



Resource Mobilization Workshop



Fundraising

What is Fundraising?

The Art
The Science

Here's what it actually is:



The Science



The Art



Resource
Mobilization





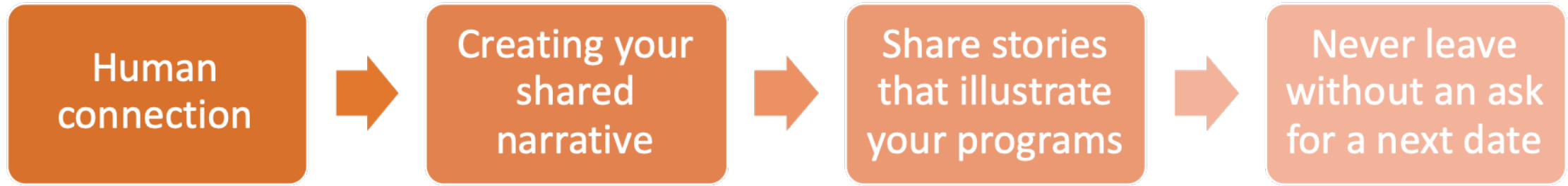
The Art: Building Relationships

Here's what it actually is:



It's all about TRUST

THE ART: Building Relationships



THE ART: Building Relationships



Practice with a Partner:

- 1. So nice to meet you!**
- 2. Tell them about yourself (talk about you and how you got to this work)
Now, also ask them.**
- 3. Share values of your work – why now, why us, why is this the way and what will the world look like when we are done? Add in a story whenever possible.**
- 4. Never leave without an ask. Not financial but... a connection to people who might be interested? An idea you have been struggling with? Who else do you know in this space? Can you come on a site visit?**

THE ART: Building Relationships



Role Play:

You have a call with the ED of the Plenty Family Foundation. They are very small and are new to funding in Eastern Africa. Their ED is the only employee and she has never traveled to anywhere in EA. We don't know their funding capacity and they are interested in education, health and environmental activities.

Take 5 minutes per person (one as funder and one as grantee) and practice a conversation using The Art.

How do we actually meet people to get into a relationship?



- 1. If you have any grants or relationships with foundations, ask for introductions**
- 2. Conferences – you are going to have to walk up to people and introduce yourself.**
- 3. Who has visited your work? Who knows you and your organization? Even if they aren't 'funders' they might have ideas or useful resources.**
- 4. Social media**
- 5. Online research – who is out there and who has a phone number or email on their website**



The Art: Financial Ask

The Art of the Financial Ask



Here's a simple formula:



The Art of the Financial Ask



- Once you have built the relationship
- Never ask over email, but always warn in advance that you are going to make a request for support.
- Know the specific area that they are interested in
- It's ok to be nervous – write a script and practice it
- The need should never be desperation – it should be vision. No one will fund desperation.
- Ask for something concrete and specific then wait in silence.



How do we ask for money? Sample script

Small talk: Hi Ruth, how are you? How are the kids?

Transition: Listen, I've got something important to ask you.

Connection: You have been one of our school's most enthusiastic supporters. We wouldn't have a new baseball field if it wasn't for the event you hosted at your house!

Emotion: We're very concerned about the cost of tuition here at Burholme College. As you know, part of our mission is to help local inner city students receive a top-quality college education. Last year, we had over fifty who were accepted and offered small scholarships but still couldn't afford to attend our school!

Need: Ruth, our annual scholarship endowment only provides \$50,000 per year for need-based scholarships. Our goal is to offer a scholarship to every accepted student who qualifies. We need to raise another \$1,000,000 to make that dream a reality.

Ask: Would you be willing to contribute \$25,000 to help us reach that goal?

The Art of the Financial Ask



Write out your script for a specific need in your organization.
Make sure to include:

- **WHAT:** Specifically what it is for (project)
- **HOW MUCH:** Exact dollar amount
- **TIMELINE:** When it will begin

How do we ask for money? Next steps



What if they say no?

**you will survive,
thank them, ask
them if they have
any other
recommendations**

**You are going to get
more no's than yes.
Keep going.**

What if they say yes?

**Follow-up as soon as
possible with a
thank you and next
steps**

**Continue to build the
relationship. Once
you receive funding
that is the start of a
relationship**

The Art of the Financial Ask: Practice time!

With your same partner practice with the ED of the Plenty Family Foundation



Follow the formula and make an ask based off of what you know



Give each other feedback





The Science: Tools of the Trade

Research



- Arguably the MOST important part of The Science
- You need to put in a lot of work before going into The Art of fundraising. Never go into a meeting without knowing as much as possible about the funder.
 - What they are interested in (education, health, etc.)
 - Which countries they work
 - Other grantees and how much \$\$\$ they give
- Keep a database on all potential or current funders. Include your conversations, dates, grant cycle, target areas

Use [FundsForNGOs.org](https://www.fundsforngos.org) to find donor lists by region, area of work, and grant opportunities

Email



- If someone donates – send a thank you email and or hand written note *ALWAYS*. Keep their email and add them to your mailing list.
- Email is a way to share your stories. Send non ask emails through the year, like a monthly or quarterly Newsletter.
- For crowd-raising – you can send bulk emails with asks! Just don't email a big ask to one person. Always get on the phone.

www.mailchimp.com has a free version where you can store emails and also send out bulk emails in a professional manner.

- Ask at big conferences if you are allowed to set up a booth about your work.
- Go to conferences to introduce yourself, prepare, research, have meetings pre-arranged. Always ask for a card/contact info.
- Host a tea chat about your work – get a group of people together who might be interested and bring an idea or issue that you are working on to share and think through.
- Do you have an individual funder who is an advocate? Ask them to host an event at their home for you to help with fundraising.

Check out our video on how to maximize a conference, it will CHANGE how you attend and prepare!

Website



- Always have a donate button (or information on how to give) and how to contact you
- Clear and accurate description of your work
- Stories of impact – share how the work is done
- Photos and videos of your work
- Don't pay for an expensive website!

Squarespace is a great hosting site – www.squarespace.com

If you can't afford a website – create a big social media profile. Remember to share where people can give and contact you.

Social Media



- If you have social media – engage. Comment on other social media accounts. Ask questions and tag others
- Create campaigns that match your email campaigns – coordinate all platforms
- Be consistent with posts. Schedule a day to post each week.
- Photos! Take photos when you are doing an event, make sure to share so your social media community see's your work in action.

Setting up social media platforms are a free and effective way to share your work. Set up Facebook, Twitter, Instagram, LinkedIn, etc.

Visitors to your site/event



- Introductions and tour is important to make them welcome, don't be afraid to hand this off to a girl/student!
- Let them engage in a program to feel involved not just an observer (just don't put them on the spot).
- Grab their information (email) and follow-up. Add them to your email list for newsletters. All visitors are potential supporters.

Never ask for money from a visitor! But don't leave out non-monetary asks.

In-kind Donations



- Materials and supplies are often easier to get than money for the materials/supplies.
- Approach local (furniture, paint, transport, food, etc.) companies, create a network who believe in what you do, but might not have a budget for cash donations.
- Pro-bono work from larger companies (accounting, branding, legal, graphics, photography, etc.)

Google Ads - You can receive \$10,000USD of in-kind advertising each month!

Organization Collateral



- Have a one-pager for your organization that is up to date and available to send to visitors, media, etc.
- Infographics are a great way to communicate event success, yearly milestones, etc.
- Videos and photos of events, recipients, staff, buildings, etc. are great to have on hand for social media, newsletters,

canva.com is a free website with templates for any graphic design you need

International will only give to 501C3



Send them to <https://www.ngosource.org/>

This is an equivalency determination whereby local CDOs can get a determination under US 501C3 law and foundations are able to give.

Who are the best fiscal sponsors?

Taxonomy of Foundation Funders



Funder Types	Description	Reporting Requirements	Likelihood of funding small organizations
Government Aid Agencies, Multi-lateral Aid Agencies	Local or national gvts, United Nations, world bank	Challenging	Low
Large Private Foundations/ Corporate Foundations	Gates, Hewlett foundation, Ford Foundation. Looking for scale.	Challenging with onerous M&E	Low
Corporate Social Responsibility (CSR)	Local companies that want to look good.	Typically not hard and don't require deep reporting	Medium
Family Foundations	Family foundations are foundations set up from the wealth accumulated by a single family.	Varies depending on the foundation	High
Community Foundations	Taking off right now in the global space. African Womens Development Fund	Dependent on the fund. Looking for CBOs right now.	High