

Global Member Meeting

Casablanca, Morocco 19-21 May 2015

Fundraising Essentials (Session 2)

Robert Wilkinson - learn@bond.org.uk

Objectives Of Sessions

Session 2 Wednesday 20 May 11.00-12.30

- **How to apply to and approach donors**
- **What systems/processes need to be in place in order to apply/respond quickly to donors**

Session 1 Tuesday 19 May, 16.10-17.45

- *How to go about successful fundraising*
- *How to identify different sources of funding.*

SUPER fundraising

Strategic – fundraising to deliver your mission

Understanding - the donor's priorities, and matching your work to them

Presenting - your case and your organisation effectively

Effective - having good processes and teamwork to be effective in accessing and managing funding

Relationships – cultivate and develop strong relationships with donors

Wider benefits of donor relationships

- Negotiation of areas of additional flexibility, e.g. extensions, carry-over of underspends etc.
- Opportunities to influence donor programmes and policies
- Opportunities for scaling up, for joint action, replication
- Advance warning of new funding opportunities or other changes or shifts in the donor's policy
- Opportunities for “cross-selling”

Four Stages in Making Approaches

Stage 1 Identification and Evaluation

Stage 2 Raising Awareness

Stage 3 Exploring the Opportunities

Stage 4 Making the Agreement

Identification and evaluation

- previous / current relationship?
- what they fund – does it match your work?
- who they fund – are you eligible?
- process – funding cycles, application forms?
- how much they give?
- whether they fund core costs?
- do they require match funds?
- are there any unusual compliance conditions?
- contacts – can you open a dialogue with them?

Raising Awareness

- if there is a personal contact, use it
- make it clear you understand their priorities
- make it clear how you fit
- give them a clear statement of your Vision and Mission; your status and capacity – your core pitch
- provide endorsement and “success story”
- make it clear how you propose to follow up – a meeting; a concept note, more information

Exploring the Opportunities

- Be prepared – bring several projects to the discussions
- Be flexible - if they can't support you this funding cycle, how about next year? be open to changing your ideas – so long as you are still achieving your priority goals
- Expect the donor to want co-ownership of the project
- Ask – are there aspects of your work they are particularly interested in; but beware of donor “cherry-picking”

GIFTED - A formula for managing informal meetings

Greetings - lead the meeting

Interest Creator – initiate by talking about the donor

Fact Finding - ask questions and **listen** to the answers

Turn Them On – what can you do for the donor

Evidence – why your project deserves funding

Decision - ask for a commitment – at least to continue the discussion.

Making the Agreement

- Make sure that you understand the donor's terms and conditions, especially for “visibility” , reporting and accountability
- Ensure partners can deliver on compliance too
- If the proposal is rejected, find out why - is there a realistic possibility to put in a new – and stronger – proposal?

Key Components of a Funding Proposal

- Justification and relevance
- Project structure (the logframe)
- Added value and impact

Components - Justification and Relevance

- Situation analysis
- Beneficiaries – direct and indirect
- Partners and other actors
- “Fit” to donor priorities
- “Niche” – other actors
- Your expertise
- Process & participation

Components – Project Structure (logframe)

- Objectives
- Results or Outcomes
- Activities
- Project Management
- M & E – Indicators, verification
- Risks and assumptions (“Plan B”)
- Budget
- Equipment, logistics, security
- Visibility for donor

Components – Added value and impact

- Methodology and approach
- Expertise – You and Partners
- Impact
 - scaling up,
 - replication
 - capacity building
 - lesson learning
 - policy change
- Value for Money

Ten tips on effective proposal writing (1-5)

- 1. Follow the format:** exactly; respect space limits and provide all the information required.
- 2. Use a good precedent:** use an example of a good proposal to guide you.
- 3. Style:** avoid jargon; use clear headings and numbering; include an executive summary; use annexes for detail and supporting information.
- 4. Donor priorities:** Understand and reference the donor's priorities and viewpoint. Be explicit about how your proposal meets them.
- 5. Link problem and solution:** Include clear situation analysis. Make it clear how your proposal tackles the main problems identified

Ten tips on effective proposal writing (6-10)

6. **Project design:** Use a logframe or similar tool to ensure the proposal logic is strong – even if the donor does not require it.

7. **Budget as part of the fundraising proposal:** make budget persuasive, not just a list of numbers. Use budget notes to justify costs & show VFM.

8. **Involve partners and beneficiaries:** do this at an early stage; Partners should present a strong core case too.

9. **Teamwork:** Involve your colleagues at an early stage and at all review stages. Ensure enough time for review and final proofreading.

10. **Connect:** connect at a human level: include direct testimony, use success stories, case studies, powerful images.

“Hard to write” sections of a proposal

Rationale/ problem analysis

Sustainability

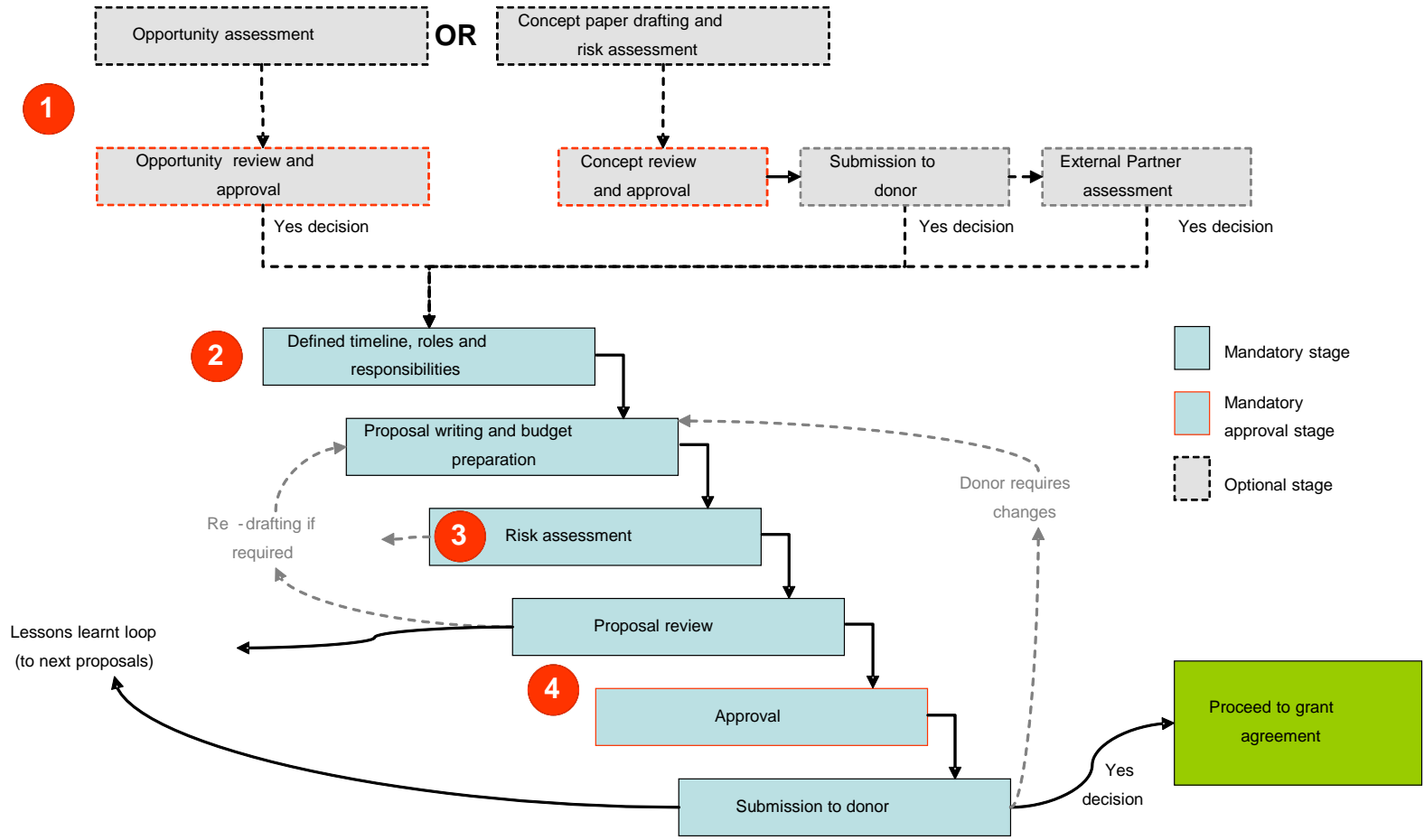
Monitoring and Evaluation

Scaling-up and replication

Value for money

Key stages for proposal development

Proposal development



Due diligence - defined

Due diligence is the process by which a funder assesses an organisation before deciding to invest.

- Grant Managers Network

Due diligence is part of 'Developing a knowledge base' to identify the organisation(s) that fit best with a funder's strategy.

- Helen Chadwick, SVA Consulting (Australia)

Due diligence – what to put in place (1)

Governance: legal status; registrations, constitutional documents, tax status, trustees, CVs of senior management, Board and Senior Management minutes

Financial: controls, management accounts, audited accounts, fundraising strategy, donor contracts, overhead recovery, internal audit, finance manual

Programmatic: strategic / operational plans; technical capacity, grant management systems; evaluations; partner assessments

Due diligence – what to put in place (2)

Systems, Processes and Procedures: policies e.g. on equal opportunities, child protection, health and safety; staff handbook; risk management, recruitment; website

Environmental risk management: policy; audit; preparedness

Value for Money: procurement policy; supplier management

Results and impact: M&E system at organisational, division and project levels; KPIs; annual and donor reports

Resources for more information on due diligence

Due Diligence: making philanthropy work for you. (Helen Chadwick article in SVA Quarterly). This sets out a framework for due diligence

<http://svaconsultingquarterly.com/2014/03/13/due-diligence-making-philanthropy-work-for-you/>

GMN – the Grant Mangers’ Network (US) has resources targeted at US grantmakers and their grantees: <http://gmnetwork.org/wp-content/uploads/2014/07/Due-Diligence.pdf>

Grantmakers for Effective Organisations (coalition of <300 funders) has developed an online tool for Due Diligence; (available to members only): <http://www.geofunders.org/>

The components of a Core Case for Support (1)

- Mission, Vision, Values;
- Problem analysis
- Beneficiaries / constituency
- Your approach, programmes and key services
- What makes you special
- Theory of Change - make use of the GnB theory of change

The components of a Core Case for Support (2)

- Case studies/ success stories
- Future plans – where you are going
- Leadership / expertise - bios
- Capacity Statements (technical capacity), etc
- What you need/ how to get involved
- Cost examples – what \$\$ will achieve

What is a Theory of Change?

- An on-going process of reflection to explore change and how it happens – and what that means for the part we play in a particular context, sector and/or group of people:
 - It considers a programme or project within a wider analysis of how change comes about.
 - It makes us explain our understanding of change – but also challenges us to explore it further.
 - It is often presented in diagrammatic form with an accompanying narrative summary
- **The focus is on what we think will change, not on what we plan to do.**

A simple Theory of Change – Save the Children

We will...

... be the voice

advocate and campaign for better practices and policies to fulfil children's rights and to ensure that children's voices are heard (particularly those of children most marginalized or living in poverty)

... be the innovator

develop and prove evidence-based, replicable breakthrough solutions to problems facing children

... build partnerships

collaborate with children, civil society organisations, communities, governments and the private sector to share knowledge, influence others and build capacity to ensure children's rights are met

... achieve results at scale

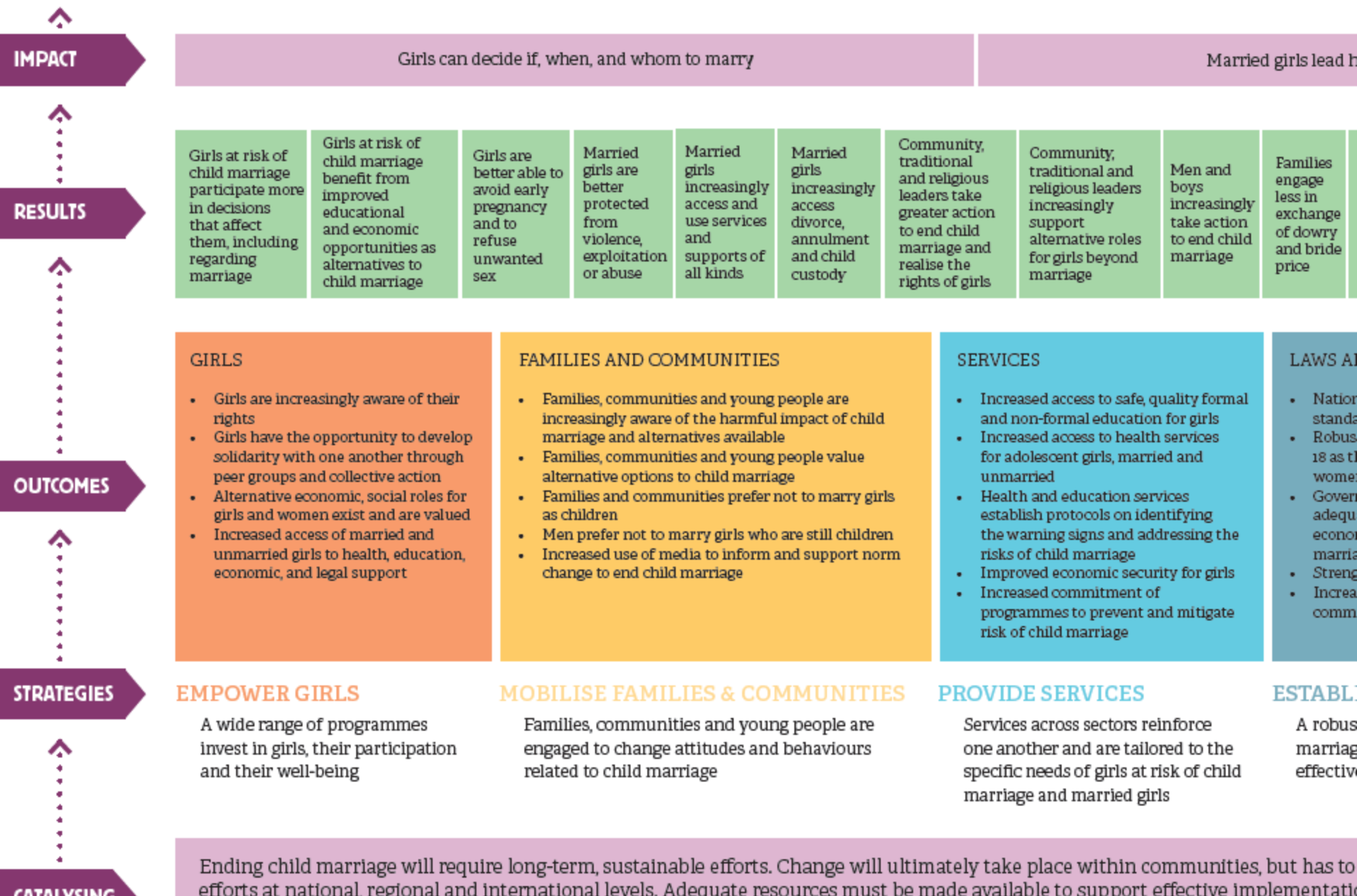
support effective implementation of best practices, programmes and policies for children, leveraging our knowledge to ensure sustainable impact at scale

More resources on Theory of Change

- Girls not Brides: View our new 'Interactive Theory of Change on Child Marriage' an online resource that takes you through the interconnected steps and strategies needed to end child marriage <http://bit.ly/1wY9w9q>
- INTRAC newsletter #51, Theory of Change: What's it all about? www.intrac.org

VISION:

A world without child marriage where girls and women enjoy equal status with boys and men and are able to achieve their full potential in all aspects of life



Other useful resources

Girls not Brides Webinars (Globalgiving)

- “Good Fundraising – Practical Skills”:
<http://www.instantpresenter.com/globalgivinguk/EB53DA808149>
- “Core Case for Support to Boost Your Fundraising”:
<https://attendee.gotowebinar.com/recording/4391370638898774529>

Girls not Brides – sources of funding for child marriage work; a brief guide

<http://girlsnotbrides.theideabureau.netdna-cdn.com/wp-content/uploads/2014/12/Funding-CM-work-A-guide-for-GNB-members.pdf>

Evaluation forms please!

Thank you