

FUNDRAISING TOOLKIT FOR PATIENT ORGANISATIONS





Author: Simona Biancu, ENGAGEDin

<http://www.engagedin.net/english>

Editors: Camille Bulot, Danielle Flores, European Patients' Forum



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1. THE CONCEPT OF FUNDRAISING

1.1 BUILD RELATIONSHIPS, THEN THINK MONEY

“Fundraising” means much more than just raising funds. Obviously, collecting money is the final goal of fundraising, as it will ensure the organisation’s economic sustainability. However, the cornerstone of fundraising is the *reason* why someone should donate money to the organisation.

Donating to someone – a cause, a person, or an organisation – is an act that gives a purpose and motivation. Our first focus when approaching fundraising should therefore be to identify people interested in contributing to our mission: *the prospective donors*. The motivations of prospective donors can be diverse: they may be familiar with the cause, or sensitive to certain issues, or it could be that they have consideration for the NGO that represents the cause, etc.

The starting point is to gain people’s interest in the cause advanced by your organisation. You can start by communicating the mission, the vision, and the projects of the organisation, in order to connect people to your organisation. **In short, the job of a fundraiser is to engage people.** On the

opposite, a relationship based solely on money will result in irregular donations for your organisation, and no stability or development perspective.

The first key element is that fundraising must be understood as a question of relationships first, and then money.

The second key element to achieve effective fundraising is striking the right balance between emotional and rational thinking.

“**If there is no emotion, there won’t be another donation**”. When talking to prospective donors, you need to develop an empathic relationship with them and to connect them to your cause, your organisation’s projects, the opportunities you see, and the difficulties you encounter.

However, when the time comes to ask for a donation, you will need to have a precise idea of the costs of your project, the break-down of your budget per activity, and the timing.



Therefore, your task will be to present your organisation in a way that you gain emotional commitment from them, while making them feel that this is a wise investment.

Keep in mind that the cause you promote is central to the relationship between you and your donors: **your organisation is a facilitator between your donors and your cause.**

Your donors are a precious asset to your patient organisation. This means that you need to invest time in this relationship, keeping your donors informed about the destination of the money that they have donated and about your organisation's plans and activities.

Communicating about your organisation and its mission is a crucial step in cultivating the relationship with your donors. In order to do this, we need to write down "the case statement" (see section 2.1.).

1.2 THE DONORS' CULTIVATION: FROM PARETO'S LAW TO THE PYRAMID OF FUNDRAISING

Generally known as the "80/20 Principle" or Pareto's Law, this formula can be summarised as follows: 80% of the outputs results from

20% of the inputs. When applied to the fundraising context, it means that **80% of the funding comes from 20% of our donors**, or put differently, 80% of our results comes from 20% of our time and effort.

In fundraising, non-profits often spend an enormous amount of time planning events, writing grants, researching potential donors, and updating multiple social media sites. One aspect that is often neglected is the evaluation of these strategies' effectiveness compared to their desired outcomes.

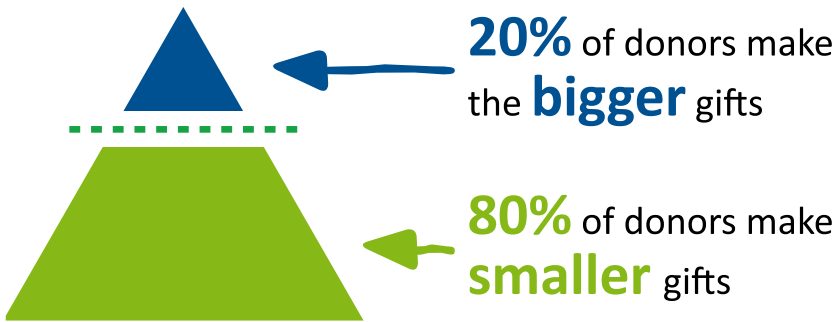
Spending a bit of time on evaluation could help save a lot of time on unsuccessful strategies (see section 3 on evaluating fundraising).

Another lesson that we can draw from Pareto's law is that your organisation should invest time cultivating relationships with prospective donors similar to the ones that already value and support your organisation. Indeed, these are the stakeholders who will make the most valuable contribution to your organisation in the long run.

Pareto's Law has also inspired one of the most well-known schemes of sustainable fundraising: **the pyramid of fundraising.** The *donor acquisition process* is usually based on the following assumption: the donors at the top of the pyramid (the 20%) make contributions equivalent to 80% of

1. THE CONCEPT OF FUNDRAISING

the donations, while the donations of first-time donors (the 80% at the bottom of the pyramid) account for 20% of the donations.



The donor development strategy “requires” moving donors “up the pyramid”, with each stage corresponding to a higher level of commitment between the donor and the non-profit organisation.

It is important to recognise the different types of supporters of your organisation and to identify specific actions for each level of commitment. The objective is to keep donors engaged wherever they are on the pyramid and to nurture the relationship throughout the **Donor Life Cycle**.

In order to build a proper fundraising pyramid, it is crucial to **keep accurate records of your donors**: number, type of supporters, giving history, etc. In order to achieve this, getting the right database (Customer Relationship Management) is pivotal.

The data compiled can then be analysed and show trends and donor segments.

1.3 THE DONORS' RESEARCH: THE CIRCLES OF CONSTITUENCY

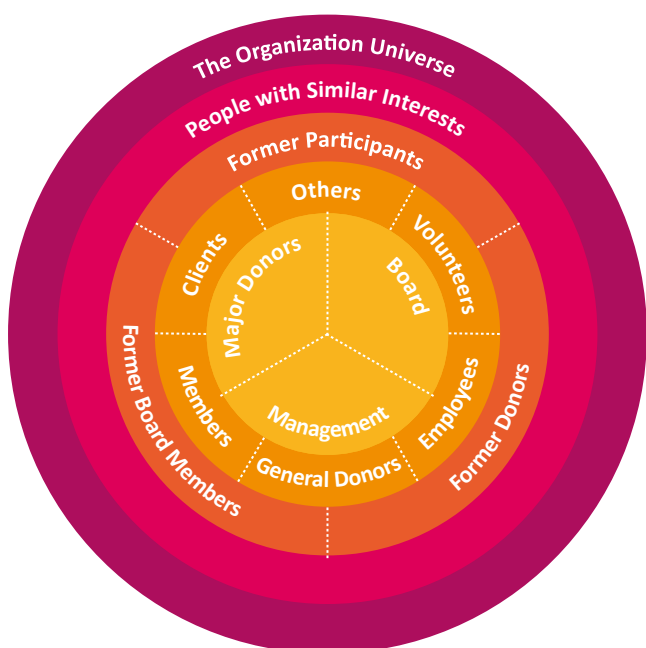
Effective fundraising requires a thorough knowledge of your organisation's constituency. We can define the constituency as a distinct group of people with actual or potential interest in the organisation¹.

A helpful way to think about an organisation's constituency is to visualise a set of concentric circles representing the energy of the organisation which dissipates from the centre outward. The core constituency is at the centre of the concentric circles. The further out the circles are, the weaker in terms of links with the mission of the NGO.

Based on this model, we can identify the constituency of our NGO filling out each circle in the following way:

- **The centre:** primary stakeholders (*Board of Directors, management, major donors*)
- **The 2nd circle:** volunteers, receivers of services/clients, general donors, members
- **The 3rd circle:** former participants/former board members/former donors
- **The 4th circle:** people with similar interests
- **The very last circle:** the “rest of the world”

¹ T. Seiler, Developing a constituency for fundraising.



1.4 THE SOURCES OF FUNDRAISING

Prospective donors are broader than just one category: they are companies, but also individuals, foundations, service clubs, and public bodies.

Ideally, a sound fundraising plan will include each of the potential sources of fundraising. Indeed, each of them will be able to contribute in a specific way to the overall goal.

This means that as a first step, the database of your patient organisation should be made of a balanced mix of all sources. The “circles of constituency” and the LAI model will then help you to think strategically of your prospective donors.

Think creatively! As regards corporate sponsors, although the pharmaceutical sector may seem an obvious door to knock on for patient organisations, the individuals working within your organisation may have contacts with people from other fields. A way to begin the search for prospective donors can be the analysis of the relationships that each board member has with companies. This has a double advantage: you will reach out to companies from a different field, and through a “personal” contact.

Once you have determined which cluster of prospective donors belongs to which of the above-mentioned circles, you need to evaluate the probability for each group to become a donor (or a volunteer, or an advocate, and so on).

The LAI model helps you to assess the likelihood of the donation of each group. LAI stands for:

- **Linkage:** the type of relationship this group has with your organisation;
- **Ability:** the financial capability of the group to give;
- **Interest:** the interest of the potential donor towards the cause and the mission of your organisation.

By linking these three criteria, you will be able to build a list of prospective donors ranked on the basis of their relations and interest towards your NGO as well as their financial capacity to donate.

1. THE CONCEPT OF FUNDRAISING

Alternatively, explore ideas around the specific mission your organisation pursues: are there other sectors relating directly to your disease area or national context? Is there a specific food or activity recommended to support the medical treatment in your disease area?

The goal of this brainstorming exercise is to broaden your portfolio of potential corporate partners beyond the pharma sector.

With regards to foundations, take the time to analyse the foundations active in your field before using a database or public data sources². This will save you time and help you make the right ask to the right foundation.

1.5 THE BOARD'S ROLE IN FUNDRAISING

The roles and functions of board members can differ greatly from one organisation to the other. However, one of the main functions of the board is to ensure that your organisation has enough resources to pursue the strategic plan and that the resources are properly used.

Therefore, there is usually an expectation that the board will play a key role in fundraising. It is important that the staff and board members share the same understanding of what is expected from each other.

Your board members should be actively involved in the development phase of your fundraising plan, from the planning process to the development of the case for support. This ensures that the supporting strategies are correctly planned, and – generally speaking – that board members understand their collective and individual roles.

The role of your board should be a key part of the fundraising plan. Indeed, Board members also account for part of the organisation's fundamental internal resources for fundraising, through their personal contacts, their role in creating engagement with stakeholders, and their personal expertise.

The board therefore works in cooperation with your organisation's staff, bringing influence and strength in support of the organisation's broader fundraising plan. For its part, the staff drives the day-to-day execution of most activities.

The most mature organisations in terms of fundraising culture will be developing a real "board fundraising policy" that defines the amount each board member is expected to give and/or raise directly, the process for waiving the requirement, and other additional ways in which board members can support fundraising.

² www.foundationcenter.org is a great source of information.



Think about it this way: an individual who gives time is a volunteer, an individual who gives money is a donor. A board member must be both a volunteer and a donor.

Specific trainings can be organised to enhance your board members' capacity and boost their confidence to raise funds for your organisation.

The main ways in which your board members can be involved are:

- Giving: is it realistic to expect others to do something that you are not willing to do yourself? (This can be giving time, not only money!);
- Advocating on behalf of the organisation;
- Being ready to tell the story of the organisation and its mission;
- Providing connections with or making introductions to new prospective donors and opportunities for fundraising;
- Identifying and cultivating high-net-worth donors;
- Promoting or hosting events and other initiatives;
- Being available for meetings with potential donors.

2. HOW TO SET A FUNDRAISING PLAN

Since fundraising is not “talking about money”, but “building and cultivating relationships”, developing a fundraising plan becomes a very personal exercise. **There is no “one size fits all” model for fundraising plans**, as the donors, prospective donors, needs, strengths, and weaknesses vary from an organisation to the other.

It is not rare to see non-profits running their activity without a fundraising plan, trying to catch the most opportunities they can or waiting for opportunities that do not show up. This is the worst way to run development programmes and to ensure the organisation’s sustainability.

A fundraising plan allows you to focus your efforts. With it, you follow a clear strategy, define activities and tactics and develop a “fundraising calendar”. It guides your daily work.

The ideal “fundraising plan” is a document that is written every year, or – in a medium-term perspective – every 2-3 year with annual revision.

Who is the owner or this activity? This highly depends on the organisational model,

but in general this process is not led by a single person: instead, a group (fundraising committee, development task force...) involving people with different functions (including a person from the communication department, or with communication skills) leads the process in very close contact with the board.

Let’s start drafting our fundraising plan!

A fundraising plan usually includes:

- The case statement
- The strategy
- The goals
- The tactics (campaigns, targets, instruments)

2.1 THE CASE STATEMENT

The Case Statement – or Case for Support – is one of the most important documents for your non-profit. But what is it?

A compelling case statement “*clearly illustrates your organisation’s mission and vision for the future, tells donors why you need funding and what outcomes you are seeking from their investment. It “offers strong reasons why prospects should make gifts to your organization*”³.

³ Joe Garecht, How to write a case for support for your non-profit – part. II.

⁴ C. Richardson, Philantropy News Digest.

“Effective fundraising is a result of telling your story⁴”. A great case statement includes a mix of both emotionally compelling stories as well as cold, hard facts that back up your claim to bring change for your community. It communicates your vision for a better future, and invites donors to be part of that vision.



The case for support should be one of the first things you write when you start your fundraising strategy. Written in a “donor-oriented” style, it will form the basis for all of your non-profit communications. You can refer to your case statement when writing newsletters, emails, on your website, in the materials developed for donors, etc. Everything that counts for your organisation should be included in it.

You can also create an “external” case for support (an extract from your case statement) suitable for sharing directly with donors – for example, by including it into a brochure.



What should the case statement include?

The information compiled in the case statement can vary depending on your organisation’s situation and history. The only suggestion is to avoid making it too long or too formal.

- **An emotional opening:** as already mentioned, fundraising involves a mix of emotions and rational thinking. Donors and prospects will read the opening of your case statement to decide whether or not the rest of the document is worth reading.
- **Mission and vision, values:** why does your organisation exist? Why should people care? What is your vision for the future?
- **Governance, paid staff, volunteers:** show your faces! Assuming that fundraising is based on relationships with donors and mutual trust, the best option to initiate a dialogue with donors will be to provide transparent information about your organisation’s Board, its staff, and its volunteers.
- **History of the organisation:** provide a brief summary of the history of your organisation and of its work to date.

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- **Strategic objectives and programmes:** explain how to put the vision in practice.
- **Outcomes and proof of impact:** show proof that what you are doing is worthwhile. Use statistics and charts, but more importantly, tell the stories of those you have helped, using testimonials, and back those up with numbers.
- **Resources needed:** how much money does your organisation need to raise? What will the money raised be used for? Why do you need to raise it now?

The elements can be included in any order. The case statement needs to be coherent and make sense for your organisation, so you do not have to stick to any formula.



A clear case statement ensures that the entire organisation has a unique identity (from the board to the volunteers) and conveys a consistent message when speaking to external stakeholders, developing educational materials, speaking to the media and public, and... fundraising.

The case statement (3-4 pages or more) does not need to be reviewed regularly, being the conceptual basis for the practical plans developed year by year in fundraising.

2.2 DEFINING YOUR STRATEGY

The Strategy is the instrument that mobilises the organisation to achieve its vision for the future. The Strategy gives your Board, staff and volunteers a purpose and direction to engage with the external stakeholders. It is the path between now and the future. The Strategy determines how the organisation relates to the outside world: how it makes the most of opportunities, responds to change, and faces up to challenges and threats. A strategy clarifies what the priorities are and where the organisation's resources should be concentrated.

The Strategy usually focuses on the medium to long term (3 to 5 years), but is relevant on the short term too.

2.2.1 THE SWOT ANALYSIS

The starting point to better understand our potential in terms of fundraising is to analyse the current situation. The *SWOT analysis* is a useful tool to do so: writing down the **strengths, weaknesses, threats, and opportunities** will give you a good overview of where your organisation is at the present time, both on the internal and external side.



Your weaknesses are the areas where you should put forth some extra effort, while your strengths constitute your capital – what you are already able to do – and will guide the development of your fundraising plan.

2.2.2 KNOW YOUR ASSETS

This first analysis of the present situation will become even more meaningful when completed with a **benchmarking with potential competitors**.

A detailed overview about volunteers and donors will help you to complete the picture: how many of them are in your database? Do you have their full profile or do you have a simple “name and surname” database? Are major donors a consistent group within your database?

You should also assess your **visibility rate within the community**: when people talk about the needs and issues covered by your organisation, do they know about your programmes? Are you a reference point for the patient community you represent?

2.2.3 RESOURCES NEEDED?

Last but not least, you should have the most precise idea possible of the resources you need.

Evaluate carefully the financial resources you need to achieve your mission. The more precise you are in the identification of your fundraising needs, the more fitting your strategy will be, and the better your fundraising plan will be.

2. HOW TO SET A FUNDRAISING PLAN

2.2.4 THE G.I.V.E.S. MODEL

The G.I.V.E.S. Model is often used to determine the best fundraising strategy for an NGO.

It describes five paths the organisation can take to achieve its objectives. This model requires clear and precise definitions of your goals and priorities.



for GROWTH: growing the number of first-time donors

This path is based mainly on increasing the number of first donations from a bigger number of newly-acquired donors.



Whom is this for? This strategy is frequently adopted by newly created NGOs, or NGOs with a start-up fundraising plan.

A strategy based on a growth path requires lots of energy and a high commitment from the whole organisation, as well as strong governing bodies. If for any reason you perceive this may be a difficulty, it is probably better not to choose this option.



What's the idea? Let's take another look at the fundraising pyramid. At the very base of the pyramid are the "small-gifts donors". All these people have a low level of engagement with your organisation.

This fundraising path is aimed to take them through the donor journey (to move them

"up the pyramid"). Our objective will then be to enhance the level and the quality of the interaction between the two parts of the fundraising-relationship, and to go from small donations up to major gifts and legacies.



What are the tools? The best tools to reach a high number of new donors and ask them a first low-level donation are probably mailing and e-mailing. Face-to-face meetings, but also word of mouth can be used within small communities.



for INVOLVEMENT: increasing your impact through new recruits

This path consists of people-raising plans, volunteers' programmes, and programmes based on increasing the level of involvement of the organisation's members.




Whom is this for? This is a typical path for NGOs who need to increase their number of volunteers and to demonstrate their impact within their own community. This strategy works well when the NGO is supported by people with a high visibility on their own territory.



What's the idea? Setting a fundraising strategy based on involvement will require charismatic volunteers, a pro-active approach towards the people you are seeking to engage, and a high level of commitment from


your organisation's individuals. Mentorship programmes for the new recruits can be implemented.


 **What are the tools?** The tools typically used for the "involvement" strategy are membership campaigns, newsletters, in-house publications and social networks.




for VISIBILITY: raising your profile!

This strategy is based on increasing of popularity for the NGO.

 **Whom is this for?** This path is for organisations who have a strong and well-defined brand identity. The organisation needs to have distinctive traits that make it unique and well-known in its own field of activity.

 **What's the idea?** In this "community-focused" strategy, the organisation aims at raising awareness of its cause, reinforcing its brand identity and reputation, and strengthening its capacity to generate positive feedback about its activities within its community.


 **What are the tools?** The focus will be on media actions and organising events in a creative way. Cause-Related marketing initiatives can also help here: CRM is a


strategy whereby a company decides to allocate a fraction of the whole cost of its products (or a percentage of the income from its products) to support an NGO, by putting the two brands together on the products and setting up a joint communication plan. Setting up an interactive website (enabling online donations or an app for smartphones) and social media-based campaigns are further tools which can be used in the framework of a strategy focusing on visibility.




for EFFICIENCY: less donors, higher donations

Choosing this path means looking carefully at the ratio between the investments and costs of your organisation.

 **Whom is it for?** You will need a strong management, able to identify alternatives to some expenditures – for example by increasing in-kind donations.

 **What's the idea?** This strategy aims to find the best option between the ideal situation (in terms of projects, resources, and fundraising) and a reasonable, realistic alternative that is possibly less risky. This attention to costs produces immediate benefits in terms of savings but also helps improve your organisation's efficiency overall.


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 **What are the tools?** The typical tools used to raise funds while keeping an eye on the cost-benefit ratio are major donors campaigns (as mentioned above: you target fewer donors who already have a strong relationship with your NGO, which means you have no costs in terms of publicity, but you rather focus on personal meetings in order to generate more important donations), planned gifts (legacies), corporate foundations, and public funding. All these tools will generate a high income in terms of donations with a low financial commitment for the NGO.




for STABILITY

The stability path is appropriate when the organisation is already established and tackles fundraising from a long-term perspective.

 **Whom is it for?** The NGOs typically based on this strategy are steady and economically stable, with a mission that could be defined as permanent and a set of strong and immutable values.

 **What's the idea?** A stability strategy means connecting with steady institutions, such as universities or health foundations, and other well established stakeholders.

 **What are the tools?** Setting a fundraising campaign means using direct debit donations,

patrimonial funds, and a strong diversification among the tools available: the more tools we use, the lesser risk we take in terms of funds potentially raised.

How to choose which path to pursue?

When choosing a strategy, you must decide where you want your organisation to be in the future. There is not necessarily an ideal fit: you will have to choose the best option on the basis of the information you currently have.



A strategy is usually pursued for a 3 to 5 years-cycle. In this amount of time, you will implement the strategy, plan campaigns, and assess the outcomes in terms of impact, funds and donors. At the end of this cycle, you will assess your organisation's situation again, using the same approach. You might then choose a different strategy for the future.

It is important to consider fundraising as something really practical, able to generate tangible changes within your organisation and in the relationships you have with your donors. It has to be approached step-by-step.

In short, keep in mind that raising funds is an activity made of 90% of analysis and back-office work, and 10% of requests. Spend some time thinking of the strengths and weaknesses of your organisation, and identifying the most suitable strategy accordingly.

Once chosen the appropriate strategy, you will have to define some goals. For example, if your strategy is based on growth, your task will be to increase the number of first-donors. But what should be this number? 100 more donors? 10 more donors? It is important to know what your goal is. If you assume that you need to raise 10.000 euros to implement your projects, the question is: how many low-level donors do you need to reach that amount of donations? And most importantly: do I already have all of these donors in my database?

2.3 THE FUNDRAISING GOALS

The best way to start is by having your final objective in mind: what is your overall fundraising goal? And even better: what is your fundraising goal for this year, and for each of the next four years?

A useful tool to help you defining practical goals is the SMART model⁵, where **SMART means: Specific, Measurable, Acceptable, Realistic, and Timebound.**



The first step to refining your fundraising goals is to **make them SPECIFIC**. It is not enough to say that you want to raise more money than last year. Indeed, that goal can be accomplished by raising just one more dollar. You will need to be more precise and to quantify your goals.

Your specific fundraising goals can be raising € 50,000, engaging 50 new donors, or raising 10% more in total donations. Remember to write down your goals.

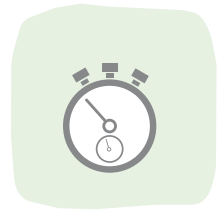
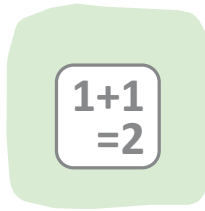
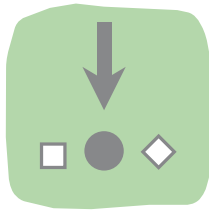


MEASURABILITY is an important element to make your goals specific. **Setting MEASUREABLE goals will make success and failure more “objective”**. If your goal is to raise “a lot” of money, everyone may have different numbers in mind. Having a measurable goal means that when a campaign is over, you will be able to say if you have succeeded or failed. To make your

⁵ The SMART model was first outlined in an article published by George Doran in the Management Review “There’s a S.M.A.R.T. Way to Write Management’s Goals and Objectives”, 1981.

2. HOW TO SET A FUNDRAISING PLAN


S M A R T





Specific **Measurable** **Acceptable** **Realistic** **Timebound**

objectives measurable, ask questions such as “how much?” and “how many?”.

explain how each of your fundraising goals relates to your mission.

 Thirdly, **fundraising goals should be both ACHIEVABLE and ACCEPTABLE.** Achievable doesn't mean “easy”. Difficult goals result in greater performance: people derive a greater amount of satisfaction from achievements they had to work hard for. Conversely, if a goal seems unachievable, people may feel discouraged or as though they are being set up to fail. **Your fundraising goals should be challenging, not impossible.** Also, there should be a broad agreement among the people taking part in the project on its objectives.

 Finally, **your goals need to be TIME-BOUND.** Deadlines are important to make sure your objectives are specific and measurable. If a goal isn't time-based, achieving it can be put off indefinitely. A clear deadline can also be a powerful motivation for donors and fundraisers. Remember to allow a reasonable amount of time to achieve results. By linking it with “measurability”, timelines for campaigns also make it easy to check progress towards your goal.

 **R stands for RELEVANT.** We value results that make a positive difference and donors also want to know what impact their gift will make. Therefore you should be able to

2.4 THE COMMUNICATION PLAN

Fundraising cannot exist without a clear and compelling communication strategy.

So, how to draft your fundraising communications plan?

The first step is to sit down with your organisation's strategic plan and fundraising plan for the year. Make a list of the different target groups you need to be communicating with and when this needs to happen. Then, create a matrix matching the important messages for the year and the strategic goals for the organisation with each of your target groups.

Your **communications matrix** establishes a foundation for your outreach activities throughout the year. It may include deliverables such as newsletters (electronic or printed), calls for support, event announcements and reminders, annual reports, policy and advocacy activities, as well as calls for volunteers.

Its purpose is to ensure that communications are sent regularly, that they deliver your key messages, and leave room for specific communication needs that may arise unexpectedly.

Once you have finalised a draft of your communications plan, invite the appropriate staff members in your organisation to review and offer additions based on any events or constituencies you might have overlooked.

As you create your communications plan or fine-tune an existing plan, make sure that the three most important messages are included throughout the year:

- 1. This is our mission. These are our needs. This is how you can help.**
- 2. Thank you, thank you, thank you!**
- 3. Your support has helped us accomplish "x, y and z".**

Technology has made it easy to engage our target audiences through a variety of platforms. Determine the platforms that resonate most with your constituencies and make sure to incorporate the use of social media platforms to enhance and complement the communications tools you have already listed.

2. HOW TO SET A FUNDRAISING PLAN

Next, establish a realistic set of communication goals for your organisation. Will you communicate with your various constituencies on a weekly, monthly, or quarterly basis? You may need to communicate with some groups more frequently than others.

Finally, build in a process to evaluate the success of your communications. Monitor the response rates, open rates, and the contents that your various audiences react to. What are they sharing? Which appeals and calls to action are they responding to? Set aside a few hours at the beginning of each month to review the communications activities from the previous month, so you can tweak them and recalibrate your strategy if necessary.

A few tips! Here are some of the possible communications supports to reach your target audience:

- To engage your Board, think of weekly emails to the Board members outlining your organisation's recent success stories and important next steps;
- Send campaign updates to pending donors every two weeks;
- To cultivate prospective donors, send monthly inspirational emails, letters, website links or articles;
- A quarterly newsletter or magazine can remind your target audience of whom you are;

- Send semi-annual President or Chairman letters;
- Publish annual reports to recognise your donors' role and to demonstrate impact;
- Occasionally send handwritten notes to thank key donors and volunteers;
- Send a personal email invitation rather to a blast email;
- Make a phone call to say "hello" or "thank you".



Your challenge is to create or enhance a climate that is favourable to donations to your organisation. A well-conceived communications plan will be essential to the success of your campaign, especially if you are targeting the general public. The case for support, campaign brochure, and publicity plan are the tools to support your fundraising campaign.

To recap, remember to:

Develop a Persuasive “Case for Support” for a fundraising campaign.

It presents the rationale for supporting a fundraising campaign or project. Properly executed, it is one of the most powerful and compelling tools your organisation can have in communicating its fundraising objectives and in persuading prospective donors to make a commitment.

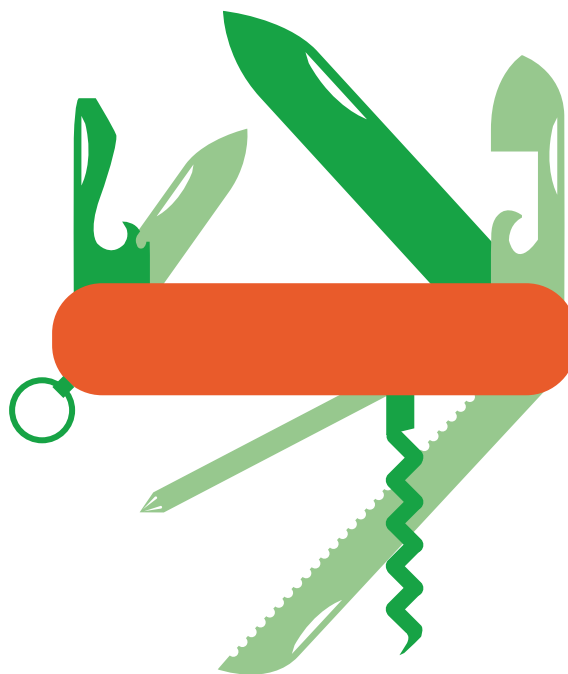
Write and design a winning brochure.

A fundraising brochure is another important tool to communicate about the value of an organisation to a targeted audience, as well as to make your organisation’s “family” more knowledgeable about your non-profit and the purpose and structure of the campaign. Learn from others: do not hesitate to study brochures from other non-profit organisations’ campaigns. Having an official brochure in hand is essential in establishing the perception in the potential donor’s mind that the campaign is professional and in providing confidence to volunteer leaders and solicitors.

Announce and publicise your campaign.

Bear in mind that publicity should be sought only in order to specifically support and enhance the fund-raising effort. You are trying to create public awareness of the reason for the campaign, rather than of the campaign

itself. Publicity in the case of a fundraising campaign means scheduling announcements and events. Opportunities for publicity should be planned and committed to a timetable and incorporated within the campaign’s overall calendar. Announcing your campaign to constituency groups is a first step in preparing them to be solicited.



2.5 CAMPAIGNS AND TOOLS

Once you know how much you need to raise and why you need to raise it, you need to figure out what tactics and tools you will use to reach your goal. **A campaign** is a series of operations undertaken to achieve a set goal(s), and it operates within a particular time period with defined start and end dates.

2. HOW TO SET A FUNDRAISING PLAN

Segmentation is the key

There is no such thing as “the general public.” People come in all shapes and sizes, with their own likes and dislikes. Even saying “potential donors” can be problematic: how do we target such a general group of people? Campaigns are vehicles that should be used to talk about the impact of non-profit’s work, but not in a general way: some audiences are more important than others to reach a specific goal.

Therefore, think of the following fundamental elements when defining your campaign:

- ➔ The target (what kind of constituencies we want to talk to)
- ➔ The message we want to pass on
- ➔ The desired action (from the target)
- ➔ The channel (or tactics, or tool) which will be the most effective to reach the target.

2.5.1 THE FUNDRAISING VEHICLES

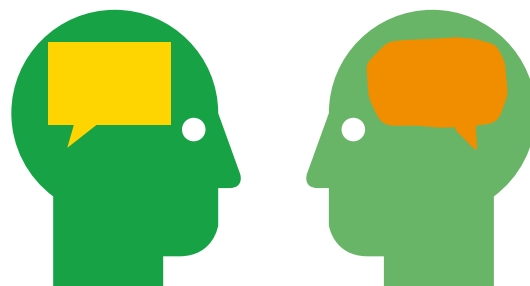
There are lots of vehicles to be used in a fundraising strategy – from mailing and e-mailing to events, face-to-face meetings, and many others.

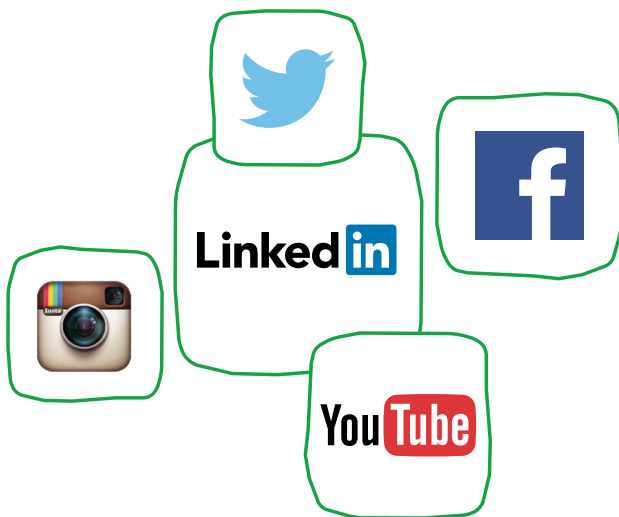
The vehicle should be chosen depending on the specific situation, each of them involving a different degree of personalisation. The rule is: the more personalised the vehicle is, the more efficient it will be.

Therefore, if your fundraising campaign’s goal is to reach a high number of people, you will not use face-to-face meetings to inform each of the potential targets about your organisation and programmes. You could instead arrange a public event or set an email campaign to inform the community you target about our projects.

Try to include a good mix of fundraising tactics. Common tactics include:

- ➔ Individual giving – asking major donors to make gifts to your organisation
- ➔ Major donor groups
- ➔ Minor donor groups
- ➔ Annual giving and multi-year Giving Campaign
- ➔ Events – both large and small
- ➔ Direct mail
- ➔ Telemarketing
- ➔ Online giving
- ➔ Grants – foundations, corporate, government...
- ➔ Corporate giving programmes
- ➔ Participatory Fundraising.





2.5.2 WHAT ABOUT SOCIAL MEDIA?

Generally speaking, social media is a broad term used to describe various web-based and mobile technologies that facilitate social interaction and the sharing of words, photos, and video. Facebook, Twitter, LinkedIn, YouTube, or Pinterest are popular social media tools.

Social media rely on audience participation as a driver, allowing individuals with common interests to quickly and easily use technology to interact and exchange information in the electronic world.

Social media should be part of your strategic communications plan, simply because it's a fast, cost-effective way to monitor and build your brand and grow relationships with your audience. However, you need to be ready to use it. Social media can do more harm than good to your brand and communications

objectives if you leap into conversations too soon.

How to engage on social media?

- Know who you are and how you want to position yourself online. A strong organisational identity will help you do this.
- Appoint one or two social media ambassadors to keep communications consistent. Be sure they understand the approach you are aiming for and what is off-limits for online discussion.
- Be realistic about your ability to manage your social media strategies. Small steps will help you to assess the time and resources you will need to dedicate to social media to benefit from it.
- Before you start talking online, listen carefully. Get a sense of who your audience is and what they are talking about before you chime in. This will ensure you offer relevant information that positions you as an expert.
- Engage people in meaningful interactions. It is easy to simply talk at people, but effective social media strategies are about building relationships with your target audience.

2. HOW TO SET A FUNDRAISING PLAN

- Consider posting questions that invite feedback and opinions about issues that matter to your organisation. When users post comments that are relevant to your organisation, acknowledge them.
- Use social media as one of the ways you thank individual donors.
- Follow conversations about your organisation, programmes and services. Do not wait to respond if the discussion takes a negative turn. The intimate nature of social media encourages open dialogue, and sincere exchange is welcomed.
- Most of all, be creative. There are many ways you can build affinity with your audience. Embrace them.

2.5.3 TELLING STORIES: STORYTELLING

People remember stories. They engage, inspire, and encourage people to act. All non-profits have stories to tell about how their community was impacted through their work. Many organisations underestimate the power their stories have to help them connect with their audience. Storytelling is one of the most important element in your communications toolkit.

Stories are memorable and touch readers in a personal way. They help you bring independent pieces of information together into a coherent message.

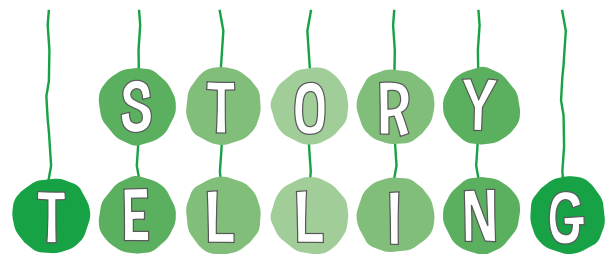
Think about using storytelling in annual

reports, on your website, in newsletters, fundraising campaigns, and in direct mail. Keep stories short and relevant to your audience, and make them about a single person or group of people. Finally, do not forget to deliver an underlying message that ties back to your mission and goals.

Remember: good time management is essential!

Many non-profits stumble here: even with a solid budget, a great mission, and a plan that includes a solid group of fundraising tactics, they fail to set timelines, and thus never seem to get things done.

A detailed and precise timeline as well as some indicators that clearly show how the campaign is going/has gone will force you to think critically of your fundraising decisions, and provide invaluable guidance on activities as the year progresses.



2.6 FUNDRAISING AS A PERMANENT PROCESS: THE CYCLE OF FUNDRAISING

The fundraising process needs to remain genuine, personal, and focused on the donor as a human being. Your donor is not an ATM machine! Donors are to be engaged for life, not for a single transaction.

The four primary steps in the fundraising process can be defined as:

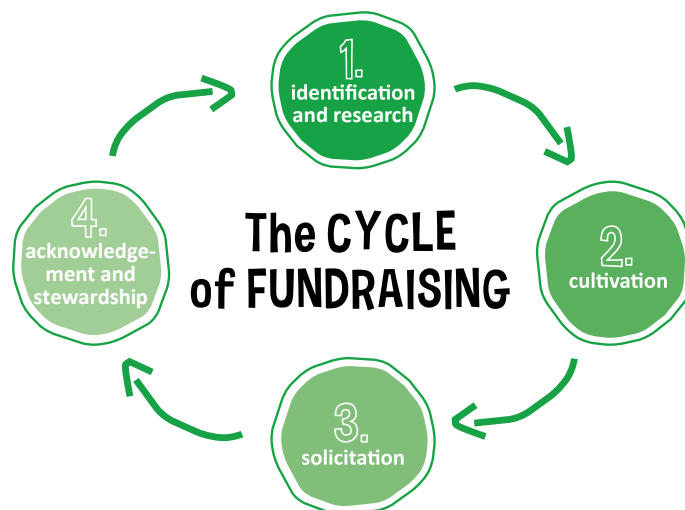
1. Identification and research (20%) –

Identifying potential donors is an essential aspect of any fundraising campaign; without prospective donors there can be no solicitation.

2. Cultivation (25%) –

Cultivating the relationship with the identified prospective donors is the second step in the fundraising process. The solicitation (“the ask”) might come a month or two years later, but a well thought-out strategy to bring that donor to the actual point of solicitation is critical.

A process that is either too fast or too slow can become a problem. By asking too quickly you might offend the donor; by waiting too long you might miss an opportunity and leave it to a competing organisation. It may require months if not years of relationship-



building before you consider making the actual ask. The cultivation step is similar to farming, where timing is essential: plant the seeds, cultivate the field, and be patient. You must also be diligent, meaning tending with care, interest, concern, and respect for the circumstances surrounding you.

3. Solicitation (5%) –

Solicitation of (major) gifts and donations is the culmination of all the hard work. Unfortunately this is also often the most difficult or anxiety-driven step for you as a fundraiser because asking for money is not an easy task for many people. But if the cultivation of the donor was done properly and the prospective donor is well prepared, then asking becomes much easier.

2. HOW TO SET A FUNDRAISING PLAN

At this stage the prospective donor is approached with a specific request for support, usually in the form of financial support, although it could be a request for a gift-in-kind. Typically the solicitation is made during a meeting, or series of meetings. This must be performed very professionally and with a focus on the donor and their particular heart-felt interest. Ultimately, you need to demonstrate how the donor's support is going to directly impact people in a significant and meaningful way.

4. Acknowledgement and stewardship

(50%) – Donors' gifts need to be thanked over and over again. Stewarding the donor is critical to reinforcing trust, create engagement, and planting the seeds for future gifts. During this stage the gift is acknowledged and the donor is also regularly informed of the progress of the project and the results that were attained from their individual gift.

Donors need to be stewarded to varying degrees depending on their level of financial commitment and involvement. This step in the cycle of fundraising is critical to the long-term success of your fundraising programme and of your organisation itself. People are very sensitive about how they are treated by an organisation. No matter how good your organisation is, donors have high expectations regarding how they want to be treated. So thank your donors profusely; demonstrate how important they are to your organisation and make them feel like they are true advocates of your organisation.



3. THE CHALLENGE OF EVALUATING FUNDRAISING

Non-profit organisations are facing increasing pressure from their corporate donors to act and report like companies. Donors want to know what their support meant in terms of social or public health improvement. This demand for measurement poses a new challenge to organisations. On the other side, as an organisation, you also need evidence to assess your own performance, outcomes, and impact.

3.1 RETURN ON INVESTMENT / SOCIAL RETURN ON INVESTMENT

It is not always easy to measure achievements in the health and social sectors. To assess your **effectiveness**, you will need to develop measurable indicators. This is particularly important from a fundraising perspective because there is a direct relationship between visible results and the willingness of people to donate and volunteer.



3.1.1 DIFFERENTIATING BUSINESSES AND NON-PROFIT ORGANISATIONS

In the business world, the concept of return on investment (ROI) is quite simple: it refers to the profit generated by the money invested into a business. It is usually expressed as a percentage per year.

The business definition of ROI has a number of applications for patient organisations. Many non-profit organisations deliver products and/or services for fees. Patient organisations differ from businesses primarily in that they fully reinvest all profits into their organisation, and no owner will eventually reap a capital gain.

3. THE CHALLENGE OF EVALUATING FUNDRAISING

In addition to the classical ROI formula, which will produce numbers related to the efficiency of the service delivered by your organisation, the real challenge for you will be to be able to answer the three following questions:

1. Do I have evidence suggesting that my organisation creates a positive ROI?
2. What is the added-value created by my organisation when serving its members and the patient community?
3. What information do I have to substantiate the claim that my organisation contributes to strengthen the specific community of patients it addresses?

3.1.2 HOW TO CALCULATE YOUR RETURN ON INVESTMENT?

Traditionally, ROI is calculated by adding all the benefits from investments, subtracting the costs associated with these investments, and then dividing by the total costs.

You can use this formula to calculate the ROI of your organisation's fundraising operations: you will need to add the compensation for fundraising staff (including benefits and salaries) to the expenditures for fundraising to determine **your total fundraising expenditures**. That number then should be subtracted from **your total fundraising revenue**. The result will then be divided by the total fundraising expenditures.

$$\frac{(\text{Total Fundraising Revenue} - \text{Total Fundraising Expenditures})}{\text{Total Fundraising Expenditures}}$$

The result of this calculation is the amount of money directly applied to your organisation's mission.

3.1.3 SOCIAL RETURN ON INVESTMENT (SROI)

ROI is only one of the variables used in the very large equation of fundraising effectiveness measurement.

Social Return on Investment is a framework for measuring and taking into account the broader concept of value; it measures change in ways that are relevant to the people or organisations that experience or contribute to it. SROI goes beyond numbers: it can include case studies and qualitative information in addition to the mere quantitative and financial information.

SROI tells the story of how change is being created by measuring social, environmental, and economic outcomes. These are then translated into monetary values, which allows us to calculate the benefit-risk ratio.

For example, a ratio of 3:1 indicates that an investment of 1€ delivers 3€ of social value.

An SROI analysis can take many different forms. You can take into account the social

value generated by the entire organisation, or focus on just one specific aspect of the organisation's work. The SROI analysis can be carried out as an in-house exercise or can be led by an external researcher.

There are two types of SROI analyses:

- **Evaluative** – conducted retrospectively and based on actual outcomes
- **Forecast** – predicting how much social value will be created if the activities meet their intended outcomes.

Forecast SROIs are especially useful in the planning stages of an activity. They can help to demonstrate how investment (or donations) can maximise impact. They are also useful to identify what should be measured once the project is up and running.

For an **evaluative SROI** to be carried out, data on outcomes will be needed. A forecast SROI can provide the basis for a framework to capture outcomes. It is often preferable to start using SROI by forecasting what the social value may be, rather than evaluating what it was, as this ensures that you have the right data collection system in place to perform a full analysis in the future. The level of detail required will depend on the purpose of your SROI; a short analysis for internal purposes will be less time-consuming than a full report for an external audience that meets the requirements for verification.

The seven principles of SROI

- **Involve stakeholders**
- **Understand what changes**
- **Value the things that matter**
- **Only include what is material**
- **Do not over-claim**
- **Be transparent**
- **Verify the result**

3.1.4 THE USES OF SROI

An SROI analysis can be used as a tool for strategic planning, for communicating impact and attracting investment, or to make investment decisions.

SROI will help you understand, manage, and communicate the social value that your work creates in a clear and consistent way with customers, beneficiaries, and funders. It will also point out potential improvements to the services, information systems, and the governance of your organisation. Therefore it is a great tool to guide the choices managers face when deciding where they should spend time and money.

Finally, SROI may help you improve the way you collect information. Improving the information you use to report performance and being able

3. THE CHALLENGE OF EVALUATING FUNDRAISING

to compare performance against forecasts will help you create more value.

For a patient organisation trying to obtain funding through donations, the impact and SROI can be seen from three different perspectives:

- **The organisation contributes to avoid unnecessary spending and suffering by helping to prevent certain health conditions through knowledge dissemination and awareness-raising;**
- **The organisation multiplies the core funding's impact with volunteers' experience and in-kind donations such as goods and pro-bono services;**
- **The organisation contributes to strengthen the community by encouraging patient involvement and creating connections between healthy individuals and disease-affected people.**

3.2 INTERNAL ENGAGEMENT

When evaluating the internal engagement and its contribution to the organisation's ROI and impact, the most important focus usually is the effectiveness of the personnel (staff, board members, and volunteers) involved in fundraising activities.

The effectiveness of the paid staff is usually measured by comparing the revenue factors (including the number of quality visits and of open and closed proposals), to the staff expenses (total salaries and benefits).

But many non-profit organisations also rely to a great extent on volunteers. The key question is: **how do we measure the value of volunteers?** And what about volunteers serving on the boards of the non-profit organisations? Assuming a board meets 12 hours each year, the combined value of the board members' volunteer time amounts to a lot of money, if they were to be paid. We also need to consider the additional time that board members devote to their organisations and the value of their skills and expertise. Boards benefit from the knowledge of consumers, activists and a wide range of professionals, including lawyers, judges, doctors, nurses, teachers, executives, financial experts, marketing specialists, and academic experts.

A major opportunity to improve efficiency is through internal collaboration. **Increased collaboration between fundraising staff** and other staff not only improves global engagement, but also enhances your fundraising effectiveness by creating organisational advocates and demonstrating to your entire organisation the impact and value of development. This would also apply to all people involved in the organisation, such as board members and volunteers.

From an external perspective, potential supporters/donors/contributors examine several different factors when determining the organisation's impact and value. Among these are the organisation's mission (is the organisation true to its mission?), its size (as returns will vary based on size and scope), the constituency profile (socio-economic, geographic, and demographic variations will affect ROI as well as potential impact), and the maturity of the organisation (well-established organisations deserve a higher expectation of increased ROI and impact).

Contribution by your organisation's board members also constitutes a leading indicator of whether the organisation is serving its purpose. This should not be viewed solely in terms of money contributed but also in terms of the board members' engagement. If an organisation receives strong support from its board, a donor will feel more comfortable supporting this cause and will thus expect the return on his or her donation to be higher.



3.3 ETHICS, TRANSPARENCY, ACCOUNTABILITY

Ethics are the rules of conduct recognised in respect to a particular class of human actions or a particular group, culture, religion, ethnic community, etc. In the same way we speak about medical ethics, we can also talk about fundraising ethics.

3. THE CHALLENGE OF EVALUATING FUNDRAISING

Fundraising professional associations worldwide have agreed on five important principles for acting as a fundraiser⁶:

- **1. Honesty:** Fundraisers shall at all times act honestly and truthfully so that the public trust is protected and donors and beneficiaries are not misled.
- **2. Respect:** Fundraisers shall at all times act with respect for the dignity of their profession and their organisation and with respect for the dignity of donors and beneficiaries.
- **3. Integrity:** Fundraisers will act openly and with regard to their responsibility for public trust. They shall disclose all actual or potential conflicts of interest and avoid any personal or professional misconduct.
- **4. Empathy:** Fundraisers will work in a way that promotes their purpose and encourage others to use the same professional standards and engagement. They shall value individual privacy, freedom of choice, and diversity in all forms.
- **5. Transparency:** Fundraisers shall publish clear reports about the work they do, the way donations are managed and disbursed, and costs and expenses, in an accurate and comprehensible manner.

3.3.1 THE BENEFITS OF TRANSPARENCY

An SROI analysis can be used as a tool for strategic planning, for communicating impact and attracting investment, or to make investment decisions.

Transparency is the obligation or willingness of organisations to publish and to make relevant data available to stakeholders and the public.

Transparency is essential to generate trust in non-profit organisations. In fact, transparency is very often a condition to receive funding (grants, subsidies, corporate funding and donations...).

Develop a favourable attitude toward

transparency: legal obligations such as annual reporting or financial audits should not be viewed as a difficult chore, but instead turned into an incentive to build good practices. Transparency is a proactive and self-imposed engagement from your organisation: the information on issues such as funding sources, governance, and participation mechanisms should be released without anyone needing to request it. It becomes a value incorporated into practice.

Speak a language everyone can understand!

Additionally, the information must be properly updated and understandable to anyone who will look it up. Make sure you accompany your

⁶ International Statement of Ethical Principles in Fundraising, from the Association of Fundraising Professionals' website: <http://www.afpnet.org/Ethics/IntlArticleDetail.cfm?ItemNumber=3681> (accessed on 4 January 2016).

technical documents with explanations in plain language. Finally, make sure your content is accessible to people with disabilities (such as impaired hearing or vision).

The communication channel that allows non-profit organisations to better fulfil all of the above conditions is the organisation's website.

What are the results from applying transparency into your daily work?

- It improves management
- It improves internal and external trust in the organisation
- It contributes to developing a favourable perception of your organisation to potential donors, investors, volunteers, etc.
- It facilitates participation and dialogue on an equal footing
- It provides accountability
- It encourages appearance in the media
- It is a preventive factor of corruption.



3.3.2 ACCOUNTABILITY: CORRELATING RESOURCES AND OUTCOMES

Accountability is an obligation or willingness of organisations to account for their actions towards their stakeholders. For a non-profit organisation it is to account for its activities, accept responsibility for them, and to disclose the results in a transparent manner. It also includes taking responsibility for the money received or any other entrusted funding. Most organisations (be they for or not for profit) will follow principles-based standards which address issues such governance, management model and organisational strategy, along with sustainability and stakeholder engagement. Being accountable to donors, funders, supporters, and society as a whole is about explaining what your non-profit organisation does, why it does it and what it achieves to help other people.

3. THE CHALLENGE OF EVALUATING FUNDRAISING

One of the most common forms of being accountable is through reporting. An annual report is a yearly publication that corporations and businesses must provide to shareholders to describe their operations and finance. Although non-profit organisations are not required (yet) by law to publish annual reports like corporations do, many non-profit organisations, foundations, and charities do recognise the value of reporting and thus produce annual reports.

Target audience and structure – In non-profit organisations the information is addressed to members, donors, funding institutions, and the public in general. Typically, an annual report will have two parts: the first part will often contain a combination of graphs, pictures and an accompanying narrative text with the chronicle of your organisation's activities over the past year; the second part will contain detailed financial statements (with or without an auditor's report depending on your turnover and legal requirements) and operational information about services or programmes.

A well-written and well-presented annual report, in either a printed or a digital format, helps demonstrate the accomplishments of your organisation to current and future donors and funders. The report also cultivates new partnerships and recognises the people, foundations, and corporations who support you.

Some non-profit organisations struggle with what should be included and should be left out in the annual report. Instead of just complying with the obligation and pleasing the internal audience of the organisation (board, members, funders, governmental agencies, etc.), the common headache of annual reporting can be turned into an opportunity. Annual reports can be a precious communication tool to generate social trust in your organisations. Consider the following:

- Think of the external stakeholders and of the public at large. Define clearly whom you are addressing and what you want to tell them. Give your report a title, perhaps a tagline, and/or claim.
- Plan for your report as an ongoing communication activity. Information about facts is not communication. Collect pictures, testimonials, and highlights to make it a lively publication.
- Think your dissemination strategy through! Decide where, how, and to whom the annual report is distributed.





Some practical tips for a non-profit organisation's annual report:

1. Focus on the organisation's accomplishments (outcomes), not activities (outputs)

Show the change that is taking place because of donors and supporters. The services (and products) of the organisation should be proof of the progress toward the (better) world that you are trying to build. The stories you tell need to demonstrate how your organisation is helping others get there too. Explain what you did, but more importantly, why you did it, and what the results were. Explain why your organisation spent time and money the way it did, and the difference it made. Link your accomplishments to your mission.

2. Tell the story of the organisation's vision to get the most impact

Show people your organisation's blueprint for the future and invite them to help you create it. Define your brand: more and more people want to associate with brands that share their beliefs. Tell them what yours is and give them the opportunity to agree with it.

3. Don't emphasise fundraising success

Fundraising achievements are not to be celebrated in the annual report on the same level as the mission-related accomplishments. Readers prefer to find out what was done with the money rather than how it was raised. This information is best placed in the financial section of the report.

4. Include pictures (and videos when using digital format)

Photos really are worth a thousand words. Many of the people reading the organisation's annual report will not actually read it. Acknowledge that and show them what the organisation has been doing with pictures instead.

5. Write captions to tell the story behind the pictures

Now that you have your readers looking at the photos, tell them a story with captions. Avoid simple statements of just what is in the photo, and instead, connect the picture to an accomplishment. If people were to read nothing else but the captions in the annual report, they should still be able to get a sense of the good work the organisation did last year.

3. THE CHALLENGE OF EVALUATING FUNDRAISING

6. Include personal profiles

Donors and supporters will be more impressed with real stories about real people than general summaries of the organisation's work in the previous year. Explain what the organisation has accomplished overall, then "humanize" the statistics with some personal profiles. Highlight how the organisation's work helped a specific individual or group. Share a volunteer's story or a beneficiary's testimony of how they made a positive difference.

7. Explain finance

Most probably many of the organisation's donors won't know how to read a financial statement or won't take the time and trouble to read it. Include a couple of paragraphs that explain in plain language what the tables and diagrams say. Where does the organisation's money come from and how is it spent? What are the organisation's main funding (and fundraising) strategies? Did the organisation implement any cost-savings measures this year?

8. Recognise donors

If space is scarce in the annual report, consider recognising smaller donors in other ways such as lists in newsletters and specific sections on the website. Whatever the choice, triple-check the correct spelling of donor names. Also carefully check the full names of agencies, foundations, corporations, or any other organisations that have provided funding or grants.

9. Tell donors and supporters how they can help

Never leave a potential supporter hanging, wondering how they can help you. Once you have inspired them with the good work you do through your annual report, close by telling them how they can help you do more. Explain how they can support your organisation with their money or time and make them understand how that action contributes to a larger effort. Be clear about the best ways to help, and provide options about how to apply, join, give, sign up, and sign in.



4. FAQ

My NGO does not have a database. May I start a fundraising plan?

Yes, you can. But raising funds without an effective knowledge of your current and prospective donors will make your life difficult when it comes to identifying the right campaign, fundraising vehicles, or ask.

We have not identified clear fundraising goals yet. How can I approach the fundraising plan?

Raising funds without a clear plan will be difficult. Setting a fundraising plan will enable you to focus on your organisation's mission and programmes and to identify priorities and needs to be accomplished through the fundraising activity, based on the values that your organisation represents.

We have not identified clear fundraising goals yet. How can I convince the Board to work on goals setting?

Show your Board members how difficult it is to ask for something indefinite. Being more efficient implies planning; and planning implies having a clear idea of our needs. If you ask a potential donor to do something for you, or to give you some money when you are not clear about the amount of money you need or about the purpose you intend to fulfil, it will be difficult for them to decide what to do.

My Board members are not really involved in fundraising. How can I encourage them to promote our organisations, to engage, and to meet prospective donors?

You should conduct a "Board coaching"

exercise. This process will analyse the reasons why a person has decided to join the organisation and to embody a top role. It will look at the personal values and feelings motivating your Board members, as well as the will to do something good for you mission. Serving as a Board member is a delicate role, which entails responsibilities. An active and committed Board is vital for fundraising and for an NGO in general. Alternatively, a SWOT analysis, conducted by an external person (a consultant, a former Board member, etc.) could enable you to understand the situation and motivate your Board members.

My NGO needs to increase the number of donors (individuals, companies, etc.). How can I achieve this goal?

Work on communication as a first step. Spread the word about your cause and your programmes using both online and offline vehicles, arrange a public event within a popular location in your community, and involve groups which are already active in the community. And keep track of the participants' names, of course!

How can I start a fundraising campaign for first-time donors?

Tell them who you are and what you do as a patient organisation. Donations come after information and mutual trust, that is, after some kind of contact and relationship has been made. Arrange a campaign to present your programmes and goals and to show your organisation's faces. This will encourage first-time donors to respond to your appeals.

I have been asking my donors the same donation year after year to avoid possible compliances about the amount of money required. Is it correct?

It depends. A theoretical rule states that if a donor has responded at least 3 times to your ask giving you that you asked for, he/she has become a loyal donor. It is theory, of course. In practice you have to work on our pyramid of fundraising to develop the donors' journey with your NGO. If you are able to actively involve donors in your organisation's life, you will then be allowed to ask for an increasing level of involvement and, as a consequence, an increasing level of money. Working on donor cultivation is something really delicate and challenging for an organisation. Ask for more money if you are able to engage, cultivate, and stimulate loyalty for your donors.

Does the protection of personal data conflict with transparency?

The protection of personal data does not question the exercise of transparency. If the information published contains data that needs to be protected, these elements need to be dissociated. This means that the documents can also be published but substituting the protected data by whitespace or an expression (that can go in brackets) explaining the reason for the absence.

Are social media appropriate channels for transparency?

Social networks are not an adequate solution. They present many problems that contradict the principles of transparency: to access the information, users must previously register, therefore access is not open and can be restricted by the account owner/manager. Ownership of the social networking space does not belong to your organisation; moreover, your organisation does not have control over the publicity inserted and does not fully know what use is made of the data.

What is a volunteer worth?

According to a 2006 estimate (U.S.A. Independent Sector), the standard rate assigned to volunteer time was \$18.77 per hour. If a volunteer spends two hours each week mentoring at risk adults on healthy behaviour, the dollar value of that time over one year is \$1,952. Clearly, the value of mentors – and that of all volunteers – goes well beyond any dollar value that can be assigned.

Do non-profit organisations really need an annual report?

Yes! It's not about producing a full-colour 50-page glossy document but rather a truthful account of the organisation's accomplishments and how these help change the lives of people. It can be a five-page photocopy.

What is the most important part of a non-profit organisation's annual report?

It is the description of what the organisation has accomplished, the reasons and rationale behind these goals and accomplishments and who and in what ways it benefited to.

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<http://www.raise-funds.com/2001/designing-a-communications-plan-to-enhance-your-fund-raising-campaign>

<http://www.thefundraisingauthority.com/donor-cultivation/collect-fundraising-stories/>

http://www.firstnonprofit.org/wp-content/uploads/2014/04/Fundraising_A-Partnership-Between-Board-and-Staff.pdf

<http://www.urban.org/uploadedpdf/412673-the-nonprofit-research-collaborative-special-report.pdf>

Websites

www.theagitator.net

www.sofii.org

www.fundraising.org

www.fundraising123.org (free fundraising tools)

<https://bloomerang.co>

www.malwarwick.com

www.philanthropy.com (The Chronicle of Philanthropy)

www.gailperry.com (free fundraising tools)

www.efa-net.eu/ethics (international ethical principles in fundraising)

www.eu-patient.eu/About-EPF/EPF-Website-Policy/

www.gettingattention.org (free tools and tips)

www.kenburnett.com/blogs.html

CONTACT US

European Patients' Forum (EPF)

Rue du Commerce 31
B-1000 Brussels
BELGIUM

Phone: + 32 (0)2 280 23 34

Fax: + 32 (0)2 231 14 47

✉ info@eu-patient.eu

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