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COURSE BROCHURE

# Charity Fundraising Strategy and Income Mix Training Course

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**jupiterprime.uk**
info@jupiterprime.uk
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# Charity Fundraising Strategy and Income Mix Training Course

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Charity Fundraising Strategy and Income Mix is a 1-week training course for charity directors and fundraising managers who decide where donated income comes from, and who leave with a multi-year fund strategy for their charity. Rising demand for services, tighter grant rounds and changing donor habits make a narrow income base risky. Jupiter Prime Training offers this course in Charity Fundraising Strategy and Income Mix.

## Why Charity Fundraising Strategy and Income Mix Matters Now

Three pressures shape charity income today. Individual supporters give through more channels and expect to see the difference their gift makes. Trusts and foundations ask for sharper outcome evidence and often fund projects rather than core costs. Companies want partnerships tied to their own purpose and staff engagement. A charity that relies on one large funder or one appeal can lose services overnight when that source shifts, while one with a deliberate spread of regular giving, grants, legacies and corporate support can plan staffing and reserves with confidence.

## Who Gains Most from Charity Fundraising Strategy and Income Mix

- Leaders who set income targets and present fundraising plans to trustees
- Managers who run individual giving, regular gifts and appeal campaigns
- Officers who research trusts, write bids and report to grant makers
- Staff who steward legacy pledges and in-memory giving
- Leads who build corporate partnerships, sponsorships and payroll giving schemes

Small and mid-sized charities, hospices and community foundations gain most when a director and two or three income stream leads attend together.

## Charity Fundraising Strategy and Income Mix Capabilities

Participants turn scattered appeals and bids into a deliberate portfolio of income streams with clear targets, costs and owners.

- Analyse the current income mix by stream, volatility and cost to raise — trustee risk discussions
- Design donor journeys from first gift to regular and major giving — supporter retention
- Assess trusts, foundations and institutional funders for fit and likelihood — bid pipeline choices
- Build a legacy and in-memory giving offer — long-term reserves planning
- Specify corporate partnership propositions with shared aims — company engagement decisions
- Calculate return on fundraising investment by stream — budget allocation across the fundraising function

## Key Charity Fundraising Strategy and Income Mix Terms

- Income mix — the share of total donated income coming from each stream, such as individuals, grants, legacies and companies.
- Donor journey — the planned sequence of contacts that moves a supporter from first gift towards deeper, longer giving.
- Cost to raise — the fundraising spend needed to bring in one unit of income from a given stream.
- Restricted funding — money given for a stated purpose that a charity may spend only on that purpose.
- Legacy pipeline — the pledged and notified gifts in wills that a charity expects to receive in future years.
- Case for support — the core statement of need, solution and impact that every appeal and bid draws on.

## Charity Fundraising Strategy and Income Mix Day by Day

### Day 1: Income Landscape and Case for Support

- Income Mix Audit — Stream Shares, Volatility and Dependency Risk
- Giving Trends Scan — Donor Behaviour, Funder Priorities and Channels
- Case for Support Drafting — Need, Solution and Measurable Impact
- Trustee Risk Appetite — Acceptable Income Concentration and Reserves
- Fundraising Ethics Checklist — Donor Consent, Vulnerability and Gift Acceptance

### Day 2: Individual Donors and Donor Journeys

- Supporter Segmentation — Gift Value, Frequency and Motivation Groups
- Donor Journey Mapping — Welcome, Thank-You and Upgrade Points
- Regular Giving Conversion — Moving One-Off Donors to Monthly Gifts
- Major Donor Cultivation — Prospect Research and Relationship Plans
- Retention Metrics — Attrition, Lifetime Value and Reactivation Triggers

### Day 3: Grants, Legacies and Corporate Partners

- Funder Prospecting Matrix — Fit, Size and Likelihood of Award
- Bid Writing Structure — Outcomes, Budget Lines and Reporting Promises
- Legacy Giving Offer — Pledge Conversations and In-Memory Gifts
- Corporate Partnership Proposition — Shared Purpose and Staff Engagement
- Sponsorship and Payroll Giving — Terms, Recognition and Renewal

### Day 4: Portfolio Choices and Fundraising Investment

- Return on Fundraising Investment — Comparing Streams by Net Income
- Restricted and Unrestricted Balance — Protecting Core Running Costs
- Income Scenario Modelling — Upside, Expected and Downside Cases
- Fundraising Team Structure — Roles, Skills and Stream Ownership
- Income Dashboard Design — Targets, Pipeline and Monthly Variance

## Day 5: Practising the Multi-Year Fund Strategy

- Charity Case Briefing — Applying the Income Audit and Case for Support
- Stream Target Setting — Applying Journeys, Prospects and Return Figures
- Trustee Pitch Rehearsal — Applying Risk Appetite and Scenarios
- Peer Challenge Panel — Testing Assumptions, Gaps and Timelines
- Multi-Year Fund Strategy Assembly — Targets, Investment and Milestones

## Applying Charity Fundraising Strategy and Income Mix After the Course

- Run an income mix audit of the last three years of donated income and present stream dependency risks to the board.
- Map the donor journey for new supporters and introduce one upgrade point that asks one-off givers to start a monthly gift.

## Charity Fundraising Strategy and Income Mix Questions FAQ

### What is Charity Fundraising Strategy and Income Mix and why does it matter now?

Charity Fundraising Strategy and Income Mix is the deliberate choice of how much income a charity seeks from each source. It matters now because funders, donors and companies are changing how they give, and narrow income bases leave services exposed.

### Which roles gain most from Charity Fundraising Strategy and Income Mix?

Charity directors and fundraising managers gain most, alongside trust officers, legacy staff and corporate partnership leads. You benefit if you set income targets, write bids or steward supporters.

### How does Charity Fundraising Strategy and Income Mix differ from a charity budgeting course?

Charity Fundraising Strategy and Income Mix decides where income comes from and how to grow it. A charity budgeting course costs services and balances spending against income already expected.

### What do you bring back from Charity Fundraising Strategy and Income Mix?

You bring back a draft fund strategy for your own charity, with an income audit, stream targets, donor journey, funder shortlist, investment case and scenarios ready to discuss with your board.

## Charity Fundraising Strategy and Income Mix: The Way Forward

The multi-year fund strategy first informs how much the board invests in each income stream next year. Directors, stream leads and finance colleagues use it to set targets and track the pipeline. After its first year, revisit the cost to raise and retention figures, so a hospice appeal or a youth charity grant pipeline is rebalanced on evidence rather than habit.