreadsheet to build contacts | 10 new donations by October 2025 |  |
| Hold **Open days** during the year for corporates deciding on theme, ‘hook’ and opportunities for service users. | Welcome Staff supported by Trustees and new Fundraising Volunteer[s] | Also set ‘Appeals Day’ to phone contacts on spreadsheet and ask for pledges. | Showcasing the Welcome Measurable impact for residents as regards? Meeting local employers etc |  |
| Increase opportunities for employee fundraising activity and payroll.  | As above  | Include within literature/invites and developing relationship. Also, JustGiving. | Set target for annual number of events led by employees fundraising for Welcome from corporates  |  |

**E - Gift Aid**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Action**  | **By whom/when or timescale**  | **What might be required to achieve action?** | **Target Outcome**  | **What has been completed** |
| Further understand how to maximise income from Gift Aid  | Fundraising subgroup | Discussion/sharing information | Clarity on approach and potential setting of target income |   |
| Ensure eligible donors maximise their donation through the use of Gift Aid | NS/SC | Develop a communication approach to advise donors of how to choose this option.Incorporate into the fundraising information pack  |  |  |

**F - On-line**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Action**  | **By whom/when or timescale**  | **What might be required to achieve action?** | **Target Outcome**  | **What has been completed** |
| Explore options for online match funding platform campaigns  | DM to advise /June 25 | Plan into annual schedule of fundraising activity for example.[See Appendix] Christmas Challenge. | £Note – who will manage this campaign and others | Information about the Big Give has been circulated for NS to register  |
| Explore Easyfundraising  | NS with support/DM – June 25 | Look first at examples of what this achieves / how it works  | TBC  | This has been reviewed and agreed as not suitable at this stage. No further actions |
| Assess and review current and other online approaches  | Fundraising subgroup | Align with refreshed approach to building our Supporter-Donorbaseand benchmarking with other charities.Consider new approaches and resource to implement |  |  |

**G - Development Tasks – Other**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Action**  | **By whom/when or timescale**  | **What might be required to achieve action?** | **Target Outcome**  | **What has been completed** |
| Assess additional Pro Bono support available/needed for example marketing  | NS – DM support  | Skills ‘audit’. SWOT | To have in place additional support to develop and sustain fundraising/marketing etc [ link this to corporates]  |  |
| Benchmarking other charities | All – DM can lead | To learn further from how other similar local, regional, national charities are fundraising and share best practice within the fundraising sub group | Awareness leading to prioritisation of our actions and new methods - review/test and learn |  |

**Other methods - future**

**H - Legacy**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Action**  | **By whom/when or timescale**  | **What might be required to achieve action?** | **Target Outcome**  | **What has been completed** |
| Explore and understand further this option | DM to feed into Fundraising sub group | Agree to timescale during 2025/26 | Scoping of this approach. Presenting back to Trustees |  |
| Set up a legacy campaign  | Fundraising subgroupFrom end 2026 onwards  | Amend fundraising literature include legacy tickbox.Specific marketing in November 2026 (National Will Week). | To have up to 5 individuals confirm that they have put the Welcome in their wills |  |
|  |  | Contact local solicitors and accountants– explore possibility of inviting them to Open Day. + other actions if we proceed |  |  |

**I - Social Loan Finance**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Action**  | **By whom/when or timescale**  | **What might be required to achieve action?** | **Target Outcome**  | **What has been completed** |
| Enable Trustees to understand this option as a future funding source [loan/grant] for 2026-2030 | DM to feed into Fundraising subgroupAgree to timescale during 2025/26 | Analysis/Case StudiesInclude further if agreed into business plan. | Scoping of this option Presenting back to Trustees |  |

**J - Crowdfunding**

**Contracts**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Action**  | **By whom/when or timescale**  | **What might be required to achieve action?** | **Target Outcome**  | **What has been completed** |
| In addition to Catering/Hospitality contracts, assess other Local Authority opportunities  | DM to feed into Fundraising subgroupAgree to timescale during 2025/26.Forecast more likely for 2026/27 | Further assess the Welcome’s position as regards being contract ready and actions needed | Awareness through Contracts Register of any pipeline opportunities, assessed and scoped. Welcome does further work to become more contract ready as required  |  |
| Commissioning – further review how you can pitch for business outside of procurement processes | As above but current action 2025/26 | Market research into any further opportunities for your services. Ways to put forward business case to sell your services.  |  |  |

Appendix

**Match – the Big Give**

<https://biggive.org/christmas-challenge/?fbclid=IwY2xjawHmCA1leHRuA2FlbQIxMAABHbMRwuvmTlj8iCIIc3JVBCog05DFPC6OsVhsQfhuLT9SDtS9REJnqf_Gsg_aem_CSn3zB-KWiRJcMRXMXxhvg>

Example of timescales …..

2025 Campaign Timeline

• May 12th, 2025: Applications open

• July 5th, 2025: Applications close

• August 29th, 2025: Pledge deadline

• October 8th, 2025: Offer deadline

• December 2nd – 9th (midday) 2025: Campaign

Which other campaigns online or similar opportunities could the Welcome incorporate into its forward plan for 2025?

**Appendix**

**STRATEGY**

**Summary overview**

A strategy document provides a clear focus and alignment with the goals and plans for sustainability or growth of a small charity. It defines the approach we will take in the next financial year from a fundraising perspective and should run alongside business planning. It has a focus on how we will seek to achieve our aims.

**Supporting documents**

a] The ‘Tracker’ records which funding sources, primarily grants are researched and noted as suitable to apply for and have been applied for, when, for what and the success. [ Also referred to as Pipeline]

Detail

a] Our main fundraising objectives are for.

1. Core staffing costs

2. Project costs, namely

• Meals on Wheels

• Name of main project/service

• Others as defined.

b] A Full costs recovery approach will be taken where possible.

<https://www.ncvo.org.uk/help-and-guidance/running-a-charity/financial-management/planning-and-budgeting/project-budgeting-full-cost-recovery/full-cost-recovery/>

c] Needs Analysis led approach. Working with the support of partner organisations and stakeholders we will take a needs led approach looking to meet the needs of the community and provide opportunities where appropriate for co-production which can be considered as - “a way of working that involves people and communities who use services in equal partnership; and which engages groups of people at the earliest stages of service design, development and evaluation’’.

Impact of our services and the benefit to service users or participants will also be at the forefront of our approach through regular evaluation of what we do well, how we can improve and how individuals and organisations have benefitted from accessing our building, services and offer in the community.

As part of our fundraising strategy to run alongside our annual report we will also, from Summer 2025 produce.

1. An annual evaluation survey with at least 100 individuals?

c] Fundraising methods. Our main approaches focus on;

1. Grants

2. Appeal letters to Foundation Trusts

3. Donations and community fundraising.

4. Corporates

5. On line

We have identified a need to review our marketing / social media approach as regards opportunities for donors via platforms. We need to align this with our capturing and sharing of impact.

We will also take into account other methods such as crowdfunding and match funding giving campaigns as well as assessing scope for https://www.easyfundraising.org.uk/ and other methods which are low resource.

d] Who is part of the team?

Charity trustees have overall responsibility and accountability for their charity and this includes its fundraising.

A fundraising action plan for fundraising is summarised below with an overview of different methods and a focus on building a supporter base of potential donors.

Our Chief Executive Officer has a lead role reporting to the board of Trustees supported by staff and the fundraising sub group; members currently being; NS

Chair of Trustees–SC

Consultant –RP

Funding Partnerships Lead, Daniel Mountford, support role as defined in FSO - DM

**Checklist** -methods

1. Grants

2. Foundation Trusts

3. Contracts

4. Payment by results

5. Donations

6. Legacies

7. Major donors

8. Community events, auctions, raffles, lottery

9. Membership fees

10. Social media / online; crowdfunding / text / just giving, cashback, shopping.

11. Appeal letters

12. Telephone fundraising

13. Sponsorship

14. Gift Aid / payroll

15. Match funding

17. Corporate / philanthropic patrons

18. Partnership

19. Loan finance