

Funding Plan Framework

Charitable Purpose: what is your 'purpose' as defined in your founding document?

Mission, Vision, Values: what sets your organisation apart from others?

Business Objectives: what are the current priorities (usually set by the Trustees)

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Income generation Audit

External Factors which: PEST, STEP, PESTLE, STEEPLE (Social, Technical, Economic, Environmental, Political, Legal, Ethical)

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Competitor Analysis: who are your 'competitors? What are they doing better/differently from you? What could you learn from them?

Collaborative Analysis: are there other organisations which you could be partnering with in your income generation activities to maximise income to both parties?

Market Analysis: what are the trends and future predictions for the income generation activities you are considering?

Internal Analysis:

People

Portfolio

Policies

Past Performance

Principles

Pounds (£s)

SWOT Analysis: drawing together the factors identified in the preceding analyses

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

SMART Income generation Objectives:

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Strategic Direction: existing products for existing audiences; existing products for new audiences; new products for existing audiences; new products for new audiences? Use Ansoff 'sMatrix?

Branding: how do you want to be perceived in the wider market – values, personality..

Positioning: how do you wish to position yourself in the wider market?

Segmentation: which is your target donor market?

Aims, Objectives and Actions:

Aim One: to.....

Objective 1.1

Actions:

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Objective 1.2

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Objective 1.3

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Action Plans: showing exactly **who** is responsible for **what** and by **when**. GANTT Chart?

Budget

Projected Income

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Projected Expenditure

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Reserves

Monitoring & Controls: how will you know that your strategies are successful? Targets? Milestones? Return on Investment? Life Time Donor Value?

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Contingencies? What will or can you do if something changes?

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Derived from:
Fundraising Management: Analysis, Planning and Practice by Adrian Sargeant & Elaine Jay
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