Use this document to form the basis of your plan. This is an opportunity to assess and discuss where you are and what you do, what you need to achieve and how to get there. Use the actions to create your final plan on the ‘Planning Template’

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| Branch/Group Name: | | |
| Budget - It’s good to know what you’re aiming for. Set reasonable achievable target. | | |
|  |  | Action |
| Do you have an income target? | Yes/No | e.g. look over previous years accounts to understand expenditure on deliverables |
| Social Media - Having a good social media presence is fundamental for branches and groups during Covid | | |
| What social media platforms do you use? | Facebook |  |
| Twitter |  |
| Instagram |  |
| Tik Tok |  |
| Facebook |  | Action |
| Is Facebook ‘Page’ or ‘Group’? |  | e.g. Consider the use of the page/group. Is it being used to communicate directly with members, or promote activities. |
| How many members of the group? |  | e.g. RF/ASC to drive traffic |
| How is the Facebook Group being used? | Marketing virtual events |  |
| B/G Appeals |  |
| Feedback on group activity |  |
| Facebook live (event promos, support news etc.) |  |
| Surveys/polls |  |
| Recruitment (e.g. Social Media champs, Trust ambassadors, Fundraising Group) |  |
| Other |  |
| Diverse Portfolio  More important than ever for B/Gs to have a diverse range of fundraising activities to ensure sustainability of income. Also, there is a need to be flexible during changing times so it can be good to have a plan to run some face to face events should the climate allow it. | | |
| Which methods of fundraising do they use? | Yes/No | Action |
| Virtual Events |  | e.g. decide on a programme of virtual events/products and add to plan template |
| Virtual Appeals |  |  |
| Trust Fundraising |  | e.g. RF upskilling/training |
| Corporate Fundraising |  |  |
| HV Donor Fundraising |  |  |
| Face to face Fundraising Event |  |  |
| Community Group Fundraising |  |  |
| Training and Upskilling  Many of the activities we are proposing are new to volunteers, so there may be a need to deliver and extra training/support to enable them to carry out different fundraising activities | | |
| Where do we need to provide extra Training/support? | Yes/No | Action |
| Virtual Events |  | e.g. add to plan to create calendar throughout year |
| Trust Fundraising |  | e.g. RF Team to work on Webinar to provide training |
| Corporate Fundraising |  |  |
| HV Donor Fundraising |  |  |
| F2F Fundraising |  |  |