

# Fundraising toolkit

## The Fundraising Plan

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Building a fundraising plan can be useful for appeals that require more structure than one-off sponsored activities or events. Examples of this kind of appeal are MCF Festivals or Province wide appeals that encourage members to get involved. With activities such as this, a fundraising plan can make a huge difference to the outcome of the appeal.

Whilst fundraising teams may all differ in their approach, there are some basic things to consider when building a fundraising plan.

Start by considering the following three questions;

### Where are we now?

**Review the current position.** Things to consider may be;

- How do your members donate?
- What other appeals are taking place in the province?
- Do you have good channels of communication with Charity Stewards?

### Where do we want to be?

**What is the ambition?** Things to consider may be;

- What do we want to deliver - is it a project for a charity or purely donations?
- Is there a time scale
- Are there other outcomes that you are seeking – awareness, community engagement?

### How are we going to get there?

**What is your strategy, what are your tactics?** Things you may want to consider

- What is the case for supporting the appeal?
- What is the most effective way to fundraise in your province – Digital, Gift Aid Envelope collections, sponsorship?
- How can you advertise, promote and encourage support?

Once you have considered these three questions you can start to build a planning framework. The framework should include a number of key points that will need to be included in the fundraising plan.

## **Vision/Objectives**

What are the aims of the appeal? What will success look like? Make sure that the objectives are SMART!

### **SMART objectives**

- Specific – Do not create multiple activities as this can confuse. Keep it targeted to one thing.
- Measurable – Have a quantifiable outcome so that you can track progress and measure success.
- Achievable – It is much harder to engage with members/donors if they feel the overall task or objective is unachievable.
- Relevant – If members/donors do not feel that the objective is relevant to the aims and objectives of the province or indeed, Freemasonry, they may not engage in the appeal.
- Time-scaled – Have an end or completion date. A target as to when the appeal will be delivered.

## **SWOT analysis**

What are the Strengths, weaknesses, opportunities and threats that need to be considered? A good SWOT analysis will be concise, easy to read and understand. It should highlight clear indicators that will bring success.

## **Key strategies**

Consider the overall direction of the appeal, and in particular the case for support, i.e. why should members donate and support this appeal. Also, how you are going to position this to the members and how it fits in with other provincial activities and strategies.

### **Case for Support**

Why should your members support and donate to your appeal? This is a question that will be asked and it is therefore crucial that you have an answer. The best way to prepare for this is to build your case for support. When building such a case for support you should address the following;

- The vision, mission, values and strategy of the charity
- How the charity delivers on its services
- What the objectives of the charity are and why those objectives need to be met
- Examples of how funds are used by the charity and the impact that generates
- What the outcome of your appeal will be and the benefits it will bring
- Summary of the appeal

### **Tactical plans**

How will you promote/market the appeal? How will you raise funds? Will you encourage individual members to support, Lodges to make donations, hold events and activities, sell merchandise? How will you approach different sections of the membership?

### **Budget**

Do you have or need a budget to run the appeal? What resources do you already have available? Will the charity support you with marketing tools? The MCF have a great deal of support available to provinces engaged in fundraising appeals for the MCF.

### **Schedule**

What is your time line? From launching through marketing campaigns, activities, promotion and the end of the appeal.

### **Monitoring/control**

How will you measure success? Who will monitor progress and check that the fundraising appeal is on track and in line with key strategies, and overall objectives? Who will manage expectations?

### **Other things to consider in your fundraising plan include;**

- Contingency planning
- Dealing with objections
- Planning events and fundraising activities
- Communications plan

Once you have put your team together and built your fundraising plan you are ready to start your appeal.

### **For more information about the Masonic Charitable Foundation:**

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