

1. Plan on a page

Completed by:

Date completed:

Overall goal	<i>e.g. to find new prospects that will help fill the gap between identified prospects this year and our target / to secure at least two new multi-year funders by December '25 / to secure funding for xx new project etc.</i>
Income target (unidentified i.e. your 'gap')	<i>e.g. £86,000</i>
Specify the type of funding needed	<i>e.g. core / revenue / capital</i>
Success rate	<i>1 in 4 (you can detail what this is based on if needed)</i>
Value of prospects we need to find	<i>£344,000</i>
Sources you'll use	<i>e.g. Daily GRIN newsletter CC searches (specify what)</i>
Sources you will exclude	<i>e.g. the ones you've tried before, already used</i>
How much time you'll dedicate to the research	<i>Dedicate one morning per week on prospect research between December '24 and February '25</i>
Additional help needed	<i>Support from volunteer in making initial phone calls</i>

*Use the Prospect Research Metrics to report on the progress of your plan

2. 101 ways to grow your list

TRUST FUNDRAISING

101 Ways to Grow Your Prospect List

FREE AND PAID-FOR RESOURCES
YOU CAN USE TO FIND NEW
TRUSTS AND FOUNDATIONS TO
APPLY TO

3. Research pipeline

[illegible]

4. Prospect scoring

	0	1	2	3	Score
Capacity to give in a single year	Under £1,000	£1,001 to £5,000	£5,001 to £25,000	Over £25,000	
Likelihood	Don't fit the criteria	Has broad or general charitable objectives	Has at least one specific criteria that fits with our cause	Strong fit to cause	
Connection	No connection	Potential connection identified but need to make contact	We have met or spoken to a Trustee / member of staff / employee / volunteer	Warm and active relationship	
History	No previous donation	Lapsed (no gifts in the last three years)	A previous award in the last three years but not regular donations	Regular donations	
TOTAL					

5. Funder profile

Date completed:	
Completed by:	
ABOUT THE FUNDER	
Name of funder:	
Database number:	<i>Where to find the record on your database if you have one</i>
Trustees:	<i>You can detail names of Trustees, any other charities they're also Trustees of, any connections and any links to further information such as Wikipedia entries</i>
Any other key staff:	<i>You can name Grant Administrators or staff here</i>
Relationship manager:	<i>The person leading on the potential funding opportunity</i>
Other staff involved:	<i>Any other staff involved in the relationship e.g. known Trustee contacts or if the CEO has had a conversation with someone</i>
THE OPPORTUNITY	
Giving priorities that fit with our charity:	<i>Detail why this funder seems like a good fit and how we specifically meet their criteria</i>
Source of wealth:	<i>Where their money comes from e.g. company profits, investments</i>
Annual giving:	<i>Detail the amount of expenditure last year on grants</i>
Type of funding:	<i>e.g. project, core or capital, single or multi-year</i>
Potential grant size:	
Other example grants:	<i>Detail any other relevant grants to give you a better idea of what's possible</i>
HISTORY	
Previous giving:	<i>Detail previous grant awards</i>
Any other unsuccessful applications?	<i>Detail amounts, dates and any feedback given</i>
Sources:	<i>Detail any sources used, press articles etc.</i>
NEXT STEPS	
Relationship development goal:	<i>Detail here what you'd like to achieve e.g. meeting before submitting an application.</i>
Date:	Action:

6. Phone call prompts

Introductions:

- Hi, my name's Alicia. I'm calling from [xx charity] and wanted to ask a couple of question about applying to the [xx trust] if that's ok?
- Hi, my name's Alicia and I'm calling from [xx charity]. We're hoping to make an application for funding and I just wanted to check a couple of details if that's ok?
- Hi, my name's Alicia and I'm calling from [xx charity]. Who's the best person to speak to please about a few questions I've got for the [xx trust]?

Possible questions to ask:

- Is the [xx trust] currently accepting applications?
- Do the Trustees require any particular information in applications? Would you like a copy of our latest Annual Accounts?
- When are the Trustees next meeting?
- I can't see any grant amounts listed in the Trust's latest accounts, are you able to give me a guide on the amounts they tend to give?
- Is there any geographical preference at all or will the Trust consider funding projects across the UK?
- Is it ok to send our application by email or post?
- (If email) What's the best email address to send it to please?
- (If post) Should I mark that for the attention of anyone in particular?

Next steps:

- If the funder is accepting applications and sounds like a suitable prospect, update your pipeline spreadsheet with the information you have gathered so that you know when and how you need to apply.
- If the Trust isn't accepting applications or doesn't sound suitable, move the prospect to your 'ineligible' tab. This is a good thing if it has saved you time in sending an application that wasn't ever going to go anywhere, so if you're reporting a high number of ineligible trusts this isn't a negative – it actually means that you're doing your qualifying and are able to focus on the best prospects.
- Remember, try to only ask genuine questions that will help you to find out if the prospect is the right one for your charity. Try to not ask questions about

7. Network exploration

Name	Role	Organisation	Why we want to get to know them	Know and happy to approach	Know of them and happy to ask for an introduction	Don't know	Any notes
e.g. Mr Barnaby Swire	Chair	John Swire 1989 Charitable Trust	They support multiple health charities, with a bias towards London. Giving c. £3m every year, they have the capacity to give five figure gifts and longer-term support (£25k+).	Insert name of who you're asking in the relevant box	Insert name of who you're asking in the relevant box	Insert name of who you're asking in the relevant box	https://en.wikipedia.org/wiki/Barnaby_Swire Also Chair of the Swire Charitable Trust, sir John Swire's St Nicholas School and Educational Charitable Trust and Swire 2765.

8. Cultivation ideas

	Under £5k	£5k-£20k funders	£20k+ funders
Connect			
Exploratory phone call			
Invite to a Teams call			
Send introductory email			
Send introductory letter			
Send introductory materials e.g. project information, slide deck			
Send impact and / or annual report			
Invite to a virtual event			
Invite to a face to face event			
Invite to visit a project			
Request to connect on LinkedIn			
Share the connections' post on LinkedIn			
Attend an event / conference that the funder is speaking at			
Send research highlights / reports			
Send news article e.g. launch of a campaign			
Send a policy update e.g. request to sign a petition			
Acknowledge			
Thank you phone call on award			
Thank you email			
Welcome email / letter			
Bespoke thank you video from fundraising			
Recorded thank you video from a beneficiary			
Personalised thank you handwritten card			
Thank you card / email from CEO			
Welcome to the Team message			
Welcome to the Team badge			
Office wall of fame / funder wall			
Announcement comms on social media or press release			
Profile page on website			

	Under £5k	£5k-£20k funders	£20k+ funders
Celebrate			
Offer of bespoke naming opportunity			
Send end of year thank you / Christmas card			
Thank you phone call as part of a donor recognition day or Giving Tuesday			
Social media comms during grant period			
Funder feedback survey			
List in annual report			
Feature in newsletter			
Proactive PR opportunities			
Invite to virtual and in person events			
Mark important milestones e.g. £1m raised			
Send			
Invite to sit on project boards / working groups			
Invite to meeting with Chief Executive			
Opportunity to meet beneficiaries			
Meeting / lunch with Trustees / Chair			
Invite to meeting with Chief Executive			
Send a birthday card			
Invite to an office tour			
Reporting			
Share photos from visits / events			
Send ad-hoc project updates			
Send end of year report			
Send quarterly newsletter			
Invite to visit project			
Invite to report presentation meeting			
Certificate at end of grant			

9. Email introduction

Dear [name],

My name's Alicia and I'm writing from [charity name], a [something unique about your charity e.g. a local charity based in Eastbourne that helps local people in crisis so that no one has to go hungry or choose between eating or heating and lighting their home.

2-3 sentences about what your charity does e.g. we provide a minimum of three days' nutritionally balanced emergency food and support to local people who are referred to us by our trusted partners . We support people like [example story – link to blog / video]

1-2 sentences about what you're looking to achieve e.g. we're totally dependent on the support of local residents, businesses, trusts and foundations who donate food, money, time and funding to help more people like [repeat name of story above].

1-2 sentences about what you're asking for e.g. So I wanted to get in touch and ask about the application process for the XXX trust and to check if the Trustees are currently accepting applications / ask if you would like to come to EVENT / ask if I might be able to call you and tell you more about our work.

If you'd like to hear more about our work please do give me a call on [phone number]

I look forward to hearing from you / I hope you have a fantastic day / I hope to hear from you soon etc.

Alicia

Alicia Grainger FUNDRAISING

10. Progress tracker

[illegible]



[www.aliciagrainger.co.uk
/fundraisingeverywhere](http://www.aliciagrainger.co.uk/fundraisingeverywhere)

happyholidays

Alicia Grainger FUNDRAISING

Keep in touch

WWW.ALICIAGRAINER.CO.UK/NEWSLETTER

HELLO@ALICIAGRAINER.CO.UK

FACEBOOK.COM/ALICIAGRAINERFUNDRAISING

LINKEDIN.COM/IN/ALICIAGRAINER



WWW.ALICIAGRAINER.CO.UK