

Researching possible donors template

Below is an example research template. Although fictional, it shows how your church could organise approaches to potential funders and donors.

Name of funder	Types	Area(s) of interest	Past giving	Key people	Procedure	Important to note	Target amount	Next steps
Name of potential funder or donor	Individual, trust/ foundation, corporate, or statutory funder	What is the funder's area of philanthropic interest, as relevant to your church?	The kind of projects and organisations that the funder has supported in the past	A list of trustees, key executives or administrative staff (such as a grants manager) of a given trust, foundation or funder	The application procedure of the potential funder	Any special considerations relating to your approach	Proposed target grant or gift amount	E.g. set up meeting or draft application
AN other Trust	Family trust	Community projects, deprived areas.	£3,000 to local charity supporting families in poverty.	Chair/Trustee Ms E	By email, confirm eligibility first.	The grants manager is a local resident.	£5,000	Email the grants manager to confirm edibility.
The XYZ Trust	Grant-making trust	Heritage buildings and arts education.	£25,000 to X Cathedral. £10,000 to XYZ Castle Learning centre.	CEO: Mr X, Trustees: Mr A, Mrs B, Mr C	Send an application in writing to the address provided on the charity commission website.	Mr A (Trustee) lives in the next village and is a school governor.	£25,000	See if Sally knows Mr A through school and introduce. Prepare application.

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www.ecclesiastical.com/churchfundraising

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