



# How To Get Fundraising Ready

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# Why is it important to get fundraising ready?

Trusts and foundations and donors are more likely to trust and engage with organisations that are well-prepared. If you're ready to clearly articulate your mission, vision, financials, and strategic plan, it shows you're serious and professional.

This builds credibility and confidence in your ability to manage funds effectively.

Trusts and foundations in the UK are very oversubscribed; the charities they choose to fund are those that present the most compelling and well-organised case.

It will also save time and money if you are working with a fundraising consultant if you ensure you are fundraising ready from the outset.

**So, what are the steps to get ready for fundraising?**

# 1. Clarify your mission, need, and fundraising goal



Funders want clarity and explicitness.

Why does your charity exist?

What exact problem are you addressing?

How much money do you need, and what will it achieve?

What is the cost per outcome (e.g. £50 supports a child for X weeks).

A clear, measurable goal builds trust and illustrates good value for money.

# 2. Gather evidence of need and impact



Before a Trust or Foundation or donor gives, they want to know:

- the scale of the problem you are addressing
- why your approach works
- early proof (pilot results, stories, testimonials, data)

Even if you are a newly set up charity, small tests and a few or case studies help demonstrate credibility.

# 3. Understand your donor audiences

Different donors give for different reasons;

- Major donors for impact, legacy and personal connection.
- Corporate partners for brand alignment, CSR priorities and publicity.
- Trusts & Foundations want strong outcomes and accountability.
- Public/individual donors' want an emotional connection and a clear ask.

It's therefore important to understand your donor audience, create donor segmentation and plan how to approach each of your donor groups.

# 4. Build your case for support



This is your core fundraising narrative – it needs to be clear, emotional and credible.

Need to include:

- the problem
- your solution
- why your approach works
- your impact so far
- what funding will unlock
- and a strong call to action.

This then becomes the backbone of your website content, grant applications, and donor conversations.

# 5. Prepare your fundraising materials



This typically includes:

- Case for support (2–4 pages)
- Impact report or outcome data
- Budget & funding breakdown
- One-page overview for meetings
- Website donation page
- Short pitch script
- Stories of beneficiaries (with permissions)

And remember, consistency across all materials builds trust.

# 6. Strengthen your charities governance and operations

Funders often check the basics before giving, what are they looking out for?

- Updated policies (safeguarding, finance, data protection)
- Clear reporting processes
- Strong financial controls
- Ability to measure and report outcomes
- Websites and social media

If any of these are unclear or outdated, it's important to fix them before approaching funders.

# 7. Get your charities finances in order

Trust and foundations, companies wanting to start a relationship with you and donors expect transparency and professionalism.

What does this mean?

- Clean accounts (no red late markings listed with the Charity Commission)
- Clear budget and costings
- Restricted/unrestricted income plan
- Bank account and financial procedures
- Simple reserves policy

Essentially, well-prepared financials help funders feel confident.

# 8. Get “fundraising ready” internally

Ensure your charity can support increased donor activity:

- Who handles donor stewardship?
- Who writes grant applications?
- How will you track donor data?
- Do you have thank-you templates and reporting calendars?

Good stewardship equals repeat giving.



# 9. Build relationships before you ask



The number one rule in fundraising: fundraising is about relationships.

Warm up potential supporters by:

- Sharing updates
- Inviting them to events
- Asking for advice - not money
- Connecting through mutual contacts
- Engaging on LinkedIn or community forums

People rarely give meaningfully without a relationship first.

# 10. Launch fundraising with a plan



Once everything else is in place:

- Create a clear campaign timeline
- Set monthly targets
- Plan donor events or outreach sequences
- Submit grant applications strategically
- Collect stories and data continually
- Report back to donors quickly and warmly

# Thank You!



I hope this is a helpful run through of the top ten tips on how to get fundraising ready.

At Good Fundraising, we're dedicated to supporting all your fundraising needs with tailored approaches that suit your organisation.

We work with a wide range of charities, including local authority museum services, hospices, children's charities, churches and city minsters, community centres, arts and community theatre organisations.

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