

6 tips for creating a clear Fundraising Plan

1. What's your vision?

Behind any successful fundraising plan is a clear and inspiring vision. It is a brief aspiration description of what your charity would like to achieve. A good vision ensures everyone within your organisation is working towards the same goal; your external message is clear and consistent; and any potential funder immediately understands why your cause is worthy of their support.

What makes a good vision:

- Short and concise
- Compelling
- Specific to your charity
- Agreed upon internally
- Consistent across all your documentation.

Good examples:

“Our vision is a society where all children irrespective of their background are able to achieve their full potential and where young people play an integral role in this.”

Students4Students

“Committed to improving the lives of everyone affected by cancer and inspiring others to do the same”.

Macmillan Cancer Support

2. What's your situation?

To move forward, it is important to first look back. Undertake a thorough fundraising review to understand where you are now, what works well for your charity and what doesn't. Things that are important to include in your review are:

- Current income
- Current funding needs
- The sources you are currently approaching (e.g. individuals, local businesses)
- The methods you are currently using (e.g. social media, emails, telephone campaigns)
- Levels of current fundraising success
- Skills and experience of your fundraising team or volunteers
- The commitment of your board and trustees to fundraising
- Who your current audience/supporters/donors are.

3. What's your funding made of?

As a general rule, the more funding streams a charity can draw from, the less severely affected they are by unforeseen circumstances such as lost revenue, pandemics and economic shocks. If you have the ability to diversify funding streams, or at least start that journey, then your charity will be better protected against any future bump in the road.

A more sustainable fundraising mix might be made up of:

Quick wins

Great for short-term monetary gain. This could be an email campaign to a group of existing supporters or an easy to set up online event (Zoom quiz etc.)

Long-term gains



The income streams that support your future, the results of which may take time to reap. These may include legacy programmes, corporate partnerships, or the development of relationships with major individual donors.

Improved existing activity

Making sure current fundraising activity is reviewed, refreshed, tightened and improved; not only to nurture the existing income, but to cultivate opportunities for new contributors.

New activities and approaches

Do what you've always done and at most you'll get what you've always got. New approaches shouldn't make up the bulk of your plan – as there is a risk involved – but with new platforms for fundraising and communication appearing every year a change in activity could be key to promoting growth.

4. What are your key milestones?

Planning your level of activity will be informed by the targets you set. It's important to plan the value of funds you expect to receive and when. Use our fundraising planning template to help set financial targets.

Remember you may also have non-financial targets, such as increasing your social media engagement, visibility in sector etc. These targets may not factor into your income stream now, but are important building blocks for future fundraising success. Include these non-financial targets in your plan.

5. What's your timeline?

It's important to create a timetable of project milestones and key dates for fundraising events, appeals and other activity. This should be a living document that gets updated as often as every week. It needs to be shared within your organisation, so everyone involved in fundraising is up to date and can access it.

Use our fundraising planning template to get started.

6. Take the next step

A plan, a vision, or a good idea has no purpose if it sits on a shelf. A plan should be an evolving document that acts as a barometer and guide for any action. It's now what you do with you plan...