

3. Needs Assessment Part 2: Defining The Ask

The Tool

Now, that you have identified your gaps in resources, be they funding, in-kind or people's time and expertise, you need to refine this and turn it into **a list of asks**.

First make a list of what is definitely cash needs, and another list which includes all in-kind support.

Look at your needs in a strategic way, not just 'we need 10,000 and we only have 3,000 so we need to find 7,000', but look at the needs that can be fulfilled by alternative means: have volunteers make things, get free or reduced goods and services, get pro bono advice, etc. Note anything that could be fulfilled by in-kind support rather than cash, particularly if the CoOp research showed that in your country that SMEs give in-kind support for preference.

Secondly look at the timescale of the activities you need these resources for. Note when you need them, and highlight the urgent ones. As well as noting when you need to have the resources delivered to you:

Make a note of the likely lead time (for example, you got an agreement for a design and printing SME to produce leaflets for you – allow time for said design and printing to happen, bearing in mind that pro-bono work will not always be performed immediately as paying customers will take priority);

Go even further back and calculate when you should start asking potential donors (know that not all your prospects will agree to give, so you need lead time to ask several of them, meet a few, go forward and back over the ask, etc.).

If it looks like a lot of asks and you are unsure if you can manage the process, grade them in terms of importance between 'must haves' and 'nice to haves'.

Look at which items look easiest to achieve, in particular check if any of them are a good fit for an existing donor or partner/contact. Of course, there is no guarantee, but on balance these asks are likely to take less time than if you need to profile and prospect from scratch. If there are a lot of local firms in the line of business you need, again this will make the process easier and quicker than if you have to look further away from your community.

Start to think about who can assist you with these asks.

Maybe board members and volunteers can help you by having more contacts or more time available. This will feed into your fundraising plan, where you will assign 'to do's' to support your resourcing drive.

Why do all of these?

These steps break down your resourcing needs into specific asks so that you can start to

Visualize what is involved in the ask (time, complexity, likelihood of success, etc.);

Prioritize your asks and your potential targets;

Stay realistic;

Start to think about who will take on the ask. It is great to collaborate with SMEs and look for more support, but you need to be mindful of the workload and make sure staff can fit this into their work-plan or are happy to do it as extra work, before you rely on it to fund your projects. If not, you must engage your board and volunteers instead/as well. Think ahead about the time required for follow-up and relationship building with the SMEs.

Finally...

All this should then input into your annual fundraising plan and be part of your fundraising mix. See template below for an annual fundraising plan.

Template for Annual Fundraising Plan

What is the target for the year?

Type of Fundraising	How Many? (number required to make the target)	What? (which event, grant, or sponsorship deal)	Where? (what is the venue or what is the partner organization)	When? (date of the event, or for grants /sponsorship: date the money is due in)	Who? (who is the lead: staff, volunteer, 3rd party?)	How much? (revenue? incl. worst case scenario)
Major gifts ? K	1-2	(annual event, large grant or corporate sponsorship)				
Medium gifts ? K	5?	(SMEs/smaller grant/ philanthropy, Lyons, Rotary, Christmas event, etc.)				
Community Fundraising ? K	10-20?	(church gates, bucket/flag days, raffles, personal sponsored events)				
In-Kind Support						

Suggestions & ideas for your fundraising mix

(adapt to your own charity/country/local area)

Major gifts:

- Large grants;
- Major corporate sponsorships;
- Large annual fundraiser event.

Medium gifts:

- Philanthropy and grants;
- Clubs (Lyons, Rotary, Bikers clubs, Hunting clubs, Golf clubs, vintage clubs, bridge clubs, etc.);
- Christmas events (Tree of Remembrance, Carroll Singing, Hamper Raffle, etc.);
- Other events/challenges – either organize your own or ‘piggy back’ on them, your own event:
 - get people to be sponsored by their friends/family;
 - don’t forget that many employers match whatever their employees have raised;
 - ask the organizers of an event to donate a % of the proceeds or they can suggest an optional top-up on the ticket price.

Community fundraising:

- Church gate collections (check whether you need a collection permit);
- On street flag days or bucket days (check whether you need a collection permit);
- Bucket day on business premises (petrol station for ex, no permit required, less competition);
- Bag packing (Try Christmas, Easter, Halloween, any national holiday or local celebration date for preference);
- Try a pop-up shop of second hand goods;
- Organize a table sale/car boot type event – people can sell their own stuff but they pay you a fee for the stall;
- Cake sale;
- Door to door collections;
- Counter collection box;
- Auctions of large value items (open or blind).

This list is of course not complete and some types of fundraising don’t exist in certain countries, so add your own ideas to the list.