**Standard Operating Procedure (SOP)**

**Fundraising**

**FUN-002-01**

**Purpose**

The purpose of these Standing Operating Procedures (SOPs) is to provide a framework for Out There Exeter (the “charity”) to effectively manage its fundraising activities. This SOP will ensure that all fundraising initiatives are conducted in an ethical, transparent, and accountable manner.

**Scope**

These SOPs apply to all fundraising activities undertaken by the charity, including but not limited to:

* Individual donations
* Corporate sponsorships
* Grant applications
* Fundraising events
* Online fundraising platforms

**Responsibilities**

The following are the key responsibilities for fundraising at the charity:

* **Fundraising Committee Lead:** Oversees all fundraising activities and ensures compliance with this SOP.
* **Fundraising Committee:** Assists the committee lead in carrying out fundraising activities.
* **Trustees:** Approve all fundraising strategies and ensure that fundraising activities align with the charity's mission and values.

**Procedures**

1. **Fundraising Planning**
   1. Develop an annual fundraising plan that identifies fundraising goals, strategies, and timelines.
   2. Conduct a fundraising capacity assessment to identify strengths, weaknesses, opportunities, and threats.
   3. Research and identify potential donors, sponsors, and grantors.
   4. Develop targeted fundraising materials and messaging.
2. **Donor Relationship Management**
   1. Cultivate relationships with potential and existing donors.
   2. Maintain accurate donor records and ensure data security.
   3. Express gratitude to donors and recognise their contributions.
   4. Respond promptly to donor inquiries and concerns.
3. **Fundraising Events**
   1. Obtain all necessary permits and licenses for fundraising events.
   2. Develop a detailed event plan and budget.
   3. Secure sponsorships and in-kind donations for fundraising events.
   4. Recruit and train volunteers for fundraising events.
   5. Promote fundraising events through multiple channels.
   6. Evaluate the success of fundraising events and identify areas for improvement.
4. **Online Fundraising**
   1. Establish a secure and user-friendly online fundraising platform.
   2. Promote online fundraising campaigns through social media and other digital channels.
   3. Monitor and track online donations regularly.
   4. Express gratitude to online donors.
5. **Grant Applications**
   1. Identify and research potential grant opportunities.
   2. Develop compelling grant proposals that align with the charity's mission and goals.
   3. Submit grant proposals by the deadline.
   4. Manage grant funds in accordance with the terms of the grant agreement.
   5. Report on grant activities and outcomes to the grantor.
6. **Ethical Fundraising**
   1. Ensure that all fundraising activities are conducted in an ethical and transparent manner.
   2. Comply with all applicable laws and regulations governing fundraising.
   3. Respect donor privacy and confidentiality.
   4. Accurately represent the charity's mission and work.
   5. Use donated funds responsibly and for the intended purposes.
7. **Evaluation and Reporting**
   1. Regularly evaluate the effectiveness of fundraising efforts.
   2. Track fundraising progress against goals.
   3. Prepare regular fundraising reports for the Board of Trustees.
   4. Conduct an annual fundraising audit to ensure financial integrity.
8. **Record Keeping**
   1. Maintain accurate and up-to-date records of all fundraising activities.
   2. Keep receipts for all donations and expenses.
   3. Store all fundraising records securely.

**Review and Revision**

This SOP will be reviewed and revised annually to ensure that it remains relevant and effective, or as needed to reflect changes in the charity's strategies or the regulatory environment.

**Compliance**

Failure to comply with this SOP may result in investigation and disciplinary action, up to and including dismissal for employees and termination of volunteer appointments and membership of the charity, and a vote on removal of trustee.

**Version Control**

|  |  |
| --- | --- |
| **Version:** | V1.1 FINAL |
| **Date of approval:** | 01/12/2023 |
| **Date of next review is due:** | 01/12/2024 |