

## 10 Ingredients for Successful Fundraising

Whether you are a national cultural treasure or a small community heritage site, having the following foundations in place before you set out to fundraise will help you maximise your potential to attract supporters and avoid common pitfalls.

### 1. Compelling vision

What is unique about your organisation or place, and why does it matter to society? Remember: successful fundraising is about people and their stories as much as bricks and mortar.

### 2. Fundraising messages

Be clear what you are fundraising for, why now, and what difference a gift will make. Prepare a menu of “asks” that you can deploy quickly when opportunities arise.

### 3. A clear fundraising plan

Know your project costs and develop a realistic, phased plan with milestones, target funders, and the tools and resources required to deliver it.

### 4. Leadership

The strongest fundraising programmes are driven by strong organisational leadership, both staff and volunteer. Fundraising is never a solo effort, so the ability to delegate and empower others is crucial.

### 5. Volunteers and champions

Volunteers are often the lifeblood of heritage organisations. Their passion, knowledge and commitment make them powerful ambassadors. Involve them actively and let them inspire others.

### 6. Prospects

Your prospects include past, current and future supporters. Understand your public audiences and invest time in identifying and researching potential higher-value donors and partners so you can make the right ask at the right time, in the right way.

## **7. Good marketing**

Maximise your visibility both offline and online, and ensure your fundraising messages are embedded consistently across all communications.

## **8. Processes**

Put the essentials in place: gift acceptance policies, data procedures, ethical guidelines, and compliance requirements. And don't forget Gift Aid.

## **9. Tracking**

Whether through a sophisticated CRM or a well-maintained spreadsheet, develop a shared system to record donations and relationships. Good tracking supports compliance, stewardship, and the possibility of lifelong philanthropy with your organisation.

## **10. Confidence (and stamina!)**

Fundraising is a long game. Confidence in and passion for your cause, combined with persistence, will help turn your plans into results.

**Philanthropy Company** is a fundraising consultancy dedicated to providing strategic advice, practical support and expert training for charitable organisations, philanthropists and corporate donors seeking to improve lives and transform futures. Our work spans the heritage, arts, education and charitable sectors: please do see our [website](#) for more information.