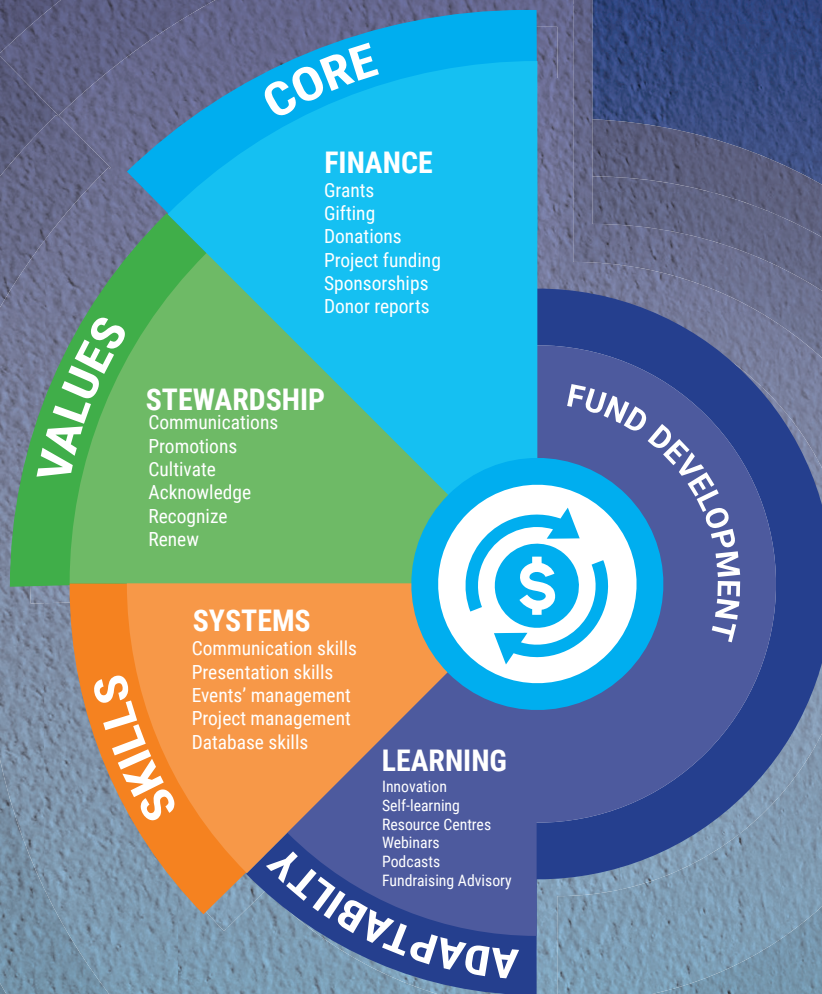


# DEVELOPING DONOR SUPPORT

## Selected Ways & Means for African Non-profits



Peter N. Thuynsma



## ABOUT THE AUTHOR

**Peter Thuynsma** began a parallel career in fundraising in 1976 in Denver, Colorado (USA) for that State's largest Catholic parish. In Johannesburg he managed the *Centre for Black Education and Research*, and *the Institute for Human Rights Education* and was listed on the UN HRC's Roster of Experts in Human Rights Education.

Among others, he has served on the Board of the *International Training Centre of Indigenous Peoples* (ITCIP) in Nuuk, Greenland. He modernized and directed the fundraising function at the University of Pretoria and has been a consultant to several Southern and East African universities and local NGOs. He has also undertaken fundraising best practice tours of Oxford, Cambridge, LSE, Columbia, New York, Fordham, and Georgia State universities.

He helped develop the first certificated course in *Advancement Practice* at the Rhodes University Business School, and most recently taught the *Philanthropy and Fundraising* module for the Wits Business School/CAPSI postgraduate diploma. Formerly Professor of African Literature and later Special Advisor to the Vice Chancellor at Wits University, he has published widely, and guest lectured at local and international universities including Rutgers, Harvard, and SUNY (Binghamton).

He is the managing partner of *Thuynsma Consulting*, a fund development consultancy in Johannesburg.

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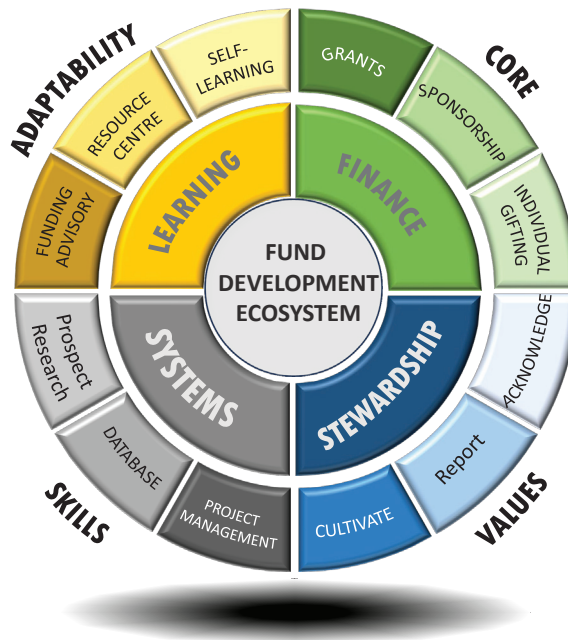
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# DEVELOPING DONOR SUPPORT

Selected Ways & Means  
for African Non-profits



Peter N. Thuynsma



## This book is about selected aspects of the *mechanics* of professional fundraising

I read this book with great interest and all I can say is **Wow!**

It is very refreshing, even for me, who I want to believe falls in the seasoned fundraiser category. It is definitely a jewel for any fundraiser, at any level. I like the practical, systematic approach to donor development and the useful links and templates that come with it... it will definitely be a resource that I would like to use in best practice sessions that I regularly have with my team, especially those elements of the development process where we lack experience, i.e. *theory of change*, *log frames*, *success equation*, to name a few.

The systems thinking approach should be a standard in fundraising entities – its makes for a focussed and disciplined workflow. The many illustrations concretise the concepts and the templates are invaluable worksheets – be it for *letters of enquiry*, *proposals*, *propositions*, *forecasting* or *cashflow* simulations. The templates are extremely useful, so too are the sections on *progress dashboards*, *performance development* (not performance management) and workload.

The seven (7) parts of the book provide a very clear, holistic overview of the elements that are critical in ensuring the success of any donor development office, succinct, to the point, thus making the tool very user friendly.

**David Marupen**, Director: Major Gifts and International Engagement  
Development and Alumni Relations, University of Stellenbosch

---

### **This book is really great!**

There's a ton of information and knowledge contained and I have nothing but praise and positive comments. It is very comprehensive and practical. One of my colleagues has said it should be a standard requirement in development units at our universities.

Thank you for this great contribution to the field!

**Zwakele Ngubane**, Director: Advancement and Alumni Relations,  
Durban University of Technology

---

The guide is comprehensive...it's great to see a variety of frameworks like the *Theory of Change* and *Impact Planning* templates included to offer a well-rounded approach. The sections on *Finding Donors* are very practical and I particularly appreciate the questions to qualify donors - it is a great resource for hands-on application.

The section on *determining value propositions* is also a valuable tool and one I plan to incorporate into our team discussions. Similarly, the suggestion to use internal reviewer panels that mimic funder panels is also useful. The *Write tight*, *Be donor-centred* sections, and the points pertaining to *Capital Campaigns* are crucial and practical.

**Ninette Kotzee**, Research Grants Manager: Department of Research and Innovation,  
University of Pretoria

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# LIST OF TEMPLATES




ACCESS ALL OUR TEMPLATES BY SCANNING THIS QR CODE  
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<https://upmonographs.up.ac.za/index.php/ESI/catalog/book/41>

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2. Service Pledge / Credo **(p.175)**
3. S.W.O.T. analysis **(p.176)**
4. Strategy Map **(p.177)**
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# ABOUT THIS BOOK

This book is made up of two sections: a 7-part narrative of the fund development process, and a set of 43 downloadable templates that are hyperlinked to pertinent sections in the text. The sections complement each other, but they can also be treated as distinct and separate. This means that you can choose to read the work as a tutorial OR to concentrate on either section alone. Do realise that the templates are intended to make developing donor funds more systematic and efficient – they are not short-cuts. They are practical tools to help drive the process from planning and project design, through the imperative stewardship programme and into the communication strategies that underwrite the progression. Each may be accessed by clicking on the link icon  wherever it appears in the text or by using the QR code on page 12.

The text is essentially a storyboard of the fund development process. It follows the stages, the techniques, and the tools involved in attracting and appreciating donor support that both makers and managers should find useful. But instead of being another macro journey through the duties of a fundraiser, this is more of a micro look at the individual responsibilities and descriptions. The variety of checklists, models, 70 accompanying illustrations, along with the downloadable templates help the reader navigate this journey.

The techniques outlined are related to a conventional system of actions that move from framing a project, to finding donors, costing, implementing, and appreciating the benefactor. The downloadable templates are practical tools to help drive the process along from planning and project design, through the imperative stewardship programme, into the communication strategies that underwrite the progression.

The list of contents is deliberately extensive to make it easy to navigate to any section without laboriously having to scroll through the e-booklet. I would, however, recommend that readers who require a more comprehensive look at the whole process, turn to Jill Richie's excellent and detailed overview in her *Fundraising for Non-profits: A guide to starting and resourcing NPOs in South Africa*.

Developing donor support is an extensive undertaking and each stage of the process deserves recognition. In most cases the effort is only measured by the level of support that is raised, but tackling the tasks systematically should account for all the effort that practitioners put into their work. I have found that these efforts are efficiently served and recognised when tethered to a business framework. This publication hints in several places at the use of the renowned *Balanced Scorecard* system (BSC) to account for the financial, donor relations, internal systems, and learning/innovation dimensions of developing donor support. The title page illustration reflects the BSC ecosystem – a system that helped coordinate my work as much as it helped develop my colleagues' confidence, competence, and motivation. Although I incorporated the basic principles of the BSC, I cannot advocate adopting the system without experienced assistance. My reference to this regimen is merely subliminal in the hope that fund developers will explore it or turn to some similar business process (for example, Sustainable Planning) to help discipline their invaluable efforts.

## ACKNOWLEDGEMENTS

I am beholden to several people who made this publication possible. Father Harrington of the St Mary's Catholic Parish in Littleton Colorado introduced me to disciplined, professional fundraising as far back as 1978. I am also deeply indebted to Shelagh Gastrow and *Inyathelo*: the SA Institute of Advancement who, along with the *Kresge Foundation's* Bill Moses, undertook the bold and multi-faceted initiative to professionalise the practice of developing donor funds at several universities in South Africa.

I am grateful to *Inyathelo's* Nazli Abrahams, Khaironisa Fofonkler, and Jocelyn Collins for inviting me to participate in their many training sessions. These were not only excellent times to network, but also to share and test new techniques and ideas. Most of these lessons have found their way into this volume. The opportunities to learn and teach through them are reflected here, but any inaccuracies, anything contentious, or any absurdities, are entirely my own.

Through *Inyathelo's* initiative, I was also privileged to help craft a syllabus and teach in the *Certificate in Advancement* course at Rhodes University's Business School and, latterly, offer an online elective module in the Wits University Business School's *CAPSI Postgraduate Diploma in Resource Mobilisation*. These proved to be useful testing grounds for the perspectives I present in this volume, and most of the illustrations included here are the *PowerPoint* slides I used in those courses.

Tim Seiler, Tyrone Freeman, and their colleagues at the University of Indiana's Centre for Philanthropy's *The Fundraising School's* gave me expert instruction and guidance. These have undoubtedly been my prime source of confidence, if not competence. I thank them profoundly for indirectly validating my decision to make disciplined fundraising my second career.

I am also most grateful to Professor Es'kia Mphahlele for his confidence in letting me run the Council for Black Education & Research (CBER) in Soweto, to Professor Ian Steadman for exposing me to fundraising at tertiary education level, and my thanks certainly goes to Professor Callie Pistorius, the then Vice Chancellor of the University of Pretoria, for entrusting me with managing the handsome Kresge Grant to professionalise Advancement and where we won the challenge grant award four of the five years.

Over the years, one has read much and taken in many a webinar and podcast. Such exposures embedded ideas whose many authors, unfortunately, slip from memory. I acknowledge the many who are woven into this text, and I reflect on many whose teachings I enjoy more frequently. But too many footnotes would have been a nuisance, so I've tucked most of my supporting references into the text itself. Where I have not, it most certainly was not deliberate.

I can only hope that by distributing this e-booklet as a free reference to those who were not as fortunate to benefit from the many training sessions in the *Inyathelo-Kresge* initiative, the descriptions and templates contained here are useful enough to complement their invaluable investments in social service.

## DISCLAIMER

Any information, suggestions, or templates provided in this monograph may be downloaded and used.

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Should anyone detect an inaccuracy in the text or in a template, I would appreciate being notified and promise to investigate and, if necessary, correct any such mistake.

I may be reached at: [peter@thuynsmaconsulting.com](mailto:peter@thuynsmaconsulting.com)

## PREFACE

Fundraising is the gentle art of teaching the joy of giving.  
- Hank Rosso

Donors don't give to institutions. They invest in ideas and people in whom they believe.  
- G. T. Smith

Although there is passing mention of it, this booklet is NOT about fundraising governance, or leadership. Not strictly speaking, anyway. It is about the nuts and bolts of developing donor funding and hopes to be a ready reference to the key processes in raising donor funds. Most of the processes mentioned have a template attached; those that do not, have clear descriptions of how to complete the process. It is not exhaustive nor definitive. It is a reference handbook that should find use in both the maker and the manager's hands. Ultimately, this guide hopes to encourage a more systematic way of shaping projects and securing continued support through purposeful and systematic practice.

It is aimed at assisting African non-profit organisations and non-commercial education institutions to raise support beyond what they receive in state subsidies. It hopes to encourage non-profit organisations to work systematically to strengthen their leverage of current funding sources and to excavate corporate marketing budgets.

The fund development system I advocate is premised on the fundamental difference between African and European/Americas fund development – that Africa’s endeavours do not yet involve a wide range of individual donors. We rely more on philanthropists, foundations, trusts, corporate social investment, and government support. Our tax concessions are not attractive enough to spur individual giving on a scale comparable with overseas countries. Nor have we entrenched the ethos of individual giving (excluding the impressive scale of remissions) that Western nations have built over generations.

That said, I recommend that we work within a system because, even though we all boast of our eloquent organisational plans, we often do not monitor or measure our progress. Where this applies, the following quote might offer some apt wisdom:

You do not rise to the level of your goals. You fall to the level of your systems.  
Your goal is your desired outcome. Your system is the collection of daily habits  
that will get you there.  
– James Clear, Atomic Habits



## BEGIN WITH THE END IN SIGHT!

Let's try to illustrate the dynamics of the fund development world in an analogy.

Consider the activities around a waterhole anywhere in the African bush. There are thirsty animals who need to drink and hungry predators who lurk in or around the waterhole looking to secure their own wellbeing. The common goal for each is survival. For the thirsty there are a few options:

- Be leary and amble to the water hole, slake their thirst and hope there are no predators to scupper their drinking while they spend a long time with their heads down;
- or
- Run past the waterhole, risk a quick sip or two and dash off only to repeat this hyper-conscious activity several times to spend less time at the waterhole and avoid the predators;
- or
- Wait until extremely thirsty, determine when it is safest, dash to the waterhole, take a good long drink to last a long time, and then dash to safety. This reduces the number of times the thirsty animal makes itself vulnerable.

In each case the thirsty animal must deal with the ever-present risks, making each act a gamble for survival. If we relate this analogy to the complexities of fund development, we can see the elements like this:

- Thirst – the non-profit entity's need to fundraise
- Waterhole – the donor pool
- Predator – the risks that are inherent in applying for donor support.

The point is that we need to identify the risks, calculate how to mitigate against them, and secure the support to survive and continue delivering social good. The animal secures its biological survival. The fund developer must secure, appreciate, and ensure continuation of the support for their social project.

The question is whether we will do this by ambling along, chancing, or going about our work methodically and systematically.

This booklet advocates strategic thinking and working with systems. It promotes beginning with the end clearly in sight, not only in mind, and it recommends that the end should be to:

Secure the necessary **support**,  
Steer **progress**,  
*Build* and maintain lasting business **relationships**, and  
*Develop* colleagues' **skills and techniques**.

For those who imagine working systematically will require a sea change, consider this not entirely uncommon scenario: imagine you as the fund developer are faced with the need to leverage support at relatively short notice (i.e. not the usual 3+ months to run a concerted campaign). The first thing to do is to compile (assuming there is not one at the ready for such exigencies) an up-to-date Top 50+ *Large Donor List*. Ideally, this list will come from an up-to-date donor database.

From this list:

1. One-by-one, consider those who have supported your organisation recently, who receive your blog/newsletters and who volunteer.
2. Determine their level of commitment by what activities they attend(ed), or comments they may have made about your organisation/projects.
3. Are their interests aligned with this particular project?

We know, instinctively, that there is no time to stumble about, that there must be an orderly way to address the task. Even such a short-notice endeavour will benefit from following a logical sequence of activities. So too will larger, continuing campaigns benefit from a pre-determined progression of activities instead of a random flailing about doing things as they present themselves. This booklet will explore how such a system can be implemented. It will describe each stage and provide simple templates to assist in applying the techniques. If adopted, this system will ensure that activities happen and then allow for progress to be planned, measured, and reported – all the while keeping the donor at centre stage.

Before we get into such a system, let's turn our attention to naming. This is a volatile arena where several names for what we do change hands. I've seen many a friend and fellow-professional gulp when I called myself a 'fundraiser'. It seems that 'fundraiser' is too mundane a title. Other labels get used, dissolve, and resurface, soar, and subside on the seasons of current currency – perhaps we'll circle back to 'fundraiser' one day.

But in the meanwhile, what's in a name? Everything! Especially when it describes a business process. I'd venture to say as many of those who sell things balk at being called a *salesperson*. Those who skirt *salesman* prefer 'sales executive', or 'product representative', and a host of other euphemisms that do nothing to change the fact of selling something and satisfying a customer. These are glossy terms to mask a legitimate service.

Fundraisers are no different. We prefer to pin such terms as programme officers, client liaison/

relations officer, advancement specialist, gift officer, project executive, and a host of similar labels to our lapels. Even the very practice of leveraging support is draped in elaborate robes like development, advancement, and resource mobilisation. Each has its own merit, and each describes activating several processes towards raising donor support. If it is perhaps easier to see why salespeople wish to be known by glossy titles, the common misconceptions about fundraising make it almost expected that fundraisers will be equally bashful.



**Figure 1: The titles by which we work**

The overall label for a process should be an accurate envelope of the activities and protocols. Loathe to offend, I've chosen a middle of the road title to describe the system of identifying likely donors and realising and keeping their support. The contending alternatives to fundraising dictate that I choose a more neutral yet pragmatic title and so *Fund Development* it is to lasso the several processes and practices.

This compilation is an outline of practices and tools I have used over nearly 40 years in both a part-time and full-time capacity, as a slogger fundraiser, as manager-fundraiser and latterly, as consultant-trainer. And, for those who say fundraising is not a *business process*, think again. It involves someone's hard-earned profit, involves making an investment decision, and it means reporting on that investment. But a donation is *not* an investment, you say. Well, it is the support given to make a social change. It was given in exchange for an affect that was considered worthy, even noble. It was given with the full expectation that it will be used to make the difference it promised it would – that would be the expected return on the investment (RoI).

Since we are uneasy with what to call ourselves, we should also debate whether what we do is indeed fundraising and not *financing*. Perhaps we ought not to be uncomfortable that fundraising spills over into

the commercial lexicon. Our leveraging donations to deliver a social impact is really not, theoretically at least, that far removed from a banker leveraging funds for a financial return. Both practices work towards a positive return – whether that return is in achieving social good or personal wealth, whether it be warm and fuzzy, or coldly monetary. But that discussion is for another place, if not another time.

In truth, one needs to be unwavering in regarding fund development as an investment in social change. An investment that demands impeccable moral values, effective people skills, precise communication, and a great deal of care. In other words, if done properly, if done in a business-like manner, fund development must be professional. It must build up to making the ‘ask’ AND regard the ‘ask’ as an exchange of skills for support. Because this exchange is an activity that will benefit people, it should be regarded as a noble exchange of skills and support – an investment towards satisfying delivery with a positive social effect.

Our purpose is straightforward: *identify; cultivate; solicit; and steward*. Hardly different from a sales process of identifying a product and likely customers; marketing and attracting customers; making the sale; and being prepared to support the decision to make the purchase (satisfy, exchange, maintain, etc). So, a name does matter, and it should be a pithy statement of the operation. I hope *Fund Development* will serve the purpose of this e-booklet.

We must understand, though, that if we are to be fussy about what we call ourselves and borrow from business terminology to make sure that our labels reflect our legitimacy and professionalism, then **we should also be as discerning about being systematic and tech-savvy in our procedures.**

Most people believe that developing donor funds is a simple business. Afterall, one simply saunters up to a person known to have resources, and one asks. Sometimes they give, sometimes they don't. If they don't, you move on to the next. All you need is rhino-thick skin and perseverance. If your ‘ask’ is successful, you celebrate and plough it into your project until it is time to ask once more.

If only it could be that simple!

Even the briefest glance at the size of this publication will suggest that the activity of raising donor support is not quite as straightforward as the scenario above makes it out to be. But however slim a volume this is, it also indicates that there is a fair degree of sophistication and know-how involved. That same brief glance will show that this is not by any measure a definitive or an exhaustive guide to the process of developing donor support. It should, however, provide a clear roadmap to a systematic process that will ensure careful planning, formulation, execution, and stewardship.

These pages aim at being a ready reference to promote and encourage working to a sequential system where one activity follows logically on from a previous one and feeds into a subsequent one. One that is flexible and can happily accommodate cross-referencing.

The system begins with formulating a project or programme in such a way that it will convince a donor of its merits and potential and will ensure that it achieves its goal. It flows through the costing and budgeting stage into developing promotional and solicitation documents, then works its way through cultivating donors, accepting a viable agreement, and goes on to nurture and renew the relationship with a donor. At any and every point during that cycle, cross-referencing and collaboration is welcomed, much like a carpenter or bricklayer would confer with an architect, a cardiologist with a nephrologist, an F1 racing driver with a race engineer, and a first violinist with an orchestra conductor. So too, a fundraiser may pick up suggestions in a meeting with a donor and feed it back to the prospect researcher to refine a search, or to the project design team to tailor the project contours to align it more with a prospective donor's interests, or to the finance officer to adjust a budget to meet a donor's requirements. Although it is a system, it is not a robotic progression!

The fund development process is an enterprise. It is a social enterprise and the templates at the end of this booklet should help drive both performance and personal development. The cyclical process traces the balanced scorecard (BSC) model where all activities are viewed in four categories, viz. finance, client, services, internal systems, and learning. The BSC runs in the background and is merely peripheral. Using the templates included in this publication would only harness a fraction of the power of the fully balanced scorecard. But even if deployed superficially, it would provide added focus and discipline.

Before we begin, I recommend you take a hard look at the next three Figures; these exercises might help orientate you to what lies ahead.

Many people hold interesting, sometimes contending opinions of what fundraising is, and what it is not. Look at some of the more prominent misconceptions or assumptions listed in Figure 2.

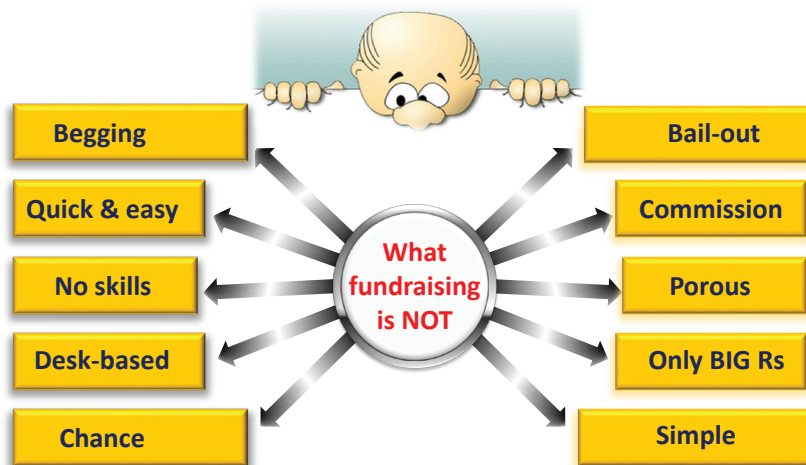


Figure 2: Misconceptions

Can you refute each one?

You might also wish to test your own concept of whether fund development is *begging* by attempting this simple exercise: divide a page into two columns. Head the first column with the question *What do we get from donors?* List as many of the benefits we derive from our donors. Head to the second column with *What donors get from us?* Proceed to **list as many items** as you think donors receive from associating with us. Which turns out to be the longer list?

WHAT WE GET FROM DONORS	WHAT DONORS GET FROM US

The chances are that the right-hand column will have the longer list. If that is so, can we still think of the fund developer as begging rather than giving more than they receive?

Now look at Figure 3 and ask yourself whether the statements in the left-hand column apply to you. Compare your answers with the statements in the right-hand side column.

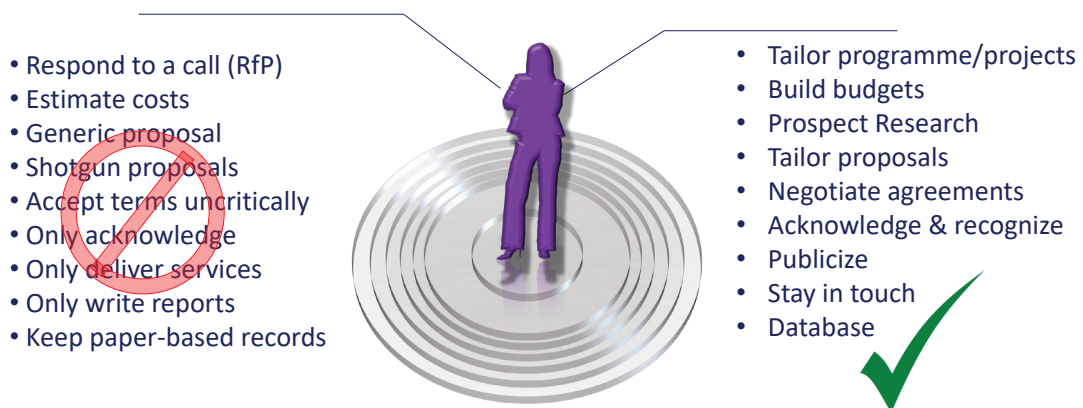


Figure 3: How do you raise funds?

Which column reflects your fund development practice?

## WHAT THEN IS FUND DEVELOPMENT?

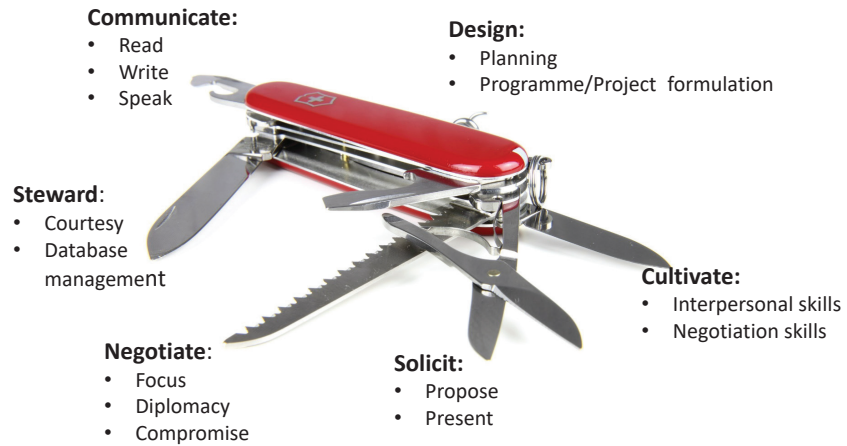
Here is a cursory overview of why this publication prefers fund development as a comprehensive term to describe the process over the several other terms in current use, such as *Development*, *Advancement*, and *Resource Mobilisation*. Fund development is guided by organisational and strategic leadership and activates several complementary processes.

FUND DEVELOPMENT	FUNDRAISING
<ul style="list-style-type: none"> <li>• Fund development is long-term organisational development</li> </ul>	<ul style="list-style-type: none"> <li>• Fundraising is organised for short-term relief.</li> </ul>
<ul style="list-style-type: none"> <li>• Fund development is an interlocking sequential series of activities that is agile enough to encourage cross-referencing and teamwork.</li> </ul>	<ul style="list-style-type: none"> <li>• Fundraising is essentially a responsive and reactive practice that acts on notices, or impulsively, on perceived opportunities.</li> </ul>
<ul style="list-style-type: none"> <li>• Fund development is built on a base of sensible, calculated investment planning and is woven into the complete operation of an organisation.</li> </ul>	<ul style="list-style-type: none"> <li>• Fundraising is usually organised around meeting immediate needs.</li> </ul>
<ul style="list-style-type: none"> <li>• As a social enterprise, fund development follows sound business principles and practices that encourage professional growth and measures progress.</li> </ul>	
<ul style="list-style-type: none"> <li>• Fund development is guided by organisational and strategic thinking.</li> </ul>	<ul style="list-style-type: none"> <li>• Fundraising is usually left up to committees and lower-ranking practitioners.</li> </ul>
<ul style="list-style-type: none"> <li>• Fund development is based on a communications and promotional plan which identifies and addresses appropriate market segments.</li> </ul>	<ul style="list-style-type: none"> <li>• Fundraising is aimed at a more general public segment.</li> </ul>

To raise support from donors, fund developers must believe in a social cause or purpose, they must be able to shape that purpose into a business-like concept, find a donor who is likely to be interested in the concept, project, or programme, and draw them into a partnership. When successful, fund developers need to ensure that the exchange of skills and experience with in-kind or financial support is cost-effective and will benefit both partners. Throughout the endeavour, the supporters' interests must be satisfied through deliberate and meaningful communications that work towards continuing the partnership.

All this means is that a fund developer must be skilled in formulating projects (project design), finding likely donors (prospect research), costing materials, equipment and labour (budget building), approaching (cultivating) and convincing prospects of a project's worth and impact (solicitation); and,

in maintaining the relationship that has been built (stewardship). In other words, a fund developer/ advancement officer/programme officer/resource mobiliser, or fundraiser needs to be something of a Swiss army knife, as Figure 4 illustrates – to be prepared to engage a donor in a wide variety of ways.



**Figure 4: Fund developer qualities**

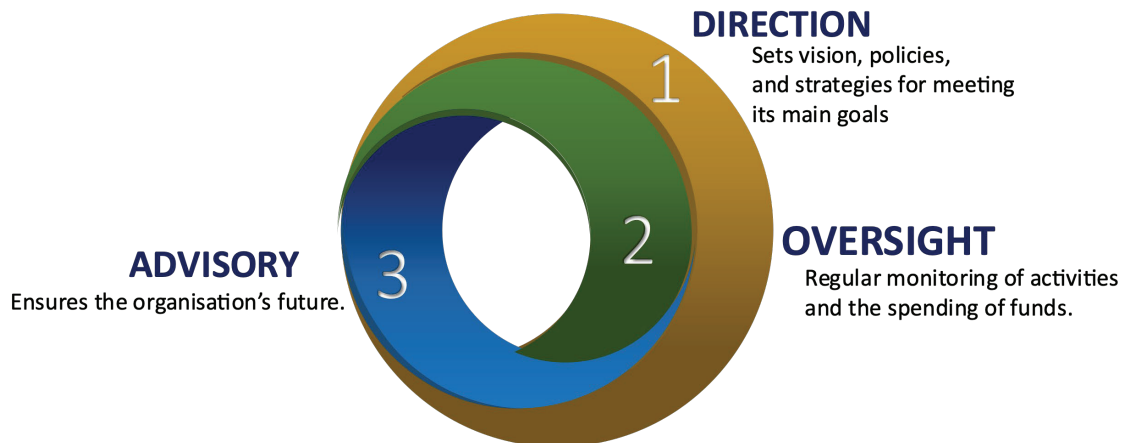
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# PART 1: GOVERNANCE & OVERSIGHT

## GOVERNING BOARDS

It might not be entirely out of place to liken governance to a mobius ring which represents the endless cosmic process of cause and effect – denoting how the levels of governance should fold seamlessly into one another.



**Figure 5: The mobius ring of governance**

Governance gives direction on the organisation's vision, policies, and strategies for meeting its main goals, for example, what it hopes to achieve and how it will serve the specific need it has identified in a community. It has broad oversight of the organisation by regularly monitoring its activities and how it spends its funds. It gives input on fundraising and other resources that may be targeted/utilised to ensure the organisation's future.

The governing Board of an organisation is, as its name implies, the ultimate authority to advise and decide on directions and resources. The Board members' roles in fund development are to:

- Review & approve vision, mission, critical issues, and tasks;
- Ensure the organisation fulfils its legal obligations;
- Ensure adequate resources;
- Commit to planning;
- Help prepare and approve plans;
- Approve final plans;
- Ensure plans become operational – implemented & tracked;
- Advise and coach towards accomplishing the set goals;
- Ensure full & defined participation;
- Decide on approaches;
- Promote the organisation’s public standing;
- Co-ordinate committees or panels;
- Recruit new Board members;
- Appoint & evaluate the executive director; and
- Conduct self-assessments.

Of the 10 essential responsibilities that the King Commission on corporate governance in South Africa recommends, the following five apply most universally:

- **Ensure effective planning.**  
Boards must actively participate in an overall planning process and assist in implementing and monitoring the plan’s goals.
- **Monitor and strengthen programmes and services.**  
The Board’s responsibility is to determine which programmes are consistent with the organisation’s mission and monitor their effectiveness.
- **Ensure adequate financial resources.**  
One of the Board’s foremost responsibilities is to secure adequate resources for the organisation to fulfil its mission.
- **Protect assets and provide proper financial oversight.**  
The Board must assist in developing the annual budget and ensure that proper financial controls are in place.
- **Enhance the organisation’s public standing.**  
The Board should clearly articulate the organisation’s mission, accomplishments, and goals to the public and garner support from the community.

South African civil society has gone a step further and formulated an *Independent Code*. Organisations that serve the public good can subscribe and append the Code decal to their publicity materials, e.g. a website, to pronounce their ethical stances. Non-profit entities can subscribe to the Independent Code at: <http://www.governance.org.za/subscribe-to-the-code/>



**Figure 6: The Independent Code**

The Code includes eight fundamental values to guide legal, fiscal, and leadership principles for NGOs both in RSA and on the African continent.

It is not uncommon to encounter staffers who are dissatisfied with their governing Boards and their discontent focuses on too much involvement in the daily operations and/or on their reluctance to become involved in raising the necessary funds. Simplistic as this may seem, more concerted recruiting, orienting, and assigning portfolios may be the immediate solution. Boards should consider structuring themselves into pertinent portfolios to carry out their key responsibilities.

Each stipulation is crucial, however, it might be useful to look at the one item that is invariably absent from constituting Boards in several African non-profit organisations – orientation or onboarding. It begins with the recruitment process that must keep three aspects very clearly in mind:

- fund development knowledge, if not also fund development experience;
- mediation skills (from committee roles held); and
- a clear sense of what to expect from the Board member and what the Board member expects from the organisation.

This orientation should be the responsibility of a single staff member who should have, at the ready, a comprehensive package of documents, viz.:

- Organisational charter/guidelines;
- Any specific Board guidelines (expectations, any compensation, etc.);
- List of staff names and responsibilities;
- List of projects & programmes with a short description of each (goal, objective, budget, risks);
- List of policies & protocols;
- Operational guidelines;
- The current strategic & fundraising plans (along with any recent reviews);
- Recent meeting minutes & any project reports;
- Recent finance & fundraising overview;
- Any supplemental information;
- An appendix of pertinent documents (media reports, white papers, etc.).

An inconvenient point worth making is that donors may ask  
(if only to themselves) whether  
*“...the organisation/programme/project believes enough in itself to contribute to itself?”*  
This translates into, **are you prepared to invest in your own work?**

It is common practice elsewhere to expect non-profit Board members to voluntarily contribute to the functioning of their organisation. It is also not uncommon for staff members to donate to their own organisation or projects – after all, you would probably buy shares/stock in the successful commercial company you worked for, wouldn't you?

Ultimately, it is imperative that the Board engages itself in developing support without being unusually nervous or resentful of the practice. It might mean Board meetings should include information and/or training sessions.

## POLICY FRAMEWORK

If we understand the policy to mean the regulations by which we conduct our business, then a service pledge should be the headnote.

## SERVICE PLEDGE

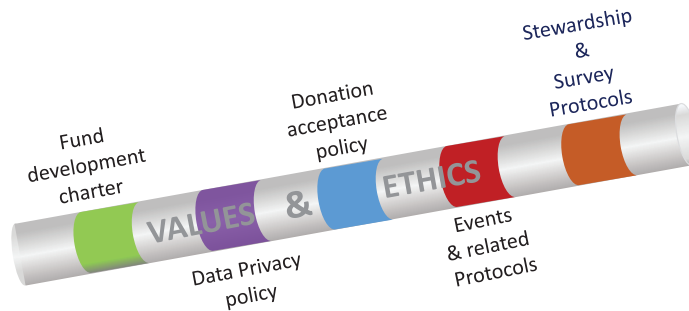
Although not strictly a policy, it is the code of conduct each employee adheres to. It should be posted conspicuously, yet it is not! In fact, it is often a document that is totally disregarded. A generic, downloadable template is the first of the list of 40+ templates at the end of this publication to suggest such guidelines.

There are several policies that should determine a fund development enterprise's conduct and ethics. Key to such a framework should be:

- A charter or mandate (general regulations)
- Fund development guidelines (ethical & procedural stipulations)
- Data management policy (protection of privacy)

Although these three **keys to such a framework** could be rolled into subsections of the Fundraising Charter, they could also be stand-alone documents for distinct reference.

One could, conceivably, regard a fund development enterprise as a glass rod – strong and transparent, but also brittle. The rod itself could represent the ethical standards on which the enterprise rests and bands or straps (policies) ensure its strength and integrity.



**Figure 7: Essential policy framework**

Several organisations also have a plethora of protocols or procedures to be followed to streamline activities. Examples are:

1. **Event's checklists and protocols**
2. **Annual fund / Recurrent donations**
3. **Alumni relations**
4. **Media relations**
5. **Appointing service providers/vendors**
6. **Surveys**
7. **Donor administration**
8. **Photographic services**
9. **Social media**
10. **Corporate identity**
11. **Privacy,**
12. *....and several others that apply to how you work.*

## **PRINCIPLES OF DATA MANAGEMENT & PRIVACY**

Donor privacy must be of prime concern. Maintaining a record of all activities that involve donors, whether it be as a notebook list, a software spreadsheet or worksheet, or a dedicated donor database, is imperative. Each activity must be captured for possible future reference and of course, those activities must be tied to the identity details of a donor or prospective donor. Therein lies the rub. Privacy is paramount – not only for legal reasons, but for simple human decency.

More formally, organisations must regard the donor and financial data they hold as:

- a strategic asset that should be managed as such;
- a business discipline, not merely as a project;
- the foundation upon which all enterprise initiatives are built;
- having a common glossary of shared and approved business terms and data;

- definitions with a clear curatorship and ownership;
- being the only version of the truth for enterprise data;
- data that is actively managed and is trustworthy;
- information whose management needs to comply with legal and regulatory requirements, internal policies, and follow sector best practices and standards;
- data that must be accessible and understood by relevant portfolios as needed to carry out their duties;
- directly or indirectly accountable for different data management practices that are
- clearly defined, assigned, and managed; and
- whose governance efforts, goals and objectives, priorities, decisions, and deliverables (*procedures, processes, standards, policies, framework, etc.*) that are always communicated and made available to the entire enterprise.

NOTE:

It is important not to confuse Governance with management.

A useful distinction is to think of Governance as determining the “what” – what the organisation does and what it should be in the future. Management controls the “how?” – how the organisation will operate to reach its stated goals and aspirations. Management, therefore, focuses on the operational side of the organisation, which is equally important.

Our references to organisational leadership from this point will be to management and operations rather than to governance.

# PART 2: PLANNING FOR SUCCESS

Witticisms and affirmations about planning abound and this is among the more prominent ones:

If you don't know where you are going, you'll end up someplace else. (Yogi Bera)

And perhaps the most famous of all comes from Lewis Carroll's *Alice in Wonderland*:  
*If you don't know where you are going, any road will get you there.*

For our purposes the most pertinent may be:  
*Planning is bringing the future into the present so that you can do something about it now.*  
(Alan Lakin)

An organisation's strategic plan provides its institutional view. It is a document that sets out a multi-year view with broad goals, general processes to reach those goals, and portfolios that are to be custodians of those goals. Typical sections in a strategic plan are:

- Strategic theme
- Values statement
- Action-based strapline\*
- Vision statement
- Mission statement
- Goals
- Objectives
- SWOT analysis
- Focus areas with a timeline, and the
- Portfolios that will carry the responsibilities

\*Effective *straplines* are punchy and deliver sharp messages that galvanise staff. More often than not, they condense a mission statement into pithy everyday language. Here is a simple guide to help design a strap/tagline. The ideal attempt should be a S.U.C.C.E.S. because it is:

- Simple
- Unexpected

- Concrete
- Credible
- Emotional
- provokes a Story.

Among the best known are:

- Nike's *Just Do It*;
- TED Talks', *Ideas worth Spreading*; and
- FNB's *How can we help*.

The central features of a strategic plan are the Goals, Objectives, and *Timeframes* and it is only really meaningful when displayed in an Action Table, like the generic schematic in Figure 10.

After articulating goals and objectives, it is most useful to undertake a SWOT analysis. Although often anecdotal, it does help sketch the environment for a project or programme. There is an easy template available as Template 2 of Figure 8. It is good practice to revisit a SWOT analysis several times a year and certainly when developing a new initiative.

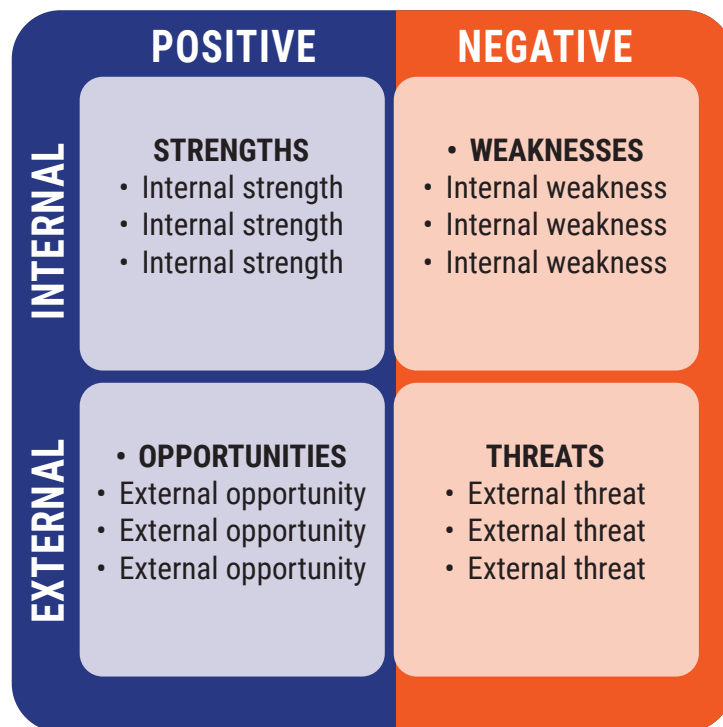


Figure 8: SWOT analysis template



## STRATEGY MAP

Fund development units are focussed operations and require more specific planning documents to guide and track their own paths – whether they are a stand-alone unit or an entity within a larger organisation. Their planning should ideally begin with a broad, or bird’s eye view of what the unit hopes to be within a given time frame.

The example of a strategy map in Figure 9, is based on the Balanced Scorecard (BSC) approach by dividing a long-term plan into four perspectives: *financial; donor relations; internal systems; and innovation and learning*. If this exercise is adopted, the BSC categories need not apply as an actual regimen; it is simply used in this example for convenience as a structured guide. Each of the four blocks (perspectives) can as easily be regarded simply as operational stages.

The example of a strategy map plots a path of several initiatives to strengthen the unit along four strategic perspectives. The left side contains initiatives that will serve the **financial perspective** of fund development, while the right half lists activities that will ensure the **efficiency** of the process. Building a strategy map within these four parameters can produce a clear and incremental guide to comprehensive strategic fund development by building a robust infrastructure.

Here is a generic example of such a *strategy map* populated with sample data. Once populated, it is a strategic guide to activate specific initiatives that, together, will work towards building a viable, holistic, social enterprise.

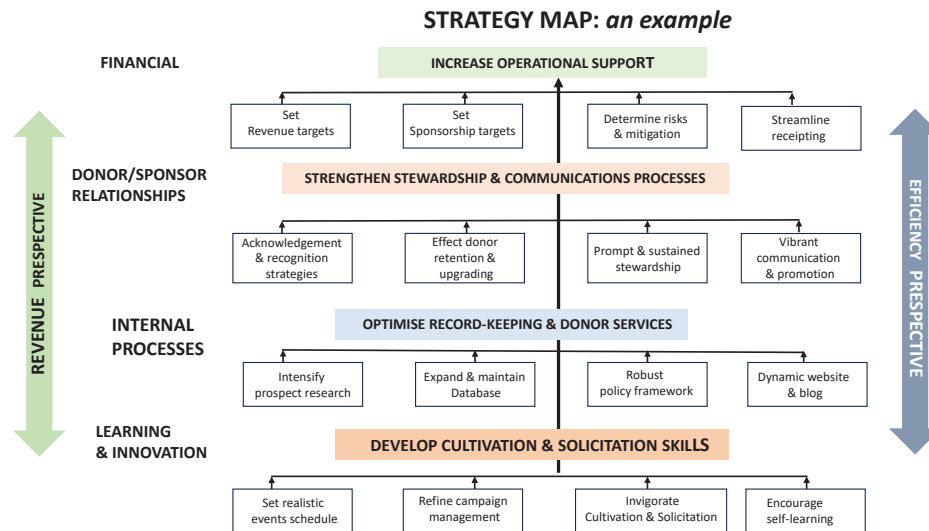


Figure 9: Sample strategy map

## FUNDRAISING PLAN

Strategic plans are typically those of the institution or the organisation. Fund development units usually have more specific planning documents to guide and track their own paths. These are more tailored schematics towards developing support for various projects/programmes via particular activities and within certain timelines (See Fig. 10).

So, from the high-level institutional/organisational Strategic Plan, a fund development unit would identify to which of the main document's goals and thrusts (or focus areas) they would contribute, then use these to sculpt their own *Fundraising Plan* with the following components:

- Values statement
- Action strapline
- Mission (specific to fundraising but also which compliments the organisation's purpose)
- Vision (ultimate, anticipated result)
- Goals (milestones)
- Project management timeframe (Gantt chart)
- Tactics (strategic activities to be deployed with accountability and timeline)
- **Template 6** provides a more detailed guide to building a fundraising plan.

(In practical terms, fund developers derive their direction and broader goals from the institutional plan and customise it within their own capacities. For instance, when an organisational plan sets a task of sheltering the homeless, the fund developers will anticipate or agitate for a specific remedy project. They would then shape that remedy project or intervention into doable components, cost them, and identify possible donors to approach.)



**Figure 10: Generic fundraising framework**

Fundraising plans can be simple or extensive, but like all plans, they need to have buy-in from all who will be involved. The headings are standard and among the most essential questions to ask in building a Fundraising Plan are:

QUESTION	POSSIBLE RESPONSES (SUGGESTED RESPONSES)
1. Which <b>values</b> will guide you?	Honesty, respect, compassion ...
2. What do you <b>need</b> to run your programmes or projects?	Money, equipment, advisory, services, more deliberate Board recruitment & onboarding ... Use a forecasting template, build a cash flow budget.
3. Which development <b>strategies</b> worked well in the past?	Face-to-face meetings, letters of enquiry, subscriptions to donor databases, networking at functions & events invitations, demonstrations, exhibitions, podcasts, webinars ...
4. What <b>new initiatives</b> would you like to tackle this year?	Try fresh approaches to performance development, new tracking methods, build a stronger stewardship programme, introduce/ improve the weekly blog, adopt an actionable rationale, e.g. <i>Give to be able to Get</i> .
5. Where can you find <b>new donors</b> & sponsors?	Through networking, Board introductions, scouring annual reports from other organisations, subscription databases ...
6. What are your <b>strengths</b> and how can you capitalise on them?	If it is <i>writing</i> – develop your communications programme; if it is <i>networking</i> – host or attend more events; if it is <i>speaking</i> – consider hosting panel discussions, symposia, community radio/civic association discussions; if it is <i>presentations</i> – offer to train or advocate/advise...
7. Who can <b>help</b> you?	Make a list of people in cognate professions and in commerce who you know and who you can approach – (the key guideline here is “Ask for money and you are bound to get advice, ask for advice and you are likely to get money”).
8. What <b>support</b> will you need?	Make a comprehensive list of what you will need during the year, prioritise and timeline each item with a short rationale of why it is needed.
9. <b>By when</b> will you need such support?	Develop a cash flow budget.

These questions can then be detailed in an Action Plan similar in format to that in Figure 11.

 **FUND DEVELOPMENT DEPARTMENT**  
**ACTION PLAN: MONTH - MONTH 20XX**

Category	Target	Responsible Person	Assisted by	How	When	Status
Foundations						
Corporates						
Sponsorships						
Recurrent Income						
Events						

**Figure 11: Sample action plan worksheet**

A pivotal principle here is:  
An idea in a plan without an action plan is nothing more than a wish

For anyone wishing to frame a specific fundraising action plan to serve not only the revenue aspect but also a more holistic developmental angle, then one that works within the parameters of the *Balanced Scorecard* system (BSC) seen in Figure 12 could be ideal. Such an action plan would organise its individual planned actions under the BSC canopy of *finance, donor relations, internal systems, and learning/innovations*. The table below illustrates how such an action plan would be structured.

 **ACTIONS PLANS: January - December, 20XX:**

**Portfolio:**

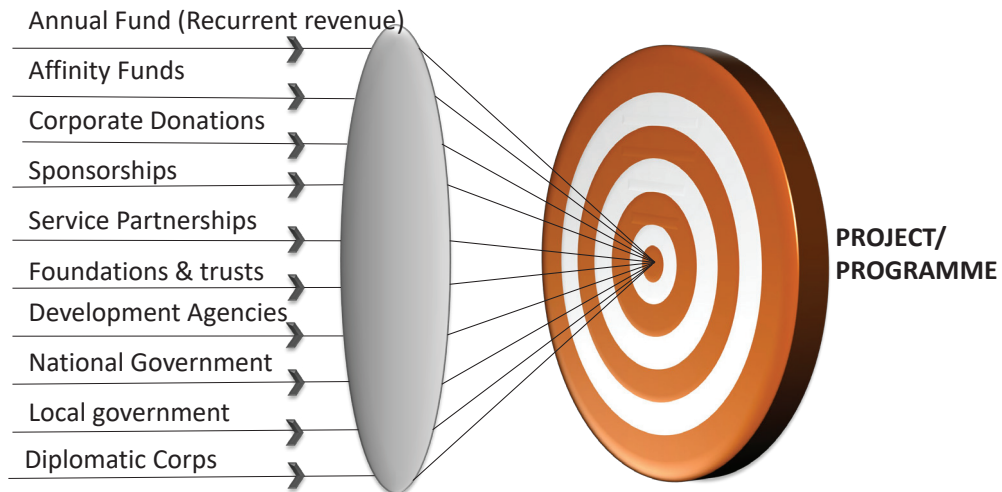
**Name:**

BALANCED SCORECARD CATEGORY	TARGET	RESPONSIBLE PERSON	ASSISTED BY	WHAT	WHEN	STATUS SCORECARD
1. Financial						
2. Internal Systems						
3. Client/ Donor						
4. Innovation & Learning						

**Figure 12: BSC action plan worksheet**

## REVENUE SOURCES

We derive our support from a variety of sources as Figure 13 illustrates.



**Figure 13: Typical revenue sources**

Briefly, they are:

## AFFINITY PROGRAMMES

Like credit card loyalty plans, corporations have instruments that match or contribute a percentage of a purchase to a cause. In its simplest form, an affinity programme could be a matching fund, where a company matches a donation. Another form would be a bank offering to support a cause if a client opens and maintains an account savings/investment/ or deposit account in, for example, environment, wildlife, sports code, etc.

## ANNUAL FUND

In the current African environment, we would feel more comfortable referring to these as *recurrent funds* or something approaching it. Such support typically comes from modest donations made regularly, viz. monthly, quarterly, or annually. Such funds should be regarded as bread 'n butter and be hotly pursued. They are often unrestricted and are excellent to ensure a healthy cash flow and deserve dedicated energy. Educational institutions tap into their alumni for such individual donations.

## CORPORATE PARTNERSHIPS

Such partnerships can come as corporate support from the CSI (Corporate Social Investment) budgets, or separately as corporate sponsorship from a company's marketing budget.

## EVENTS AND SPONSORSHIPS

Events in themselves are not always worth the time and effort it takes to make them happen (unless it is a church fête or bazaar where everything for sale or entertainment is usually donated regardless of time, effort, cost of ingredients/equipment, or travel).

Events that are properly sponsored are those that have listed every single aspect that will benefit a sponsor. Such events would have calculated the marketing/exposure value of each item in relation to the category of audience and brand value and arrived at an agreed RoI (Return on Investment). Every element of an event needs to be listed as a benefit to a sponsor, then calculated as a brand value and **sold to a sponsor**. This flies in the face of traditional approaches that simply ask a sponsor to contribute to the costs of an event – oblivious of the value the sponsor will gain from everything from logo placement to product displays and demonstrations, and several others.

Arguably the most important aspect of an event that hopes to raise profile and support lies in the follow-up strategies, viz. recording details of who attended, demonstrating gratitude to attendees, contacting those who RSVP-ed but did not attend, contacting those who did not acknowledge receipt of their invitations and a host of other courteous actions. Each activity that went into staging an event must, without fail, be recorded in a database (for more on what to capture, see Figure 68: What to Measure, on page 141).

## PLANNED GIFTS

In their simplest guise, a planned gift is a donation bequeathed in a Last Will and Testament to a cause, campaign, or organisation after the benefactor's death.

Another form would be for a benefactor to include a cause, campaign, or organisation in an insurance policy that will channel specified support upon death or when such an insurance policy matures. There are several other planned giving facilities that investment officers may suggest to suit particular purposes.

## DEVELOPMENT AGENCIES

The EU (European), DFID (UK), USAID (USA), GRZ (Germany), CEDA (Canadian), SEDA (Scandinavian), Australian Aid, etc. are among the more prominent bi-lateral agencies that serve African civic society. They offer both substantial and on occasion, smaller grants, but they are more concerned with making a significant impact and require extensive solicitation. Disbursement processes are often onerous and follow exacting accounting and business practices.

## GOVERNMENTS

Governments mandate many, if not all, of their individual departments with assisting non-profit entities with their civic missions. Parastatals, such as the tax collection agencies and lottery Boards indicate the wide range from the most unlikely to the most obvious department donors. Local government may also have budgets allocated for social service projects. Although often encumbered by dense bureaucracy, accessing state funding is also a useful endorsement of social action.

## FOUNDATIONS & TRUSTS

Probably the best-known source of philanthropic funds are foundations and trusts. Grants from these entities also require extensive preparation, well-managed implementation, and meticulous impact assessment.

## DIPLOMATIC CORPS

Embassies and diplomatic missions often support smaller or definable-term programmes, however, in exceptional circumstances, they are also able to harness funds for more substantial programmes.

## COSTING & FORECASTING

Even before we approach these sources, it is necessary to have a fair idea of what we need and who we will approach and for what kind of support, be it financial, service, advice, equipment, or an in-kind donation.





In other words, unlike simply taking the data and making a picture story out of it, this forecasting template will provide something of a simulation. You are imagining what would happen if you were to apply your choices. Of course, no amount of simulation can predict exactly the degree of success you'll have in securing the funds, but a reasoned simulation is preferable to flailing about in trial and error.

Your financial forecasts will have been based on your operational and project/programme needs and then be entered into a master budget. We will explore building and managing budgets in Part 3.

Less necessary but often useful, is an exercise **to take stock, to inventory** the project and programmes in your stable under the following headings (sample greyed-out text to be replaced):

PROJECT	SHARED & CONCOMITANT VALUE	OPPORTUNITIES & SUSTAINABILITY	RISKS & ASSUMPTIONS	CAMPAIGN OPTIONS	INITIAL PROSPECT CATEGORIES
<p>ECD</p> <p>XXX developed a model to improve the quality and promote the sustainability of centre-based care in resource-poor environments.</p> <p>The aim is to provide a holistic programme, incorporating a health component to help ensure adequate child nutrition, monitor child growth, and refer children for available services.</p>	<p>XXX worked with local unregistered ECD centres in Amatole Eastern Cape to develop them to be able to be registered with DSD for a grant. XXX built capacity of the ECD staff to be able to receive a qualification in ECD. Identified needs in community ECD centres and raised resources to provide the infrastructure and upgrades necessary to be licenced to practice legally.</p>	<p>The model is in place and can be expanded and reenergised to other provinces. ECD support is collaborative, identifying resources that already exist within the local community, working with each centre to identify both their strengths and their needs, then coordinating access, and monitoring the delivery of needed inputs. Beyond a coordinating role, promote sustainability through mentoring, helping to bridge the gap between the provision of training, materials, and other inputs. Enable better centre management, better classroom practice and better child outcomes in the long term.</p>	<p>XXX may not want to share model with us exclusively. Funding environment for ECD is fairly oversubscribed. May not get buy in from DBE and DSD departments for the project. Need to find a training institution to provide the ECD centre manager with training to qualify as a ECD certified institution.</p>	<p>Just fundraising for a particular geographic area and small number of ECD centres so that impact is high. In this case it is more quality and not quantity to ensure sustainability and continuity. Foundation grants from – XX, XXX, XXXX. Arrange a gala event just for this purpose to generate unrestricted funding so that it can be used to attend to the needs of the project as they arise – e.g. a building/ training/ supplies for ECD activities/ Translation of materials/ payment of staff to do the job.</p>	

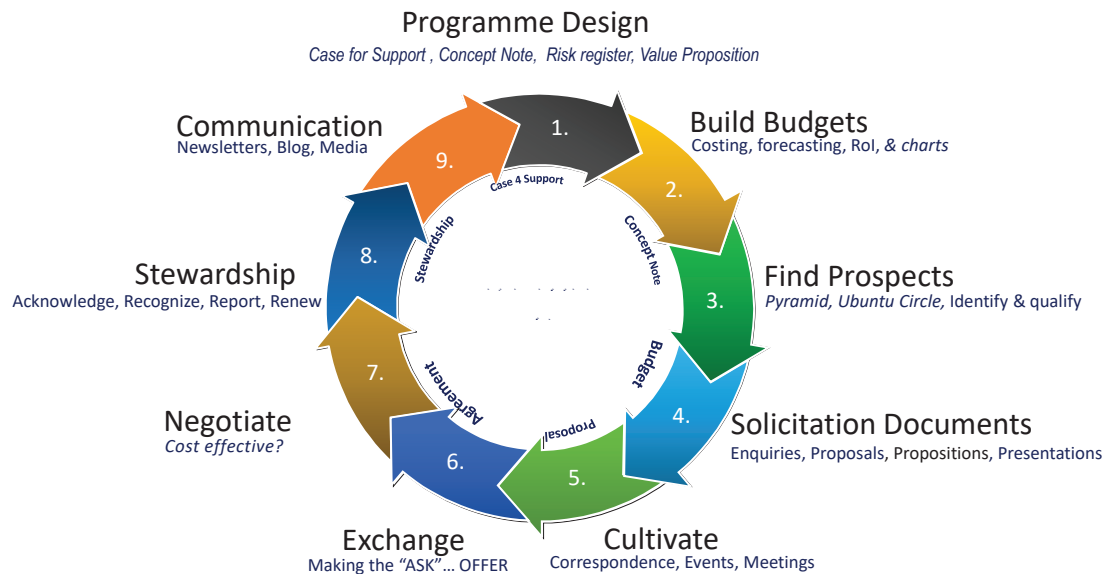
**Figure 15: Project fundability inventory**

This exercise will articulate the key exigencies of a project and allow you to think beyond its existing configuration. It will help in adding fresh and innovative aspects or follow-on interventions.

## THE FUNDRAISING CYCLE

Revenue sources deserve to be systematically approached and leveraged via a logical system to develop funding relationships with them. In an ideal situation each component will follow in sequence, but ideal situations are rare and cross-referencing is often inevitable. What is necessary is that one knows the order in which these activities are scheduled and what each stage requires.

A useful model to effectively drive a service idea from conception to support and renewal is the fund development cycle illustrated in Figure 16 – that is, a system that is open to cross-fertilisation during the build, the execution, and in continued support.




**Figure 16: Fund development cycle**

Agility is key. These stages may be combined. For example, *project design* and *budget building* could form a single portfolio, as can *finding prospects* be linked with developing *solicitation documents*, *cultivating donor relationships*, and *making the exchange*. Similarly, *negotiating*, *stewardship* and *communications* could dovetail quite neatly, and these are but standard combinations. Some fund development enterprises have more specific areas that branch off from these main stages. One could have international donor relations be a branch of *prospecting* and of *stewardship*.

Where would you locate *Bequests* or *Planned Giving*?

Working within a system should not mean performing activities as if along an un-thinking, mechanical assembly line. Fund development is dynamic because it involves developing a project or programme that will benefit people and require the support of others. It requires deliberately and considerately approaching possible supporters and assuring them that their support will be used prudently according to their wishes, and it requires respectfully appreciating their support. Each stage is crucial and must be handled diligently.

Even though many fund development operations adopt *ad hoc* processes and are still successful, it does not mean they are necessarily working as efficiently as they could. Having separate departments or units to perform research, budgeting, proposal writing, solicitation, and stewardship is a great beginning, however, many of these units tend to become distinct entities in themselves and lack interconnectivity and inter-dependence.

Many proposal writers frown upon the project design step and are often impatient to see the activity articulated. But this structural stage is crucial. Formulating a project or programme is the grittier side of planning and its importance is best seen in the questions a grant-maker is bound to ask. Template 30  is a list of 27 questions that former Mellon Foundation CEO, Prof Salim Badat, said his proposal evaluation panel applied when they assessed the viability of a proposal. One key question that should concern us at this stage of building a project for donor support is:

*What preparatory steps will the project leader take to formulate /shape this activity?*

Here the panel would look for evidence of an *Outline*, an *LFA*, a *Theory of change*, a *So that...*, or that a *Success Equation* was used to think through all aspects of a project or programme.

The Request for proposals may also have stipulated any one of these tools be used to articulate the project. Such seminal *thinking through* of an activity is the first stage of the fund development cycle.

Let's unpack the various methods available for such planning:

## FORMULATING A PROJECT

The cycle begins with an idea that needs to be framed to deliver maximum social benefit and a framework that should also guarantee transparency and efficiency. The Programme Design stage is the conceptual stage and is at the top of the cycle. Here we would typically use either an old-fashioned outline of a primary idea, secondary ideas, and supplementary ideas, etc. OR one or more of the following templates: *theory of change* (ToC), *a so that...* analysis, a *logframe analysis* (LFA) and/or *a success equation*. We will discuss these concepts below and there are templates and models for each .

An idea, however fine it may appear at first, must be shaped not only to secure support, but far more importantly, to effect maximum desired change. The path towards this change must be diligently explored BEFORE implementation. We must set goals and objectives, decide on effective activities, make assumptions, and anticipate challenges. We typically use any of several methods to do so – some casual and expedient, others more deliberate and more elaborate.

When we shape a project or programme into an operation, we need to determine the following:

- What is our project/programme's **purpose**?
- What specific **problem** do we want to address?
- What is the **underlying cause(s)** of the problem?
- At what **depth/level** do we want to work?
- What **affect or impact** do we want to achieve?
- **Who will our work affect?** Where do they live?
- **How will we reach/influence** the target groups/structures?
- What **tools or processes** do we need to affect/influence each of our target group(s)?
- What **resources** – financial, knowledge, skills, and time – do we need to realise our goal(s)?
- What resources do **we already have**?
- What other **resources do we need**?
- Are **other people already working in this field**? Who are they?
- Who can we potentially **partner** with to help us achieve our goals? and
- How will we know we have been successful?

The following techniques use logical models to help shape projects not only for operational efficiency, but certainly to make them clear to present to donors.

Distilling a brainstorming session into a clear, action-oriented document can happen in several ways. A project outline is one fine example that lists the:

- Project name
- Project leader
- Project objectives
- Scope of work
- Key products to be produced (deliverables)
- Key performance metrics (measures)
- Project timeframe:
  - estimated duration
  - phases
  - milestones
  - project team

- roles
- responsibilities
- Expected results.

## BRAINSTORMING AND OUTLINING

In its most rudimentary form, we can use the Outlining exercises that we learnt in school, i.e. main idea, secondary idea, supplementary and complimentary ideas, etc. This we typically arrange as:

### TOPIC

Primary idea

- Secondary idea
- Supporting idea
- Supporting idea
- Supporting idea

Secondary idea

- Supplementary idea
- Supporting fact/facet
- Supporting aspect/facet

Second key idea

- Complementary facts
- Supporting facts
- Supporting facts....and so on.

## MIND MAPS

The conventional outline method is an excellent first step, but in using the mind mapping method one can give more structure to such a free-flowing stock-take. As an example, here is the initial mind map I made to consider compiling this booklet:

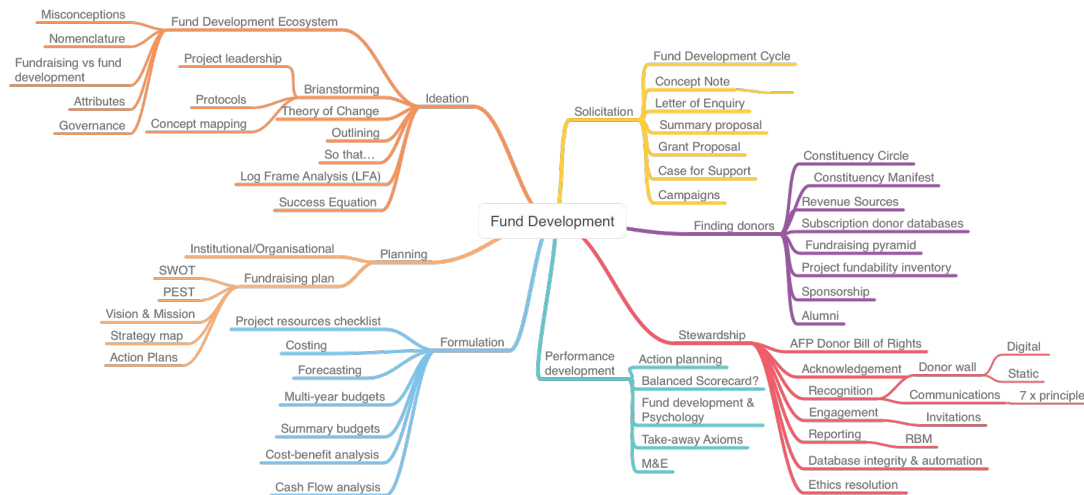


Figure 17: Mind mapping

If you compare this outline with the table of contents of the booklet itself, you will see several items were either revised, added, deleted, or moved about. Mind maps give one such flexibility and when one sits down to write, other logical decisions make one move items about easily. However, without some kind of outline, such thinking and re-thinking is near impossible.

Flexibility is a hallmark of digital mind mapping, and several such software programs offer free versions. The one I've used here is *MindNode* and the free version offers enough features for my needs .

After a group's 'idea dump', one needs to organise the project into operational parts so that we can determine the cost and articulate the benefits. This can be done via a variety of tools. Most prominent and preferred by large funders are Concept Maps, Theory of Change, and Log Frame Analysis worksheets. Certain funders may insist that either worksheets be included in proposals or they deconstruct them into questionnaires as online application forms.

Let's explore each one:

## CONCEPT MAPS

These can be simple, but always show clear logical connections. This example describes what concepts maps are and is an especially useful illustration of the complexity that Concept Maps can unlock.

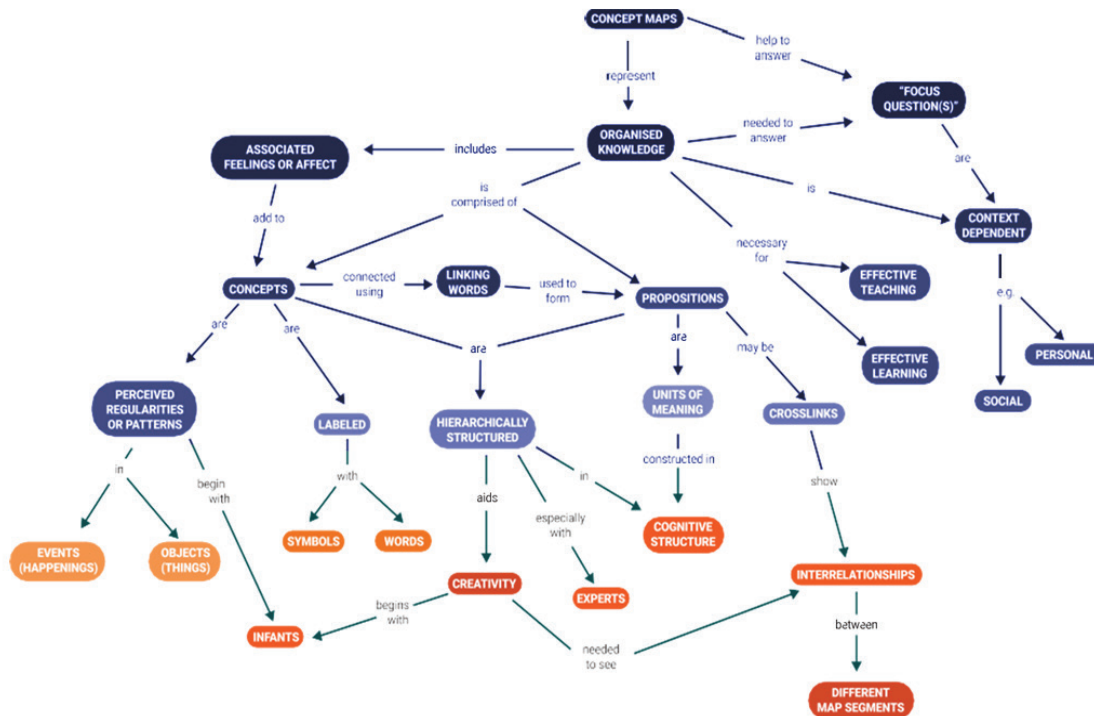


Figure 18: Concept mapping

## THEORY OF CHANGE

A *theory of change* (ToC), or perhaps a more workable nomenclature would be a ‘reason/ justification for change’, is a method that explains how a given intervention, or set of activities, is expected to lead to a specific result. It sketches a path towards the change the activities will make by using six elements: mission; assumptions; target group(s); strategies; reflections; and outcomes.

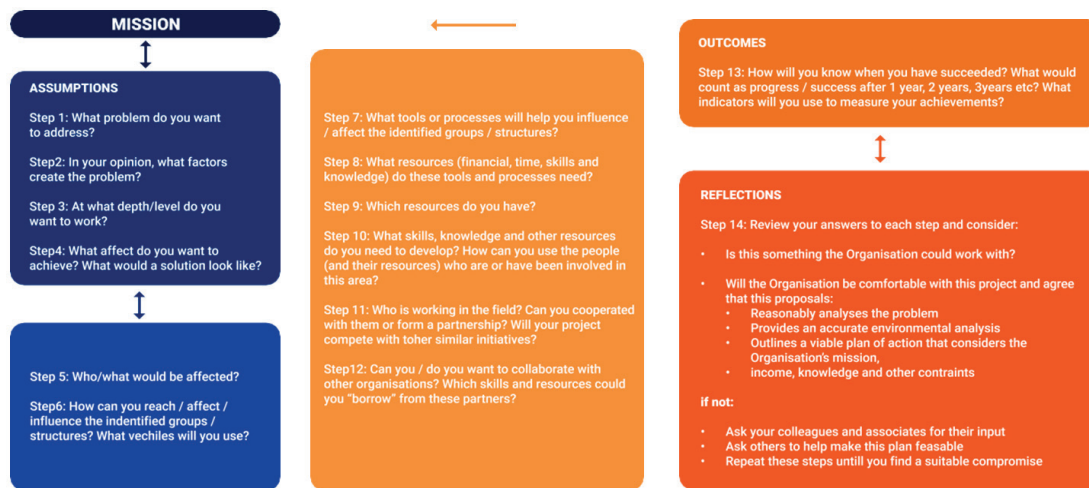


Figure 19: Theory of Change worksheet

Using a ToC approach to shape a project prompts critical questioning of all aspects of the selected activities. The process supports adaptive planning and management to deal with the many changing and often challenging factors, and developing a project within the ToC discipline ensures the quality and transparency of strategic thinking and discovery.

The *Learning for Action* organisation has a clearer description when they say a ToC determines:

- **What** you do;
- **Who** you are targeting for results;
- **Why** and how you do it; and
- **What** you expect to achieve.

They articulate it further by explaining that a ToC can help you:

- **Clarify how change happens**, what progress and success will look like, and what it takes to get there;
- **Identify and account** for factors that may affect success; and
- **Know what resources** are needed to create change.

The ToC path also defines what is within (and outside of) your 'sphere of accountability', helps you know what questions to ask, what data to collect, and how to make decisions that lead to better results.



Learning for Change is also quick to point out that a ToC is not:

- A static document that sits on a shelf (or file server);
- A straitjacket that stifles innovation;
- An item on your To Do list simply to satisfy external stakeholders; nor is it
- Simply a ‘neat’ way to package what you are doing now.

Figure 20 is a comprehensive 14-step chart to guide you through a ToC exercise. 

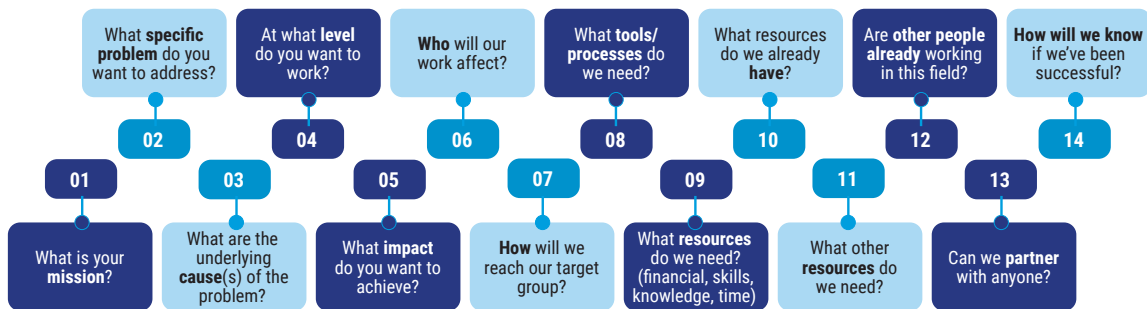


Figure 20: 14-Step Theory of Change

## SO THAT ..CHAIN

Similar to the logical progression of a ToC exercise is the So that...method. It is a very direct progression and is best described through the example, in Figure 21.

**STRATEGY**

Provide opportunities for neighbourhood residents to receive positive information , hear positive messages, and connect with fellow residents via a neighbourhood newsletter and a new community centre that hosts community gatherings and cultural gatherings, become aware of residents’ concerns about the neighbourhood.

**SO THAT**

Residents are more aware of the historical, cultural, and civic strengths of the neighbourhood  
*(Individual Impact)*  
 and



**Figure 21: Sample So that...chain**

## LOG FRAME ANALYSIS (LFA)

Also known as the log frame matrix, the LFA is a Results-Based Management tool used for systematic planning, implementing, monitoring, and evaluating projects or programmes.

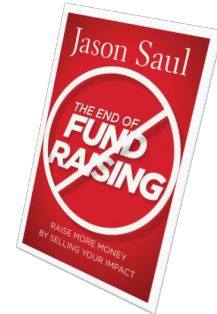
A favourite of many funders, an LFA could be required in the tabular form illustrated here, or as a series of questions. Please note, not only the questions that each component looks to answer, but also the **recommended order in which to answer them**.

INTERVENTION	PERFORMANCE INDICATORS	MEANS OF VERIFICATION	ASSUMPTIONS
<b>1 GOAL</b> State your general goal	<b>14</b> What indicator will show that your project has contributed to the goal?	<b>15</b> Where will one find that information?	
<b>2 PURPOSE</b> State your specific objective	<b>12</b> What will show that you have achieved your stated purpose?	<b>13.</b> Where will one find that information?	<b>7</b> What key external factors must exist to enable purpose to contribute to the goal?
<b>3 OUTPUTS</b> What will your activities produce to achieve the purpose?	<b>10</b> What evidence will there be that you will have produced the stated outputs?	<b>11.</b> Where will one find that information?	<b>6</b> What key external factors must exist for the outputs to produce the desired affect or outcome?
<b>4 ACTIVITIES</b> List the activities that will produce the outputs you plan on achieving (assuming you have the necessary resources)	<b>8</b> What will indicate (evidence) that you have conducted the activities listed?	<b>9</b> Where will one find evidence that the intended activities took place/	<b>5</b> What key external factors must exist to enable the activities to produce the outputs?

**Figure 22: Log Frame Analysis (LFA) worksheet**

## SUCCESS EQUATION (SE) OR IMPACT PLANNING TEMPLATE [🔗](#)

In 2011 Jason Saul published an intriguing title, *The End of Fundraising* which focussed on tools to frame, market, and ‘sell’ non-for-profit services. Saul took a different approach from the conventional catalogue of outcomes, outputs, and risks of both the ToC and LFA worksheets. He recommended demonstrating the **voracity of the impact** of an intervention through a framework he calls a *Success Equation* which is pictured in Figure 23.



**SUCCESS EQUATION WORKSHEET:**

**PRIORITY OUTCOMES**  
What changes in behaviour, condition, or status are required?

trying

A + B + C =

---



---



---

**IMPACT / AFFECT**  
What are we ultimately to accomplish?

D

**Performance Measures**  
How do we measure progress towards our outcomes?

---



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**Key Strategies**  
Which programmes will drive results?

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**Figure 23: Success equation / impact analysis worksheet**

This is a relatively unfamiliar concept to fund development and to the non-profit community. It is a detailed and graphic presentation of the overall consequence of an initiative by listing its goals, activities, AND how progress will be monitored in precise and measurable terms.

The format that Jason Saul uses may be awkward for those who may wish to attempt this form of presentation. The downloadable template in this e-booklet is a Microsoft Word table and is a simpler format to populate than the one depicted in Figure 23. Accompanying it is an excellent completed sample to introduce student housing that could serve as a model of a Success Equation or Impact Plans (as some would prefer to call it).

The tool is easy to understand and answers the essential queries donors are likely to raise when deciding on an intervention. In Saul's words, this tool helps "to demonstrate value to stakeholders" by determining which outcomes can be produced and being able to monitor and measure the progress towards achieving those outcomes.












It is a succinct and most effective project outlining tool.

## PROJECT OUTLINE

It is not common for fund developers to build conventional project outlines unless their governing Boards or committees require one. It is, however, a fairly standard business practice and I include an infographic here to share the format and the elements required.

It is a practice well worth adopting, for it would certainly assist proposal writers by outlining all the essential aspects to weave into the document they need to produce.

Figure 24 is a useful example of a project outline canvas. 

<b>Project:</b>		<b>Project Leader:</b>
 <p><b>Purpose:</b> What is the goal of this project? Why are we doing this?</p>	 <p><b>Scope:</b> Which areas should this project cover? Which areas should it NOT cover?</p>	 <p><b>Success Criteria</b> What do we need to achieve? How can our success be measured?</p>
 <p><b>Milestones:</b> When do we start? What are the key milestones/benchmarks and what are their due dates? How can these milestones/benchmarks be measured?</p>		 <p><b>RESULTS:</b></p>
 <p><b>Actions:</b> Which deliverables need to be produced to reach each milestone? Which activities need to be executed to produce a certain deliverable?</p>		
 <p><b>Team:</b> Who are the participants? What are their roles in the project?</p>	 <p><b>Stakeholders:</b> Who affects the success of the project? Who do we need? What are their roles in the project?</p>	 <p><b>Users:</b> What is our target group? Who are our beneficiaries?</p>
 <p><b>Resources:</b> What resources do we need? How much will the project cost? How long will it take?</p>	 <p><b>Constraints:</b> What are the current project limitations or constraints?</p>	 <p><b>Risks:</b> What risks may occur during the project? How do we treat these possible risks?</p>

Adapted from: <http://www.projectcanvas.dk/en/business/>

**Figure 24 Canvas: Project outline**

# PART 3: FINDING DONORS 1

With a project shaped, framed, and forecasted, we need to find a donor who has a real **interest** in our project, has some **affiliation** with our organisation, and who has the **means** to support or co-support our project.

We need to map all the types of donors who may be interested. Our initial exercise is to populate a **Constituency Circle**, or in African terms, an *Ubuntu* circle of prospects, associates, and friends.

## CONSTITUENCY CIRCLE

This is a series of concentric circles with those most invested in the project or the organisation at the very centre, at the very heart of the circles. Each circle that radiates outwards contains donor constituencies in their relation to the project. The outer ring would be the least aware of the project, but still is a constituency that would be amenable and should be prospected.

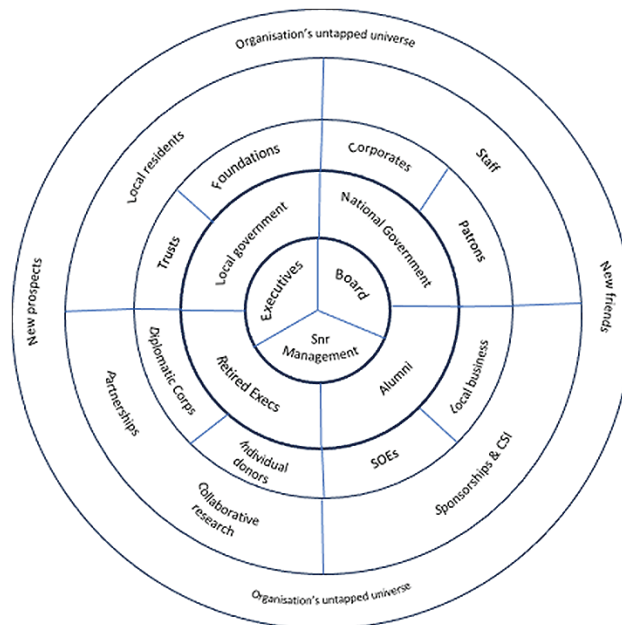


Figure 25: Constituency or Ubuntu circle

Since the constituency circle will show categories of probable donors, these categories must now be exploded to list actual people and their donor-worthiness. In other words, we need to qualify them as reasonable prospects. Each name must be researched for their **Affiliation/Association** with the

project/organisation, their **Interest**, and their ability to give, i.e. their **Means** (A.I.M.). I call this template a Constituency Manifest. [🔗](#)

All the details MUST be captured in great detail on a database, be it a dedicated software program, or on a spreadsheet, or even on an old-fashioned sheet of paper (although the latter is not recommended).

CONSTITUENCY	NAME	AFFILIATION/ASSOCIATION	INTEREST	MEANS
Board				
Executive				
Snr Management				
National Government				
Local government				
Local businesses				
Corporates				
Foundations				
Development Agencies				
Staff members				

**Figure 26: Constituency (or Ubuntu) circle - manifest**

## REVENUE SOURCES

Once the planning phase is complete and both direction and tactics are articulated, the business of activating hands-on fund development can begin. In Figure 13 we saw that among our revenue sources were:

- Affinity funds
- Corporate gifts
- Development agencies
- Diplomatic corps
- Foundations and trusts
- National & local government
- Service partnerships
- Sponsorships



Each source requires and indeed, deserves a unique manner of approach and this will come when developing the solicitation methods. However, in preparing for the solicitation stage, diligent fund developers should deploy the following steps.

## FUNDRAISING PYRAMID

Armed with probable donors for a reasonable target, the next step is to begin working towards a budget. The first step would be to calculate a *Donor Pyramid*, also known as a *Gift Chart*. This is a tool to help project and plan how many donations/gifts are needed per donor category towards a project/programme/organisation target. It will indicate from whom and from where support will come.

It is a reasonable guide and a tool widely used in the US and Europe where there is a higher reliance on individual donors.

Although not (yet) widely deployed among African non-profits where individual donors are not as prevalent, a donor pyramid should still be attempted. A blank worksheet to calculate a donor pyramid or gift chart is available in the templates section and Figure 27 is a generic example of such a worksheet.

The calculations in this example of a fundraising pyramid are based on a fictitious project's history of raising one large donation (set at >R500k) for every three or four prospects that they approached. Each moderate donation came after approaching around five prospects, and smaller gifts or donations came after approaching every second prospect.

It is significant to note in this example that if the target total is calculated using the ratios above, then that total will require over 2,000 prospects to be contacted and a little over 1000 gifts to be received to reach the target. This may well be unreasonable since not too many fund development operations have that many prospects in their databases. One would then adjust the donation amounts upwards to solicit fewer prospects for larger donations – invaluable information that this tool can provide and forewarn.

Gift Chart/Pyramid Worksheet

Target R 20 000 000,00  
 Ratios: 1: 4 Large & Medium Gifts  
 1: 3 Moderate gifts  
 1: 2 Smaller gifts

NOTE: replace only the greyed-out data

	Gift Range	Gifts required	Prospects required	Subtotals	%
Major Gifts	5 000 000,00	2	8	10 000 000,00	79%
	1 000 000,00	3	12	3 000 000,00	
	550 000,00	5	20	2 750 000,00	
Medium Gifts	250 000,00	8	24	2 000 000,00	19%
	100 000,00	4	12	400 000,00	
	150 000,00	8	24	1 200 000,00	
Moderate Gifts	25 000,00	10	30	250 000,00	1%
	500,00	100	200	50 000,00	
	250,00	100	200	25 000,00	
	150,00	300	600	45 000,00	
Recurrent Fund	50,00	500	1000	300 000,00	1%
	<b>Totals</b>	<b>1 040,00</b>	<b>2 130,00</b>	<b>20 020 000,00</b>	<b>100%</b>

Note: This category should reflect the largest revenue (ideally, approaching 80% of target income).

These gift categories should approach 20%

Figure 27: Generic gift Chart/ fundraising pyramid worksheet

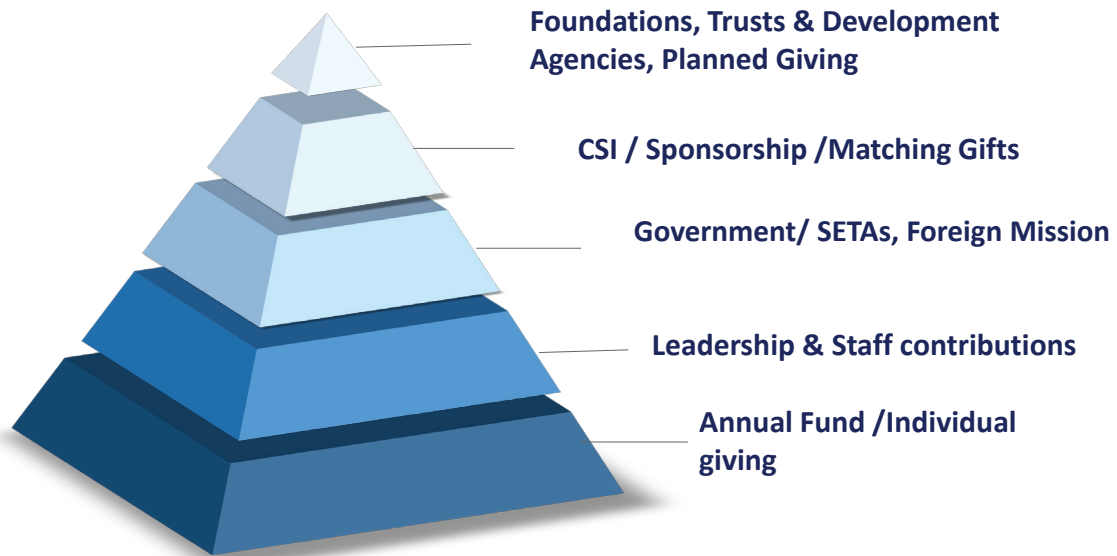


Figure 28: Generic fundraising pyramid

Be cautioned against guesstimating ('thumb sucking') the costs of items to be included in a budget. It is an unwise practice because donors may not tolerate much of an over- or underspend – and this is likely to happen if the cost of an item is not closely related to its true value. An under- or overspend will, of course, become apparent when filing financial reports.

Make the effort to get a reasonable cost of an item and one that can be explained later.

## BUILDING A BUDGET

It is general practice to obtain three price quotations and choose the highest or at least the average of the three for budgeting purposes. If you can secure the item or service for less, and this on average contributes to an underspend, ensure that the donor allows for a surplus at the end of the project.

When the contours of a project or programme have been set, as large a group of colleagues as is appropriate should, along with the project leader, compile an inventory of every item the project or programme will need. This should include all goods and services required and should ideally be checked off a comprehensive list of line items that any project budget is likely to use.

## BUDGET CHECKLIST

Critical on this list should be any equipment and/or service that the organisation will absorb, e.g. *utilities, compensation, facilities*, etc. There are several ways to calculate these costs and it is best to consult finance colleagues.

Donors often appreciate the degree of tangible commitment that an organisation shows, and these *incidental expenses* may be offered as the organisation's contribution to the project. All other items in the inventory list must be calculated as accurately as possible by comparing prices from two or three suppliers.

(There are different ways to calculate *incidental expenses*. The budget template offered here is perhaps more old-fashioned, but it clearly specifies those expenses to which the host organisation/project/programme will contribute.)

Next, group the inventory with costs into categories, such as *Human Resources, Equipment, Travel & Accommodation* (along with a figure for the *incidental expenses* if contributions are not itemised) in a budget spreadsheet to accurately calculate the overall amounts we will present to a donor.

A budget is not merely a list of expenses, it is to be the instrument that will reveal how efficiently the money will be used. At the time that the donor expects a financial report they would appreciate (if not stipulate) an over- or underspend within a range (usually 5–10%). Anything outside of this range suggests a weakness in the project implementation and management.

## DEVELOPING DONOR SUPPORT

Remember, most large donors are not necessarily geared to receive money, only to invest them in worthy causes. Remember too that a substantial underspend could be as much a problem as an overspend. Drawing amounts from other categories to cover under budgeting elsewhere is also poor budgeting or poor budget management and will need to be explained in the inevitable financial and narrative reports.

After setting a project's parameters and contours, it is time to list the necessary resources. It is useful to have a checklist of items to which one can add. Figure 29 is a sample list of line items you could consult when drawing up your own list.

This template, although by no means exhaustive, lists as many of the typical items a project or programme requires.

CATEGORIES AND ITEMS		YOUR CONTRIBUTION	DONOR
Salaries			
Employee benefits			
Office costs			
Office Supplies			
Printing			
	Envelopes		
	Letterhead		
	Reply forms		
	Thank you cards		
	Brochures		
	Invitations		
Postage			
Graphic design			
Events			
	Catering		
	Speaker fees		
	Speaker transportation		

CATEGORIES AND ITEMS		YOUR CONTRIBUTION	DONOR
	Space rental		
	Supply rental		
	Invitations		
	Flowers		
	Favours		
	A/V Equipment Rental		
Production costs for video/podcast/webinar presentations			
Lunches, etc. with prospects			
Travel within service area			
	Transportation		
	Lodging		
	Meals		
Other Promotion & Marketing			
Costs of video library (tapes, outright purchases, shipping, etc.)			
	Tapes		
	Purchases		
	Shipping		
Branded gifts			
Promotions			
Donor recognition			
	Plaques		
	Pins and other token items		
	Permanent display		
Telemarketing Services			
Training programme			
	Conference Registrations		
	Conference Travel		
	Conference Lodging		
	Conference Meals		
Travel	Airfares		
	Shuttle transfers		
	Train transfers		
	Car rental		
	Insurances		
	Guest travel		
Meals	Breakfasts		
	Morning coffees		

CATEGORIES AND ITEMS		YOUR CONTRIBUTION	DONOR
	Lunch		
	Afternoon Tea		
	Dinners		
	Snacks		
	Consultant's Fees		
	<b>TOTALS</b>		

**Figure 29: Sample budget line-item checklist**

Each item checked or added should then be costed – ideally by using three prices and taking the average, or the highest price. Do not guess a price. Prices are then entered into a budget spreadsheet and a donor is almost certain to have a variance range or variance threshold of 10% over- or underspend. It is worth reiterating that anything outside of this range may be regarded as mismanagement.

In projects whose duration may span several years, one should build in appropriate inflationary increases.

## SIMPLE BUDGET

Although there really is no such thing as a ‘simple’ budget, one that covers one year or less might, for argument’s sake, be considered simple. This is only so because it will not require building in an inflationary increase and depreciation for subsequent years. Additional years may also not require the same items or additional items that would not have been appropriate in year 1.

Even a simple budget should be accompanied by basic charts – to help tell the story of the figures to donors, and as a visual aid in apportioning expenses. In the budget Template 19, as you enter items and costs, the related graph will immediately show which categories (personnel, equipment, services, travel, etc.) are being favoured. For example, we often believe (whether mistakenly or not) that donors are reluctant to support personnel. This graphing /visual feature will alert you in real time to where you are allocating your expenses and help you tailor your project expenses where certain donors prefer.

Whether simple or complex, the budget should account for any contribution (whether in kind or currency) that a host project/programme/organisation intends to make.

## MULTI-YEAR BUDGET

More complex, a multi-year budget spreadsheet covers the costs of the first-year along with built in formulas to automatically calculate subsequent year predetermined increases. As with ‘simple budgets’ one usually relies quite heavily on the built-in graphs to guide the planning as much as on them to tell the story of the figures.

Multi-year budget worksheets are naturally more extensive and detailed because they anticipate needs into the future years. They should also include buffers for unanticipated occurrences.



## SUMMARY BUDGET

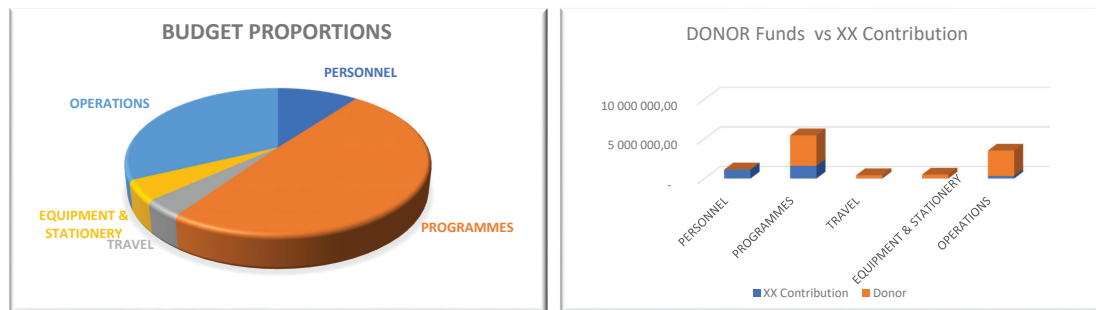
A multi-year budget could prove to be unwieldy to include in a short proposal, but there is no good reason not to complete one. Onerous a task it may be, but it is an imperative task.

Multi-year budget spreadsheets often become the master budget and can, appropriate to the occasion, be summarised into a more convenient model that lists only the main categories with accompanying graph charts, particularly the overall % proportions, and the difference between what you are suggesting the donor supports vs the amounts your organisation is willing to contribute by absorbing or covering certain amounts, such as utilities and/or premises.

**EDIT ONLY THE GREY Data**

Anticipated Inflationary increase:

	20xx		20xx <sup>6%</sup>		20xx <sup>8%</sup>	
	XXX Contribution	DONOR	XXX Contribution	DONOR	XXX Contribution	DONOR
<b>Subtotals:</b>						
PERSONNEL	350 000,00	5 000,00	371 000,00	5 400,00	400 680,00	5 832,00
PROGRAMMES	500 000,00	1 200 000,00	530 000,00	1 272 000,00	572 400,00	1 373 760,00
TRAVEL	8 000,00	120 000,00	8 480,00	127 200,00	9 158,40	137 376,00
EQUIPMENT & STATIONERY	5 000,00	150 000,00	5 300,00	159 000,00	5 724,00	171 720,00
OPERATIONS	100 000,00	1 000 000,00	106 000,00	1 060 000,00	114 480,00	1 144 800,00
<b>TOTALS</b>	<b>963 000,00</b>	<b>2 475 000,00</b>	<b>1 020 780,00</b>	<b>2 623 600,00</b>	<b>1 102 442,40</b>	<b>2 833 488,00</b>



**Figure 31: Summary budget**

Again, you may select to calculate incidental expenses rather than insert individual organisational contributions.

Simple pie and bar charts with both amounts and percentages are ideal to illustrate the different levels of contribution.

A word of caution when using pie charts: use them when there are only a few categories and use as much detail in the accompanying data sets, e.g. category name, percentage, and amount for each pie slice.



# BUDGET MANAGEMENT

## CASH FLOW BUDGET

Armed with a reasoned expectation of the amounts you expect, the next step is to chart when you will need the funds to cover your expenses. A cash flow budget will identify how much money is available,

how much is still needed, and when.

A cash flow budget can only be drafted after deciding on the overall organisational budget. Each expense should be plotted on the calendar to determine when each will be incurred.

Tracking monthly financial activity is vital to managing a budget. Among the templates there are cash flow and operating budget tracking tools that may be of help to those who do not have either of these and want to use such instruments.

The cash flow budget (seen here as Figure 32 and as a downloadable 12-month Cash Flow worksheet as Template 25) charts one quarter period. As with all the template worksheets, the greyed-out data is included only for illustration and must be replaced with your own.

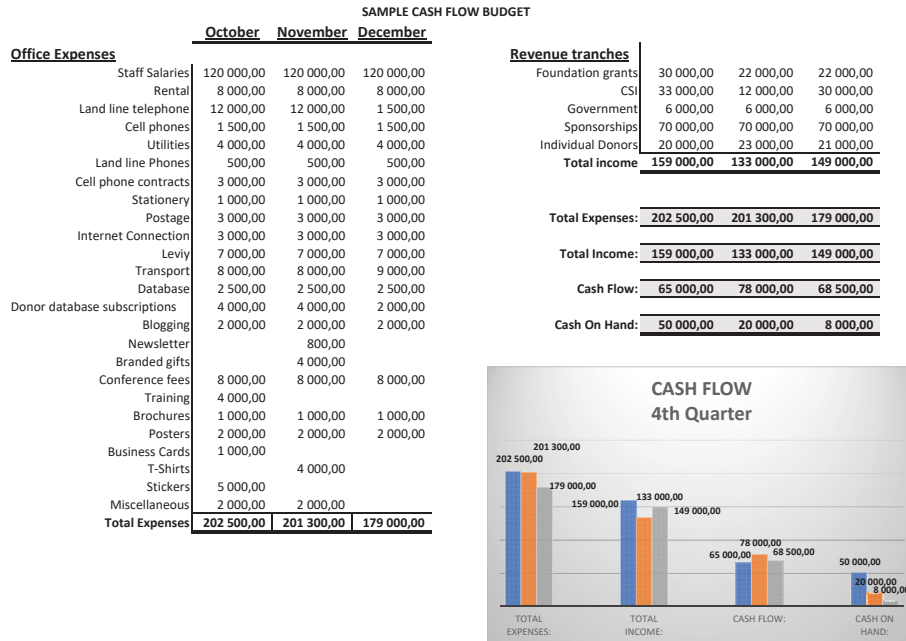


Figure 32: Quarterly Cash Flow worksheet

## OPERATIONAL BUDGET

The finance officer should capture each transaction and use a tracking tool to keep the organisation abreast of what it is expending compared to what it budgeted. A useful tracking tool is the operation tracker included as Template 15.

This worksheet will not only display the differences between budgeted allocations and expenses, it will also calculate what it costs the organisation to raise money at any one time.

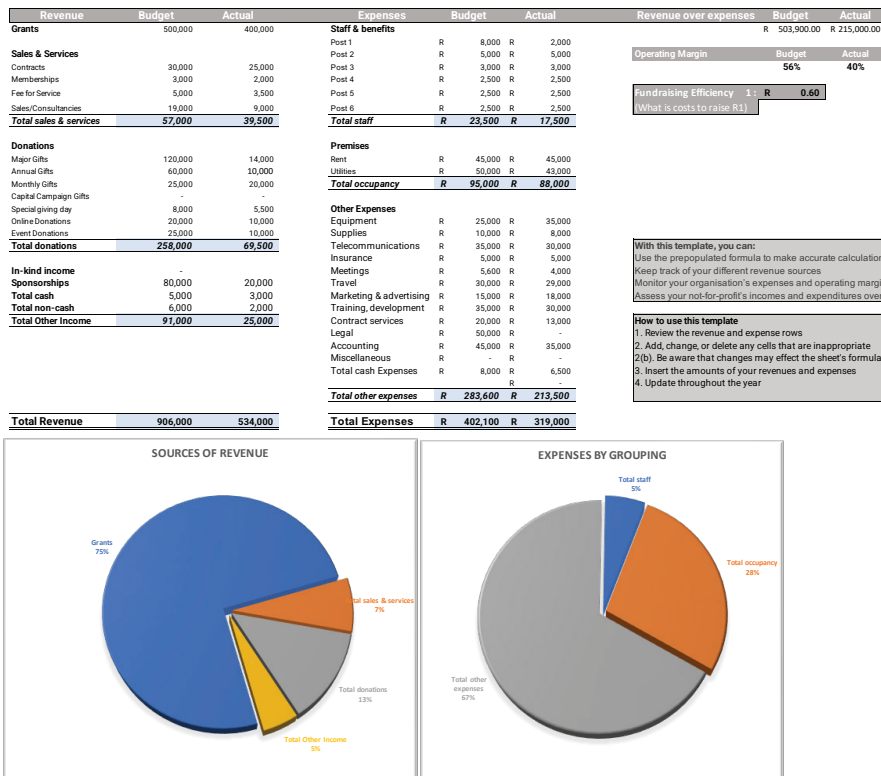


Figure 33: Operation budget tracker

## SPONSORSHIP

We used to think of sponsorship as a magnanimous contribution to cover the cost of an event. Many organisers hold that view and still do not think of a sponsored event as being an opportunity for the sponsor to advertise and market their brand and their products. Today, even that has changed. Chris

Baylis of 'The Sponsorship Collective' explains:

*Sponsors don't just want your attendees to be aware of their product or service. They want to offer value, provide solutions, and create deeper, long-lasting connections with your attendees.*

This means we must know who our attendees are and ask what will they get out of this opportunity. **Sponsorship is a business investment and sponsors need to see a tangible outcome** before they will meet with you, much less commit anything to your function or event.



**Figure 34: Sponsorship process infographic**

Applying for sponsorship requires different calculations. **Sponsorship is a commercial transaction** and does not normally qualify for tax concessions. That means it must not be misconstrued as a donation and its cost must be calculated as a business transaction.

Instead of merely listing items as one would with a non-profit project/programme/ organisation budget, **sponsorship lists items that are to be sold**. Sponsorship identifies its items as saleable assets and should be costed based on the sponsor's brand value – which is often difficult to obtain.

## BRAND VALUE

Brand value can be thought of as anything that consumers associate with a brand or that influences consumer behaviour.

Sponsored non-profits events, services or equipment must revolve around the exposure the event and its promotional opportunities are worth to a sponsor using their brand value as a baseline.

There are six different methods to determine a company's brand value. The one that would align more closely with what non-profits would appreciate would be the **Net Promoter Score (NPS Valuation)**, however, it is the company's prerogative as to which method they use. The NPS valuation is, in essence, a measure of how well their brand performs at inspiring word-of-mouth promotion. They calculate their NPS Value by asking customers how likely they are to recommend their products to someone they know and calculate the score by subtracting the percentage of detractors from the percentage of promoters. This is often done by using a focus group survey because the promoters need to know who likes and trusts the brand. Perhaps this is a rather anecdotal measure of brand value, but it is one on which several marketing departments rely.

Setting the initial price for the *saleable assets* of your function or event can be tricky. No one guesses the 'perfect' price on their first attempt. Even with all the best research in the world, you will be much better served if you treat pricing as an exercise of constant learning and adaptation.


The sponsorship asset Template 35, lists typical assets along with brand value and traffic, and multiplies these to determine the cost. Companies would usually determine their own value that would accrue from the various forms of promotional exposure.

**To avoid an impasse, suggest a brand value and negotiate one that is of mutual benefit.**

As noted earlier, the way in which conventional events are managed are rarely cost-effective since few not-for-profit organisations bother to count the cost of their efforts; they concentrate more on covering the cost of an event and are often unaware of the full potential of an event for a sponsor.

Non-profits should list items that they expect will be of value to sponsors. For example, saleable assets should consider quantifying:

- how many people will see a sponsor’s logo?
- what other brands are involved or will be associated and will promote their brand(s)?
- how many channels will feature their logo(s)?
- how many subscribers will there be to those social channels?
- is there a demonstrable communication plan?
- to how many people will the event be marketed?
- will there be high engagement content?
- what will the post event communication be?

Clearly, the biggest asset to leverage will be attendee data. How will such data be captured along the way – and will you make this available to a sponsor? A Sponsorship Assets inventory is included as Figure 35 (and Template 37 ) populated with sample assets that will also calculate RoI ratios and percentages.

INVENTORY VALUATION (for internal use only)				
ASSET	TRAFFIC	COST P/VIEW	BRAND VALUE	ASSET TOTAL
<b>NAMING PRIVILEGES:</b>				
Named xxxevent	200 R	2,50 R	50,00 R	25 000,00 R
Presenting privileges at award event	100 R	0,75 R	2,50 R	187,50 R
<b>ATTENDANCE:</b>				
Executive/Snr Management	10 R	3,00 R	5,00 R	150,00 R
Junior academics	40 R	2,00 R	2,00 R	160,00 R
Postgraduates	30 R	2,00 R	2,00 R	120,00 R
Snr undergraduates	40 R	1,00 R	1,00 R	40,00 R
Junior undergraduates	50 R	0,15 R	0,05 R	0,38 R
Public	50 R	0,10 R	1,00 R	5,00 R
				R -
				R -
<b>ON SITE:</b>				
Display space at events	100 R	0,20 R	0,75 R	15,00 R
Distribute product brochures at events	100 R	0,50 R	5,00 R	250,00 R
Distribute xxxbrochures at events	100 R	0,15 R	0,75 R	11,25 R
				R -
				R -
<b>ADVERTISING:</b>				
Full page advert of the xxxin newspaper	2000 R	1,50 R	20,00 R	60 000,00 R
Half page advert of the xxxin newspaper	2000 R	1,50 R	15,00 R	45 000,00 R
Quarter page advert of the xxxin newspaper	2000 R	1,25 R	12,00 R	
Full page advert of the xxxin event brochure	2000 R	0,75 R	20,00 R	30 000,00 R
Half page advert of the xxxin event brochure	2000 R	0,60 R	15,00 R	18 000,00 R
Quarter page advert of the xxxin event brochure	2000 R	0,35 R	12,00 R	8 400,00 R
Branded merchandise	800 R	1,25 R	4,50 R	4 500,00 R
				R -
				R -
<b>WEBPAGE:</b>				
Link from institution/Accountancy dept website/page	500 R	2,50 R	10,00 R	12 500,00 R
Link on xxx webpage	500 R	1,50 R	25,00 R	18 750,00 R
				R -
<b>SOCIAL MEDIA:</b>				
Sponsored post on xxx Face Book	700 R	1,50 R	3,50 R	3 675,00 R
Sponsored post on xxx Twitter	900 R	2,00 R	2,00 R	3 600,00 R
Sponsored post on xxx LinkedIn	700 R	1,50 R	3,00 R	3 150,00 R
Sponsored post on xxx Instagram	200 R	2,00 R	1,75 R	700,00 R
Sponsored post on xxx Pinterest	100 R	0,75 R	0,75 R	56,25 R
				R -
				R -
<b>SIGNAGE:</b>				
Logo at award event	100 R	0,25 R	5,00 R	125,00 R
Logo at xxx event	1000 R	0,25 R	8,00 R	2 000,00 R
Logo at internal event	100 R	0,55 R	12,00 R	660,00 R
Company banner display	100 R	0,45 R	10,00 R	450,00 R
				R -
<b>EMPLOYEE BENEFITS:</b>				
Employee invitations to event	100 R	12,00 R	3,00 R	3 600,00 R
Employee engagement/volunteering/mentoring	25 R	12,00 R	3,00 R	900,00 R
				R -
<b>PUBLIC RELATIONS:</b>				
Sponsor mention in press release	1000 R	2,50 R	3,00 R	7 500,00 R
Sponsor signage at press conference	25 R	1,00 R	2,00 R	50,00 R
				R -
				R -
<b>PROGRAMMING &amp; SPEAKING OPPORTUNITIES:</b>				
Acknowledgement in welcoming speech at award event	200 R	1,20 R	0,75 R	180,00 R
Acknowledgement in welcoming speech in xxx				R -
Prime mention in keynote speech at xxx event	200 R	2,50 R	0,50 R	250,00 R
Prime mention in keynote speech at	200 R	5,00 R	5,00 R	5 000,00 R
Sponsor speech during the xxx event	200 R	10,00 R	25,00 R	50 000,00 R
Sponsor’s speech at the xxx supplemental event	200 R	20,00 R	50,00 R	200 000,00 R
Verbal recognition from the podium	200 R	20,00 R	0,15 R	600,00 R
				R -
<b>PAID MEDIA:</b>				
Logo listed in paid media ads				R -
				R -
<b>TOTALS</b>				
	<b>20 870</b>	<b>R 119,00</b>	<b>R 341,95</b>	<b>R 505 585,38</b>
Total value of tangible assets:				R -
Total brand Value:				R -
Fair Market Value:				R -

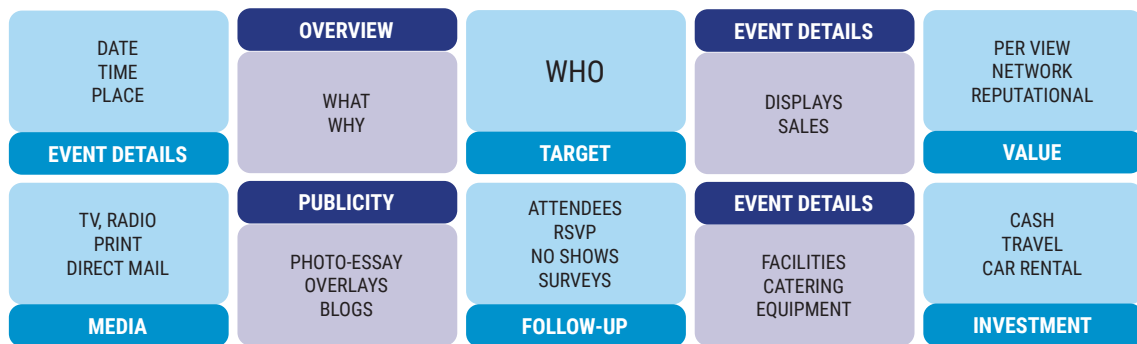
ROI Ratios	EVENT			
	COST	Ratio	ROI	%
	R 175 000,00	2:1	R 252 792,69	50%
		3:1	R 168 528,46	33%
		4:1	R 126 396,34	25%

Figure 35: Sponsorship assets inventory

Note: goodwill and sentiments cannot always be quantified, therefore, it is best to present a list of assets to a potential sponsor and have them select what they regard as pertinent, then cost those.

The key here is NOT to approach a sponsor for what it will cost you to stage an event. Approach them for the value their exposure will give them (or a reasonable estimate of their brand value). They usually determine their own Return on Investment (RoI).

Figure 36 is a schematic of the components of a sponsorship application:



**Figure 36: Sponsorship components**

Template 38 [🔗](#) is a blueprint for a sponsorship *proposition* (which is what a sponsorship proposal should be called) and is populated for a sample Golf Day event for guidance.

## NETWORKING / EVENTS

At the risk of belabouring the point, few events are in themselves efficient fundraisers. There are of course exceptions and persistent exceptions are faith-based events. Church or school bazaars are instances of fine money-making. Rarely do they include the cost of electricity, ingredients, or effort that goes into all the goodies our aunts bake and cook. What matters is that they sell their wares... and the final tally.

It is imperative to keep certain things clearly in mind when planning an event: its brand- building value; its public relations value; and to measure the time and resources it will take to stage the event. One good way to do this is by developing a quick cost-benefit analysis as in Figure 37. [🔗](#)

LINE ITEM	COST	RETURN VALUE
Audio-Visual Equipment		
Banners		
Book Fee		
Database Recording		
Decor		
Deposit		
Entertainment		
Flags		
Furnishings		
Gifts		
Hoarding		
Honoraria		
Invitations		
Labour		
Licences		
Post-event Admin		
Post-event Follow-Through		
Promotional Considerations		
Safety & Security		
Ticket Sales		
Tips/Gratuities		
Transport Venue		
<b>TOTAL</b>	<b>0</b>	<b>0</b>

**Figure 37: Quick cost-benefit**





# PART 4: FINDING DONORS 2

## PROSPECT RESEARCH

With all the planning, forecasting, and budgeting done, fund developers now need to activate steps to approach and engage prospective donors. We need to identify and qualify (make sure they are appropriate to approach), then cultivate a relationship, and present our offer.

Gone are the days when we wrote up a proposal document and shot it out to everyone we knew and to every conceivable company or foundation, sat back and hoped someone would find it appealing. Professional fund development dictates a more systematic and deliberate approach to identifying a likely donor.

Vital to meticulous prospect research, is a customer relations management (CRM) database – whether this be a tailored donor database or a simple spreadsheet, it ought to be digital. Paper-based lists should only be used if digital is a totally unaffordable option, not because it is difficult to learn.

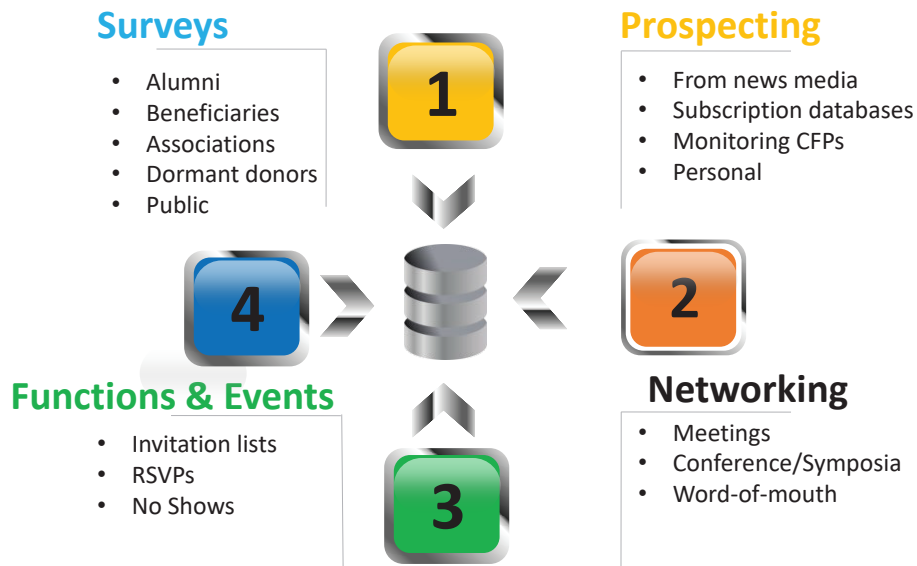


Figure 38: Donor database

The database must have fields to capture every relevant aspect of and contact with a donor. Birthdays, hobbies, and gift preferences are often useful extras, but social preferences and interests, previous donations, size of donations, and to whom recent donations have been made are among the most appropriate. Each snippet of information and certainly every contact with a donor, whether it be a telephone call, email, letters, invitations, and greeting cards, should be kept on record. When used judiciously and selectively, such information will build credibility and foster a significant relationship with a prospective donor.

The most essential information about a donor you need to have:

- Their **interest** and geographical **areas**
- **Previous grant** sizes & to whom
- Do they **renew/extend** their grants
- Do they make **repeat grants**
- Will they make **more than one grant simultaneously**
- How to **approach** (*letter of enquiry, proposal, interview...*)
- **Contact person** & contact details
- Timelines & **deadlines** for applications.

It is vital that your data is 'clean', which is the jargon for consistent format and detail. Each data entry must be exactly the same in layout, in its use of abbreviations and detail so that the database search mechanism can find and display exactly what you ask of it. Here are only some of what you need to consider.

### Donor record information

- Name formats (*e.g. Initials, use of a middle initial*)
- Abbreviations (*'and' or '&'*)
- Nicknames
- Phone number format (+xx (xxx) xxx-xxxx or xxxxxxxxx)

### Donation capture

- Prioritising 'Thank You' templates (*there should be separate 'thank you' templates for every category of donor, 1st time, 2nd time, repeat, etc.*)
- Special donation considerations
- Recording pledges, recurring donations and matching donations be captured

### Stewardship

- Receipting methods (*letter, email, welcome pack*)

### Tracking & reminders

- What donor detail do you record? (*contact method, summary of contact, sensitive information?*)

### Data maintenance activities

- Avoiding duplicates
- Address formats
- Data removal

To find the data to create a database entry, one needs to identify possible and prospective donors. This is where we look around; where we scrutinise our environment:

## USE WHAT YOU HAVE

Board members and current donors are already invested in your work. Consult them. Ask them for names and introductions from within their networks. Offer branded gifts for bringing new sources to your attention, however, do not make rewarding gestures common practice.

## REVIVE DORMANT OR LAPSED DONORS

Dormant or lapsed donors are donors who have not renewed their pledges and those who may have suspended their support. Some may have forgotten, were not notified that a renewal was necessary, and others, like local small businesses, may simply have experienced downtimes. In such instances, suggest suspending their debit orders rather than having them cancel their donations. Negotiate renewals or a considerate timeline to renew.

## REINVIGORATE YOUR WEBSITE

Keep the website up-to-date, colourful, and dynamic. Add a blog page, if there is no blog, refresh content regularly. Ensure that content is mobile-friendly. Offer free give-aways of branded gifts for completing a word puzzle using words from your projects. Automate welcoming text messages for new visitors, and offer additional information in bite-sized chunks, notice of events, along with other privileges for those who subscribe.

## CONSIDER HOSTING SMALL, COST-EFFECTIVE GET-TOGETHERS

An example of this would be *Friday 5s* – inviting three new prospects along with two existing donors to cheese ‘n crackers with juice and/or wine, tea, and coffee each first Friday of the month for an hour. Consider introducing them to the work being done via a 1-2 min looping short video or simple *Doodly* chalk video of your work during this informal after-work function. Never lose sight of the reason for such events: they are networking opportunities and each staff member that attends should be charged to collect a certain number of email contacts for your database. Make your database the prime beneficiary of such events and your Constituency Circle your primary guide.

## CONSULT ANNUAL REPORTS

Read through the list of donors to similar organisations/programmes/projects. Select and research their details to see if they could be prospects for supporting your projects or programmes.

## ONLINE SUBSCRIPTION DATABASES

Subscribe to reliable local and international online databases. Many of these have weekly alerts that send notifications of newly published grant opportunities. They also categorise their lists by focus and interest area. Several databases also offer supplementary information on preparing grant applications, proposal writing, and have lists of case studies that could be models from which to learn best practices.

## NETWORK WITH COGNATE ORGANISATIONS

Try not to work in isolation. Make and maintain contact with other organisations within your focus area. Offer to share resources, meet and discuss strategic initiatives, and collaborate where possible. Offer assistance or share training materials/knowledge where you can.

An excellent unwritten and often rewarding (pun intended) attitude to have, is – *'Give to be able to Get'* – always find a way of offering something, whether it be a suggestion, even casual unsolicited advice, or something tangible, before asking for anything in return. Invest to expect a dividend.

## SOCIAL MEDIA

Use social media judiciously and extensively, especially the more professionally-oriented LinkedIn. More on social media further on.

## CHECKLIST

Consider developing a checklist to help you evaluate prospective grant funders:

Does the grant-maker's mission correspond with yours?	
What are their specific goals?	
Do you meet their specific requirements?	
What is the typical size grant they award?	
Does it suit your budget?	

What type of grant opportunity is this? (once-off, multi-year, comprehensive, selective, renewable, etc.)	
How has their average grant size varied over the past five years?	
Can you identify at least three previous grantees similar to your project?	
Do you fall within the funder's geographical interest?	
What percentage of those funded are new grantees?	
Has the funder been favouring more new grantees over time, or have they preferred to renew/extend existing grants?	
If you are likely to be a new grantee, does the average grant amount for new grantees align well with your project/ programme budget?	
Do your organisation/project's impact areas align with the funder's three-year giving?	
Does your organisation/institution/unit have enough bandwidth to make this application online if so required?	
Do you/can you meet this funder's reporting requirements?	
Does the RFP have parts where your project/programme can re-purpose previous grant proposals?	

**Figure 39: Checklist to evaluate prospective grant funders**

## CONSTITUENCY CIRCLE

You might remember Part 2 suggested that the first step in finding possible donors is to articulate what you know and have. This we do by using a simple, but most useful, Constituency Circle Template 21 (I called it an Ubuntu Circle) – a series of concentric circles showing diminished influence from the centre. The centre would show those who have the highest interest/commitment to the organisation/ programme/project, and the populated circle will have donor categories. From the Constituency Circle you would move to the Constituency Manifest where, within each category, you will insert the actual names of prospects, or the names of contact people. These prospective donors will need to be qualified as reasonable contacts to approach for a grant or donation.

## QUALIFYING DONORS

The first stage in qualifying donors is to use the AIM system where:

- A** = Association with your organisation/project/programme,
- I** = Interest in your work, and
- M** = Has the means and/or the resources to support your work.

Other more specific questions can follow once you have identified sound prospects. Such questions are: (note: some questions are deliberately repeated from the checklist above)

- What is the grant maker’s mission?
- Does it align with your project?
- What are the specific goals of the request for proposals (RFP)?
- Do you meet their eligibility requirements?
- What size grants are being made? Do they align with your budget needs?
- What type of grant is this RFP (a project, programme, organisational, operational, event, award, scholarship, research, etc.)
- Has the average grant amount changed over the last three years?
- Has the grant maker given to at least three organisations similar to yours?
- Does your organisation fall within the grant maker’s geographic interest? (country, province, or city)
- What percentage of those previously funded are new grantees?
- Has the funder been giving to more new grantees over time, or more to repeat grantees?
- Does the average grant size for new grantees align well with your project budget?
- Do your organisation’s impact areas align with the funders’ previous 3-year’s giving?
- Can your organisation meet the reporting requirements outlined by the funder?

## SUITABILITY INDEX

To help make sense of all the questions there is an optional exercise to hone your application and boost your confidence, a ‘suitability index’. In this worksheet you make a list of the grant’s requirements. Then, make a corresponding list of your organisation’s credentials and experience to meet those requirements. In some ways this exercise is a simple follow-on of the ToC, LFA, and Success Equation we outlined in Part 2 and it can be an invaluable document for any kind of interview, and as a ready-reference for a proposal writer.

GRANT REQUIREMENTS	ORGANISATION’S (or personal) CREDENTIALS	ACCOMPLISHMENTS
Cause		
Location		
Programme type		
Purpose		
Timescale		
Grant size		
Operational costs		
Disbursement schedule		
Reporting schedule		

**Figure 40: Suitability index**

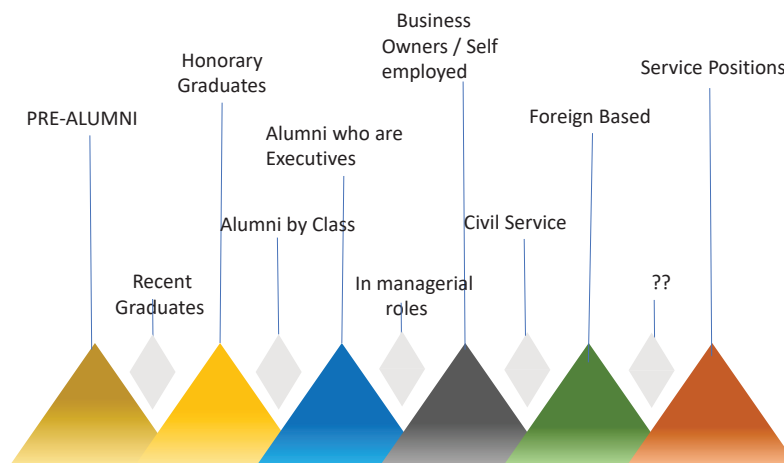
## SUBSCRIPTION DATABASES

There are several online databases and the prominent ones in South Africa are, the Papillon Press CSI database and Inyathelo's Funding Finder. Other significant sources are FundsforNGOs and the Foundation Centre which are reliable and are updated regularly.

## ALUMNI

Organisations involved in training and development qualify their clients and produce what we call *alumni*. We tend to focus on them once they leave the training organisation, but we should also make them sensitive to the value of their experience during their training courses. These persons should be regarded as *pre-alumni* and sensitise them NOT to 'giving back', but rather to *paying forward* – by helping them think of those who will come after them to enjoy similar experiences to theirs.

Those who move on, those who have become alumni, take on a variety of positions in the workplace. Some of these may be found in the following diagram:



**Figure 41: Alumni in the world of work**

Because these persons have both an interest and an affiliation/association with the training institution (their *alma mater*), it is essential that relationships with them be nurtured and maintained – not only in expecting them to reciprocate financially, but equally importantly to plough back in service and professional advice.

## STORYTELLING

A discussion on storytelling would seem more comfortable in the Solicitation section, but it has an equally valid place in a motivating document we call a *Case for Support (CAS)*.

Even the most austere or fact-laden proposal document will be read by a person – a person who, like us all, has a natural tendency to be captivated by a good story. It is more than advisable to include a story wherever possible and however brief in most communications with prospective and potential donors. It is the voracity and impact of your work that you hope will appeal to their generous nature – and stories can convey that more readily than a catalogue of naked facts.

We enjoy stories quite naturally, and almost instinctively allow ourselves to be seduced by a good story whether it be happy or sad. Stories often help us to learn new things, form new thoughts, distinguish right from wrong, and from childhood they have taught us values. Stories can also ignite our emotions. Stories sketch the human context of our work.

For fund development this is significant since we need to appeal to the foundation and corporate official who will make the decision to support us, as much as we need to attract the interest of individual donors. Prospective donors must be able to relate to the proposition we are presenting to them. They must like and even empathise with what we can accomplish with their assistance. Once they relate, they can then probe the facts we present.

The internet is awash with advice on storytelling. Pixar, arguably the best storyteller ever, has a list of 22 principles they use to shape their movie scripts. Several others list six or seven principles, like setting, plot character, dialogue, setting, conflict, resolution, etc. Self-evidently, a story needs a beginning, middle, and an end. It should be directed at and be appropriate to a particular donor; unfold compelling details that serve our purpose in approaching a specific donor, then make a call to action.

The all-important call to action (CTA) should also put forward a solution and tie that solution as directly as possible to the support that will come (or has previously come) from the donor. It is vital to be able to include or to connect the donor with the story.

Shay Leesman offers a useful concluding comment:

*Storytelling should do more than entertain your audience. A great story not only informs your readers but inserts them into the story and asks them to take action. By focusing on what your donor needs to hear, using the right images to help donors connect with your subject, and splitting your appeal into two parts so that donors decide the story's ending with their actions, your appeals will motivate donors to give ... to make the better outcome a reality.*



## CASE FOR SUPPORT (C4S)

The next step in confirming your identity and strengths is to develop a document that will celebrate your achievements and manifest your attributes. This document must work towards convincing both yourselves and prospective donors that you can undertake what you expect them to support.

*This is a vital document and we refer to it as Case for Support (C4S). It should depict your organisation as vibrant and competent and must be the expression of your organisation's credibility and integrity.*



**Figure 42: Case for Support (C4S)**

It must answer any question anyone could possibly raise:

- Why is your organisation different from similar service providers?
- What are the specific needs of the people/communities you serve?
- What impact are you making?
- How will the funds specifically benefit those you serve? And the community?
- Are you being successful?
- What are your current priorities? Your urgent needs?
- How will the funds raised be used?

A C4S is also more than merely a tool to leverage support. It can also be:

- A communication tool;
- A promotional tool;
- A training tool;
- A planning tool; and
- An inspirational tool (to motivate staff, Board members, and to recruit volunteers).

Composing a C4S is an exacting process and George Stanois says of the process and the product:

*A Case for Support tells your organisation's unique story—the whole story. And that is the key to understanding a Case for Support. It is a matter of telling a good story, one that draws readers in and never lets them doubt for a minute that your organisation is the greatest, and your cause the worthiest. That doesn't mean you have to exaggerate and embellish, or heaven forbid, lie. No, it means that you must write your Case for Support with heart, soul and passion— you know, that same heart, soul and passion that all of you bring to the work you do every day.*

*A well-argued case may be logical, rational, and full of great, supporting statistics, but the case can fall flat if it doesn't reach out to people. People do not give to causes, to arguments, or to bricks and mortars for that matter. People give to other people. So regardless of the campaign goal or the need, you have to appeal to both hearts and minds. Frame the argument in anecdotal material and you have listeners. However, avoid sentimentality and emotionalism at all costs. This will not serve your purpose.*

*A case must be balanced. It is not a plea; it is a reasoned argument that states a need clearly and concisely, appealing to the readers' intellect while also calling upon other motivating factors that make us human: a desire to help others, to give back to the community, to show compassion, to be part of something bigger than ourselves.*

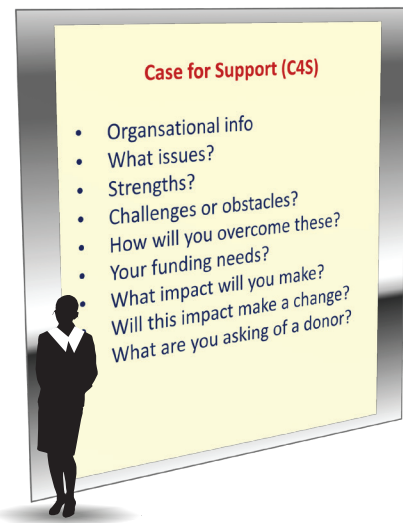


Figure 43: Case for Support (C4S)

Stanois recommends the following steps:

Development phase:

- Gather up research and all relevant background information.
- Define key focus.
- 

Writing phase:

- Create the outline (and a table of contents).
- Consider the core content carefully.
- Brainstorm other elements that could be included to enhance the message.
- Watch your language! There is no room for waffle. Avoid clichés and over-used phrases.
- Complete the first draft.
- Reconsider, revise first draft, and write the second draft.
- Have others not involved in the writing, read and comment.
- Proofread, and you should have a final draft.<sup>1</sup>

<sup>1</sup> Reprinted with permission from The Goldie Company.

## PITCH

Imagine you are in a lift (elevator) and your fellow passenger asks you what you do. Can you give a clear and exact explanation of what you do or of your project in the time it takes to travel three floors, or in roughly 2-3 minutes?

Only a person who is intimately familiar, even emotionally invested in an endeavour, can manage an explanation convincingly and with confidence. It is likely that that person will effectively communicate *what, for whom, why, and where*.

The ToC, LFA, SE, and 'suitability index' worksheets are indispensable in helping to develop scripts for an effective pitch. Examine whichever planning document you use and write out a concise description of what you do in bullet points first, then convert these into short sentences. Your pitch should not only deliver facts, but also betray some excitement about your work. Celebrate what you do.

Rehearse your pitch often.

A clear and compelling pitch will also help in crafting a *Letter of Enquiry* and an *Executive Summary*.

Claire Axelrad, another redoubtable fundraising consultant, offers practical advice on how to answer the question *What do you do?* – whether it comes from a donor or a prospect. She says they are asking what your organisation accomplishes, NOT simply what it does. Your answer must intrigue them and you must be selective, very selective, of what you tell them and be conscious of how you share the information.

In her interview with *NonprofitPRO*, Ms Axelrad shares the following advice:

Tell them about one resonant thing you accomplish. An accomplishment that is:

- Timely (urgent, seasonal).
- Topical (currently in the news).
- *Something you know they're interested in (they, someone else or something in their background told you as much).*
- The most popular programme you operate (if you have none of the above, go with the odds).
- *Surprising, extraordinary, cutting-edge, a game changer (maybe you're new, but you're necessary).*

She recommends that you relay the information with excitement and commitment. She discourages identifying yourself with what you are, e.g. a hospital foundation, a homeless shelter, conservationist, etc. and recommends, instead, that you share exactly what you do, the nitty gritty of what you do, for example;

- You're saving lives through cancer research.
- You're keeping people safe and off the streets.
- You're soothing the savage beast through music.
- You're preventing kids in your community from falling behind.
- You're rescuing abandoned puppies.

- You're healing the ocean.

Ms Axelrad recommends being simple and direct, because complexity often kills fundraising. Focus on the actual change your contribution (participation?) will make and do so in the form of a pithy story.

## VALUE PROPOSITION

One often hears the term 'value proposition'. What is it?

A value proposition is simply communicating the benefits of your project, programme, service, or idea, and doing so in simple, direct language. It is an expression that highlights what you want to do, it intends to convince a donor of its merit, and it should be the closing statement of your pitch and feature prominently in letters of enquiry and executive summaries.

It 'boils down' your pitch into something that your prospective donors or sponsors can easily grasp and remember. But it is not enough to describe the features or capabilities of your offer, your statement needs to be very specific. The proposition must focus closely on what your donors really want and value. It must convince them to become engaged in either solving a problem(s), improving existing solutions, to have a better life, build a better service, do more, better, faster...? In other words, a value proposition needs to be aligned with each individual donor's focus/ interest area.

A value proposition is a useful technique that has a much wider application than communicating and promoting your project/programme/service. The idea is to help donor prospects see the specific value your work brings to them. And by doing so, grab their attention in such a way that they know: "Yes, that's right for us/me." The statement must be convincing, and compelling.

### Step 1: Know your prospective donor.

Thinking from the perspective of your prospective donor, ask the following:

- Who is he or she? What does s/he do and need?
- What problem does s/he need to solve?
- What improvements does s/he look for?
- What does s/he value?

**Tip: If you don't know, ask!**

### Step 2: Know your product, service, or idea.

From your donor's point of view:

- How does the product, service, or idea solve the problem or offer improvement?
- What value and hard results does it offer the beneficiary?

**Tip: Include numbers and percentages, but only the utmost significant ones.**

### Step 3: Know your civil society sector and what similar organisations offer.

Keep on thinking from the perspective of your prospect, and ask:

- How is this initiative more effective than competing ones?

**Step 4: Put yourself in the prospect's mindset.**

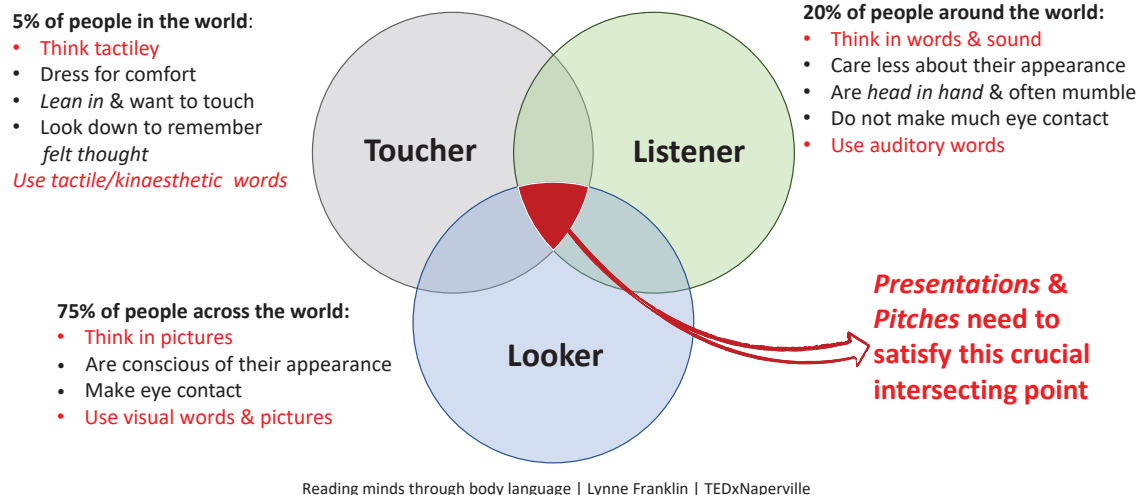
"Why should I buy into this specific project or idea?"

Try writing from the donor's viewpoint by completing the following (and do not forget to include the only numbers and percentages that matter most!):

- "I want to give to this initiative because it will..."
- "The things I value most about the offer are..."
- "It is better than competing services or ideas because..."

Your prospects' 'answer' in step 4 will be your value proposition statement and be placed as the closing statement of a pitch, and an Executive Summary. It should also be woven into a Case for Support.

When considering an audience encounter, whether for a pitch, a C4S, or a presentation, keep the following Venn diagram of audience types in mind.



**Figure 44: Audience types**

## PRESENTATIONS

An increasingly common instance is donors asking you to present your project. The pandemic forced many to work remotely and presentations have become an expected practice and therefore, a highly competitive one. Being able to use a presentation soft-ware program is no longer a choice, but an imperative. By that I do not mean presenting loads of text onto a slide, projecting it, and reading (or even simply summarising it).

As we saw in Figure 44 is a Venn diagram of the different audience types that a presenter should be conscious of and make every effort to address, for example, those who think in pictures, those who would benefit from making references to touchable concepts, and those who are quite comfortable to listen to information. Presenters would do well to pepper their presentations by including auditory, visual, and tactile references.

Most importantly, presentations should complement a verbal presentation and try to find an optimal middle-ground. They could have videos and polls and ought to build around colourful and animated (moving) concepts.

- A picture on the side of a slide should be relevant and integral, not a pretty filler.
- Text should be brief ideas or thoughts (bullet points) that the presenter must qualify; not long sentences to be read out loud.
- Infographics should be conceived around a metaphor, e.g. this infographic explains the fund development steps by depicting the process as a funnel:



**Figure 45: Fund development workflow**

In this slide, each component appears on the screen individually, is fully explained, and allows for questions before the next stage appears. This build method allows for effective incremental learning. If the entire graphic were to flash up on the screen all at once, both understanding and learning would almost certainly be lost.

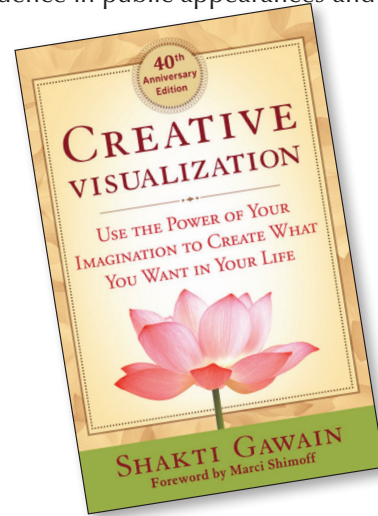
Building informative and persuasive infographics have taken precedence over boring slides overloaded with text that the presenter reads to an audience. Incremental animation and colour have become the standard. Most of the infographics in this publication are fully animated PowerPoint slides used in my

own presentations.

For those of us who are hesitant, reluctant, or even resentful about making public presentations, may I suggest reading Shakti Gawain's *Creative Visualization*. This is both a description of the concept of visualising and a series of exercises to help you gain confidence in public appearances and all other aspects in life.

### Key tips in making slide decks are:

- Learn to use:
  - the *Slide master*,
  - Presenter Mode,
  - The laser pointer (built-in or a peripheral),
  - For online presentations, learn to use *Subtitles*;
- **Plan** your presentation;
- **Do not read your text to the audience**;
- Use bullet points & abbreviated language;
- Build your message incrementally with animation;
- Avoid flashy transitions;
- **Do not overload slides with text**;
- **A useful rule is: six lines per slide, six words per line**;
- Limit punctuation;
- **Practice, practice, practice**;
- Have alternate plans to deal with **glitches** (presentations on USB drives in case your computer cannot connect with a venue's projection equipment and you need to use theirs);
- The cardinal principle is to direct your content at your audience – it is not about you;
- Avoid a white slide background, it is harsh on the eyes;
- Use bold but complementary colours to draw attention to vital information;
- Use sound and animation carefully to build understanding;
- Use humour appropriately and only if you are very comfortable at injecting humour;
- If you use build animation (lines of text appearing each time you click), have content appear on the screen in a consistent, simple manner; from the top or from the left (from the right if you read right to left);
- **Focus your audience's attention on what you want them to look at**;
- Prefer neuroscience designed infographics over text to stimulate emotion and interest – use **metaphors** to illustrate concepts;
- Learn to navigate backwards and forwards in your presentation, it helps interactive discussion (audiences often ask to go back to a particular slide);
- **Speak slowly and clearly**;
- Do not apologise for anything in your presentation. If you suspect something will be hard to read or understand, do not use it;
- Let your slides support your point...not make your point.







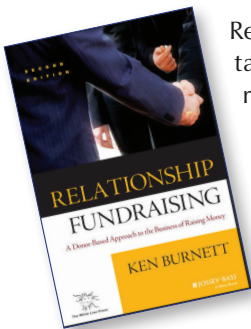
# PART 5: SOLICITATION

Now that we know what the goals and objectives, the contours, the parameters, cost, and prospective donors of the project are, we can begin making contact.

## CULTIVATE

Approaching prospects begins the cultivation process. This is where a possible supporter is approached and is drawn into understanding the what, the how, and the why of your project. It can be by phone, via correspondence, or even with visits. In-person contacts would normally be an invitation to meet at their place of business or, occasionally, at a restaurant. Corporate donors are often more open to out-of-office contact than foundation programme officers are.

The type of contact we make will depend on our relationship with the prospective donor. If the donor is a good friend of the organisation, has previously supported, and/or attended functions, etc., we could make a telephone or personal visit approach.



Remember **you are working to win over a prospect's commitment to your cause**. This may take time and effort, but when successful it would be incredibly satisfying. Cultivating relationships is a vital business and indeed a vital life skill that is well worth mastering.

A seminal and wide-ranging text worth consulting is Ken Burnett's *Relationship Fundraising*. It contains such alluring chapter titles as: *Much more than money; Proud to be a fundraiser; The vital ingredients for success; Avoiding common pitfalls; Making and keeping friends; Creative approaches to relationship building; Keeping up with change; and Fundraising for the twenty first century.*

Besides cultivating one-on-one relations with individual donors, functions and events become portals to meet prospects. One could argue that the real value of such events is that they are *cultivation* opportunities before they are *fund development* opportunities.

Although of decisive importance and contrary to common thinking, fund development does not revolve entirely around the proposal document alone. Following rigorous prospecting research, first-time approaches are likely to be via a *Letter of Enquiry* (LoE). This may be followed by an abbreviated

proposal, or summary proposal, and/or an interview (in-person or online) which, if successful, the donor may invite a proposal.

Unless responding to a request for proposals (RFP), where all requirements will have been stipulated, you may be obliged to prepare any or all the following documents.

### CONCEPT NOTE

A more narrative description of a project is a Concept Note, also referred to as a Concept Paper. This is a condensed version of a full proposal that does not normally include the ask/ offer for money, support, or partnership. Instead, it is a crisp and concise summary of a project outlining the reasons why the initiative is essential, and lists the steps involved in the activity or intervention.

If an internal document is necessary for presentation to an executive committee or to a governing Board, especially if it is a major intervention that will require an extensive campaign, then a concept document will be appropriate. It is, in essence, a mock proposal with all the key components to aid decision-making.

For a prospective donor, one could send a Concept Note when that donor's focus area, location, and donation range aligns with that of one's own project. In that instance **we would enquire if they agree that our interests correspond, and if they would have an interest in our project.**



Figure 46: Concept/note/paper

Often a donor may issue a 2-phased request for proposals (RFP) where the first phase calls for a concept note. If such a document is in response to a donor's RFP, it is meant to be a stringent screening exercise. The donor will likely issue a set of guidelines or criteria. These guidelines must be followed meticulously, to the point of printing them out or better still, have colleagues study each stipulation in a group, re-word and rephrase each stipulation to your best understanding. Print it and have it as a reference next to your computer as you draft the Concept Note in response to their call. Such guidelines may contain what to many would be mundane, such as font, font colour, and font size. Complying with these seemingly minor details will demonstrate an applicant's attention to detail. Language should be succinct and crystal clear. Avoid unnecessary verbiage...do not waffle to sound smart! **Turn a phase before you turn to a big word.**

Unless this is a pioneering initiative, there is no need to include testimonials.

Donors must wade through hundreds of approaches and the ones that deliver their content directly, clearly, and differently are much more likely to win their interest. Respect their time.

Equally important is who you will name to take responsibility for the project. Ensure that the contact person listed knows everything about the project and will be easily available should the donor make contact. The best contact person would naturally be the project leader/manager.

Not dissimilar to a letter of enquiry (LoE) discussed overleaf, a sharp and to-the-point Concept Note will answer the following questions:

- Why this activity? (*what are the Goals and Objectives you would like to achieve*).
- What will you do?
- How and who will manage the project?
- How will you monitor and evaluate the activity?
- What will the performance indicators be? (*what features will show successes and/or stumbles*).
- How resilient (sustainable) is this activity?
- How can you justify the costs to mount this project?
- What are the long-term benefits to the community you will serve?
- How will you communicate with your beneficiaries? (*voice and visibility*).

If a likely donor requests a short/summary/abbreviated proposal, you will again need to study their requirements carefully and compile a concise description along with a summary budget (that is, expense categories with subtotals and grand totals, without listing line items). Ideally, explanatory graphs should accompany the budget table.

Remember, it is much easier to write a long document than it is to write a short, concise one. Mark Twain famously apologised to a friend for writing him a long letter saying,  
*'I didn't have time to write a short one.'*

## LETTER OF ENQUIRY (LOE)

If this is your first approach to a donor, you should send a *Letter of Enquiry* in which you outline how your project aligns with their interests. Then politely ask for an appointment to present your project or ask whether you can send a formal proposal.

Having identified a likely donor and confirmed their interest, preferred location, and range of giving, it would be courteous to outline how your organisation/programme/project is aligned with their requirements and request permission to submit a proposal. Such an enquiry is not reserved for first-time contacts; it is good manners to approach even previous donors for a new project via a letter of enquiry (LoE).

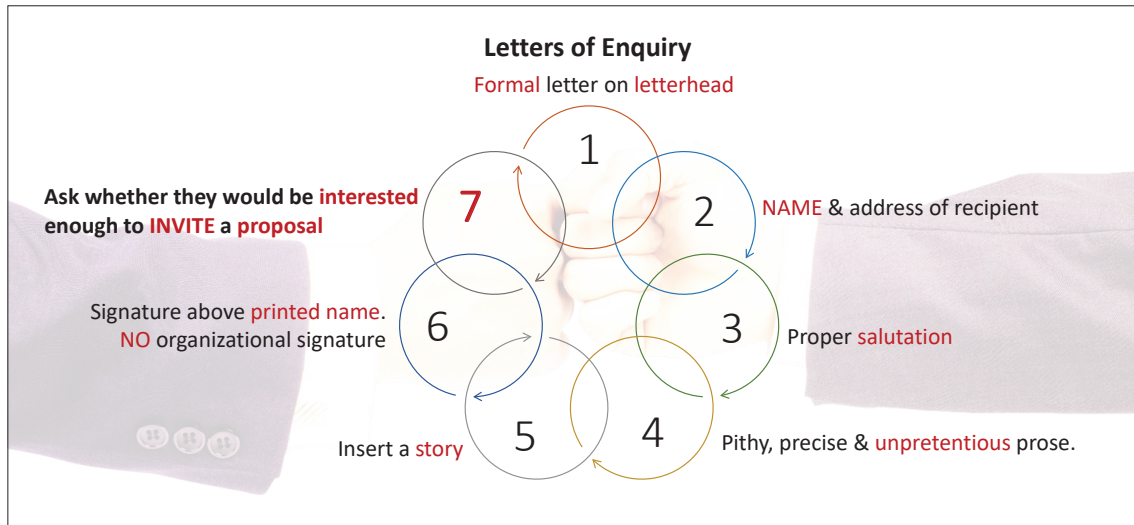
In an LoE you are **asking to be invited to introduce your project** in the hope (I would prefer to say, in the *belief...*) that they will invite more information in the form of a proposal.

LoEs should be written on an official letterhead and addressed directly to the person who is likely to consider an application (never to *Dear Sir/Madam*).

Succinctly outline:

- how your organisation/programme/project aligns with the donor's interests, and intention,
- a short summary of the work involved,
- who the beneficiaries will be,
- the overall impact you will make,
- courteously request whether you could submit a proposal,
- in soft language you might also ask them to acknowledge receipt,
- in an equally soft tone, you might add that you will call to enquire after their decision if you do not hear back after xx days, then
- sign and print your name beneath your signature, and
- DO NOT rely on an institutional/organisational branded signature.

These details should not be spread over more than three pages, preferably fewer (a strong word of caution: when telephoning DO NOT begin the conversation with *How are you?* This is a typical call centre approach to conceal the fact that want to sell something. Be bold and proud enough to identify yourself and your organisation to initiate the conversation).



**Figure 47: Key components of a Letter of Enquiry**

## THE COVER LETTER

When the time comes to present a full proposal, it is not only customary, but essential, that the proposal pack be introduced by a cover letter. No matter how familiar you are with the person to whom you are writing, this is not to be a casual chatty communication.

Be sure:

- the cover letter is addressed and is tailored to a real person! Do not direct it at a 'dear sir/madam',
- to make clear mention of how your subject/cause aligns with those of the company or foundation you are addressing,
- your letter is brief and to the point,
- if your letter is sent by email, ensure that the subject line is short and direct (change subject line to reflect the content of every single email),
- proofread for extra spaces, misspellings, unnecessary or missing punctuation, and again:
  - sign and print your name beneath your signature, and
  - DO NOT rely on an institutional/organisational branded signature.

## PROPOSALS

Before getting down to filling out a grant-maker's online application form, or developing a detailed proposal document, it is crucial to know what grant-makers want from a proposal.

On an anecdotal level, Stephanie Minor, of *NonProfitPro*<sup>2</sup> in several conversations with a variety of seasoned grant-makers, summarised what they, personally, preferred in applications. Reviewers must often read tens, if not hundreds, of applications and they need to see crisp, active language with little, if any, extraneous information (waffle). Minor managed to summarise the following key concerns and we should read them as 'insider tips'.

The reviewers preferred applicants to show:

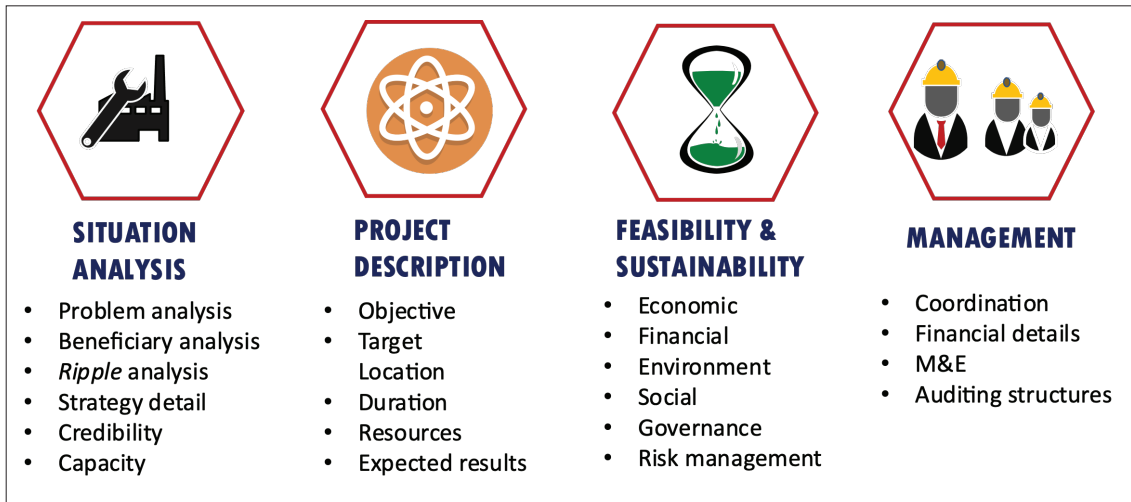
- evidence of solid planning and not be left with questions about the primary details of an applicant. They do not appreciate being left with questions on **who, what, when, why, or where** of a programme or project;
- they want a clear idea of how the project fits into the vision, mission, and objectives of an organisation. They want to know **how their funding will advance an organisation**, programme, or project. They also look for evidence of quality leadership thinking that led to and drove the application;
- a strong match with an organisation's mission and **tightly aligned with the funder's objectives**. The project or programme must **advance an organisation's core purpose**. *Mission statements must guide requests*, one reviewer said;
- surprisingly, reviewers look for truthfulness, especially about the **challenges and risks** that a funded project is likely to face, like budgetary deficits and leadership changes. They want to know how and to what extent you have identified risks, and how you plan to mitigate their impact;
- the logical flow and interconnectedness of narrative, budget, and supplemental documentation. The document must have a **logical progression and must be coherent**. All components must relate seamlessly to one another. The narrative and support materials must tell the same story;
- because **grant-making is about building relationships**, funders who have no introduction to your organisation and what you are working on are likely to set your application aside. Funder's care deeply about their investments and must report their decisions to their Boards. They need to know in whom they are investing and will have developed a certain confidence in the non-profit who will use their money. If you are considering a new funder, get to know them. **Do research**. Make an introductory call to communicate your project concept and work up towards a letter of enquiry. **Establish a connection before submitting a grant request ...** and follow through with deliberate and sincere stewardship actions.

Remember, **treat every donation as the first of several**. Make sure it is renewed in a continued and valued relationship.

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<sup>2</sup> Stephanie Minor, *What Grant Funders Really Want*, in *NonProfitPRO*, Philadelphia: NAPCO Media, 3 January 2023.

Proposal lengths and breadths differ from donor to donor. Some require no more than a Concept Note, others, like bi-lateral agencies require extensive, extremely detailed documents because they must comply with immovable bureaucratic stipulations. Figure 48 lists the details that are likely to be expected in a full proposal:



**Figure 48: More on what grant-makers want in an application**

It is difficult to suggest a proposal template that would suit all donors. The template included in this publication is generic and will most likely need extensive adjusting to meet a specific donor's requirements, however, the key components are:

**Section 1: Summary & Overall Suitability:**

- Compliance/alignment
- Beneficiaries Impact ASK/OFFER

**Section 2: Programme/Project Factors:**

- The proposition Purpose Motivation Objectives
- Content & methods to be used Activity schedule
- Duration & time frames Evaluation & review Profile of target group(s) Expertise
- Environmental impact Diversity strategies
- Sustainability of programme/project

**Section 3: Cost Implications (Budget):**

- Personnel
- Staff benefits
- Equipment Administrative support
- Travel

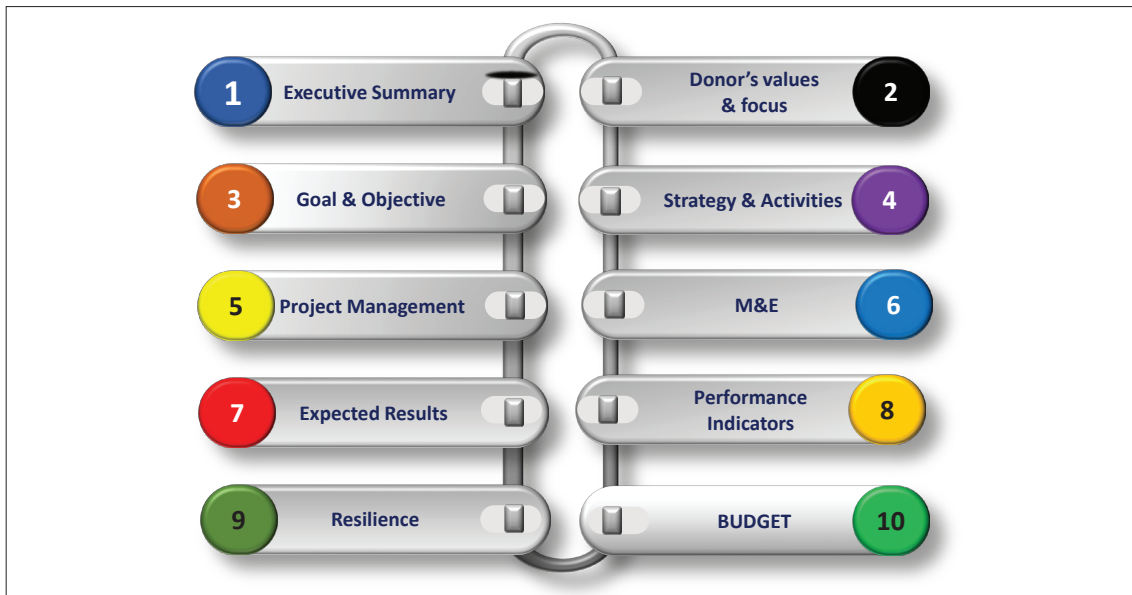
**Section 4: Programme Management**

- Factors
- History Mission
- Catalogue of achievements
- Office staff
- Board of Directors/Trustees

### Section 5: Conclusion

This is usually a summary – directed at a reader who now knows the contours and details of the project. It should be a confident statement of the advantages and certainly of the necessity of the project. It should close with a pithy statement as to why the project is best qualified to design, implement, evaluate, and manage the activity (both administratively and financially).

The typical headings in a proposal are pictured in Figure 49:



**Figure 49: Typical proposal sections**

The 7-page [Template 34](#) included in this publication, has several questions to guide you through each subheading.

Key to a full proposal is the *Executive Summary*. While it is natural to begin writing a proposal with its executive summary, it is imperative to regard this as a launch pad, (remember, you cannot introduce what you do not know ... and you will only know the content of your proposal once you've written it).

When the proposal body is complete, revisit the executive summary and spend time editing it into a compelling half to three-quarter page summary. Again, do not waffle. State inspiring facts as clearly and as precisely as you can. Avoid clichés, over-used phrases, pretentious vocabulary, and especially, avoid writing in the passive voice.



PLEASE NOTE: add a Footer to all documents, especially solicitation documents, like:

Organisation Name

Project Name

Page xx of xx pages

Rather than trying to list everything that would make a successful proposal, a list of the typical reasons why proposals fail may be more useful. Figure 50 is such a list:

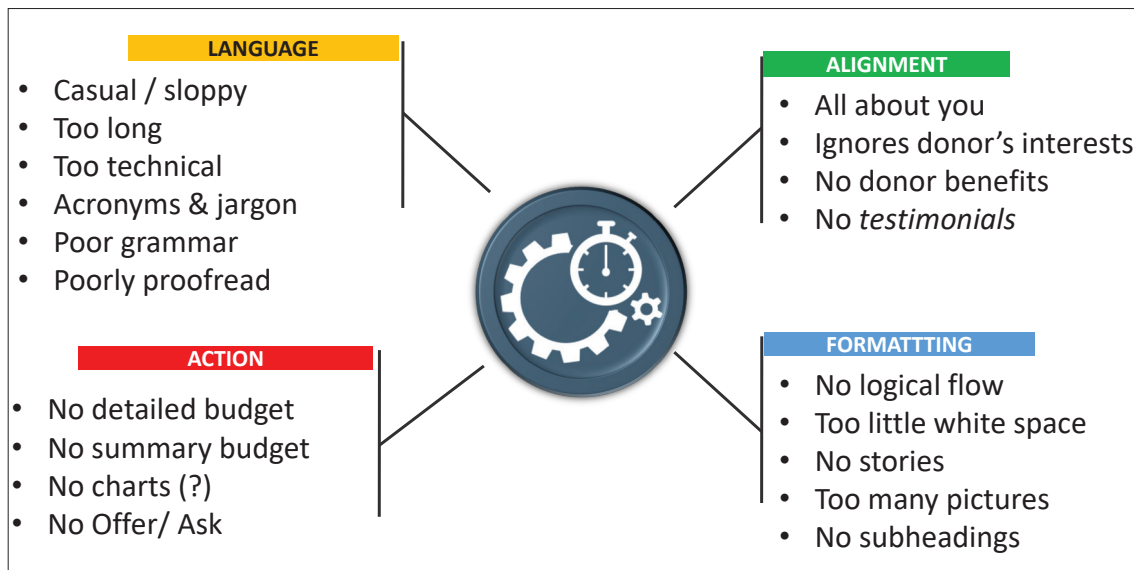


Figure 50: Typical reasons why many proposals fail

## SOLICIT

As naturally as you segued from developing solicitation documents into the cultivation process, so too will your efforts flow into the actual solicitation. This could be via a proposal or in person. The latter must be delicately and courteously managed.

After the initial **introductory courtesies** and meaningful small talk, conversations should **recall previous contacts**, or better still, **previous donation(s)** to your organisation (or the support the donor has given elsewhere), then move to **state the exchange you have in mind (your Ask)**. Remember, you are offering to do what they are interested in, but which they do not have the time or talent to do. **You are offering to synchronise your expertise with their support.**

## PROPOSITIONS

Strictly speaking, written approaches for sponsorship are not simply proposals, they are viable propositions for a commercial partnership. We hardly make this distinction anymore, but it denotes the difference between a charitable (non-taxable) request for support and a commercial (taxable) transaction.

The components of a sponsorship proposition are markedly different to that of philanthropic support:

### Event details Overview

#### Target audience

#### Onsite activities:

- Hospitality
- On-site displays On-site sales

#### Media support:

- TV
- Radio
- Newsprint
- Magazines

### Publicity:

- Website
- Signage
- Postal

### Suggested promotional display:

- Travel/product/services packages
- Sportswear/sports equipment
- branding
- Business interests

### Investment

- Other opportunities

Among the many other differences between proposals and propositions is that the latter does not often refer to its financial worksheet as a *budget*, but as an **investment**.

Although sponsorship is often seen as part of soliciting donations, it really is a distinct practice. Effective sponsorship is a commercial transaction not a donation and usually does not attract tax concessions. One sells sponsorship. Refer to page 66-72 on sponsorship, a full sample sponsorship proposition is included as Template 38. Since this approach to sponsorship is not commonly used, the downloadable sponsorship proposition template is populated with sample details of a Golf Day event.

## ESSENTIAL WRITING TIPS

Writing is a vital skill and one of the hardest to master for most people. It is a mainstay in fund development because letters need to be written, so are persuasive proposals and propositions, and so too must 'thank you' letters be clear communications. Descriptions of projects must be compelling and convincing. Tone and tenor must be well harnessed.

**Here then are a series of tips that may form a useful guide to writing.**

Many of the following will be common sense and seem unnecessary, but it might be worth reminding ourselves of the need to be disciplined when communicating with donors. Even the most seasoned writers don't do the following, often unwittingly, but we should definitely all do them:

## PLAN YOUR COMMUNICATION

Making as detailed an outline as possible. Try not to see this as an extra or a separate step in the writing process; regard it as integral and indispensable. Spending time planning and outlining will make writing flow easier and quicker. Planning an outline has a certain pleasure of accomplishment. And even though that outline may change as you write, you will at least know what you wish to communicate before you build the main document.

## KNOW YOUR AUDIENCE

KNOW to whom you are sending your document. Find out as much about the person and the company or foundation you are addressing.

## KNOW WHY YOU ARE WRITING

As silly as this may sound, many writers lose sight of the very purpose of their writing exercise. Know your reason and keep WHY you are writing to them very clear in your mind. Identify your purpose very early on.

## DECIDE ON A STRUCTURE

Preferably, begin with a concept note (even one to yourself).

Although not appropriate in all instances, it is necessary when you need to persuade an internal structure (committee/panel) of the merits and metrics of a programme. Wherever possible, **use a template that has proved successful, but be prepared to add or omit sections** that may not be relevant to the immediate project. It is hard to discard work you have done, but triage – the cutting away of irrelevant or useless and unclear information – is very, very necessary in the writing process.

## WRITE SIMPLY AND COMMUNICATE DIRECTLY

Proposals, whether they be in the form of a letter of enquiry or a full-blown proposal, are often one of a great many. Most of those will use the same stale language such as, *with regards to, in order to, in accordance with, in terms of, at this point in time, etc.* Many will use obscure vocabulary to try to sound smart. Others will be loaded with technical jargon and drag along in the passive tense. These devices often blur the message and proposals get tossed aside. Those that vary sentence length between a few longer sentences and several shorter ones, those that use crisp expressions with active verbs, will grab their attention and deliver their messages much more effectively.

## AVOID THE PASSIVE VOICE

Consider the effect of these sentences: *Vuko cooked the meal;* and *The meal was cooked by Vuko!* or *The team won the game,* instead of *The game was won by the team,* or *Thabo wrote the proposal,* rather than *The proposal was written by Thabo.* The first version of each of these examples is more direct and even lively compared to the second. Prefer an active voice. Prefer sentences that begin with a noun followed by an active verb (I often look back at my use of ‘of’ and ‘by’ to check whether I had not lapsed into the passive voice).

## USE PRECISE VERBS

A fund development proposal is not a sociology essay or a lengthy legal opinion. It is a document that must deliver and justify a call to action. It must convince a reader that your activity is worthwhile investing money, service, or equipment in an activity that will yield the results they anticipate. It requires delicate forcefulness, persuasiveness through language that cannot afford to dilly-dally about. Say what you mean, not what you think you mean. Scour your writing to see if you cannot use an even more direct and active verb that you may have used. If you meant to say you will *use* a system, do not risk saying you will *utilize* a system.

## “WRITE TIGHT”

As Suzanne Lieurance, a former classroom teacher and now a prolific freelance writer of more than 20 books, says in her excellent e-book, *Be a Better Writer: Tips to improve your writing*, “no matter what you write make every word count; eliminate unnecessary words”. She uses the example of why say “he nodded his head” when “he nodded” says exactly the same thing; or “she said softly”, instead of “she whispered”.

**More general recommendations are:**

## WRITE CONVERSATIONALLY

Be relaxed not stiff and while you should not write as you speak, let your writing flow easily, sincerely without jargon, without pompous vocabulary or phrases (but personalise with care – do not become too familiar). Write to be easily understood. Take your reader on a journey. Make it a letter (especially letters of enquiry) to someone you know. Be fresh and original or you will sound like everyone else. Tell the reader why you are writing to them now.

Read, read, read! This is the only way to improve your writing. Reading will not only expose you to new experiences and facts, it will also show you different ways of describing things, with new and unusual ways of arranging words and turning phrases. Focus on the message not the data/metrics. Repeat the reader’s name on the last page.

## BE EMOTIONAL

Put some feeling into your message; don’t be cold and aloof, nor teary or soppy. Find a balance to show you care about your subject without being gushy, pitiful, or unnecessarily sentimental. Emphasise the benefit to the reader.

## INCLUDE YOUR ACTUAL ASK/OFFER

Don’t shy away from your ultimate reason for writing. Own the fact that you are approaching the donor for a particular reason. Do it proudly and straightforwardly, not bashfully or apologetically. Yours is the noble business of connecting skills and know-how with interest and support.

## FORMAT FOR EASY READING

A cluttered page can easily dissuade someone from reading. Prefer shorter sentences and shorter paragraphs to leave as much white space as is reasonable. If you do use boxed inserts, use them sparingly and judiciously. If you can, try to end each page in the middle of a sentence!

## MAKE IT SURF-ABLE

Most readers spend as little time as possible on a page. Speed reading has unfortunately become something of a fad (by frowning upon slow readers). Following on from the previous point, try to deliver a page that can be skimmed. Use bold and italicise, even underline type sparingly but effectively to catch a readers' eye and provide a fair sense of the content.

## BE CONCISE

Be short and to the point, but not too concise as to leave the reader with major questions.

## BE DONOR-CENTRED

*Its less about you than it is the donor...*remember, you have chosen to approach her/him about what they can do for your project. Address them and do not put yourself or your organisation in the way of their decision-making.

## CALL TO ACTION

Be firm but courteous in asking for a response by a certain date and say you will call to follow-up if you do not receive a reply ... if only not to burden the reader with the chore of having to write an acknowledgement (tut, tut!).

**Finally, and arguably most significantly,**

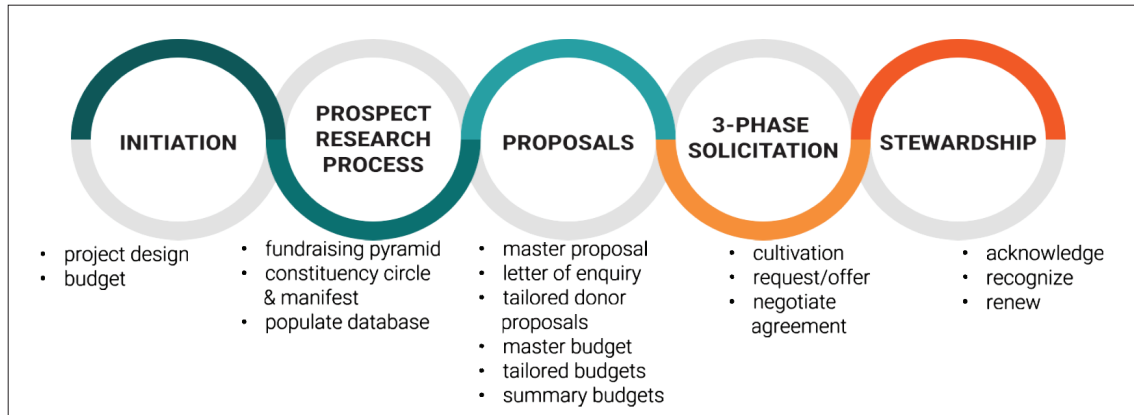
## PROOFREAD!

Proofread for extra spaces, misspellings, unnecessary or missing punctuation. If you cannot find someone to help you, consider using a software programme like *Hemingway* (which I found more exacting than another popular writing guide, *Grammarly*). True to its name, the *Hemingway* app fashions its suggestions on Ernest Hemingway's staccato, direct style that is well-suited for fund development proposal writing.

## ANATOMY OF A FUND DEVELOPMENT CAMPAIGN

Armed with the necessary solicitation documents, developing donor support can move to the next stage, the campaign. Each campaign has three phases of completion, viz. Design, Solicitation, and Stewardship and must always be seen as part of a larger whole.

Figure 51 represents the key stages in a campaign game plan.



**Figure 51: Generic campaign game plan**

On a more practical level, Figure 52 is one example of a short-term, *ordinary* fundraising campaign.

STAGE	CATEGORY	ACTIVITY	DETAIL
<b>DESIGN</b>	<b>INITIATION</b>	Prospect researcher identifies funding source	
		(Project may identify funding source)	Prospect researcher verifies & qualifies
		Meet with project staff	<ul style="list-style-type: none"> <li>Brainstorm project contours</li> <li>Schedule time to workshop Concept Map/mind map/Success Equation/LFA</li> <li>Schedule budget build</li> <li>Develop project timeline</li> </ul>
	<b>PREPARE FOUNDATION DOCUMENTATION</b>	<ul style="list-style-type: none"> <li>Study focus areas</li> <li>List project details</li> <li>Develop Organogram</li> <li>Develop action plan</li> <li>Fine tune SE/LFA/Concept map/mind map outline</li> <li>Draft mini C4S</li> <li>Craft compelling C4S</li> </ul>	<ul style="list-style-type: none"> <li>Determine &amp; articulate project's impact/affect</li> </ul>
<b>BUDGET</b>	<ul style="list-style-type: none"> <li>Review &amp; finalise budget</li> <li>Develop gift range chart</li> </ul>	<ul style="list-style-type: none"> <li>'Lateral think' activities</li> </ul>	
<b>SOLICITATION</b>	<b>PROPOSAL / PROPOSITION</b>	<ul style="list-style-type: none"> <li>Develop LoE if applicable</li> <li>1<sup>st</sup> Draft master grant proposal/ sponsorship proposition</li> <li>Proofread</li> <li>2<sup>nd</sup> draft</li> <li>Proofread</li> </ul>	<ul style="list-style-type: none"> <li>Project leaders sign-off</li> <li>Proposal writer sign-off</li> </ul>
	<b>PROSPECT RESEARCH<sup>3</sup></b>	<ul style="list-style-type: none"> <li>Develop <i>Ubuntu</i> Constituency circle</li> <li>Develop <i>Ubuntu</i> manifest</li> <li>Trawl local databases</li> <li>Trawl international databases</li> </ul>	<ul style="list-style-type: none"> <li>Prospect researcher sign-off</li> </ul>
	<b>SOLICITATION</b>	<ul style="list-style-type: none"> <li>Develop meeting schedule</li> <li>Schedule meetings with prospects</li> <li>Develop an elevator pitch &amp;/or slide presentation</li> <li>Approach prime prospects</li> <li>Review</li> <li>Approach secondary prospects</li> <li>Review</li> <li>Approach auxiliary prospects</li> <li>Final Review</li> </ul>	<ul style="list-style-type: none"> <li>If successful, Development Officer signs-off</li> <li>Determine probability of success</li> <li>If unsuccessful, report to Project Leader</li> </ul>

<sup>3</sup> Prospect research could also initiate a campaign OR could begin with listing the project focus areas.

STAGE	CATEGORY	ACTIVITY	DETAIL
SOLICITATION	AGREEMENT	<ul style="list-style-type: none"> <li>Scrutinise terms of agreement for cost-benefit ratio</li> <li>Negotiate terms if necessary</li> </ul>	<ul style="list-style-type: none"> <li>Director signs-off</li> <li>Critically analyse campaign trajectory &amp; make recommendations on lessons learned</li> <li>Hand over to Stewardship team</li> </ul>
	STEWARDSHIP	<ul style="list-style-type: none"> <li>Dissect Agreement methodically</li> <li>Acknowledge</li> <li>Recognise</li> <li>Renew</li> </ul>	<ul style="list-style-type: none"> <li>Distribute requirements &amp; timelines</li> <li>Build timelines into Database for alerts</li> <li>Acknowledge donation</li> <li>Design a tailored &amp; continuing proactive stewardship plan on database</li> <li>Design reporting template per donor (on donor's stipulations, where necessary)</li> <li>Shepherd project progress &amp; maintain constant contact with donor.</li> </ul>

**Figure 52: Sample anatomy of a fund development campaign**

## CAPITAL CAMPAIGNS

These are the most disciplined of fund development endeavours and most take several years to unfold successfully. Capital campaigns are audacious and intensive and require a substantial contribution from the host organisation in additional staff, an independent consultant, communication, and towards promotional activities.

A capital campaign begins with a high-value concept, such as expensive equipment or a building. There must be near 100% buy-in from the entire organisation and diplomatic measures taken to mitigate any dissention. Organisers must devise a full and detailed risk assessment and develop a detailed budget.

An equally critical component is a Feasibility Study on which the entire project will reside. This should preferably be conducted by an independent consultant since confidentiality (and impartiality) is imperative. A consultant, as a totally independent contractor, will be tasked to meet with key potential donors and ask, among other questions, whether the prospect would be interested in contributing, and if so, in what amount. Prospects may not want the campaign host to know either response, or not yet, and that is why this phase of a capital campaign should be tackled by an independent consultant.

Appoint feasibility study consultants with care. Consider more than a CV that includes a long list of clients and funds raised. Consider:

- recent experience along with length of experience;



- ask for referrals from organisations that have successfully engaged such consultants;
- when interviewing, consider how well they will ‘fit’ in with your team;
- both your organisations’ capacity and capability and the consultants’.

If the feasibility study is positive and indicates a high probability of success in reaching the campaign target, work on producing promotional materials. Begin with a compelling *Case for Support*. This C4S will help rally campaign staff behind the campaign activities and serve to introduce funding prospects to the goal. This, the preparatory phase, is strictly an internal business process and could last from nine months to a year.

The next year or two will be taken up by full-blown prospect research, cultivation strategies, and selected donor visits. These also take place completely without any public fanfare. Stewardship for these early contributions should be discrete, but nevertheless be as determined a practice as it would be for every single gift throughout the campaign.

When about 60% of the campaign is raised, schedule a conspicuous public launch to invite contributions to an obviously successful undertaking. Normal fund development should now ramp up its tempo. Other conspicuous events should mark the end of the campaign and the launch and use of the new acquisition.

Figure 53 is an approximation of a progress flow diagram for a capital campaign:

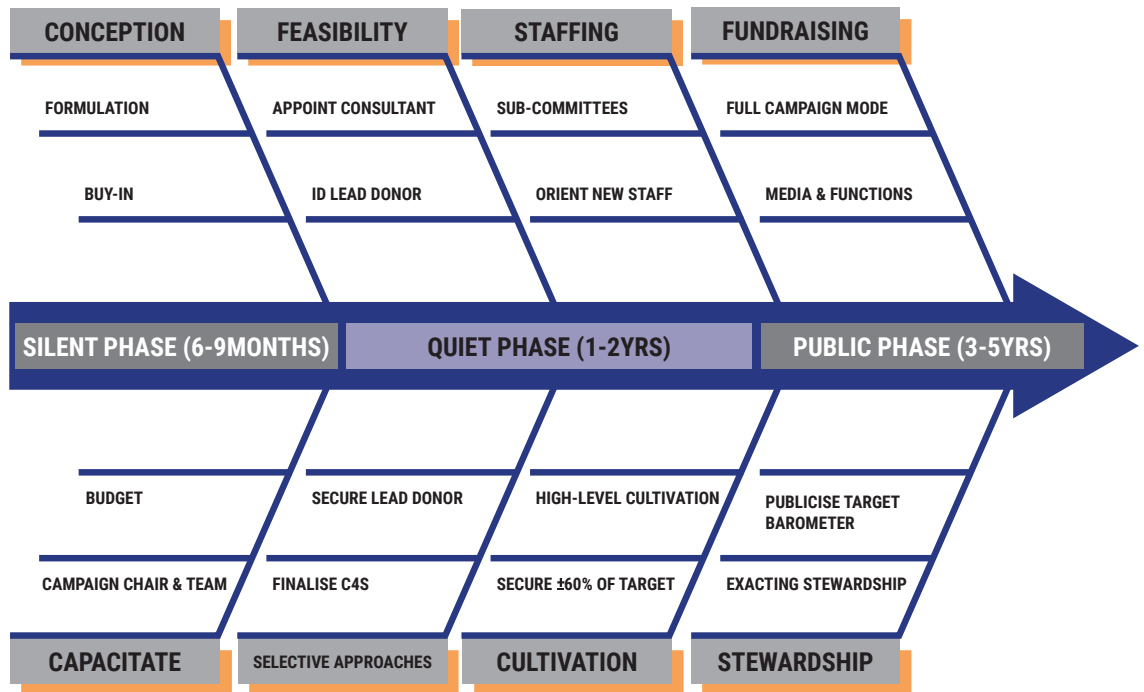


Figure 53: Capital campaign process flow

## COMPREHENSIVE CAMPAIGNS

This is a borrowing and blending of routine fund development practices with the more severe discipline of capital campaigns and is more common among established educational institutions/organisations.

A comprehensive campaign includes all aspects of fund development: from mass mailing through intimate *meet 'n greet* events to secure smaller donations, to full-on drives that secure multi-million, multi-year support in cash pledges through deferred insurance, bequests, or Trust funds. It could also be in equipment, vehicles, and a variety of other gifts to the institution – largely because the campaign target is not set exclusively as a financial value.

Comprehensive campaigns train their focus on alumni, local and locally based national businesses, foundations, trusts, philanthropists, and friends of the institution. In other words, comprehensive campaigns seek support in all sizes and varieties and from all potential sources to meet the high priority needs of the campaign target.

All institutions have strong and weaker programmes and indubitably, it is the stronger ones that will prosper more rapidly. The momentum that comprehensive campaigns create has a way of building the lesser attractiveness of others. A comprehensive campaign can also have spin-off benefits, such as enhanced teamwork, to heightening the university's public visibility, and to increase its morale.

A well organised and well-run comprehensive campaign will increase alumni engagement and expand media opportunities – especially in amenable news cycles. If prudently exploited, media exposure could paint a picture of a vibrant and dynamic place to study and research. It could attract prominent scholars and each department would be encouraged to find fresh ways to relate to its constituents and drive interest to the institutional website which will seat the comprehensive campaign and the mechanisms with which to participate (project blurbs, pledging facilities, and the donate button). The main and alumni newsletters and other publications should all consider making the comprehensive campaign their fulcrum points.

A comprehensive campaign that carries a compelling name will preclude the clumsiness of several smaller campaigns that will stretch staffing and often lead to costly mistakes like inaccurate prospect qualifying, poor database intelligence, poor solicitation, and discourteous stewardship.

A unique campaign name, such as *GIVE TO AND THROUGH ...* might provide a useful catch phrase to attract support for the institution and to the good of its beneficiaries (be they students or the communities the institution/organisation serves). Other campaign titles can be the *FOOTPRINT FUND* which would cluster all projects that enhance student life on campus and beyond.

Corporate gifts and campus activities can conveniently, colourfully, and continually promote a single fundraising thrust.

## IS THE INSTITUTION READY FOR A COMPREHENSIVE CAMPAIGN?

Support invariably comes from people who respond to credible requests when they are convinced and confident that their support will advance the institution. They are, essentially, looking to have their contribution make them feel proud.

This calls for a governing bodies' approval who must:

- issue a clear statement supporting the campaign,
- the campaign itself must be promoted as being in full compliance with the institution/organisation's mission as a bridge between the academy, business, and industry,
- there must be fully experienced fund-development staff, with an appropriate budget.

To determine an institution/organisation's readiness to undertake a comprehensive campaign, one should complete the following readiness profile:

				Replace greyed out data with your own
READINESS FACTOR	YOUR RATING	WEIGHT FACTOR	SCORE	
Board / Council gifting	3	4	12	
Top 10 donations	5	4	20	
Relevance	5	4	20	
Fund development history	3	3	9	
Urgency of appeal	3	3	9	
Prospect cultivation	5	3	15	
Development Office capacity	2	3	6	
Board /Council & staff enthusiasm	4	2	8	
External factors	3	2	6	
"X" times annual/recurrent income	2	2	4	
Fiscal integrity	5	2	10	
Campaign budget	3	2	6	
Campaign chair	3	2	6	
Volunteers	3	2	6	
Executive leadership	4	1	4	
Constituency acceptance	5	1	5	
Board /Council involvement	5	1	5	
<b>Total Score</b>			<b>151</b>	

Excellent if you scored = 175 - 215  
 Good if you scored = 140 - 175  
 Fair if you scored = 100 - 140  
 Poor if you scored = 43 - 100

Figure 54 : Comprehensive campaign readiness assessment

**Note:** these readiness factors are generic and MUST be made to pertain to your specific institution/organisation. A readiness assessment will point to any weaknesses and/or deficiencies and it is for the campaign committee to decide to what extent these will have to be addressed. It is therefore important that the readiness categories NOT be stock, but be tailored to a specific institution/organisation (the table above is only a rough attempt to reflect such factors).

Prioritising component projects is the next step. Most common categories are:

**Highest priority** – those projects with the maximum strategic effect on the quality of the facility and its beneficiaries;

**Important priority** – those activities, projects or programmes that have base or enrichment goals;

**Long-term priority** – activities that need further assessment and planning.

Each of these activities need to have a cost and should ideally be described in benefit and feature terms. It might be fair to describe a comprehensive campaign as an institution's strategic plan of funding action. The campaign would be a strategic selection of vital activities that will serve its vision. If adopted, a catchy campaign title should be a self-evident and an appealing marketing call.

Imperative to all major target campaigns (such as capital campaigns) is a *feasibility study* – a confidential 'testing of the waters' to determine prospective donors' interest and willingness to support the initiative. A *feasibility study* is a staple to a comprehensive campaign.

The initiative should fit squarely within the institution's strategic thrust and should unequivocally serve as the very connection between the academy, business, and industry, and indeed, the workplace.

As with all fund development initiatives, a comprehensive campaign will rely on an institution/organisation's existing and ratified gift policy framework.

## THE EXCHANGE

Negotiations for most grants and donations happen by correspondence. There are, however, times when a fundraiser must meet with a donor, make a short presentation, and make the offer to exchange the organisation's/project's expertise for the donor's support. This is commonly called 'making the Ask'. It is an occasion that relies on cultivated preparation, a favourable location, careful introductory chat, and **extreme discipline when making the 'Offer' or the 'Ask'**.

Several previous contacts should precede this meeting. There should have been a flow of information on the organisation and the project or programme. Even if the target donor is familiar with the organisation's work, there is no harm in packaging it afresh as a reminder – even if succinctly abbreviated.

It is also important that the meeting take place in a neutral venue, not in yours or the donor's offices, if at all possible. In your office space you are comfortable and could quite inadvertently intimidate the donor. The same applies to the donor's comfort zone. Remember too, that if the donor has been sufficiently primed, they are not likely to want to meet face-to-face to turn down your offer. That could be done more easily by mail or phone call. The point to agreeing to meet is probably to hear the amount required and then to figure out how to make it available (meaning which internal facility to tap, or which finance committee to mobilise).

It is vital that after making the ask, to say absolutely nothing. The donor is almost certainly to go quiet to figure out from where such an amount can be drawn. Their silence is not necessarily reticence, embarrassment, or getting ready to reject the offer – do not assume so. They could of course be preparing to turn you down, but this is unlikely. It is much more likely that they are calculating and/or deciding on which fund to tap or which committee to consult, or on several other such business actions to take. Do realise that it will indeed be the thickest, heaviest silence ever, but discipline yourself not to make a sound. Give the donor the time s/he needs to respond.

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# PART 6: ETHICS, STEWARDSHIP & COMMUNICATIONS

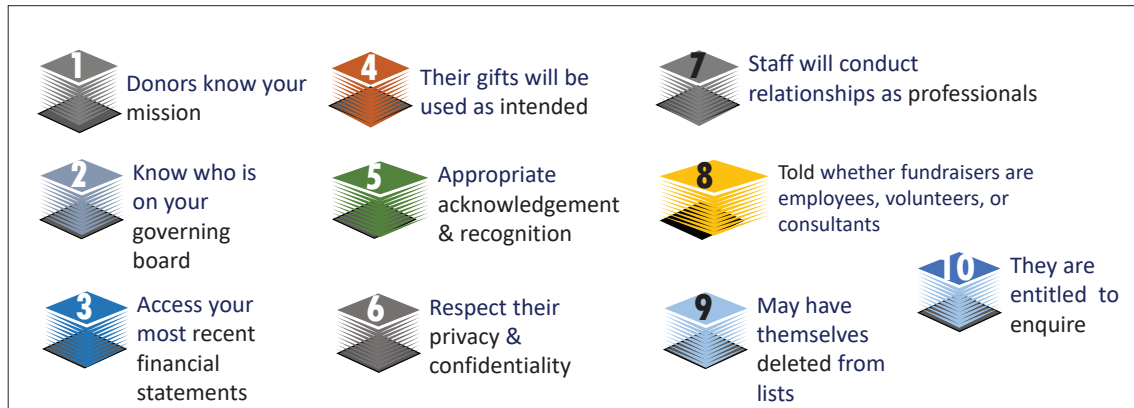
## THE AGREEMENT

We are often overjoyed when we learn that our funding proposal has been successful. This is understandable because it means our project can get underway or be added to. It also means moving towards meeting operational and financial goals. In the euphoria we often uncritically accept and sign the Agreement that follows shortly after the donor's notice of approval. We should at least ask the following of ourselves:

- For **how long** will the funding be?
- Is it for the **amount** we applied?
- If not, what will the **shortfall** mean? Can we then afford to accept the donation?
- If the amount is acceptable, is the donation/grant **renewable**?
- What **reports** does the funder expect? Financial and/or Narrative?
- How often do they expect reports?
- Do they expect a **specific format for reports**?
  - If the donation is in a foreign currency:
    - If the exchange rate is in your favour, will they allow you to keep the **windfall**?
- If not in your favour, do they know the implications of a **shortfall** for your project?
- Does the funder allow for **extensions** and if so, under what circumstances?
- If there are sub-divisions within the project, will the funder permit **cross-funding** should a valid need arise to do so?
- How would the funder wish or NOT wish to be **recognised**?

Assuming both your and the donor's needs are met, it is important to keep your beneficiaries at the heart of your endeavours and the donor at the centre of your considerations. Whether a member or not, it would be prudent to adopt the principles set out by the US-based Association of Fundraising Professionals (AFP) under their Donor Bill of Rights to set the parameters. Figure 55 is a summary of those parameters:

**Philanthropy is based on voluntary action for the common good.** It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the nonprofit organisations and causes they are asked to support, we declare that all donors have these rights:



**Figure 55: The essence of the AFP's Donor Bill of Rights**

## IMPLEMENTATION

There are three considerations when activating a project or programme: *ethics; monitoring & evaluation; and performance appraisal.*

## ETHICS

An ethical stance should begin with the **values** outlined in a fundraising plan and in an organisation's service pledge.

The values list found in many strategic plans is often lengthy and unwieldy – to the point of merely being a grocery list. The essentials in developing donor support are **honesty, respect, and compassion** and from this spawn all others, such as accountability, integrity, diligence, etc. These values are also the very spine of a **meaningful service pledge** – a bold proclamation of how an organisation exercises those core values.

Some companies have jettisoned the conventional static list of promises to instead **personalise what they value**. *Automattic* is an excellent example of such contemporary, unconventional expression. They are the people behind the world's most popular web builder, WordPress.com and several similar programs, like *WooCommerce, Crowdsignal, Cloudup, Tumblr, and Pocket Casts*, who believe in making the internet a better place. Their belief system is what they call *The Automattic Creed*:



- I will never stop learning.
- I won't just work on things that are assigned to me.
- I know there's no such thing as a status quo.
- I will build our business sustainably through passionate and loyal customers.
- I will never pass up an opportunity to help a colleague, and I'll remember the days before I knew everything.
- I am more motivated by impact than money, and I know that Open Source is one of the most powerful ideas of our generation.
- I will communicate as much as possible, because it's the oxygen of a distributed company.
- I am in a marathon, not a sprint, and no matter how far away the goal is, the only way to get there is by putting one foot in front of another every day.
- Given time, there is no problem that's insurmountable.

Most striking about this statement of conduct is that it is a personal commitment that speaks of the group's mission and vision. There is verve and zest in each statement, and this is reflected in their innovation.

Perhaps more conservative yet contemporary and timeless, would be the following list. It is purely suggested content towards a tailored credo or service pledge for a fund development enterprise:

## CREED OF ETHICS / SERVICE PLEDGE

Where necessary replace the greyed-out text with your own.

We believe our first responsibility is to raise necessary funds to allow xxx to develop innovative and useful programmes that complement its core business of xxx,xxx, and xxx.

In meeting these responsibilities, everything we do must be of the utmost quality.  
We must constantly remain cost conscious and use xxx or donor funds judiciously.

- **Our beneficiaries' needs must be met promptly and with care.**
- We are responsible to our team – the men and women who work with us.
- Everyone must be considered an individual.
- Compensation must be fair and working conditions clean, orderly, and safe.
- We must be mindful of ways to help our colleagues fulfil their family responsibilities.
- Colleagues must feel free to make suggestions and complaints.
- There must be equal opportunity for employment, development, and advancement for those eligible.
- We must provide competent management, whose actions must be just and ethical.
- We are responsible to the projects and programmes with which we work and must uphold their rights and responsibilities with their donors.
- We must be good citizens and encourage civic improvements, better service delivery, and education.

- We must maintain in good order the property we are privileged to use, protecting the environment and natural resources.
- We must explore new ideas.
- We must engage in reading and research, develop innovative programmes, and learn from our mistakes.
- We must acquire modern equipment and help launch new programmes.
- We must create reserves to provide for adverse times.

When we operate according to these principles, our team, and our community should be proud of the support we provide.

Ethics is a wide-ranging field and it is best understood by looking at the tool devised by the Fundraising School at the Centre for Philanthropy at Indiana University, to help assess aspects of an issue that might present an ethical dilemma.

The safest stance, even if perhaps too rigid a stance, to avoid ethical dilemmas, is to adopt the maxim, ***There are no grey areas in fundraising*** – meaning it is either right or wrong, there is no middle ground.

It would be best to analyse an actual situation that illustrates a simple ethical quandary and use The Fundraising School's tool to assess the dilemma.



**Figure 56: Ethical resolution tool**

*A fundraiser collected a cheque from a donor. When she got back to her desk, she discovered the cheque was in an amount a little more than she had agreed with donor. She called the donor and explained. The donor told her not to bother coming all the way back to him to replace the cheque, she should take the extra amount for herself instead.*

*The fundraiser thanked him and agreed to do what he suggested. She managed to cash the cheque, deposited the agreed amount in the organisation's account, and kept the extra. Her justification was that she was merely being compensated for her time and effort in going all the way out to collect the donation.*

### Elements:

- A pre-agreed donation amount;
- A transaction built on a relationship and on an understanding;
- The fundraiser may well have used an organisation vehicle;
- She certainly travelled on organisational time.

### At stake are:

The fund developer's integrity in accepting reward for work she was paid to do to advance the organisation's mission;

- The organisation's reputation for allowing donor funds to be rerouted into an employee's account.

### If we pass this event through the ethical tool –

#### How does this act affect:

- Colleagues
  - favours one & encourages others to create similar opportunities, Board – excludes Board governance & leadership discipline,
- Donors
  - suggests improper flexibility,
- Volunteers
  - have every right to expect similar rewards,
- Community
  - relegates them to a mere product in the transaction, instead of the prime beneficiary.

### Exercise:

Here is another example of an ethics dilemma. Consider the questions that follow the scenario and see how they can be filtered through The Fundraising School's tool.

*A long-time donor with no relatives dies and leaves a very substantial bequest to Organisation X in her Will. Before she died, she told her Executor that she wanted to make several gifts to her friends and that included the Executive Director (ED) of Organisation X with whom she had become well acquainted over the years.*

*The Executor explained that if she were to leave a gift to the ED in her Will, the ED would be obliged to disclaim the gift. She was adamant that this is what she wanted to do, and that her gift is exclusively for the personal use of her friend, the ED and for no business-related purpose! She instructed her Executor to write a personal cheque after her death. She added that if the ED refused to accept her gift her Executor was to cancel her entire bequest to Organisation X.*

*The ED arrived at work one day to find a cheque for 10,000 enclosed with a letter from the Executor explaining the gift. After recovering from the shock, the ED called the Executor to return the cheque. The Executor expressed frustration with the situation and with the ED because he is obliged to carry out the donor's wishes and refuses to take back the money.*

- Is there another ethical response open to the ED?
- If the Executor refuses to take back the money, what options are available?
- Should the ED notify her/his Board of the dilemma?
- Can the ED make a charitable donation to Organisation X?
- What would the public perception be if this situation were to be disclosed?
- Would it make a difference if the amount was 10.00, 1,000 or 100,000 or more, instead of 10,000?
- What might Organisation X have in place to help staff/volunteers who find themselves in difficult situations such as this?

## STEWARDSHIP

This stage is arguably the most crucial and the most neglected by many a fund development unit. As I have hinted several times in this publication, stewardship involves much more than saying 'Thank You'. This is where you show how much you **appreciate the donation**, go on to demonstrate **how much value the donation has achieved**, and you do all you can to **engage the donor in the works/he has supported**. At this stage it is as much about implementation and progress as **it is about nurturing relationships to retain and to renew**. It is also a stage that reveals or betrays an organisation's human decency.

Remember: one cannot fully understand the value and texture of stewardship unless you are or have yourself been a donor. Only then will you know the true importance of being thanked, and the essential gratitude and courtesy that accompanies a genuine 'thank you'.

Stewardship is another of those words that we embrace less for its meaning than for its professional ring. It 'dresses up' our custodial practice of thanking our donors. In business it works very well, so too in the fund development world. But **fund developers need the concept to work even more powerfully, more personally**. Our custodial responsibility needs to appeal much more to the emotions than it often does. We need to **value our donors**; to make them feel a closeness and a strong, if not overwhelming satisfaction of being part of what we do – strong enough to want to continue their support.

Our brand of stewardship must go far beyond a string of ‘thank you’ notes; it **must be finely laced with gratitude**. As Dr Susan Ferguson says, when humans feel gratitude “the brain produces oxytocin, a hormone important to bonding... It’s the same hormone that mothers release after birth and is found in breast milk”. Ferguson illustrated her contention in:

*“Research shows that gratitude is linked with feelings of reward, improved sleep and decreased depression and anxiety... There are measurable benefits to mental health and interpersonal relationships when humans feel gratitude”<sup>4</sup>*

It would be wise to look at two aspects that inform stewardship: why donors leave; and why they renew their investments in projects. Here are the results of countless overseas surveys, however, the reasons are so human as to be universal.

WHY DONORS DISCONTINUE	WHY DONORS CONTINUE
<ul style="list-style-type: none"> <li>• Project no longer appears to need their assistance.</li> <li>• Received no information on how their donations were being used.</li> <li>• Had forgotten they supported xxx.</li> <li>• Were never thanked.</li> <li>• No word after the initial acknowledgement.</li> <li>• Received poor communication.</li> <li>• Other organisations were more deserving.</li> </ul>	<ul style="list-style-type: none"> <li>• Perceived the project to be effective.</li> <li>• Knows what to expect from an organisation with each interaction.</li> <li>• Receives a timely thank you and updates.</li> <li>• Receives opportunities to make their views known.</li> <li>• Feel they are part of an important cause.</li> <li>• Feel appreciated.</li> <li>• Receive information showing who is being helped.</li> </ul>

We often busy ourselves with managing the project or programme and do not always give enough thought to the one who underwrites our work. Disregarding a donor’s true worth is not only a grave mistake, but also grossly unmannerly. The task is not to go through the mechanical motions of sending yet another routine thank you note – however grandly it may be worded! The true task is to make sure the gesture expresses a genuine sentiment of appreciation.

Stewardship is all-too-often underplayed and is even a discounted stage in the fund development cycle. Disregarding its significance could short-circuit all the slog involved in conceiving/ formulating a project, researching a budget, finding a donor, cultivating a relationship with a donor, and acquiring assistance.

Calling this practice ‘gratitude’ may not sound as professional as stewardship, so let us continue with stewardship, but let us practice gratitude. Understand that stewardship feeds into an intricate psychological process where motivation to give (releasing the brain chemical dopamine) is transferred to actioning (releasing norepinephrine, a form of adrenaline) and then expects the satisfaction that comes from expressions of gratitude (developing serotonin). **Gratitude can boost the neurotransmitter serotonin**

<sup>4</sup> Hanady Kader; Blog post: *The Science of Gratitude and How Kids Learn to Express It in the Seattle Children’s Hospital Research Foundation*. 23 November, 2015.

**and activate the brain stem to produce dopamine** which is our brain's pleasure chemical. The more we think positive grateful thoughts, the healthier and happier we feel. One could spin this on its head and presume that happy people give and if we can nourish that we could increase their willingness to give.

There is much to be done after the initial 'thank you' acknowledgement. Two tenets worth adopting are:

- Each donation should be the first of several; and
- Find at least seven ways to express gratitude.

Our purpose in showing our donors consideration, care, and basic courtesy, is to make them feel satisfied that they made a wise and effective decision in supporting our project. It is also our subliminal purpose to ensure they remain our donors and continue to support, if not this project/programme, then another or a future initiative.

A recent article by Otis Fulton, PhD in *NonProfitPRO*, 19 December 2022, develops the principle of courtesy a bit further. After reading *Humble: Free Yourself from the Traps of a Narcissistic World*, by social psychologist Daryl van Tongeren, he notes that people seem to gravitate to humble organisations for the same reasons they gravitate to humble people.

Fulton then interrogates that phenomenon and surmises that:

- messages must come from a single person, not an organisation. Messaging must be personal;
- humility changes lives; it is a boon for healthy relationships, a necessary component in the workplace and an important part of a society that seeks to grow and change; it is a transcendent move that shifts people to a wider perspective.

Fund development units must ask themselves whether they think of their supporters merely as donors, or whether they see their donors as an inherent part of the unit that receives support. Is the unit at the centre of their work or are the donors at the centre of the unit's endeavours? The latter should be the correct answer, and stewardship is the activity that will nurture and sustain that belief.

Here is a selection of ways an organisation can thank and express gratitude:

- A handwritten letter;
- A follow-up phone call;
- Invitation to a visit and/or tour;
- A modest gift;
- Present a welcome package;
- Spotlight donor on social media;
- Distribute in-house publications;
- Feature on a website, or in a blog post;
- Send birthday, anniversary, and holiday cards;

- Write a concise end-of-year individualised summary of your work (warts ‘n all); an informal, overview (this could be addressed to an individual donor or to the agency contact person);
- A 2-minute ‘thank you’ video;
- Invitations to:
  - small group meet ‘n greet functions
  - inside access to your larger organisation’s enterprise (campus labs, museums, operation workshops, etc.)
  - informal feedback/input conversations (written or over coffee/tea)
  - come-along events to similar projects in cognate organisations
  - if you have an alumni programme:
    - reunions
    - chapter events (meet ‘n greet city or regional) dinners, theatre or cinema shows,
    - branded gifts
    - special interest clubs (engineers, built environment, medical, touring, etc.);
- Host an appreciation event for all your donors; and
- Inscribe on a donor wall (static or digital).

Template 39 is a guide to developing a comprehensive Stewardship plan. [🔗](#)

Remember, it is imperative that we make genuine connections with both prospective and indeed, current donors. Such connections must go beyond simply landing support to making them feel like a genuine and intrinsic partner in the project or programme.

It follows that communication should not be general or generic, but tailored to specific donors. This means that the donor pool must be divided appropriately or more accurately ‘segmented’ into the unique human beings they are – whether of a larger foundation or corporate, faceless government department, or the smaller monthly ‘gifters’. It also means that as much or more time must be devoted to stewarding as to donor acquisition.

*Bloomerang* suggests the following typical donor segments could be:

- 1<sup>st</sup> time donors
- Recurrent ‘gifters’
- Dormant donors (mistakenly(?) referred to as *Lapsed* donors)
- Friends or volunteers of the organisation who have never given
- Donors who have associated with your work through attendance or feedback
- Social media followers, and of course
- Long-term supporters.

Map out the types of communications to send to each segment at certain points within a timeframe. For instance, make sure all first-time donors receive a specific message within 48 hours, that is promptly from the very beginning of the association with you. Every step should be detailed so that anyone on your staff can make sure these communications occur.

These segments could also be classified under the following categories:

CATEGORY	CHARACTERISTIC	SUGGESTED STEWARDSHIP COMMUNICATIONS
<b>Recency</b>	How long have they been giving?	The longer they have been giving, the less formal and more familiar your communications.
<b>Frequency</b>	How often are they giving?	Frequent giving suggests an automatic debit process. Ensure that your communication remains personal.
<b>Type</b>	How are they giving?	Politely suggest an automatic debit process and a minimum to cover the bank charges. Ensure that your communication remains personal.
<b>Amount</b>	How much are they giving?	If unrestricted, choose one or a range of activities to which their gifts are contributing. Inform them of the impact.
<b>Reason</b>	Why are they giving?	If a memorial gift, respond to show how your activity serves to memorialise.
<b>Interest</b>	What topics are they most interested in?	Determine the interest(s), the extent of the interest, and weave it into your activities.

These donor segments will be meaningful if drawn from a reliable database that will also provide metrics on which to base communications. If you have detailed information on your donors and have it organised in an even, consistent format, it will prevent you from sending the same message to everyone, sending dreaded duplicate communiques, help with prompt and timely contacts, and of course **personalise** your communication. Donors must be made to feel you are communicating directly with them, not addressing a faceless batch of givers. Embrace data!

A donor who owned a string of car dealerships once told me how much easier it was to sell an existing customer a newer model of a brand than it was to woo a stranger from another brand. Similarly, if a relationship with a donor is sincerely nurtured throughout the gifted project life, it is highly probable that the donor will continue the relationship.

**Retention** should rank every bit as high as **Acquisition**;  
**Stewardship** should rank every bit as high as **Soliciting**.



## REPORTING

CEOs, Executive Directors and Vice Chancellors are as demanding of their fund development units as their counterparts in commerce are of their sales departments. Salesforces and fund developers are lifelines and their leaders need to keep abreast of the vicissitudes surrounding their work.

The easiest way to keep executives informed of the progress flow in fund development is to share a dynamic dashboard of changing metrics. A dashboard is also a convenient tool to pace a team. It begins with keeping and continually updating a selective dataset.

A progress dashboard requires headings such as:

Date	Type	Source	Country	Revenue	Project	Fundraiser	Initiator
Nov 18	Foundation	Ford Foundation	USA	1,000,000.00	Language Service	John Mellis	Dr Jane Schumer
Nov 18	Grant	USAID	USA	5,000,000.00	HIV/AIDS	Thando Mosootoane	
Dec 18	Sponsorship	Total Energy	France	500,000.00	Research	Jake Bradshaw	Ms Hilary Klein
Jan 19	Grant	Sasol Oil	RSA	1,000,000.00	Research	Anne Everitt	
Jan 19	Scholarship	NedBank	RSA	50,000.00	Wildlife	Walter Mitty	
Jan 19	Scholarship	Cummins Engineering	RSA	100,000.00	Engineering	Brad Ogude	Prof Anne Pierce
Feb 19	MerSETA	RSA Gov	RSA	3,000,000.00	Engineering	Sam Makholiso	
Mar 19	EduSETA	RSA Gov	RSA	2,000,000.00	Education	Jo Collett	

**Figure 57: Sample donor dataset**



New data can be added to refresh the dataset at any time. Several pivot table exercises will then extract pertinent data, analyse it, and display the results in easy-to-read graphs. Each graph can also be interrogated using the controls (such as slicers and sparklines in Excel) in the upper left-hand corner to reflect progress at different dates. Here is a simple example, one can add several other features to assist internal reporting.

**Figure 58: Sample interactive dashboard**

Donors often remark that they agreed to support a project because it promises vibrant impact, only to receive a lacklustre report. Project leaders are so busy delivering their service that they underestimate the value of a fully reflective report. They neglect to prepare reports until the deadlines loom and hurriedly developed reports rarely, if ever, reflect the true value of accomplishments.

Remember, to you it might be a donation, to the donor it is the equivalent of an investment. They had to justify why they decided to invest in your activity and must evidence their reasoning through your report to their supervisors who, in turn, probably must report to a Board. Donors are imminently accountable, their jobs and even their company standings could be on the line. Respect that eventuality and take time and care to prepare reports.

The Results-Based Reporting template below is a useful guide to present as a table, or you may use the table as an outline for a narrative report – it will contain all the necessary narrative and metric details. One should also consider populating the template during the course of a project, not only when a report is due. A results-based template will not only represent the work done in detail, it will also serve as a continuous progress monitor and keep all participants fully aware of their achievements.

Adding progress information as bulleted points is convenient and can be dispatched ‘as is’ or written up in full narrative guise. It is a tool that would help avoid those last-minute scrambles to meet reporting deadlines.

## RESULTS-BASED MANAGEMENT

Summary of Planned to Actual Results for the Period  
Starting Date, 20xx, Phase xx, Year xxxx

Priority Outcomes (long-term result)	Priority Outputs (Achievements)	Results Planned for this Period	Actual Results for this Period	Variance (if any) of Actual Results	Progress Towards Results
Intended product 1					
Intended product 2					
Intended product 3					

**Figure 59: Results-Based Management reporting worksheet**

## COMMUNICATION

It should be clear by now that fund development is more than writing and sending a proposal. The process depends as much on establishing contacts as it does on building and maintaining relationships. It is a staged process that will also hinge on external factors. Being known and being researchable are two such external factors (be seen, be heard should be their communication efforts' mantra).

An overall blueprint for developing a communication plan would be: 

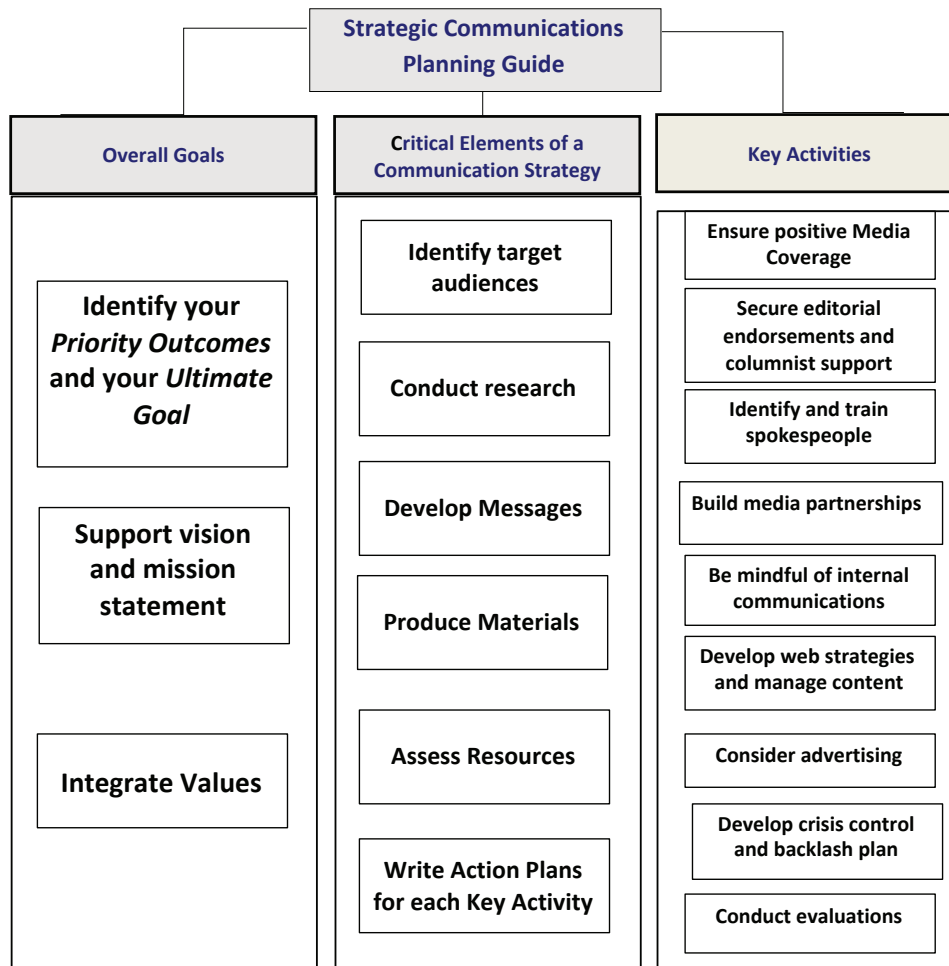



Figure 60: Communications blueprint

Building on from such an outline, one could use the following table to operationalise the strategies: 

OBJECTIVES	ACTIVITIES	TARGET AUDIENCE(S)	SUCCESS INDICATORS	DUE DATE
To strengthen internal communications				
Increase public or profile of development interests				
Publicise exceptional project achievements				
Increase the profile of the development office to internal clients				
Design & distribute promotional materials				
Cultivate publicity materials for specialist/focussed campaigns				
Develop an interactive, dynamic website with a donations' facility				

**Figure 61: Strategic communications worksheet**

Communications activities should also, ideally, be in the form of a matrix with main activities scheduled and time-lined, but with enough flexibility to accommodate ad hoc communications (e.g. not in any particular order).

Medium	When	Why	How Often	Objective	Milestone	Achievement/ Variance	Owner
Blog Newsletter							
Bulk emailing							
Call-backs							
Media bulletin							
Op-Ed Mailings							
In-person contacts							
Social media LinkedIn							

Figure 62: Communication schedule 

It is worth repeating that one's writing style should be crisp and, as we have seen earlier, not bogged down in passive descriptions. Use brand colours judiciously.

Websites should be uncluttered, dynamic, even lively and up-beat, and showcase achievements. Remember the prime purpose of the website is NOT to be another promotional brochure, but to be a vehicle to attract and receive support. The landing page should steer interest directly, but subtly to the **all-important donation page**. Here are tips for an inviting donation page:

- Stay on message **do not drift, be side-tracked, or waffle**;
- Use **crisp, short sentences** with everyday vocabulary and action verbs;
- **Show, do not tell**;
- Help visitors **imagine THEIR impact**;
- Highlight **credibility**;
- Retain **visual identity & balance**;
- Make **mobile** giving easy;
- Emphasise **goodwill**;
- Make it easy, very easy, to **donate**;
- **Follow-through** on every clicked visit (*automated and selectively, personally*).

In the post-pandemic world, we have become adept at communicating remotely. Online meetings are much more natural to us now and the world of work is likely to be less in an office building. That means, digital communication will be paramount and an online presence needs to be dynamic. Websites are likely to be the first contact and be the heart of the communication chain. They will need to throb with fresh variety and not be a digital brochure. Newsletters, even e-Newsletters are losing prominence over frequently refreshed Blogs.

As non-profit organisations dedicated to doing social good, we are driven by emotional commitment and should be able to write our stories of need and success and share these online. One can summarise the benefits of blogging as:

- Blogs are short-ish, easily digestible peeks at interesting topics.
- Blogs help optimise search engine (SEO) searches.
- Blogs are an easy way to provide a reason for donors to return to a website.
- Blogs provide context for donation asks when linked to a story.
- Blogs can power an entire digital ecosystem (*social posts, newsletters, campaign appeals, etc.*).

A simple example of how to plan to have a Blog that does not drag stale information along is:

- Appoint a managing editor.
- Recruit two persons who like to write.
- Design or acquire a set of fast-loading, visual templates that are also optimised for search engines, for example, *case studies, information sharing and others that would be appropriate for your work.*
- Have all three consider only four work-related topics and commit to writing a 1½ – 2 column blog over a 12-month period, each will publish one blog post per quarter (*i.e. only four short articles per year*).

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Editor	x			x			x			x		
Writer 1		x			x			x			x	
Writer 2			x			x			x			x

Once there is momentum and writers have the confidence, you may wish to increase the number and frequency of posts (to weekly or fortnightly). Simply assign an additional blog post to the existing writer complement, or recruit another. This is an excellent and informal opportunity to hone basic research and writing skills, especially in web content writing.

There are also drawbacks to blogging:

- Blogging takes time, however, if planned as in the schedule above, it is eminently manageable.
- Blogging can be seen as not important in the grand scheme of what is happening to serve the mission.
- Blogging distracts from other platforms.
- Blogs may not produce a direct return on investment (RoI).

Many of these objections to blogging are matters of opinion and individual organisations should weigh the merits against their own capacities. So, will blogging be worth implementing? Yes, if done sensibly.

Blogging does take time to get right. Here are five tips to consider.

- **Have a solid reason to blog and be committed to blogging.** Make sure that your blog has a call to action so that when someone finishes a post, they have something to do next.
- **Blog pertinent, interesting, and related information.** Put a process in place to help identify the stories or articles that will make good blog posts. For example, make an information element checklist (image, video, quote, result, audio, infographic, statistic, etc.). If you have two or more elements and the story or article has a human protagonist, it will likely make for an engaging blog post.
- **Narrow the range of interest.** ‘Searches’ are getting more specific. Instead of writing a post that answers lots of questions, try answering just one question per post with a comprehensive answer.
- **Turn to technology.** Writer’s block is real. Have your writer group consider using, but not relying on tools like Answer the Public and generative AI tools, like *ChatGPT*.
- **Promote your blogs.** Blog posts need readers if they are to be successful. Refer to your blog posts on social media, in emails, and add them to other areas of your website to ensure that donors and supporters know the impact your non-profit organisation makes.

To be seen and heard is vital for relationship building, and stewardship initiatives will naturally draw nourishment from all communication activities. A communication plan should schedule:

- Frequent website refreshing;
- Regular Blogsite refreshing;
- e-Newsletter(s) as well as print copy newsletters;
- Special print and radio bulletins on progress and achievements; and
- Webinars and podcasts where relevant.

It is worth repeating that writing style should be crisp and not bogged down in passive descriptions. Use brand colours judiciously.

## SOCIAL MEDIA

Today, most of us know that social media refers to the way we interact with each other by creating, sharing, and/or exchanging information and ideas in online communities and networks, namely *Facebook*, *X* (previously *Twitter*), *Thread*, *Instagram*, *LinkedIn*, and *YouTube* accounts.

### Social media is about :

- Conversations, community, connecting, and building relationships;
- Authenticity, honesty, and open dialogue;
- Allowing you to hear what people say about you, and enables you to respond; and
- Being compelling, useful, relevant, and engaging.

**Current popular social media platforms are:**

- **Blogs:** Platforms for casual dialogue and discussions on a specific topic or opinion;
- **Facebook:** The world's largest social network, with billions of active users. Users create a personal profile, add other users as friends, and exchange messages and post status updates;
- **X & Thread:** Networking/micro-blogging platforms that allow groups and individuals to stay connected by exchanging short status messages (140-character limit);
- **YouTube/Vimeo:** Video hosting and viewing;
- **Flickr:** An image and video hosting website and online community; although this platform appears to be falling out of favour. Photos can be shared on Facebook, Instagram, and other social networking sites;
- **Instagram:** A free photo and video sharing app that allows users to apply digital filters, frames, and special effects to their photos and then share them on a variety of social networking sites; and
- **LinkedIn:** A place where individuals and groups of professionals with similar areas of interest can share information and participate in conversations.

**Here are some basic maintenance suggestions for each social media platform:**

**LinkedIn**

- Keep your profile current;
- Add connections from your organisation's list of friends, colleagues, employees, volunteers, and donors;
- Ask these connections to write appropriate recommendations for your work; and
- Continuously monitor status updates and make comments as necessary.

**Facebook**

- Update your status as much as possible, at least weekly on relevant project/programme activities;
- Constantly invite new friends, colleagues, and associates to be a friend of the organisation's Facebook page;
- Ask your Facebook 'friends' to comment on issues and aspects of your work;
- Post relevant project/programme-related news stories frequently;
- Create and promote events;
- Change relevant images regularly;
- Add appealing videos often; and
- Accept any invitations to join a Facebook event page, i.e. an event your project/programme is participating in, e.g. conferences, round-table discussions, sporting, and community events. Add links to these event pages to your Facebook page.



**X (previously Twitter) & Thread**

'Tweet' often – e.g. update supporters on progress during a fundraising campaign or projects/programmes.

- Tweet about new articles that relate to your work and/or its issues;
- Tweet about any endorsement and successes;
- Tweet about any changes in contact information;
- Constantly invite new friends, colleagues, and associates to follow your work on X & Thread; and
- Follow cognate organisations/programmes/projects.

**YouTube**

As with any all these platforms, if you have the capacity:

- Constantly invite new friends, colleagues, party staff, donors, and volunteers to your YouTube channel;
- Create videos, i.e. excerpts of any media exposure you have enjoyed, interviews, events, debates etc.; and
- Make sure Facebook, Thread, X, and LinkedIn are automatically notified when new videos are uploaded.

**Constant Contact**

- Compose a weekly blog;
- Compose a quarterly or twice-yearly newsletter for donors;
- Constantly add contact emails to your database email lists; and
- Add links to your social media in the blog and newsletters.

Following these simple steps will bring attention to your work and drive traffic to your website that could potentially lead to, hopefully, attracting volunteers and be invaluable information for donors who are bound to research your organisation.

Crucially, a social media presence must be compelling; it should be an engaging digital presence. Non-profits must see social media as an essential communication and promotional tool to carry very interesting content, target specific demographics and strive to build trust. In other words, an effective message via social media platforms revolves around emotion.

The story presented must make the reader 'feel' enough to engage with your story and it should drive a sense of connection and community, says Kirsty Fontelera of *NonProfitPRO* in her 10 March, 2023 article *Unleashing the Emotional Potential of Social Media: How to create an engaging digital presence*. She advocates that the non-profit's story should be distinct and remain consistent across all its social media platforms; the similarity is bound to build familiarity.

She also recommends discussion sessions that Americans refer to as *town hall meetings* – by inviting donors and other interested parties to join in online conversations on aspects of the work you do. These need not be live, but by posting an intriguing question/statement and inviting comments/reactions over a few days or weeks.

Similar to such discussions, a blog or a remote discussion with one of your project leaders on her/his project would be another way to engage an audience on social media.

Posting photographs and beneficiary stories are also engaging, provided they are refreshed frequently to make websites dynamic – not left to be static and stale.

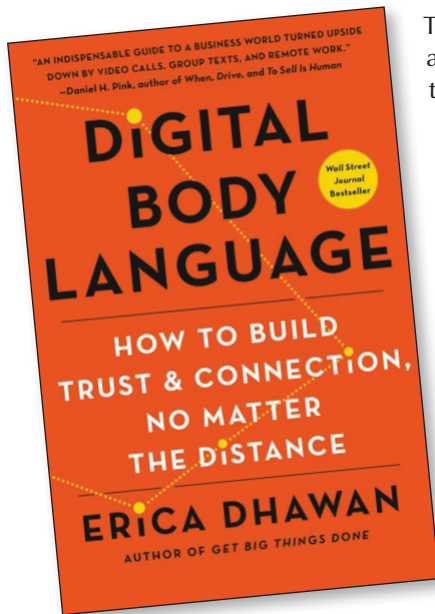
It would be a waste of energy to put so much work into servicing these social media platforms only in the hope that the messages, reports, and videos reach readers-visitors. Fortunately, one does not have to fly that blindly. *Google Analytics* is an extraordinarily useful digital engine that can track what happens to such communications.

## GOOGLE ANALYTICS – TRACKING YOUR TRAFFIC

You can track:

<b>PAGE VIEWS</b>	The number of times your website pages were viewed during a given period.
<b>VISITS</b>	The number of visits to your website during a selected period.
<b>BOUNCE RATE</b>	The percentage of entries on your website that resulted in an exit without going deeper into the website.
<b>CONVERSIONS</b>	'call to actions' completed by the website visitor, i.e. completing an online 'contact us', enquiring, or ... making a donation.

It is prudent to share programme activities and successes on selected social media platforms. This will increase brand visibility for not only those interested in the work you do, but especially for prospective funders to get to know as much about your work even before they consider your approach. Such a promotional mindset will have your organisation attend and present at conferences, write commentaries for local and larger-distribution newspapers and magazines, offer comment on aspects of your work to radio stations. In the process, you will build a network of media friends who would also be able to call on your organisation to assist in their own content-building work. Adopt the mindset *Give to be able to Get*.



The better your organisation is seen and heard, the better it will appear on prospective and active donor radars and the easier it is to support your credibility. In other words, communication and promotion works perhaps indirectly, but definitely actively, towards your fund development. Neglect communication and promotional activities at your own peril – in business, **reputation** is everything.

A word of caution. Social media has spawned a new language, one that is casual and often flippant. In some ways it has taken 'informal' to an extreme level with its own abbreviations and acronyms and made-up words. This can be treacherous in business communication and jeopardise relationships. I would strongly suggest all of us read Erica Dawan's, *Digital Body Language* to become aware of the many new habits we have formed – many to suit our own expediency at the expense of practicing simple good manners.

If left unchecked, the digital mindset risks irreparably contaminating our social behaviour.



# PART 7: PERFORMANCE DEVELOPMENT

There is a fundamental difference between performance development and performance management/performance appraisal. The latter seems primarily concerned with achieving operational objectives while performance development focusses equally on performance and the professional growth and wellbeing of colleagues. It takes into account the targets reached and the effort and abilities that went into securing progress.

It begins with measuring project or programme strides.

## MONITORING & EVALUATION (M&E)

We often leave M&E until reports or site visits from our funders loom. Yet, if M&E principles are applied at the very beginning of a project or programme, and throughout the life of a project, the implementation and flow will most likely be smoother with fewer unwelcome surprises.

We should begin with the principles of evaluation. These are those criteria that shape our assessment process and provide sound and fair guidance for evaluation. We apply these criteria when planning and they fall into four major categories:

- Utility – Serve the information needs of intended users.
- Feasibility – Realistic, prudent, diplomatic, and frugal.
- Propriety – Act legally, ethically, and with regard for the welfare of those involved and those affected.
- Accuracy – Reveal and convey technically accurate information.

These four principles should then apply to the five key questions to ask in the M&E process, in other words:

- What do we want to **achieve**? (*aims/goals*)
- What do we want to **produce**? (*objectives*)
- What **markers** will we use to indicate progress? (*performance indicators*)
- How will we know whether we are **doing well or poorly**? (*monitoring*)
- What **change** have we made? (*based on all the information you have collected*).

With these guidelines in mind, one has a clear view of how to formulate a project for both funding support AND for effective implementation.

If you built a *Log Frame Analysis* (LFA), a *Theory of Change* (ToC), a *Suitability Index*, or a *Success Equation* (SE), monitoring the progress of your project or programme should be relatively easy, as will the evaluation and review stages.

Similarly, if you adopt the *Results Based Management* (RBM) reporting template of Figure 59, the continued recording of activities will help keep a bird's eye view of progress. Keeping continual track in succinct bullet points will make compiling a report that much easier since all the details would have been captured and be at hand.

Other vehicles to monitor and appraise progress are:

- Surveys / participant questionnaires,
- 1-on-1 Interviews,
- Focus groups, and
- Case studies.

## THE BALANCED SCORECARD (BSC)

Each project or programme will naturally have its own progress details and challenges that must be recorded and be reflected in narrative and financial reports. Fund development staff often feel that they are only judged on how well they hit their revenue targets – at the expense of everything else they do. The concomitant stages that lead to landing a donation and the gratitude and retention programmes that follow, are often of little consequence when their performance is measured.

Is it possible to assess the full gamut and give credit for all the pertinent effort that goes into landing and managing a donation or grant? There certainly is if we adopt and adapt a commonly used business system called the *Balanced Scorecard* (BSC). This publication has already suggested the BSC components in discussions under Part I: Planning, viz. *action planning and strategy mapping*.

The BSC performance measurement system begins with goal setting and ends with goal attainment AND takes all other areas into full account – it is as close to a holistic management system as there is and it is one that non-profit organisations can adopt relatively easily from their commercial cousins. But, before all else, one must address the inherent angst that comes with performance appraisal.

Setting fund development targets is fraught enough, yet the anxiety around assessing the extent towards reaching those targets is often quite debilitating to both assessor and colleague and frequently strains collegiality. To preserve morale, the process sometimes becomes fudged in one way or another, or it is dismissed by completing the exercise with a good measure of contempt. This is largely because the system used is punitive – a mindset worsened in non-profit organisations that can rarely afford to include incentives to motivate excellent performance.

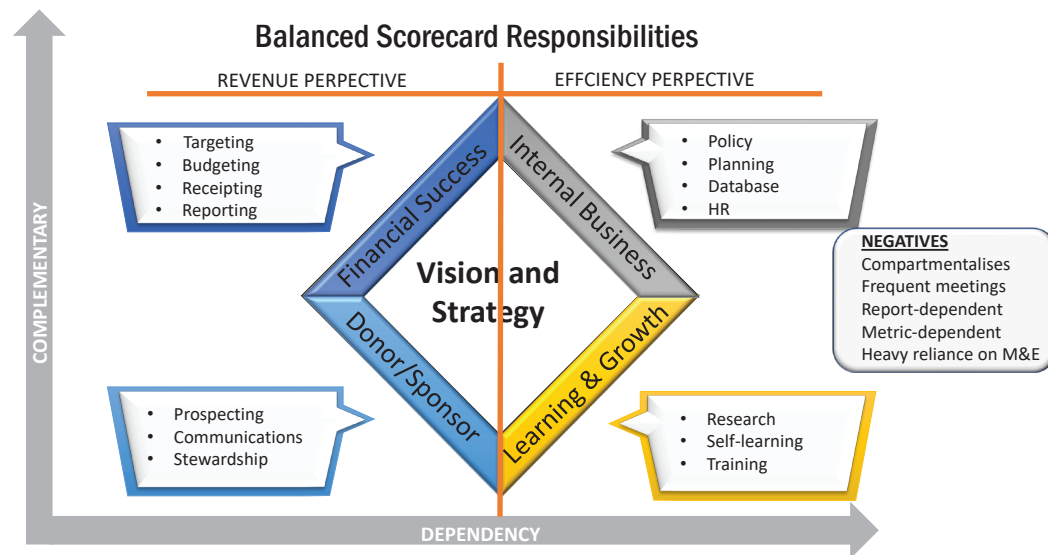
Where performance evaluation is implemented, it is often as performance *management* rather than performance *development* and is little more than a set of judgmental questions administered once at the

end of the year. The rest of the year is consumed by agonising about meeting goals and dreading the obligatory interview.

A more workable system would be if the process were to be regarded by both supervisor and employee as a *developmental*; one that meets more frequently to steer and guide, and to advise and assist. Frequent meetings, especially less-formal ones, would dissolve the inherent angst and anxiety and concentrate more on *working towards* the goal.

For the balanced scorecard to enjoy any degree of success in the fund development system, it must be used as a COACHING system, not merely as measuring system.

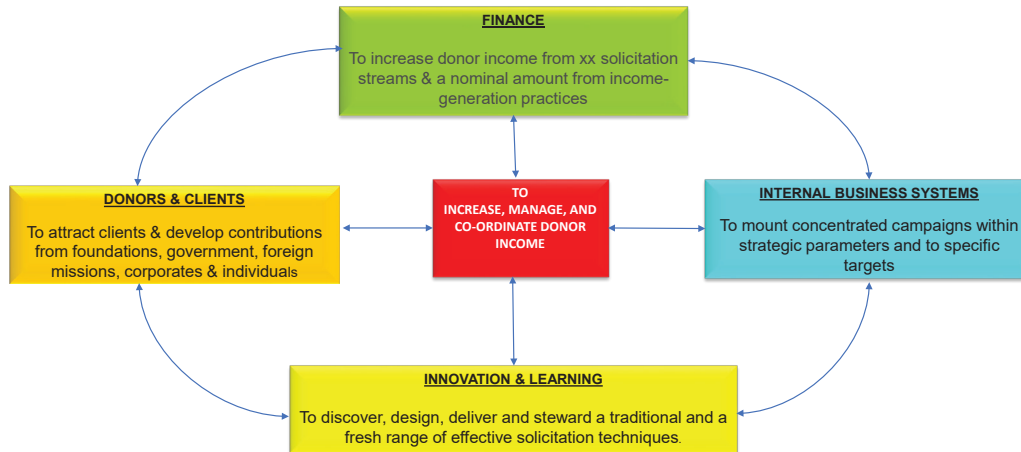
The Balanced Scorecard (BSC) is a system that lends itself to being considerate and helpful. It takes all aspects of fund development into account by dividing work into four components: Finance, Donor Services, Internal Systems, and Learning and Innovation. The accompanying diagram shows which activities fit these components and how they relate to each other. There is also a short list of the system's drawbacks.



**Figure 62: Balanced Scorecard<sup>5</sup>**

<sup>5</sup> Versions of both Figures 62 & 63 are diagrams frequently used to illustrate the Balanced Scorecard, and were distilled from Robert S. Kaplan and David P. Norton's *The Strategy-Focussed Organisation*: Harvard Business School Press, 2001 and adapted from Mike & Pippa Bourne's *Balanced Scorecard in a Week*, Abbingdon, Oxford: Houghton & Stodder, 2000 & 2002.

This translates into the following inter-related process:

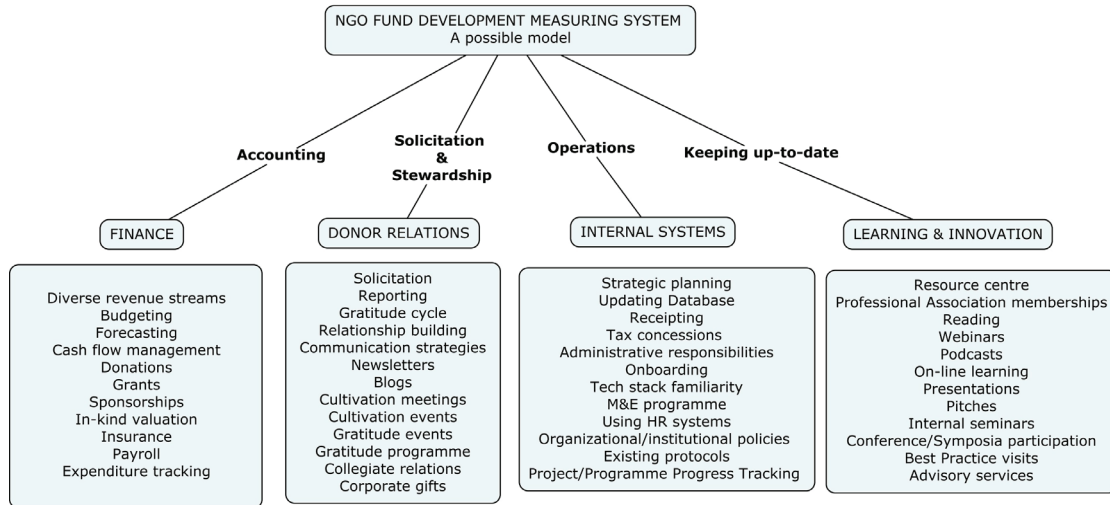


**Figure 63: How the BSC components relate to each other**

Portfolios would structure their goals around as many of these areas as are appropriate, then design strategies and tactics to go about achieving them. Throughout, they would consult with colleagues and their managers as regularly as possible to share progress, consider challenges, and exchange advice. This will require additional time in its formative stages, but, with more frequent consultations the process will become routine enough to be softly absorbed into the larger work process.

A BSC worksheet for an employee would use the organisation's *strategy map* and *fundraising plan* as reference to carve out goals under the four categories as we saw in Figures 62 & 63. They would then take a bird's eye view of their unit or department's functional landscape under the following categories:



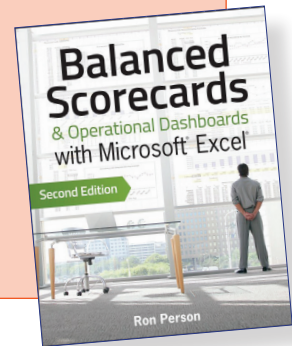


**Figure 64: Fund development operational landscape**

**Caution:** As with any development system, the Balanced Scorecard System (BSC) should only be considered in conversation with someone experienced in implementing it. Should an organisation have an existing performance management system in place (as many do), the BSC should be flexible enough to dovetail into it. This, and several other aspects would become clear when discussed with a BSC professional.

For those adventurous enough to explore the BSC on their own, Mike and Pippa Bourne’s little *Balanced Scorecard in a Week* is a superb springboard.

For those who feel even more accomplished, consider Ron Person’s substantive, *Balanced Scorecards & Operational Dashboards with Microsoft Excel*



## CONFIGURATION

No generic organogram would suit all organisations. These need to be built around the key portfolios and based on the human capacity and resources at an organisations' disposal. Key portfolios would ordinarily be:

- Director
- Prospect researcher
- Solicitation
- Database maintenance
- Finance
- Donor relations
- Communications & events.

Some of these may need to be combined, others expanded. A generic model could look like this:

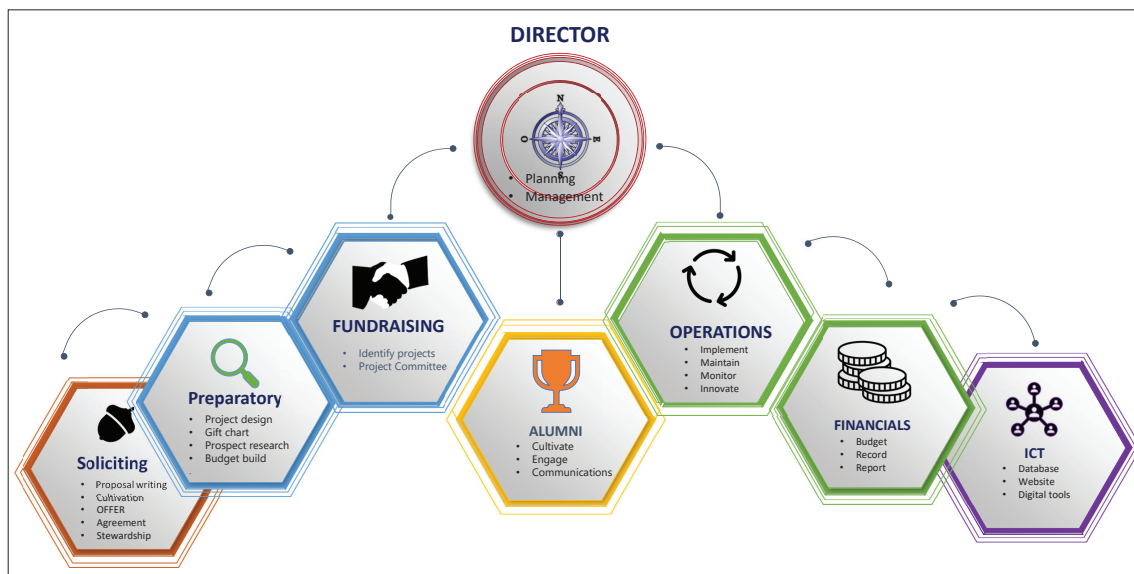


Figure 65: Generic fund development enterprise structure

## PROJECT MANAGEMENT

Much like performance management, most non-profit organisations or departments tend to avoid disciplined project management – and do so for many of the same reasons. Often it is too technical and time consuming; *we are not a 'business' and we know what we are doing without having to use business processes.* If the technical side of the fundamental processes were to be whittled down and be available as easy to populate templates, it might change minds.

Project management begins by charting the trajectory or path of a project and accounts for its time, its milestones, resources, and its costs. A Gantt chart is the most commonly used tool, but there are also *Work Breakdown (WBS)*, *Flow diagrams*, a *Responsible, Accountable, Supportive, Consulted, Informed chart (RASCI)*, a *programme evaluation and review technique (PERT)*, a *Workflow chart*, a *Risk Matrix*, a *Milestone*, and even a *Burndown chart* – a chart that shows the amount of work that has been completed in a sprint, and the total work remaining. Burndown charts are used to predict a team’s likelihood of completing a project in the time available.

Each of these tools have their place in a system-based organisation and directors ought to use them to streamline their administrative duties and ensure efficiency, however, a Gantt chart is probably the most appropriate.

The following example can be downloaded as Template 22. It functions more as a project schedule to show when tasks/activities should begin and when they should end. It excludes weekends and public holidays and the dates change automatically once the start date is inserted. The length of activities can be adjusted, as can the degree of completion. A scrolling feature allows one to see activities and time scheduled per week for a project. The chart also lists the typical fund development campaign activities, but these can be tailored.

One should have such a basic Gantt chart for each fundraising campaign to easily see progress and compare it with the fundraising plan and cashflow budget’s goals.

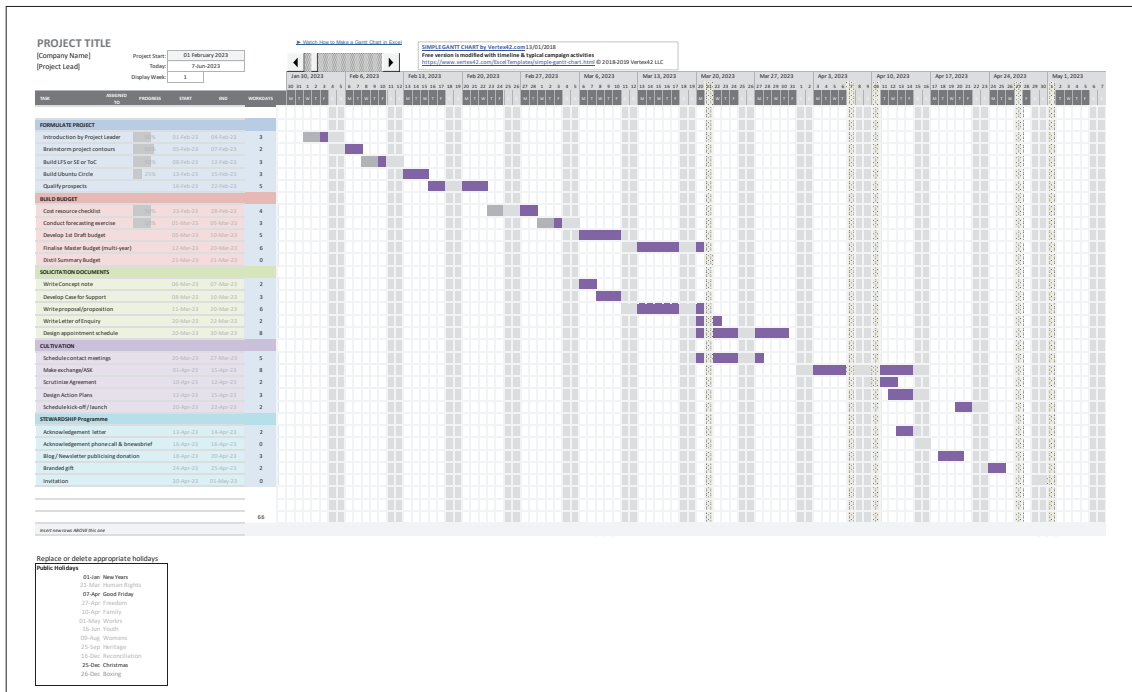


Figure 66: Gantt chart

Project management proficiency is highly sought after in both the commercial and non-profit worlds. Its basic principles should apply to any funded project, but in large campaigns, be they investment, construction or fundraising, project management prowess is imperative. This is particularly so in capital campaigns.

## TECH STACK

Like any entrepreneurial organisation, a contemporary fund development programme needs equipment to assist with efficiency. Equally important is being able to use the equipment to its fullest capacity rather than waste the investment by paying for what you are not using!

I do not think it necessary to list the standard office equipment, such as telephone, stationery, furnishing, and duplication equipment here. More significant would be the very necessary digital technology, excluding the current roll-out of AI applications.

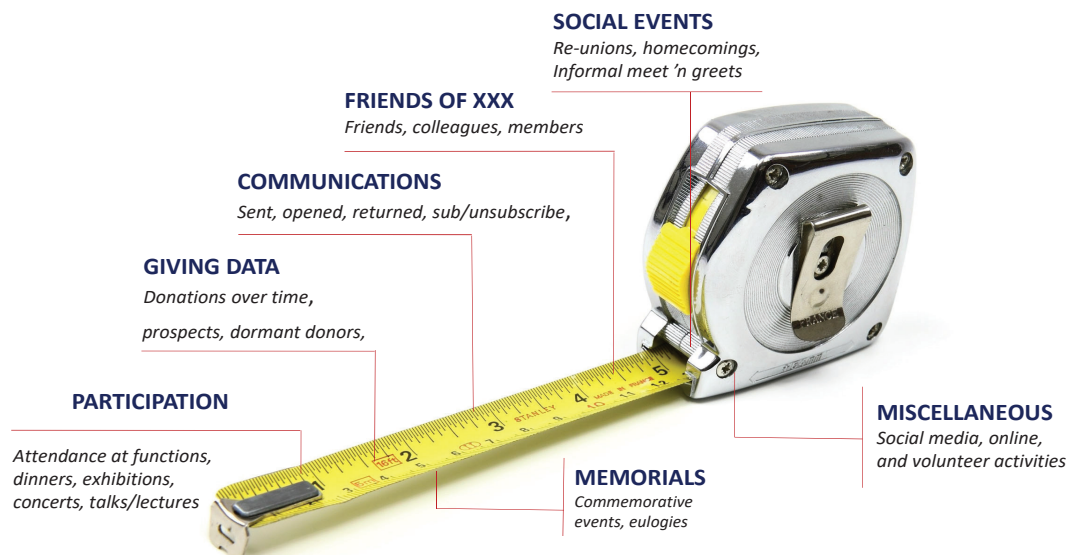
Top of the list should be a suite of office software: email, word processing, spreadsheet, and presentation software. The most popular come wrapped in the Microsoft Office (or Office 365) package. An alternate is Apple's *Mail, Pages, Numbers, and Keynote*. There are also free Open-Source clones of these suites. Most offices have either of these packages, but few use them to their best advantage (we shall return to list the essential features of each programme further on). Many of these applications now incorporate exciting AI features to make their most complex functions even more accessible.

Template 31 [🔗](#) is a list of sample prompts (instructions) that [www.Keela.com](http://www.Keela.com) recommends to generate text for specific fund development. These prompts are not necessarily grammatically correct in structure or syntax, but they do conform to AI coding. Fund developers who use these prompts MUST regard the generated text as the basic content on which to tailor their own language. Simply copying AI generated text runs the very real risk of others doing the same and recipients receiving identical submissions – such an eventuality can only prejudice communications and even risk reputational damage.

The nerve centre of any fund development programme must certainly be the database and the customer/client relations management (CRM) system. Previously, notepads served the purpose, and these may still be in use by smaller initiatives. Larger programmes that must manage several donors, volunteers, projects/programmes, etc. need a more sophisticated system. These may be in the form of a wide spreadsheet, or, ideally, a dedicated digital database which will enable an organisation to enter (or input) a variety of details and be able to retrieve or interrogate the database later to access:

- Donor profiles
- Bulk reports for performance management
- Reports
- Graphs
- Manipulate statistics
- Create selective lists
- To do list & reminders
- Allow off-site updating
- Mail shots
- Tracking
- Event logistics & follow-up
- Schedule & distribute bulk correspondence

On an organisational level, Figure 68 shows what could and should be measured and entered in the database. The accumulated metrics help prepare in approaching donors as much as it would appraising project progress.



**Figure 67: What to measure**

Although not an exhaustive list, it should indicate how helpful a donor-specific database can be if properly utilised.

Let us turn back to the basic office programmes, Mail, Word, Excel, and PowerPoint. It is a very sad reality that most users only activate a fraction of what these applications can do. A handful even refuse to have anything to do with PowerPoint or Excel ... in a profession that relies on attractive document layout, basic calculations, and depends quite heavily on persuasive visual presentations!

Here is a list of the most essential features of each of the Microsoft Office programs that should be part of a fund developer's repertoire:

### Outlook Inbox:

- Add-ins (e.g. Findtime)
- Archive
- Conditional formatting (*to distinguish the appearance & prioritise messages*)
- Create rules (*for out-of-office, re-routing messages, etc.*)
- Flag, prioritise & follow-up
- Group as conversation (*to combine same subject message threads*)
- Ignore (*...further messages on a subject*)
- Multi-view calendars (*side-by-side & overlay, colour coded*)
- My Day view
- Schedule appointments
- Task view
- To Do.

### Word: (*in addition to basic text entry*)

- AutoText
- Calculate
- Columns
- Convert to PDF
- Convert Word doc to PowerPoint
- Date & time
- Edit PDF
- Fillable forms

- Find & replace
- Footnotes/endnotes
- Formulas in tables (*sum, subtract, percentage*).
- Mail Merge
- Sort
- Formulas in tables (*sum, subtract, percentage*).
- Table of Contents
- Table of Figures

**Excel:** (*assuming you know the anatomy of a worksheet, e.g., column, row, cell, range, etc.*)

- Autoformat
- Basic formulas (*sum, multiply, subtract, division, average*)
- Charts (*pie, line, bar*)
- Conditional formatting
- Dashboard maintenance
- Dates
- Link (*in document, files & hyperlink*)
- Macros
- Organisation charts
- Styles
- Themes & colour schemes
- Tables
- Templates
- Watermark
- Insert / delete (*cells & rows*)
- Named ranges
- Number formats (*general, currency, accounting, percentage, fractions & dates*)

- Pivot tables
- Sort
- Text formatting (*alignment, bold, italics*).

### PowerPoint:

- Animations (*wipe, float, fade, & dissolve*)
- Format painter
- Format text & shapes (*fill, line, 3D, 3D-rotation, shadow*)
- Insert shapes (*oval, rectangle, pyramid, connectors, arrow heads*)
- Insert slides
- Presenter view
- Slide sorter
- Templates
- Transitions (*morph, fade, push, wipe*).

Note: because presentation skills are vital in a digital and online world, the Presentations section on Page 86-88 has an extensive list of guidelines.

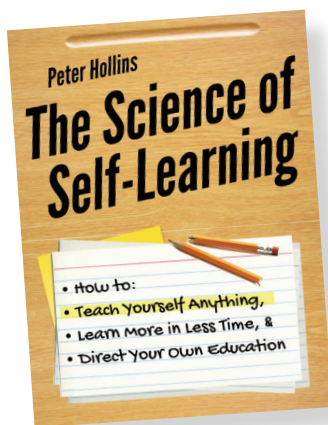


## RESOURCE CENTRES

A component within, but not exclusive to the Balanced Scorecard framework, is *Learning and Innovation*. It is a vital aspect of the fund development process, but one that is either overlooked or taken for granted. In most instances it is left to training opportunities.

Fund development is a dynamic field and if one is to go beyond transactional fundraising, i.e. securing support as a transaction rather than as an exercise in relationship building, then it is imperative to keep up to date with giving trends, the ripple effect of economic vagaries, and with campaign techniques and tweaks, etc.

To get even an inkling of how important *learning and innovation* is in fund development, one only has to look at the proliferation of webinars, blogs, podcasts, and training programmes that are available online. Each is frequently refreshed, and the majority are interactive and free. Many are, of course, marketing strategies to introduce you to other more commercial services, but one can learn invaluable tips and tricks from these exposures.



Self-teaching or self-learning must also be pursued. It is a mainstay in every profession and must be vigorously encouraged to refine donor cultivation, donor relationship, giving strategies, and fund management techniques. An outstanding example of self-learning is actor Sean Connery who dropped out of primary school, but proudly says his greatest "...break in life came when at age 8 "he learned to read". From that moment on, he proudly says, he became a proud 'autodidact', a self- teacher. To a large extent we are all self-learners responding to exigencies. To adopt the practice more consciously, it might be worthwhile to have a long look at Peter Hollins' *The Science of Self-Learning* for guidance and motivation.

For many an organisation the knee-jerk reaction to on-the-job learning will be to develop a multi-media resource centre of books, magazines, annual reports, journals, newsletters, and a digital repository of podcasts, blogs, webinars, eNewsletters, etc. However desirable, this would be expensive and will need very capable monitoring, borrowing 'n lending systems, record-keeping, and skilful knowledge management. On-going training is more viable than an in-house multi-media library, and many programmes reside on platforms such as LinkedIn, Udemy, and others.

In-person training is often preferred for their interactivity and meaningful face-to-face knowledge and exchanges with counterparts. These often involve travel and accommodation expenses, besides the training fees and time away from work.

Those organisations with limited funds should consider encouraging each staff member to develop their own personal resource centre on individual computers and later consider linking those resources centrally for all colleagues to share. There is a trove of free learning material online and good places to begin would be the *ForGood.com*, *CommunityFunded.com*, and *NonprofitPRO.com* websites.

Whichever provision you choose, make learning a critically important aspect of your social enterprise. If you only use a few of the templates included in this publication for the first time, your self-learning journey will have begun.

Again, self-learning must be actively encouraged, and organisations/departments should seriously consider developing some sort of multi-media reference learning – be it a workstation or little library. Fund developers of all levels should also subscribe to the many free and paid training webinars and podcasts to develop and hone their skills.

## RECRUITMENT

There are not many trained and experienced fund developers on the Southern and East African scene yet. This will change as more and more formal training certificated opportunities open. At the same time training workshop opportunities are burgeoning.

In the meantime, the sector will continue to draw on salespeople and marketers who will need orientation and training in developing donor support.

## BENCHMARKING

Best practice visits are also important for learning and for building networks and communities of practice. They also boost confidence and spur innovation. These should certainly be encouraged; however, they should be structured and not always be impromptu drop-ins. Here are a few pointers when embarking on benchmarking visits:

- Make arrangements to suit the convenience of both the host and visitor;
- Make the host aware of what you would like to see and explain why;
- Hosts may share their branded merchandise as gifts to their visitors;
- Visitors should be obliged to offer a selection of their own branded gifts to their hosts (remember the maxim: *Give to be able to Get*);
- Keep from offering advice and certainly do not suggest alternatives, unless invited – even then, remain respectfully restrained;
- If you wish to replicate any practice, inform your hosts, and request permission;
- Be prompt in appreciating your hosts' time and hospitality, however sparse it may have been and especially if it was exceptionally useful.

## SERVICE MAINTENANCE

It would be prudent to conclude with recommendations on keeping the enterprise primed for optimal fund development. In their 6 April 2023 blog, my favourite go-to site, *NonprofitPRO*. com, suggests these four housekeeping strategies:

1. **Keep database data 'clean':**
  - a. Merge or delete duplicate records,
  - b. Find incomplete records, delete or add missing information, and
  - c. Keep database policies, protocols, and access up to date.
  
2. **Analyse donor data:**
  - a. See what worked and what did not,
  - b. Get personal,
  - c. Revisit & tweak stewardship correspondence templates, and
  - d. Are your stewardship messages compelling?
  - e. Fine-tune the website:
  
3. **Ensure blog is periodically updated,**
  - a. Check content for accuracy, usefulness, and ease of reading, and
  - b. Check relevance, appeal/attractiveness level?
  
4. **Optimise your donation form:**
  - a. Ensure ease of access for new visitors,
  - b. Ensure ease of donation for prospective donors,
  - c. Make contributions dynamic, i.e. different donation levels,
  - d. Motivational text to encourage a donation and motivate for a larger gift, and
  - e. Add a monthly pop-up suggesting a recurring donation via credit card.

## BURN OUT<sup>6</sup>

Encouraging a commitment to working methodically and systematically is bound to have fall-out. Often that side-effect sneaks up as feeling worn-out, depleted as the workload becomes overbearing, and the load just completed offers no reprieve or satisfaction. Gradually (and sometimes not so gradually) negativity, exhaustion, increasing mental distance, and reduced confidence set in.

When work satisfaction dwindles, we often turn our ire at the tech we need to use ... and in no time we begin to snipe at colleagues!

**Karen Kendrick recommends the following self-help interventions to combat exhaustion in the workplace:**

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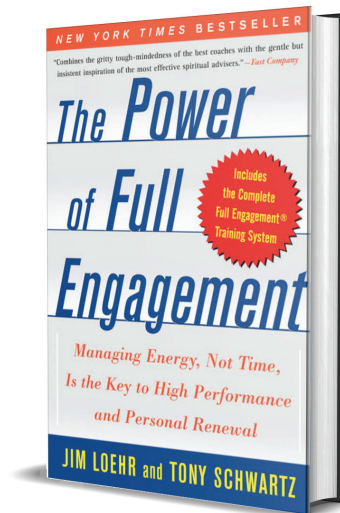
<sup>6</sup> A loose summary of Karen Kendrick's, *3 Fundraiser Self-Care check-ins to avoid Burnout*. NonProfitPRO, 11 January, 2023.

**Check the story you are telling yourself:**

- She says one's ego attaches itself to all the negative roles, ideas, and stories we tell ourselves and keeps one from self-affirmations; we perceive negatives and drag ourselves down into criticising workloads without discovering and admitting what our own contribution may be. Ms Kendric suggests we ask ourselves:
  - What beliefs or stories do I have about why I am burned out?
  - How do these stories contribute to or hinder me from finding a different way to function?
  - What story do I want to use to replace the current negative one?

**Check your energy levels:**

- On waking in the morning, do you reach for your phone or tablet to check your emails? If you do, you are probably having your first dose of 'overwhelm' for the day. Ideally, you should wake up, meditate, or make an entry into a journal, do a 15–20-minute yoga or tai chi session.
- How different these activities would be for your physical, mental, emotional, and spiritual states. Ask yourself these questions:
  - Are you treating yourself like a machine?
  - What small steps can you take to build more energy?
- You should also compare your current responsibilities with those stipulated in your job description.
- Identify what the time allocations were for each of your duties. Discrepancies between the two could lead to you not making your targets or deadlines.



Consider reading the *Power of Full Engagement*, by Jim Loehr & Tony Schwartz.

Take stock of your workload: Populate the following table (replace sample grey text) 

CATEGORY	TASKS (Enter only yours)	TIME PLANNED	ACTUAL TIME SPENT	RETURN ON TIME & EFFORT INVESTED
Project Formulation	<ul style="list-style-type: none"> <li>Brainstorming</li> <li>ToC</li> <li>Success Equation</li> <li>LFA</li> </ul>			
Budget Building	<ul style="list-style-type: none"> <li>Update checklist</li> <li>Pricing research</li> <li>Master worksheet</li> <li>Summary worksheet</li> </ul>			
Prospect Research	<ul style="list-style-type: none"> <li>Newspapers</li> <li>Business press</li> <li>Database subscriptions</li> <li>Online trawling</li> <li>Qualify prospects</li> </ul>			
Solicitation Documents	<ul style="list-style-type: none"> <li>Outlines</li> <li>Proposals</li> </ul>			
Cultivation	<ul style="list-style-type: none"> <li>Meetings</li> <li>Plan event logistics</li> <li>Attend Events</li> <li>Follow-up strategies</li> </ul>			
Database	<ul style="list-style-type: none"> <li>Input</li> <li>Interrogate</li> <li>Produce briefing note</li> </ul>			
Sponsorship	<ul style="list-style-type: none"> <li>Identify prospect</li> <li>Identify &amp; cost assets</li> <li>Build proposition</li> </ul>			
Stewardship				
Board Business				
Administration				

Figure 68 Workload Inventory worksheet

## PSYCHOLOGY AND FUND DEVELOPMENT

To round off this exploration of *selected ways and means* in the fund development process, it might be worthwhile to take a step back to look beyond the nuts and bolts for a more philosophical perspective of what we do – perhaps a more sobering, motivating, and comforting view of the invaluable work we do.

Altruism is a contentious topic for many. Some would insist that unfettered human generosity is alive and well. Others deny that such a quality exists and that nobody will give unconditionally; that the *what's in it for me* overrides human goodwill.

Regardless of point of view, we do know that it feels good to do good. But, do we know why we give, and why we give to one and not the other? *CommunityFunded.com* lists the following factors that should trigger a donor's decision to be generous and recommends that we adopt these in our fund development endeavours:

### CAN DONORS RELATE TO YOU?

Since people tend to congregate, to associate with like-minded, it follows that they would prefer to assist organisations who share their preference. That is why it is imperative to align with a donor's interests (individual or agency). Although a definite benefit, in the early stages of cultivating a donor it is less useful to make the donor like you than it is to have them relate to the work you do. The more detail you can provide about **who your organisation benefits**, the better chance you have of connecting with donors. Once that connection is established, the value of good stewardship begins to firm up the connection with the donor towards renewing and/or extending the relationship.

Much will hinge on communication. Letters of enquiry should introduce yourself more through who you serve than dwell on who you are. Remember the axiom, **it's about the donor, not you!** But do not be overwhelming and focus so heavily on your beneficiaries that you risk making the donor simply pity them. This can easily happen where you have the space to write more extensively in proposal documents. When injecting stories, do not get caught up in sharing your beneficiaries' complete life stories; concentrate more on the connections that make your donors feel human. This requires keeping a delicate balance between the hard work involved and the relief it will deliver without slipping into a soppy, teary appeal. **Fund development is a serious undertaking for impactful results.** Securing the means for it must be a focused and deliberate effort, there is no room for a begging-bowl mindset.

### IS YOUR NEED HUMAN?

Avoiding a suppliant mindset does not mean stripping your donors or your beneficiaries of their **humanness**. People give to people before (or even if) they give to organisations, and they do not ordinarily relate to statistics. Communication strategies must **put a face to the organisations** – a human personality to whom donors can relate.

No matter how intricate campaigns are constructed, no matter the length and depth that went into prospect research or in building budgets and writing the letters of enquiry and proposals to persuade a donor to partner, **it all revolves around the human element**. Your efforts may benefit thousands, but one face, one individual's face, will strike the sensitive chord. That face should **portray the survivor rather than the victim**. The overused 'when you support our cause, you'll feel profoundly rewarded' has proven to discourage prospective donors.

A useful instance is the heated debate around free tertiary education. Is it a right or a privilege? Is tertiary education elitist? These discussions become esoteric and remove or reduce the donor to little more than a mitigating factor or to a mere cog in the money supply chain. Because it is a large faceless debate, it makes it easier for corporates to dump otherwise taxable cash into scholarship funds, not particularly caring who it benefitted or even if there was any tangible return – after all, it was less of an investment than a tax tactic (and perhaps a way of keeping out of the way of the discourse). If, however, an approach charted one or a small group of scholarship recipients' path to graduation, the effect would be real.

## PRIME YOUR ASK/OFFER

**Donations come from the heart not always from the head**, we generally believe – people donate because they have developed a feeling or an emotional affinity for something. Another popular adage among fund developers is, "ask for money and you're bound to get advice; ask for advice and you'll probably get money".

Fund developers take on all the behind-the-scenes preparation specifically so that they can prime the **emotional response** in donors. CommunityFunded.com says:

*Remember, cultivating an emotional response over an analytical one results in greater generosity. By asking for someone's time, you're telling them that your cause has an emotional resonance. You also trigger thoughts of personal emotional wellness and happiness. On the other hand, asking for money creates a utilitarian, rational mindset. While giving has been linked to increased happiness, people don't often think in those terms when thinking analytically.*

Donors are also more easily persuaded to give when they are asked to participate, whether by advising or lending a hand. Once they become involved, they are more likely to continue the association or partnership ... and often increase their participation and their donation because it feels more engaging and satisfying to have to expend their effort beyond writing a check or swiping a card. Participation kindles that feeling of meaningful personal investment and involvement.

## FOCUS ON A SINGLE MESSAGE

We all know or can imagine that there are many reasons why people give. Corporates, development agencies, and foundations will have their official guidelines and individuals have their personal preferences. Most agencies, however, have their decisions crafted by governing Boards. The individuals who must process the applications are just that, individuals, no different from the individual donor.

Some may appreciate tables of facts, spreadsheets of figures, or reams of statistics, but few will like wads of facts, figures, or stats in one single approach.

Too many messages framed in different ways can come across as unfocused. And using the same information pack will become stale – even have the opposite effect, and dissuade!

It would be prudent to decide on a single narrative story and very selectively insert only the most striking figures and statistics. This is particularly applicable for letters of enquiry. Proposals may allow more leeway, yet, even on this platform, selectivity is key.

A separate, pointed message with facts, figures, and impact should be crafted for each demographic segment ... but each tailored version must have the same strategic thrust and the same end product.

### MOTIVATE THE FINAL COUNTDOWN

The principle of people enjoying being part of success rings loudest in capital campaigns. In these endeavours a campaign usually only goes public when about 60% of the target has been reached. That tangible success factor then has the power to attract others and so many a capital campaign exceeds its target.

The same principle applies, albeit at a lower scale, to more run-of-the-mill campaigns. Smaller successes can also energise prospects, however modest they may be. Tout such successes even to existing donors by offering them the chance to make a bonus donation based on the current accomplishments. However, do not raise a target during a campaign because of (unexpected) intermediate successes. No one wants to have a victory or near-victory taken away. Add subsidiary goals, such as an added scholarship or add to an existing project.

### END ON A PERSONAL NOTE

The simplest action in the entire fund development process is the ‘thank you’ note. Yet, as I’ve said several times before, it should be considered the beginning of the most essential stage in securing support. **The only way to fully realise the sheer impact and importance of gratitude is to be a donor oneself and to feel what a simple gesture of appreciation can do.** When that initial simple gesture is drawn into a programme of ‘gratefulness’, the outcome is almost guaranteed to be rewarded by high donor retention, extended and repeat contributions, and word-of-mouth referrals.

Donor satisfaction is cardinal. It should only begin with the ‘thank you’ acknowledgement and the required narrative and financial reports – these are peripheral to demonstrating gratitude, if in fact they can be regarded as anything other than the business end. Gratitude, **sincere expressions, and gestures of gratitude should be innovative, fresh, different, and professional, aimed at cutting through a staid business relationship.**



A baseline principle would be to **involve your donors** whether physically or remotely. Invite them to participate in your work or by reading about it in your up-to-date blog or website newsclips, link them to what their donations, sponsorships, or grants are enabling you to do.

## TAKE AWAYS

Figure 70 is a list of lessons that readers may take from this e-Book. As with so much in this skinny publication, it does not pretend to be complete. This is deliberate in the hope that readers will add their own points.

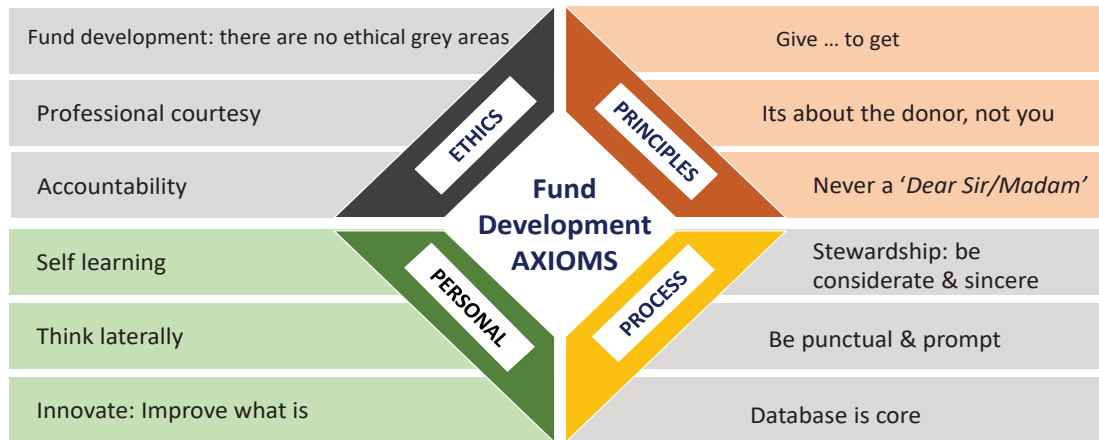


Figure 69: Fundraising axioms

## TEMPLATES

Many fund developers will approach this section with the impression that templates are only for the managers among them. Not so. Fund development operations require an unusually high degree of cross-referencing and collaboration. Perhaps more so than many other organisational functions. Even if everyone is not involved in developing templates, they should be tools that are consulted often to gauge progress and as indicators of what remains to be done.

Some worksheets certainly are the responsibility of managers, but I've always involved colleagues in developing worksheets because it encourages collegiality and transparency. Templates also invariably become references that are circulated and/or posted in departmental common areas to chart progress.

The templates included here are simple with only the most basic and necessary formatting. This is deliberate to allow users to include logos and change colours, etc. to suit their own personalities and branding. The only data and text that need to be replaced are located in cells where the font is greyed-out. Other cells in a spreadsheet are likely to be governed by formulas – making any changes to such cells will certainly affect the voracity and accuracy.

Here then are 40+ such guides and trackers – many were part of my fund developing career at one time or another.

**1. Guide to writing a strong mission** 

*This is a sample text to articulate an organisation/institution's very purpose; why it exists. It is accompanied by a vision statement which also articulates (and commits) the organisation to a structure and function in the next few years.*

**2. Service Pledge** 

*This is a sample text of what the organisation believes in and is committed to. It incorporates the vision and mission statement, but also clarifies the very principles on which the organisation grounds itself. This is a significant statement to display for visitors and especially valuable for donors to see.*

**3. S.W.O.T. Analysis worksheet** 

*A worksheet to explore your four key operational areas. Like so many, if not all these templates, it is best developed by group discussion.*

**4. Strategy map** 

*This, too, is an incorporation of the vision and mission statements, but these statements are transformed into concrete, measurable activities. The worksheet transfers everything that the SWOT analysis discovered and strategises along four typical operational areas: finance; internal systems; donor relations; and learning.*

**5. 14-Step Theory of Change (ToC) worksheet** 

*A worksheet of 14 questions towards developing the reason and implications for why a project or programme is both necessary and viable.*

**6. Log Frame Analysis worksheet** 

*Similar in purpose to the Theory of Change (ToC), but in table form. Donors not only often prefer this rationale for a project, but in deference to the many applicants who are uncomfortable with working with tables, develop, instead, a series of questions that ultimately develop the same rationale that an LFA would.*

**7. Success Equation/Impact Plan worksheet** 

*This is a relatively new exercise to develop and demonstrate the reasoning and accountable actions of project/programme strategy. A success equation could also be called an impact plan because it accounts for the ultimate product, the activities and resources required and most importantly, how each individual action will be measured.*

**8. Sample completed success equation** 

*Because this type of planning worksheet is relatively unfamiliar to many fund developers, I've included an example of a success equation. It is probably far more extensive and details what most project/programmes would not need, so this should be regarded an ultimate benchmark.*

**9. Case for support statement** 

*There can be little dissent that a Case for Support (C4S) is an imperative document in any operation that relies on donor goodwill and interest. A dynamic C4S will not only attract donor interest but convince them to at least explore further if not help them to commit their support.*

**10. Case for support checklist** 

*Because a C4S is an imperative tool, this is a checklist (intentionally generic and most likely not exhaustive) to help develop a lively, attractive C4S.*

**11. Project outline canvas** 

*Outline canvasses are more common to the business world for visually capturing programme or project details – even of extensive business plans. They are also becoming recognised by human resources functions as detailed snapshots of an applicant’s professional profile. As with success equation/impact plans, a project outline canvas is an extremely useful leave-behind, or as an attachment to a letter of enquiry.*

**12. Fundraising plan worksheet** 

*Arguably more directly useful than an organisation/institutions’ strategic plan, this is a vital document to chart a course and should be revisited each year. This worksheet could help you develop such a steering document.*

**13. Simple action Plan** 

*The common saying ‘a goal without a plan is merely an idea’ could be strengthened to ‘a goal without a plan is a delusion, or a notion, or even a decoration’. Many goals end up as these if they are not the starting point of an action plan. Here is a worksheet for a simple and very direct plan of action.*

**14. Balanced scorecard action plan** 

*More specialised and focused is an action plan along the four cornerstones of a business-like organisation. Here is such an action plan that divides activities into finance, internal systems, donor relations and learning/innovation categories. In effect, it charts a holistic course from a goal to (or set of goals) to an accountable and achievable outcome.*

**15. Gift chart /Fundraising pyramid worksheet** 

*As I note in the text, fundraising pyramids or gift charts as they are also called, are not widely used in the many African NGO organisations with whom I’ve been associated. However, they’ve all managed to get by, many with great success. Still, it is a planning tool that can help in developing a fundraising plan. The effort begins by:*

- *scouring the history behind existing and past success;*
- *determining how many approaches it took before you landed a grant and what the grant size was;*
- *classifying the grants into four sizes, in other words what your organisation regards as a major, a moderate, and a modest gift amount, then set the ratio of number of approaches it took to raise the support, e.g. 1:5 (it took 5 approaches to donors to raise funds).*

*Here is an Excel worksheet that should help you see what size gift and how many you should secure to realise your target. If nothing else, it tempers many an ambitious target when one calculates how many prospective donors need to be approached.*

#### 16. Forecasting worksheet

*The calculated theory of the gift range chart/fundraising pyramid is a useful beginning. This forecasting*

*template will make more specific projections if you:*

- *Identify a prospect;*
- *determine in which category (corporate, sponsor, individual, etc.) s/he falls based on your prospect research of her/his past donations;*
- *insert the most likely size gift they're capable of; and*
- *speculate whether they're a 'sure thing' or a 'let's hold thumbs', supporter.*
- 

*The worksheet will do all the calculations and even alert you when you're relying too much on one funding source – guiding you towards developing a diverse funding base.*

#### 17. Sample budget checklist

*Budget building could come before gift charting and/or after forecasting, but it is an essential and an exacting step. This template is a sample checklist of all the items a typical project/programme would need. It does not pretend to be exhaustive so please delete, replace, and certainly add items necessary to your project/programme.*

#### 18. Multi-year budget worksheet

*Here is a worksheet in which you simply replace the greyed-out sample items with your own. The worksheet will calculate the subtotals, add an inflationary increase for multiple years, and graph the totals. The graphs will present a visual of where you have proportioned the funding. Here, as in all these Excel templates, calculations and charting happen immediately to allow easy adjustments.*

#### 19. Summary budget worksheet

*Some donors would appreciate short summary budgets, especially at their initial shortlisting stage. This worksheet template captures the subtotals of a comprehensive budget (probably multi-year) sheet's key categories. Its calculations and graphs provide a quick, wholly informative overview. A summary budget sheet should NOT be a substitute for a comprehensive budget – there should never be a reason not to build a comprehensive budget.*

**20. Operational budget tracker** 

*Although this worksheet falls within a manager's portfolio, posting or sharing updated versions on noticeboards or presented at appropriate staff (status & strategy) meetings could be a fine motivator.*

**21. Budget vs Actual tracking worksheet (advanced)** 

*A more intricate progress tracker, this worksheet is more appropriate to present to a governing structure like a Board or executive committee.*

**22. Fundraising campaign Gantt chart** 

*A Gantt chart is the mainstay of project management. It charts progress by timeline, percentage completed, and individual task. It also tracks only workdays by excluding weekends and public holidays. More elaborate examples will also include the use of resources and calculate costing at the various milestones. The worksheet included here is basic and well-suited to NGO use. It contains the sample text of typical tasks involved in a fund development endeavour, and again, retain or replace only the greyed-out data to suit your particular circumstances.*

**23. Task tracker** 

*Simpler than a Gantt chart, a task tracker, such as this template, will provide a quick and easy visual status update. Users will begin by retaining or replacing the sample greyed out text and with only one keystroke to tick the adjacent checkbox when the task is completed. This will automatically strikeout the task description, generate the date and time completed, show the number of tasks completed, and reduce the lists of tasks yet to be completed.*

**24. RACI template** 

*This is another management instrument, however, one that encourages wide consultation/group discussion. An updated RACI chart can be posted as a clear and agreed to reference of who does what. It underscores cooperation and precludes confusion.*

**25. Comprehensive campaign readiness assessment** 

*A useful initial set of weighted questions to determine the degree of readiness to undertake a more unusual or specialised project/programme, such as a comprehensive or capital campaign.*

**26. Cash flow budget** 

*At first glance this tool may seem misplaced as an NGO application. Not so. It will help set deadlines for new grants and help regulate existing donor tranches to mitigate against that age-old NGO threat of not meeting payroll obligations or project expenses. It is also a great help to see when and how much revenue you need.*

### 27. Constituency (Ubuntu) circle

*Once the funding landscape has been developed, it is time to prospect research. Populating a constituency circle (or Ubuntu circle), will help set the scene for more specific prospecting. Here one begins at the centre to identify supportive sources/categories that are most involved or invested in an organisation. The concentric circles that radiate outwards from the centre will list those with less association, but who are reasonable prospects by harnessing the A.I.M. filtering system (Part 3 of the text includes an example of a completed Constituency/Ubuntu Circle).*

### 28. Constituency (Ubuntu) manifest

*The categories indicated on the Constituency/Ubuntu circle, will help specify who and which prospects are viable (via the AIM filter and worth approaching). Identify the actual names of prospective donors and assess the likelihood that they will support your organisation by determining their past and present Association, their Interest, and their ability (Means) to support.*

### 29. Prospect information worksheet

*This may be a useful template for prospect researchers to consistently capture necessary information about a donor. Such categories as placeholders on a database ensure uniformity and 'clean' data which is easy to search and update.*

### 30. Key questions grant-makers ask

*In preparing to design solicitation documents, it is invaluable to remind oneself what information donors want. Here are some questions that donors have shared with philanthropy investigators. They form subliminal reminders of what we should ideally include in our proposal documents.*

### 31. Artificial Intelligence prompts

*AI will undoubtedly become more and more pervasive from collating and generating information, to editing. Here is a lightly modified list of one published by by [www.Keela.com](http://www.Keela.com). These are excellent instructions or more exactly, 'AI prompts', to generate text for large and general campaigns, for bequests, recurrent gifting, corporate partnerships, stewardship, and proposal writing needs.'*

**Please note:** the text generated by AI should only be regarded as a draft; a beginning. Using the exact text will run the risk of others doing the same and having donors receiving identical wording. This could severely prejudice both the intention and, certainly, the reputation of your organisation. This applies, most particularly, to proposal writers.

**32. Concept note template** 

*Although often considered an unnecessary step, a concept note is extremely useful to share general details of a project/programme. This is particularly so for sharing the contours of an initiative internally or with a Board who needs to approve the venture. A concept paper or concept note is also a useful first draft for a full proposal document.*

**33. Letter of Enquiry (LoE) template** 

*A sample text and direction of a letter that gives an outline of your need and specifically requests an opportunity to meet IF a donor is interested in your initiative. An LoE should be much sharper and more persuasive than this sample, but I hope this very general example will form a basis for your own.*

**34. Proposal template** 

*This is an extensive and overly comprehensive collection of components and content questions as a guide. It is imperative that users cull what is irrelevant to tailor this template to suit both the recipient and the initiative.*

**35. Results-Based Management reporting template (RBM)** 

*One often hears donors complain that the worthiest of projects/programmes submit the most mediocre reports – reports that barely reflect the outstanding work that was done – because the project managers make too little time to write a detailed report or leave it to the last possible moment to meet the deadline. A RBM table that is filled in as the project progresses is an ideal method to keep track of progress, note challenges and delays, make necessary adjustments, and articulate status.*

**36. Quick cost-benefit analysis** 

*At the early planning stages, one ought to determine whether a new idea is worth the effort – most especially in applying for sponsorship, let alone when dipping into existing funds. This simple worksheet will help determine whether the idea is financially worthwhile.*

**37. Sponsorship assets inventory** 

*Part 3 of the text describes the typical way NGOs seek sponsorship: by determining (often rather cursorily) the cost of an event and going out to cover that cost. The prime beneficiary of such sponsorship is/are the sponsors. They invariably reap significant benefits from the value they attach to brand exposure and often, sales volume. This template lists all the ‘assets’ attached to an event that an organisation may have and that may be of value to a sponsor. It also costs each asset to help determine the truer worth of an event and decide what the fundraising value could be.*

*While primarily used for internal discussions, once there is a firm relationship with a sponsor, one could have them assist in valuing each asset for mutual advantage.*



**38. Sample sponsorship proposition template** 

*Quite unlike a grant proposal, a sponsorship proposition requires a different mindset; one that is sales driven rather than being based solely on cost-recovery. The template provided here uses a typical Golf Day fundraising event as an example.*

**39. Sample Stewardship plan** 

*This is an example of a fairly comprehensive stewardship plan.*

**40. Strategic communications planning guide** 

*This, too, is merely a guide and if adopted, will need to be tailored to an organisation/institution's unique needs.*

**41. Communications plan worksheet** 

*This table indicates the broad activities needed to develop an effective and sustained (not sporadic) communications programme. Each strategy should be general enough to suggest appropriate activities.*

**42. Communications schedule template** 

*If the Communications Planning Guide above sketches the necessary landscape, this worksheet asks for the details of implementation.*

**43. Workload inventory worksheet** 

*Although this would seem to be more appropriately placed after # RACI worksheet, it pertains more directly to workload than the work responsibilities.*

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# TEMPLATES

## TEMPLATE1: GUIDE TO WRITING A STRONG MISSION STATEMENT

Sandy Rees on her 'Get *Fully* Funded' website gives the following advice on writing very practical mission and vision statements. She says the purpose of a mission statement is to capture the very essence, the very core of the work that your organisation does. It should reflect your very soul and should have **an action verb along with a few deliberately and very carefully chosen words**. It needs to be **short and easily understandable**.

A mission statement must:

- Keep you **focused and moving forward**, engaging in programmes that fulfil your mission while avoiding mission creep.
- **Motivate and inspire** the governing/advisory board, colleagues, and volunteers.
- Tell everyone **clearly and succinctly** what your organisation does and how you are making the community better.

A strong mission statement is:

- **Short.** With enough brainstorming, most organisations can create a single-sentence mission statement.
- **Clear.** State what you do without over-explaining.
- **Direct.** Name the problem your organisation works to solve, the reason your organisation exists, and the people or animals you help.

When a mission statement is a long, word-packed, compound-complex sentence or goes on for three or four sentences, the problem is often a lack of clarity around the mission.

ASK: What problem are we here to solve? Why do we exist? Who are we here to help?

Here are some examples of **strong mission statements**:

- We thoughtfully guide and fiercely support wonderful students to and through school/ college/ university.
- We work to end the cycle of homelessness for families in our community.
- We feed the hungry today while building a healthy, hunger-free tomorrow.
- We unite our community to nourish our neighbours in need.
- We empower young adults to overcome poverty and build a brighter future for ...
- We distribute donated furniture to families and individuals, turning their houses into homes.
- We advocate for the best interests of abused and neglected children in ...

A **mission statement** is what you are doing now, in the present, to reach the goal in your vision statement. A **vision statement** articulates your future, the target in the distance that you are aiming for in everything that you do. The vision statement expresses the overall goal of your organisation.

A vision statement is critical, even if it seems brazenly ambitious, because the words keep you focused on your end goal. It is easy to get mired in the day-to-day work of programmes and campaigns and lose sight of the ultimate goal.

Your mission statement is as vital, even if it seems simplistic, because the words guide you as you go about your work, keeping you from wandering off course and trying to do too much.

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## TEMPLATE 2: SERVICE PLEDGE/CREDO

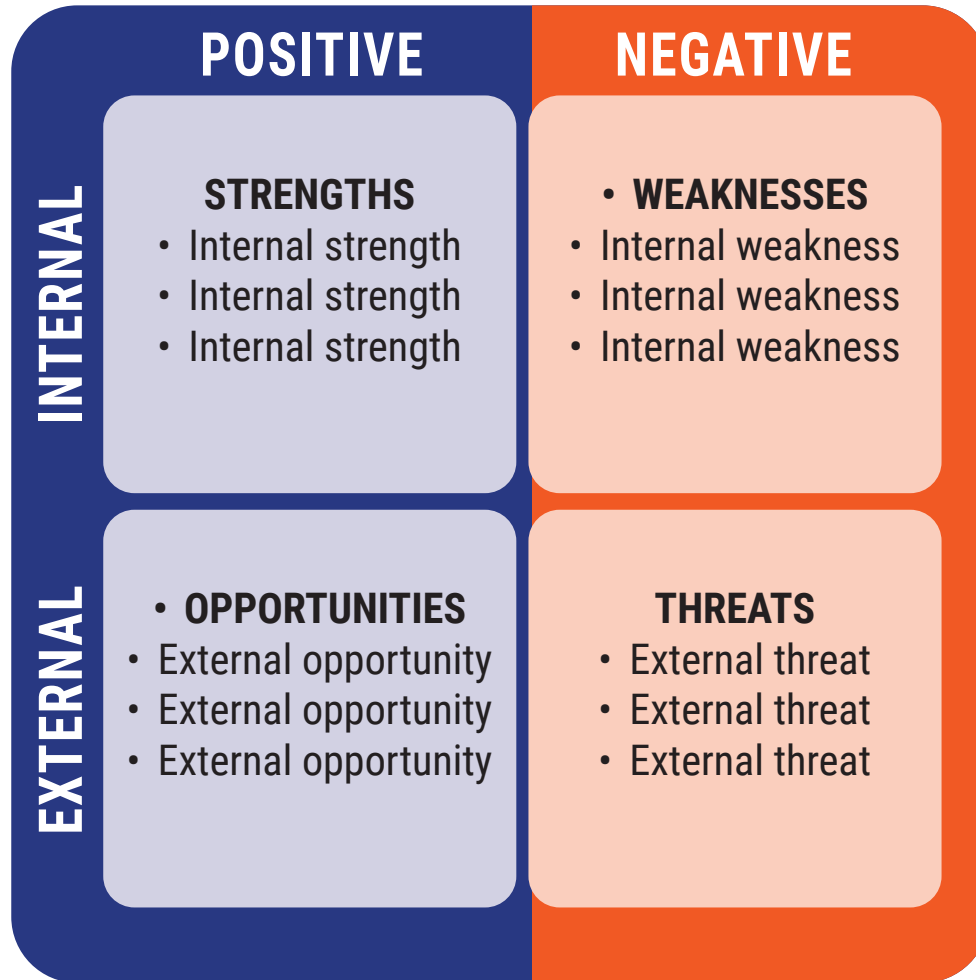
Creed of Ethics /Service Pledge (retain or substitute the greyed-out text)

We believe our first responsibility is to raise necessary funds to allow XXX to develop innovative and useful programmes that complement its core business of xxx, xxx, and xxx.

In meeting these responsibilities, everything we do must be of the utmost quality. We must constantly remain cost conscious and use xxx or donor funds judiciously.

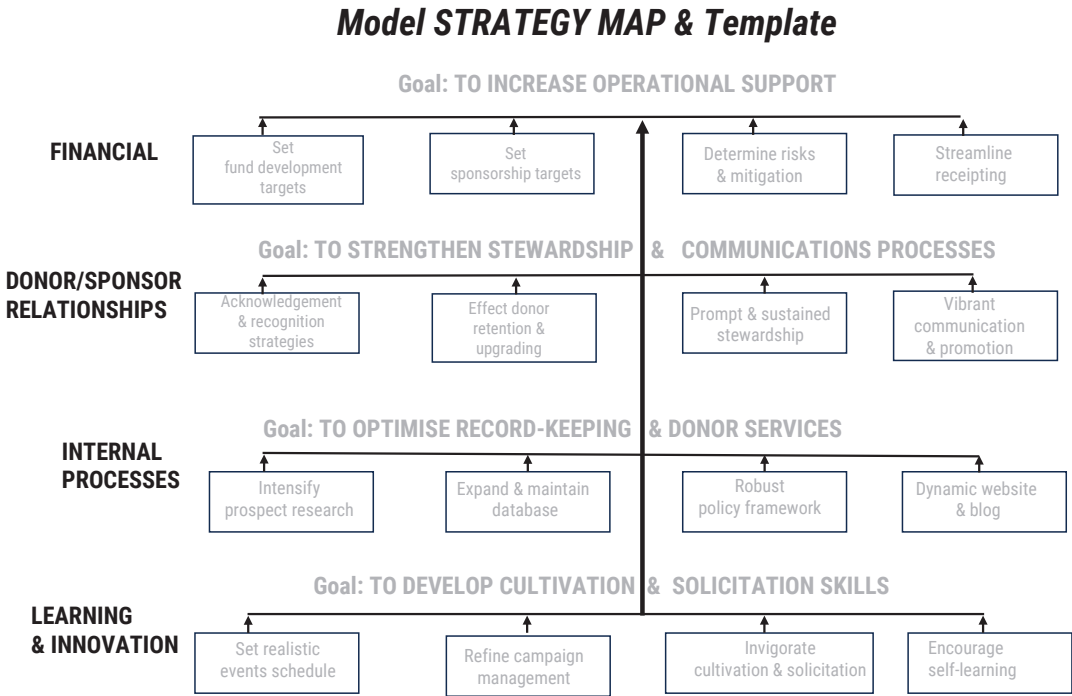
- Our beneficiaries' needs must be met promptly and with care.
  - We are responsible to our team – the men and women who work with us.
  - Everyone must be considered an individual.
  - Compensation must be fair and working conditions clean, orderly, and safe.
  - We must be mindful of ways to help our employees fulfil their family responsibilities.
  - Employees must feel free to make suggestions and complaints.
  - There must be equal opportunity for employment, development, and advancement for those eligible.
  - We must provide competent management, whose actions must be just and ethical.
  - We are responsible for the projects and programmes with which we work and uphold their rights and responsibilities with their donors.
  - We must be good citizens and encourage civic improvements, better service delivery, and education.
  - We must maintain in good order the property we are privileged to use, protecting the environment and natural resources.
  - We must explore new ideas.
  - We must engage in reading and research, develop innovative programmes, and learn from our mistakes.
  - We must acquire modern equipment and help launch new programmes.
  - We must create reserves to provide for adverse times.
  - When we operate according to these principles; our team, and our community should be proud of the support we provide.
-

## TEMPLATE 3: S.W.O.T. ANALYSIS WORKSHEET





# TEMPLATE 4: STRATEGY MAP



## TEMPLATE 5: 14-STEP THEORY OF CHANGE WORKSHEET

STEP	QUESTION	RESPONSE
1	What is our Mission?	
2	What specific problem do we want to address?	
3	What are the underlying cause(s) of the problem?	
4	At what level do we want to work?	
5	What impact do we want to achieve?	
6	Who will our work affect?	
7	How will we reach our target group?	
8	What tools/processes and do we need?	
9	What resources will we need? <i>(financial, knowledge, skills, time)</i>	
10	What resources do we already have?	
11	What additional resources will we need?	
12	Are other people already working in this field?	
13	Can we partner with anyone?	
14	How will we know if we are successful?	

## TEMPLATE 6: LOG FRAME ANALYSIS (LFA) WORKSHEET

**NOTE:** It might be more logical (and make clearer sense) to populate the table answering the questions in the numbered order.

INTERVENTION	PERFORMANCE INDICATORS	MEANS OF VERIFICATION	ASSUMPTIONS
<b>1 GOAL</b> State your general goal	<b>14</b> What indicator will show that your project has contributed to the goal?	<b>15</b> Where will one find that information?	
<b>2 PURPOSE</b> State your specific objective	<b>12</b> What will show that you have achieved your stated purpose?	<b>13</b> Where will one find that information?	<b>7</b> What key external factors must exist to enable purpose to contribute to the goal?
<b>3 OUTPUTS</b> What will your activities produce to achieve the purpose?	<b>10</b> What evidence will there be that you will have produced the stated outputs?	<b>11</b> Where will one find that information?	<b>6</b> What key external factors must exist for the outputs to produce the desired affect or outcome?
<b>4 ACTIVITIES</b> List the activities that will produce the outputs you plan on achieving (assuming you have the necessary resources)	<b>8</b> What will indicate (evidence) that you have conducted the activities listed?	<b>9</b> Where will one find evidence that the intended activities took place/	<b>5</b> What key external factors must exist to enable the activities to produce the outputs?

## TEMPLATE 7: SUCCESS EQUATION WORKSHEET

Here is an MS Word Template for a Success Equation:

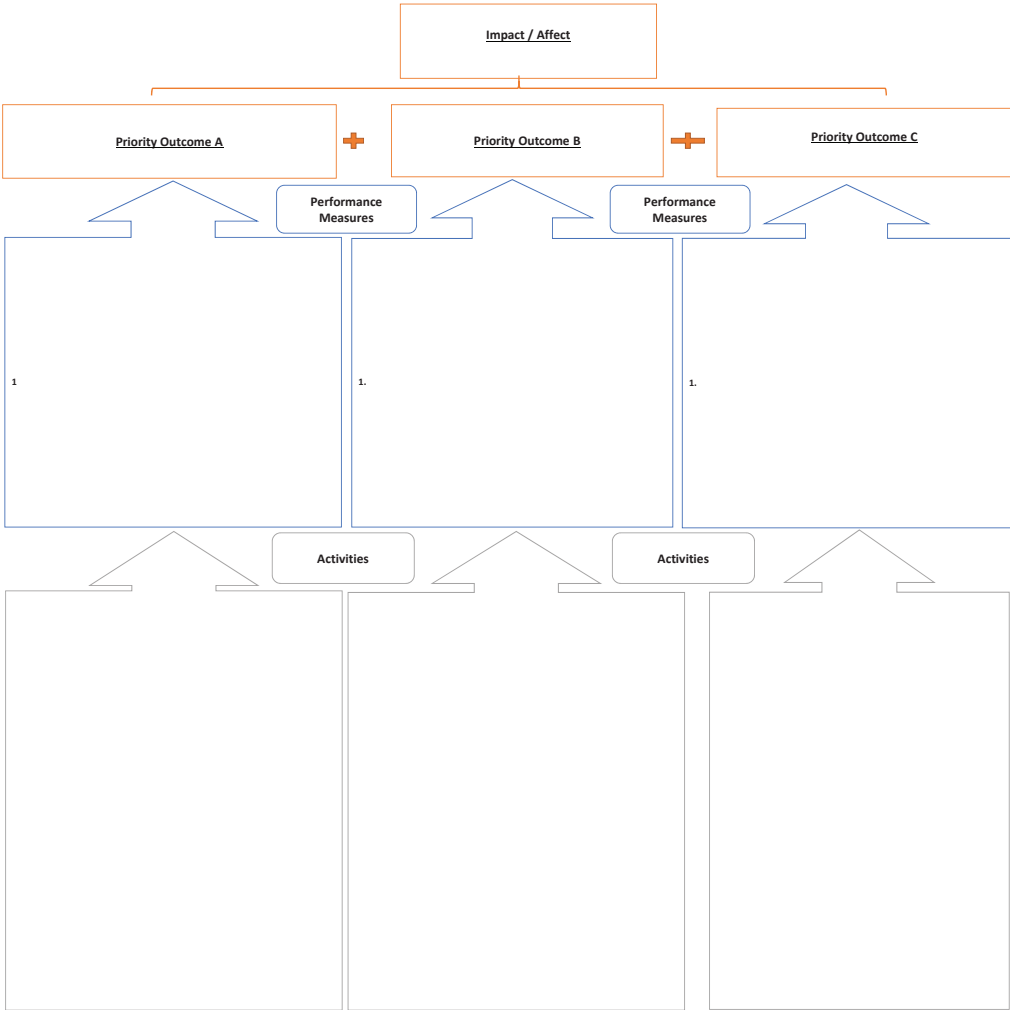
### SUCCESS EQUATION / AFFECT PLANNING WORKSHEET: AFFECT / IMPACT:

<b>PRIORITY OUTCOMES</b> What changes in behaviour, condition, or status are required to achieve our Impact/ Affect?	<b>ACTIVITIES/ PROGRAMMES</b> Which activities will drive our results?	<b>PERFORMANCE MEASURES</b> How do we measure progress toward our outcomes?
<b>PRIORITY OUTCOME A</b>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>
<b>PRIORITY OUTCOME B</b>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>
<b>PRIORITY OUTCOME C</b>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>

*Complete columns 1, 2, and 3 in that order.*

Adapted from Jason Paul, *The End of Fundraising: Raise More Money by selling your Impact*. San Francisco: Josey-Bass, 2011 Mission Measurement, Chicago, Ill.

# TEMPLATE 7.1: SUCCESS EQUATION WORKSHEET



# TEMPLATE 8: SAMPLE SUCCESS EQUATION WORKSHEET



## TEMPLATE 9: CASE FOR SUPPORT STATEMENT

### *What Is a Case Statement?*

Your case for support (C4S), or case statement, is a document detailing the argument for **why your organisation deserves gift support**, usually by **outlining the organisation's programmes, current needs, and plans**.

A C4S **should be educational and persuasive and make a compelling case for the work you do by describing your mission and values, history (track record), people, programmes and services, and vision for the future**.

Use your case statement to inform prospective funders and persuade them of your need for support. In this way it is not that different from a general support proposal, and like a proposal it should be concise and convincing.

*Your case statement should provide ready answers to the following questions:*

1. Why does your organisation exist? What is the need, problem, or challenge that you are there to address?
2. How do you plan to confront that need? What do you hope to accomplish, realistically? This is where your mission statement and programme objectives come into play.
3. How is your organisation qualified to address the need? What kind of track record do you have, and what are the skills, experiences, and qualifications of your board, staff, and any volunteers?
4. How much money do you need to advance your efforts?

*How your case statement supports your fundraising efforts:*

1. The case statement can be used as your fundamental fund development document with major donors.
2. You can draw from it to create other documents, such as speeches, press releases, or proposals.
3. Circulate the case statement among colleagues to solicit their feedback on it, to encourage their investment in your fund development process early on.
4. Give it to anyone who does face-to-face solicitations on behalf of your organisation: it can serve as a "briefing paper" for them and help them choose the best language to describe your organisation.
5. Use it as a recruitment tool when corresponding and meeting with prospective board members.
6. Where appropriate, a Success Equation/Impact Plan could accompany your C4S or be used as 'leave behinds' after meetings with donors.

## TEMPLATE 10: CASE FOR SUPPORT CHECKLIST

### Checklist for an External C4S

TOPIC	QUESTION	RATING. 1 to 5
<b>CORE CONTENT</b>	Does your case clearly explain how your Advancement Office (AO) makes a difference to the programmes and projects it delivers?	
	Does your case explain how and why your campaign(s) will increase your value in your campus and larger community?	
	Does your case clearly reflect your vision?	
	Does it clearly show for what you are raising support?	
	Does your case spell out the basic elements of your plan?	
<b>EMOTION</b>	Does the case inspire you? Is it exciting to read about the possibilities?	
	Is there anything in your case that touched your heart?	
	Did you find yourself wanting to make the programmes/projects a reality?	
<b>WRITING</b>	Is the case written in the active rather than the passive voice?	
	Is it written from the perspective of the reader's interests rather than from your fund development or organisation's needs?	



TOPIC	QUESTION	RATING. 1 to 5
	Are the sentences short -- no more than 10-15 words?	
	Does it rely on short, simple words rather than multi-syllabic, technical jargon or cliches?	
	Is the case as brief as it possibly can be?	
<b>HEADINGS</b>	When you only read the headings, do you get the essence of the message?	
	Do the headings engage you enough to compel you want to read the document?	
<b>APPEARANCE</b>	Is the document formatted clearly with plenty of white space to make for easy reading?	
	Are the paragraphs short -- no more than 4 sentences?	
	Are the margins wide enough to write comments?	
<b>FLOW</b>	Do the ideas make both logical and emotional sense?	
	Are the sections in an order that leads you through a natural thought process?	
<b>ADMINISTRATION</b>	Does every page have a "VERSION: Date"?	
	Do you and you team schedule meetings to review your case?	
<b>TOTAL /120:</b>		

## TEMPLATE 11: PROJECT OUTLINE CANVAS

<b>PROJECT:</b>		<b>PROJECT LEADER:</b>	
<b>PURPOSE:</b> What is the goal of this project? Why are we doing this?		<b>SCOPE:</b> Which areas should this project cover? Which areas should it NOT cover?	<b>SUCCESS CRITERIA</b> What do we need to achieve? How can our success be measured?
<b>MILESTONES:</b> When do we start? What are the key milestones/benchmarks and what are their due dates? How can these milestones/benchmarks be measured?			<b>RESULTS:</b>
<b>ACTIONS:</b> Which deliverables need to be produced to reach each milestone? Which activities need to be executed to produce a certain deliverable?			
<b>TEAM:</b> Who are the participants? What are their roles in the project?		<b>STAKEHOLDERS:</b> Who affects the success of the project? Who do we need? What are their roles in the project?	<b>USERS:</b> What is our target group? Who are our beneficiaries?
<b>RESOURCES:</b> What resources do we need? How much will the project cost? How long will it take?		<b>CONSTRAINTS:</b> What are the current project limitations or constraints?	<b>RISKS:</b> What risks may occur during the project? How do we treat these possible risks?

## TEMPLATE 12: FUNDRAISING PLAN WORKSHEET

*This example is based on Sandy Reese of Getfullyfunded.com's suggested template. A more detailed and advanced walk-through template for a Fundraising Plan is available from CauseVox at <https://www.causevox.com/fundraising-plan-calendar/>*

### STEP 1: VALUES

Articulate which values will guide you as you pursue the fundraising goals listed in this plan.

### STEP 2: REFLECT ON THE PAST YEAR

Reflecting on the past year is a great way to start simplifying your fundraising plan. You will be able to identify trends and patterns that you may not have noticed otherwise.

First, review your total revenue raised from all sources. Then, look at the breakdown of your revenue between individual donors and corporate sponsorships. Finally, determine if there was any change in your average gift amounts.

Also consider whether your organisation had any major changes in the previous 12 months. Did you add a new board member? Change your mission statement? Add a new programme? These changes might affect your ability to effectively develop funding.

Once you have reflected on the past year, you will be able to simplify your fund development plan and focus on the most effective strategies for the coming year.

### **Example:**

#### **Results:**

#### **Overall:**

- *We raised 10,000,000 from all sources last year.*
- *Individuals: 250,000 (12.5%) came from individual donors.*
- *Corporations: 200,000 (18%) from corporate social investment allocations.*
- *Sponsorships: 1,000,000 (10%) corporate marketing budgets.*

#### **Successes:**

- *Our online giving page had a great response, and we were able to increase our donor base by 10%,  
xx.*
- *We hit our fundraising goal for the first time in three years!*

#### **Challenges:**

- *Our postal campaign (direct mail) did not happen.*
- *Must review text and branded gifts.*
- *We battled to get corporate sponsorships; must refine our approaches.*

## **STEP 3: TAKE STOCK**

The second step is to take inventory of your organisation's resources. You will want to think about where your money comes from, how much time you spend on fundraising activities, and whether there are any additional resources available to you.

Take stock of your organisation's resources (*money, staff, board, volunteers, etc.*) and how they can support fundraising efforts in the coming fiscal year.

- What do you currently have?
- How much time does your organisation dedicate to fundraising?
- Do you have a dedicated fundraiser, or multiple?
- Are there any additional resources available to your organisation?

Once you know where your money comes from and how much time you spend raising funds, you will be able to determine if there are any additional resources that you can tap into. For example, if you do not have a clean and automated email list of supporters, you may need a database administrator to manage that list.

Also consider whether you have enough staff time to devote to fundraising. If you only have two hours per week to develop funds, you may need to find a way to reduce the number of fundraisers you run.

Finally, you may want to look at whether you have access to technology that makes fundraising easier.

For example, if your organisation uses online donation forms, you may be able to automate those forms instead of manually entering data.

**Example Resource List:****Funds:**

- We have a 20,000 budget for this fiscal year.
- 5,000 of that is set aside for mail shots, 10,000 for online giving, 2,000 for special events, and 3,000 for printing and postage.

**Time:**

- We have two full-time (40 hrs p/wk) staff members dedicated to fund development.
- In addition, we have a part-time development assistant who works 10 hours per week.
- We also have a database administrator who spends 10 hours per week on database maintenance.

**Board Support:**

- We have a three-member fundraising committee that meets monthly.
- We also have a development committee that meets quarterly.

**Other:**

- We have a great online fundraising platform and a good email list.

**STEP 4: LIST THE THINGS YOU NEED TO DO TO GET NEW DONATIONS**

*(renew existing ones, and improve existing ones).*

To begin and/or increasing your individual giving, your strategy should include tactics to discover ways to draw in new individuals who will give regularly, renew current ones, and move them up a level or two or three. Think of these efforts as “growth”, because they are essential for keeping your fund development efforts worthwhile.

**Example Resource List:****Attract:**

- Run three social media campaigns aimed at attracting new potential donors.
- Exhibit/demonstrate and/or make presentations at two community events to attract new donors.

**Renew:**

- Reach out to dormant donors.

**Upgrade:**

- Asking recurrent donors to increase their giving level.

## STEP 5: WRITE DOWN YOUR GOALS FOR EACH ACTION

(begin with an action verb or 'We want to...')

This is where you write down your goals for each activity. You will want to think about what you want to accomplish in numbers; avoid the complacency that often comes from relying on percentages. For example, if you want to increase the percentage of your current donors from 10% to 15%, then you should write down your goal as:

*"We want to increase our current donors by 25%, i.e. by adding xx new donors to our current base of xx by November 1".*

Another example of an explicit goal is: you want your organisation to reach its fundraising target, then you might state the following:

*"Raise 1 million by 25 December xxxx from xxx recurrent/corporate/development agency donors."*

### **Example:**

#### **Attract new recurrent donors:**

- *Acquire 100 new email addresses from in-person events.*
- *Raise 10,000 from our P2P campaign by recruiting three volunteer fund developers who raise 5,000 each by July(?) 1.*

#### **Renewing donors:**

- *Raise 15,000 from our current donors for our winter postal appeal.*
- *Engage 80 online donors to raise 7,000 by August 20.*
- *We want to schedule meetings with 60% or xx of our major donors by August 1.*

#### **Goals for upgrading donors:**

- *By March 31, we want to recruit 30 new monthly donors from our annual givers from our mid-level donor base.*
- *We want to raise \$60,000 by upgrading 30% or xx of our current major donors by November 1.*

Now that you have written down your goals, you can move onto Step 6.

## STEP 6: THREE FOCUS AREAS FOR THE COMING YEAR

Your fundraising plan should include at least three focus areas for the coming years. These are the three things that you want to make sure happen because of your fundraising plan. You might want to consider adding additional focus areas if there are things that you think you will want to work towards. You might decide to:

- begin a monthly giving programme,
- persuade one or more board members in becoming involved, or
- improve your database practices so that your donor reports are consistently accurate.

You could also want to add additional focus areas if you feel like there are certain things that you would like to accomplish in the coming year.

Whatever your goals are for the coming year, make sure that you write them down in your fundraising plan. They then become indelible, and you can refer to those goals throughout the year to remind yourself of where you want to focus your efforts.

### *Example Focus Areas*

- *expand your recurrent giving campaign,*
- *ramp up your development agency programme by introducing multi-year projects;*
- *launch a new online giving platform, or*
- *develop a new volunteer recruiting and training programme.*

## STEP 7: MARK IT ON THE CALENDAR

Regardless of your calendaring system, figure out how you are going to space out your plans over the next year. Plan your activities around vacations, programme events, and potential busy times for the organisation. Use the space below to brainstorm how to structure your year, and then translate your thoughts to your scheduling tool of choice, e.g. the Gantt Chart Project Schedule template included as Template 22.

## STEP 8: MAKE RESOLUTIONS TO SET YOURSELF UP FOR SUCCESS

We often make New Year's resolutions for ourselves in our personal lives, yet we are not as good at making them when it comes to fundraising. Determine what you need to succeed in the coming year. Here are some areas you might think about:

- An hour on your calendar every week to check in on the plan or make phone calls/courtesy visits to donors and sponsors.
- A quarterly check-in with your team to evaluate your progress.
- Do you need to hire someone with expertise in a particular area to help you?
- Ask your fund development committee to review your plan and provide feedback.
- Do your governing board members participate.
- Make a list of potential donors and ask for introductions.
- Evaluate your CRM system/add features.
- Educate yourself on a topic related to fund development.
- Attend a conference or webinar. [Present a webinar](#) and/or a podcast.
- Consider setting up a learning or resource centre for your team (single site or online links).

### ***Personal resolutions:***

- *Mondays and Wednesdays from 9 am to 1 pm are my fund development times. I will not schedule meetings or calls unless related to fund development.*
- *Ask for feedback from the fund development committee and see if they need any help.*
- *I will attend at least one conference and five webinars related to fund development each year.*
- *I will have a consultant review our database and make recommendations on how to improve.*
- *I will take an online course on donor stewardship.*
- *Will ask the Board chair to make introductions to three potential major donors.*
- *I will personally call/visit xx donors each month to update them on our work and ask for their continued support.*
- *I will review our website quarterly to ensure that our online giving page is up-to-date and effective.*
- *I will implement a young professional giving circle with the goal of acquiring 10 new monthly donors.*



# SUMMARY CALENDAR

**Fund Development Goal:**

**New Donor Goal:**

**Donor Reactivation & Retention Goal:**

	GRANTS	SPONSORSHIPS	INDIVIDUAL DONORS	COMMUNICATIONS	PROMOTIONS	TACTICS
JAN						
FEB						
MAR						
APR						
MAY						
JUNE						
JULY						
AUG						
SEPT						
OCT						
NOV						
DEC						



## TEMPLATE 13: SIMPLE ACTION PLAN

### FUND DEVELOPMENT DEPARTMENT/UNIT ACTION PLAN: MONTH, 20XX -- MONTH, 20XX

CATEGORY	TARGET	PERSON RESPONSIBLE	ASSISTED BY	HOW	WHEN	STATUS
FOUNDATIONS						
CORPORATIONS						
SPONSORSHIPS						
RECURRENT REVENUE						
EVENTS						
ALUMNI						

# TEMPLATE 14: BALANCED SCORECARD ACTION PLAN

## FUND DEVELOPMENT DEPARTMENT

Balanced Scorecard ACTION PLANS: January – December, 20XX:

Portfolio:

Name:

BALANCED SCORECARD CATEGORY	TARGET	RESPONSIBLE PERSON	ASSISTED BY	WHAT	WHEN	STATUS
<b>FINANCIAL:</b>						
<b>INTERNAL SYSTEMS:</b>						
<b>CLIENT / DONOR:</b>						
<b>INNOVATION &amp; LEARNING:</b>						

# TEMPLATE 15: GIFT CHART/PYRAMID WORKSHEET

Target

R 20 000 000,00

Ratios: 1 : 4

Large gifts

1 : 3

Moderate gifts

1 : 2

Smaller gifts

NOTE: replace only the greyed-out data

	Gift Range	Gifts required	Prospects required	Subtotals	%	
Major Gifts	5 000 000,00	2	8	10 000 000,00	79%	Note: This category should reflect the largest revenue (ideally, approaching 80% of target income).
	1 000 000,00	3	9	3 000 000,00		
	550 000,00	5	15	2 750 000,00		
Medium Gifts	250 000,00	8	16	2 000 000,00	19%	These gift categories should approach 20%
	100 000,00	4	8	400 000,00		
	150 000,00	8	16	1 200 000,00		
	25 000,00	10	20	250 000,00		
Moderate Gifts	500,00	100	200	50 000,00	1%	
	250,00	100	200	25 000,00		
	150,00	300	600	45 000,00		
Recurrent Fund	50,00	500	1000	300 000,00	1%	
	<b>Totals</b>	<b>1 040</b>	<b>2 092</b>	<b>R20 020 000</b>	<b>100%</b>	

# TEMPLATE 16: FUNDRAISING FORECASTING WORKSHEET

## Fundraising Forecasting Worksheet

Adapted from *Confidant's Fundraising Forecast*

Replace ONLY the greyed-out cells. Categorise your income into the different tables for each category. In the confidence column cells, enter the amount expected and your level of confidence that you will receive the funds. The forecast is calculated based on this degree of confidence.

Only Edit the greyed-out cells.

### Revenue Categories in this tool

- Table 1 Major Gifts
- Table 2 Event Gifts
- Table 3 Government
- Table 4 Corporations
- Table 5 Foundations
- Table 6 Sponsorships
- Table 7 Partnerships
- Table 8 Other Revenue

Confidence levels	Guaranteed	100%
Very Likely	75%	
Maybe	30%	
Fingers Crossed	10%	

### Revenue Source Breakdown

Major Gifts	Total Revenue Expected	Confidence?	Likelihood	Total Forecasted
Private Revenue	100,000.00	Guaranteed	100%	R100,000.00
Bank A/c	875,000.00	Very Likely	75%	R656,250.00
John Doe	100,000.00	Maybe	30%	R30,000.00
University Graduate #1	80,000.00	Fingers Crossed	10%	R8,000.00
Friend of the Lib	84,000.00	Guaranteed	100%	R84,000.00
Friend of the Lib	825,000.00	Fingers Crossed	10%	R82,500.00
Major Gift Donor	830,000.00	Maybe	30%	R249,000.00
Major Gift Donor	85,000.00	Very Likely	75%	R63,750.00
Major Gift Donor	80,000.00	Fingers Crossed	10%	R8,000.00
Major Gift Donor	80,000.00	Fingers Crossed	10%	R8,000.00
<b>Total Revenue Forecasted</b>	<b>R10,474,000.00</b>			<b>R10,148,000.00</b>

Event Gifts	Total Revenue Expected	Confidence?	Likelihood	Total Forecasted
Auction	850,000.00	Guaranteed	100%	R850,000.00
Sponsorship	850,000.00	Guaranteed	100%	R850,000.00
Sponsorship	850,000.00	Very Likely	75%	R637,500.00
Charity Sponsor	800,000.00	Maybe	30%	R240,000.00
Gala Revenue Source 5	80,000.00	Fingers Crossed	10%	R8,000.00
Gala Revenue Source 6	80,000.00	Fingers Crossed	10%	R8,000.00
Gala Revenue Source 7	80,000.00	Fingers Crossed	10%	R8,000.00
Gala Revenue Source 8	80,000.00	Fingers Crossed	10%	R8,000.00
Gala Revenue Source 9	80,000.00	Fingers Crossed	10%	R8,000.00
Gala Revenue Source 10	80,000.00	Fingers Crossed	10%	R8,000.00
<b>Total Revenue Forecasted</b>	<b>R260,000.00</b>			<b>R175,000.00</b>

Government	Total Revenue Expected	Confidence?	Likelihood	Total Forecasted
Grant	800,000.00	Guaranteed	100%	R800,000.00
Grant	825,000.00	Very Likely	75%	R618,750.00
GR	810,000.00	Very Likely	75%	R607,500.00
SETA 1	81,000,000.00	Guaranteed	100%	R81,000,000.00
SETA 2	81,000,000.00	Very Likely	75%	R60,750,000.00
SETA 3	810,000,000.00	Guaranteed	100%	R810,000,000.00
Grant 4	80,000.00	Fingers Crossed	10%	R8,000.00
Grant 5	80,000.00	Fingers Crossed	10%	R8,000.00
Grant 6	80,000.00	Fingers Crossed	10%	R8,000.00
Grant 7	80,000.00	Fingers Crossed	10%	R8,000.00
Grant 8	80,000.00	Fingers Crossed	10%	R8,000.00
Grant 9	80,000.00	Fingers Crossed	10%	R8,000.00
Grant 10	80,000.00	Fingers Crossed	10%	R8,000.00
<b>Total Revenue Forecasted</b>	<b>R84,150,000.00</b>			<b>R83,872,500.00</b>

Corporations	Total Revenue Expected	Confidence?	Likelihood	Total Forecasted
Revenue Source 1	80,000.00	Guaranteed	100%	R80,000.00
Revenue Source 2	80,000.00	Maybe	30%	R24,000.00
Revenue Source 3	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 4	81,500,000.00	Very Likely	75%	R61,125,000.00
Revenue Source 5	800,000.00	Guaranteed	100%	R800,000.00
Revenue Source 6	850,000.00	Guaranteed	100%	R850,000.00
Revenue Source 7	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 8	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 9	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 10	80,000.00	Fingers Crossed	10%	R8,000.00
<b>Total Revenue Forecasted</b>	<b>R2,305,100.00</b>			<b>R1,926,000.00</b>

Foundations	Total Revenue Expected	Confidence?	Likelihood	Total Forecasted
University of Essex	81,000,000.00	Maybe	30%	R24,300,000.00
University of Essex	81,000,000.00	Fingers Crossed	10%	R8,100,000.00
Stellenbosch University	80,000.00	Guaranteed	100%	R80,000.00
Revenue Source 4	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 5	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 6	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 7	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 8	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 9	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 10	80,000.00	Fingers Crossed	10%	R8,000.00
<b>Total Revenue Forecasted</b>	<b>R14,500,000.00</b>			<b>R11,050,000.00</b>

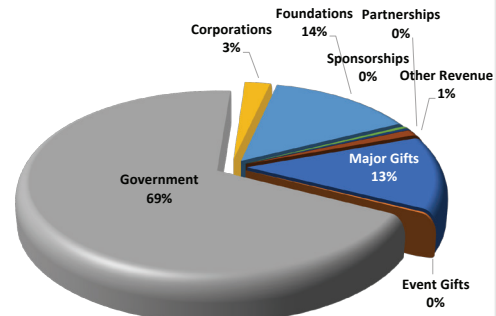
Sponsorships	Total Revenue Expected	Confidence?	Likelihood	Total Forecasted
Revenue Source 1	80,000.00	Very Likely	75%	R60,000.00
Revenue Source 2	80,000.00	Guaranteed	100%	R80,000.00
Revenue Source 3	81,000,000.00	Maybe	30%	R24,300,000.00
Revenue Source 4	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 5	820,000.00	Fingers Crossed	10%	R82,000.00
Revenue Source 6	83,000.00	Very Likely	75%	R62,250.00
Revenue Source 7	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 8	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 9	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 10	80,000.00	Fingers Crossed	10%	R8,000.00
<b>Total Revenue Forecasted</b>	<b>R1,031,500.00</b>			<b>830,300.00</b>

Partnerships	Total Revenue Expected	Confidence?	Likelihood	Total Forecasted
University of Essex	850,000.00	Guaranteed	100%	R850,000.00
University of Essex	825,000.00	Guaranteed	100%	R825,000.00
School of	855,000.00	Guaranteed	100%	R855,000.00
Business Programme	845,000.00	Very Likely	75%	R633,750.00
BS Engineering	83,000.00	Fingers Crossed	10%	R8,300.00
Revenue Source 6	845,000.00	Fingers Crossed	10%	R84,500.00
Revenue Source 7	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 8	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 9	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 10	80,000.00	Fingers Crossed	10%	R8,000.00
<b>Total Revenue Forecasted</b>	<b>R348,000.00</b>			<b>R293,550.00</b>

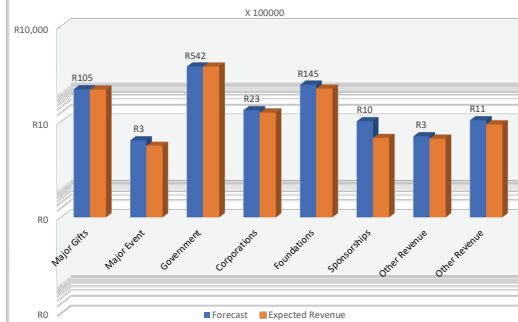
Other Revenue	Total Revenue Expected	Confidence?	Likelihood	Total Forecasted
Revenue #1	800,000.00	Very Likely	75%	R600,000.00
Revenue #2	81,000.00	Maybe	30%	R24,300.00
Revenue Source 4	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 5	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 6	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 7	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 8	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 9	80,000.00	Fingers Crossed	10%	R8,000.00
Revenue Source 10	80,000.00	Fingers Crossed	10%	R8,000.00
<b>Total Revenue Forecasted</b>	<b>R1,112,000.00</b>			<b>R828,600.00</b>

Revenue Source Summary Table	Total Revenue Expected	% of Total	Confidence
Major Gifts	R10,149,000.00	13%	Good
Event Gifts	R175,000.00	0%	Good
Government	R83,872,500.00	69%	Warning: this source is more than 50% of total revenue
Corporations	R1,926,000.00	2%	Good
Foundations	R11,050,000.00	14%	Good
Sponsorships	R310,300.00	0%	Good
Partnerships	R293,550.00	0%	Good
Other Revenue	R828,600.00	1%	Good
<b>Revenue Expected</b>	<b>R176,684,950.00</b>		

% Total Revenue Expected: 20xx

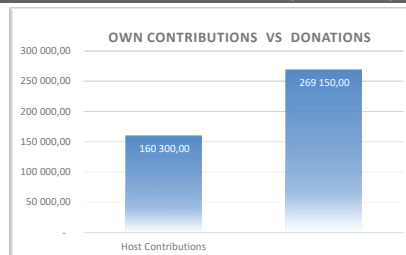


Expected Income vs Actual



# TEMPLATE 17: SAMPLE BUDGET CHECKLIST

SAMPLE Budget Checklist (Indicative NOT comprehensive)		
Categories and items	Your contribution	Expected from Donor(s)
Salaries	100 000,00	250 000,00
Employee benefits	50 000,00	10 000,00
Office costs		
Office supplies		
Printing		
Envelopes		
Letterhead		
Reply forms		
Thank you cards		
Brochures		
Invitations		
Postage		
Graphic design		
Events		
Catering		
Speaker fees		
Speaker transportation		
Space rental		
Supply rental		
Invitations		
Flowers		
Favours		
A/V equipment / Rental		
Production costs for video/podcast/webinar presentations		
Lunches, etc. with prospects		
Travel within service area		
Transportation		
Lodging		
Meals		
Other promotion & marketing		
Costs of video library (tapes, outright purchases, shipping, etc.)		
Tapes		
Purchases		
Shipping		
Branded gifts		
Promotions		
Donor recognition		
Plaques		
Pins and other token items	300,00	
Permanent display		
Telemarketing services		
Training programme		
Conference registrations	5 000,00	1 000,00
Conference travel		
Conference lodging		
Conference meals		150,00
Travel Airfares		
Shuttle transfers		
Train transfers		
Car rental		
Insurances		
Guest travel		
Meals Breakfasts		
Morning coffees		
Lunch		
Afternoon tea		
Dinners		
Snacks		
Consultant's fees	5 000,00	8 000,00
<b>TOTALS</b>	<b>160 300,00</b>	<b>269 150,00</b>

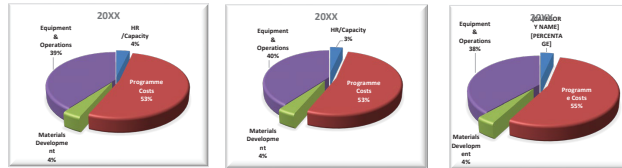


# TEMPLATE 18: MULTI-YEAR BUDGET TEMPLATE

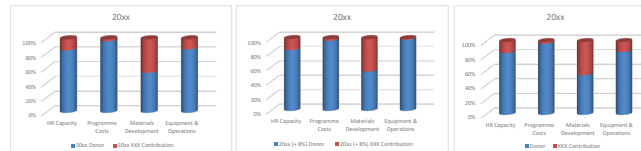
Replace ONLY the greyed-out data. (Items include applicable taxes)		3-Year Budget Template (with sample data)						
		20xx		20xx (+8%)		20xx (+10%)		
Category & Line Item	Qty	Initial Value	Donor	XXX Contribution	Donor	XXX Contribution	Donor	XXX Contribution
<b>HR /Capacity</b>		<b>R/month</b>						
Executive Director	1	10 000,00	8 000,00	2 000,00	8 640,00	2 160,00	9 504,00	2 376,00
Deputy Director	1	9 000,00	6 500,00	2 500,00	7 020,00	2 700,00	7 722,00	2 970,00
Director of Finance & Administrat	1	8 000,00	7 000,00	1 000,00	7 560,00	1 080,00	8 316,00	1 188,00
National Project Mgr	1	7 000,00	6 250,00	750,00	5 940,00	810,00	6 534,00	891,00
National QA/QI Mgr	1	5 000,00	4 700,00	300,00	5 076,00	324,00	5 583,60	356,40
HR Practitioner	1	3 000,00	2 900,00	100,00	3 132,00	108,00	3 445,20	118,80
M&E Officer	1	2 000,00	1 925,00	75,00	2 079,00	81,00	2 286,00	89,10
Regional Project Coordinator	1	1 000,00	950,00	50,00	1 026,00	54,00	1 128,60	59,40
Procurement & Financial Clerk	1	500,00	475,00	25,00	513,00	27,00	564,30	29,70
<b>Subtotal</b>		<b>R 38 700,00</b>	<b>R 6 800,00</b>	<b>R 40 986,00</b>	<b>R 7 344,00</b>	<b>R 45 084,00</b>	<b>R 8 078,40</b>	
<b>Programme Costs</b>								
Office space rental	12	12 000,00	144 000,00	1000,00	155 520,00	10 800,00	171 072,00	11 880,00
Vehicle	1	200 000,00	200 000,00	1000,00	216 000,00	1 080,00	237 600,00	1 188,00
Programme travel	1	100 000,00	100 000,00	1000,00	108 000,00	1 080,00	118 800,00	1 188,00
Foreign Exchange fees	1	5 000,00	5 000,00	1000,00	5 400,00	1 080,00	5 940,00	1 188,00
Air travel	1	100 000,00	100 000,00	1000,00	108 000,00	1 080,00	118 800,00	1 188,00
Car Rentals	1	12 000,00	12 000,00	1000,00	12 960,00	1 080,00	14 256,00	1 188,00
	0	-	-	-	-	-	-	-
	0	-	-	-	-	-	-	-
	0	-	-	-	-	-	-	-
<b>Indirect Cost (_%)</b>								
<b>Subtotal</b>		<b>R 561 000,00</b>	<b>R 15 000,00</b>	<b>R 605 880,00</b>	<b>R 16 200,00</b>	<b>R 711 552,00</b>	<b>R 17 820,00</b>	
<b>Materials Development</b>								
Curriculum review	-	-	3 400,00	-	3 672,00	-	4 039,20	-
Illustrator	100,00	36 000,00	3 500,00	38 880,00	3 780,00	42 768,00	4 158,00	
Materials design	-	-	3 600,00	-	3 888,00	-	4 276,80	-
Printing & binding	5 000,00	5 000,00	3 700,00	5 400,00	3 996,00	5 940,00	4 366,60	
Transport	-	-	3 800,00	-	4 104,00	-	4 514,40	-
	-	-	3 900,00	-	4 212,00	-	4 633,20	-
	-	-	4 000,00	-	4 320,00	-	4 752,00	-
	-	-	4 100,00	-	4 428,00	-	4 870,80	-
	-	-	4 200,00	-	4 536,00	-	4 989,60	-
<b>Subtotal</b>		<b>R 41 000,00</b>	<b>R 34 200,00</b>	<b>R 44 280,00</b>	<b>R 39 936,00</b>	<b>R 49 708,00</b>	<b>R 40 626,60</b>	
<b>Equipment &amp; Operations</b>								
Office space	1	2 000,00	2 000,00	4 300,00	2 160,00	4 644,00	2 376,00	5 108,40
Office equipment	-	-	4 400,00	-	4 752,00	-	5 227,20	-
Desks	15	800,00	12 000,00	4 500,00	12 960,00	4 860,00	14 256,00	5 346,00
Chairs	-	-	2 500,00	-	2 500,00	-	2 970,00	-
PC's	19	5 000,00	95 000,00	4 200,00	102 600,00	5 076,00	112 860,00	5 983,60
Laptops	-	-	4 800,00	-	5 184,00	-	5 702,40	-
Data projectors	1	3 500,00	3 500,00	4 900,00	3 780,00	5 292,00	4 138,00	5 821,20
Screens	1	5 000,00	5 000,00	5 600,00	5 400,00	5 940,00	5 940,00	-
B/W Laser printer	2	1 500,00	3 000,00	5 100,00	3 240,00	5 508,00	3 564,00	6 058,80
Colour Laser printer	0	-	-	5 200,00	-	5 616,00	-	6 177,60
Stationery	-	-	-	5 200,00	-	5 616,00	-	6 177,60
Binder	-	-	-	5 200,00	-	5 616,00	-	6 177,60
Laser pointer/slide changer	-	-	-	5 200,00	-	5 616,00	-	6 177,60
Laminator	300 000,00	300 000,00	5 300,00	324 000,00	5 724,00	356 400,00	6 206,40	
<b>Subtotal</b>		<b>R 420 500,00</b>	<b>R 66 300,00</b>	<b>R 454 140,00</b>	<b>R 71 604,00</b>	<b>R 499 554,00</b>	<b>R 78 754,40</b>	
Host administrative levy	15%	159 180,00	-	171 792,90	-	195 734,88	-	-
<b>TOTALS</b>		<b>R 1 220 380,00</b>	<b>R 122 300,00</b>	<b>R 1 317 078,90</b>	<b>R 132 084,00</b>	<b>R 1 500 634,08</b>	<b>R 145 292,40</b>	

SUMMARY:	20xx		20xx		20xx	
	Donor	XXX Contribution	Donor	XXX Contribution	Donor	XXX Contribution
HR /Capacity	38 700,00	6 800,00	40 986,00	7 344,00	45 084,00	8 078,40
Programme Costs	561 000,00	15 000,00	605 880,00	16 200,00	711 552,00	17 820,00
Materials Development	41 000,00	34 200,00	44 280,00	39 936,00	49 708,00	40 626,60
Equipment & Operations	420 500,00	66 300,00	454 140,00	71 604,00	499 554,00	78 754,40
Host Admin Levy	159 180,00	-	171 792,90	-	195 734,88	-
<b>TOTALS</b>	<b>R 1 220 380,00</b>	<b>R 122 300,00</b>	<b>R 1 317 078,90</b>	<b>R 132 084,00</b>	<b>R 1 500 634,08</b>	<b>R 145 292,40</b>

### Donor Contributions



### Donor & XXX Contributions Compared

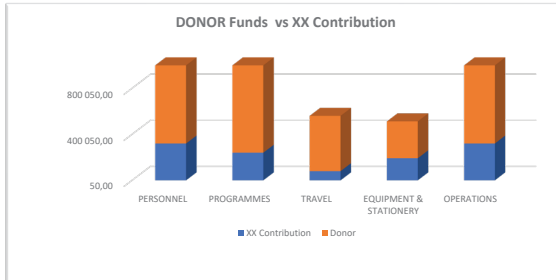
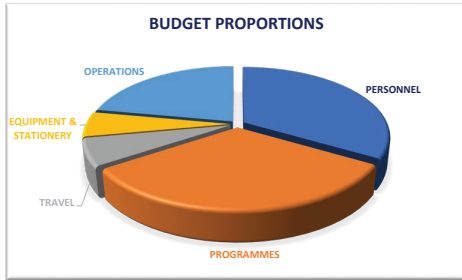


# TEMPLATE 19: SUMMARY BUDGET TEMPLATE

**ONLY edit the greyed-out data**

Anticipated Inflationary increase (CPI):

Subtotals:	20xx		6% 20xx		8% 20xx		Overall Total
	XXX Contribution	DONOR	XXX Contribution	DONOR	XXX Contribution	DONOR	
PERSONNEL	100 000,00	800 000,00	106 000,00	864 000,00	114 480,00	933 120,00	2 917 600,00
PROGRAMMES	75 000,00	800 000,00	79 500,00	848 000,00	85 860,00	915 840,00	2 804 200,00
TRAVEL	25 000,00	150 000,00	26 500,00	159 000,00	28 620,00	171 720,00	560 840,00
EQUIPMENT & STATIONERY	60 000,00	100 000,00	63 600,00	106 000,00	68 688,00	114 480,00	512 768,00
OPERATIONS	100 000,00	500 000,00	106 000,00	530 000,00	114 480,00	572 400,00	1 922 880,00
<b>Subtotal</b>	<b>360 000,00</b>	<b>2 350 000,00</b>	<b>381 600,00</b>	<b>2 507 000,00</b>	<b>412 128,00</b>	<b>2 707 560,00</b>	<b>8 718 288,00</b>
Administrative levy if applicable		10%		235 000,00		270 756,00	
	<b>720 000,00</b>	<b>4 935 000,00</b>	<b>763 200,00</b>	<b>5 264 700,00</b>	<b>824 256,00</b>	<b>5 685 876,00</b>	





# TEMPLATE 20: OPERATIONAL BUDGET TRACKER TEMPLATE

Revenue	Budget	Actual
Grants	500 000	400 000
<b>Sales &amp; Services</b>		
Contracts	30 000	25 000
Memberships	3 000	2 000
Fee for Service	5 000	3 500
Sales/Consultancies	19 000	9 000
<b>Total sales &amp; services</b>	<b>57 000</b>	<b>39 500</b>
<b>Donations</b>		
Major Gifts	120 000	14 000
Annual Gifts	60 000	10 000
Monthly Gifts	25 000	20 000
Capital Campaign Gifts	-	-
Special giving day	8 000	5 500
Online Donations	20 000	10 000
Event Donations	25 000	10 000
<b>Total donations</b>	<b>258 000</b>	<b>69 500</b>
<b>In-kind Income</b>		
Sponsorships	80 000	20 000
Total cash	5 000	3 000
Total non-cash	6 000	2 000
<b>Total Other Income</b>	<b>91 000</b>	<b>25 000</b>

<b>Total Revenue</b>	<b>906 000</b>	<b>534 000</b>
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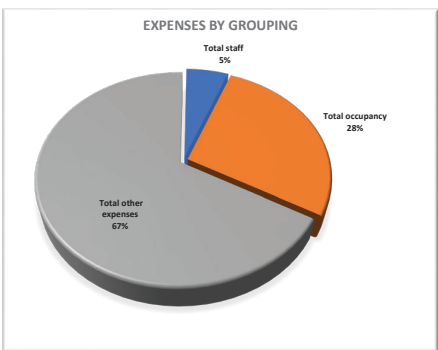
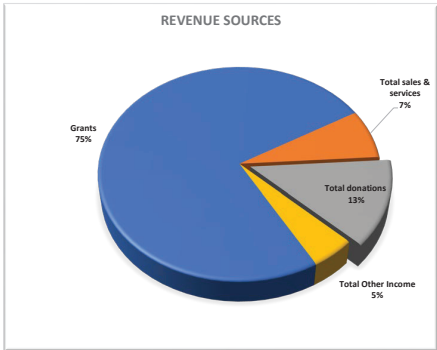
Expenses	Budget	Actual
<b>Staff &amp; benefits</b>		
Post 1	8 000,00	2 000,00
Post 2	5 000,00	5 000,00
Post 3	3 000,00	3 000,00
Post 4	2 500,00	2 500,00
Post 5	2 500,00	2 500,00
Post 6	2 500,00	2 500,00
<b>Total staff</b>	<b>23 500,00</b>	<b>17 500,00</b>
<b>Premises</b>		
Rent	45 000,00	45 000,00
Utilities	50 000,00	43 000,00
<b>Total occupancy</b>	<b>95 000,00</b>	<b>88 000,00</b>
<b>Other Expenses</b>		
Equipment	25 000,00	35 000,00
Supplies	10 000,00	8 000,00
Telecommunications	35 000,00	30 000,00
Insurance	5 000,00	5 000,00
Meetings	5 600,00	4 000,00
Travel	30 000,00	29 000,00
Marketing & advertising	15 000,00	18 000,00
Training, development	35 000,00	30 000,00
Contract services	20 000,00	13 000,00
Legal	50 000,00	-
Accounting	45 000,00	35 000,00
Miscellaneous	-	-
Total cash Expenses	8 000,00	6 500,00
<b>Total other expenses</b>	<b>283 600,00</b>	<b>213 500,00</b>

<b>Total Expenses</b>	<b>402 100,00</b>	<b>319 000,00</b>
-----------------------	-------------------	-------------------

Revenue over expenses	Budget	Actual
	503 900,00	215 000,00
<b>Operating Margin</b>	<b>Budget</b>	<b>Actual</b>
	<b>56%</b>	<b>40%</b>
<b>Fundraising Efficiency 1:</b>	<b>0,60</b>	
(What is costs to raise R1)		

With this template, you can:  
 Use the prepopulated formula to make accurate calculations  
 Keep track of your different revenue sources  
 Monitor your organisation's expenses and operating margins  
 Assess your not-for-profit's incomes and expenditures over time

- How to use this template**
1. Replace the sample (grey-out data) revenue and expense amounts
  2. Add, change, or delete any cells that are inappropriate
  3. Be aware that changes may effect the sheet's formulas
  4. Insert the amounts of your revenues and expenses
  4. Update throughout the year



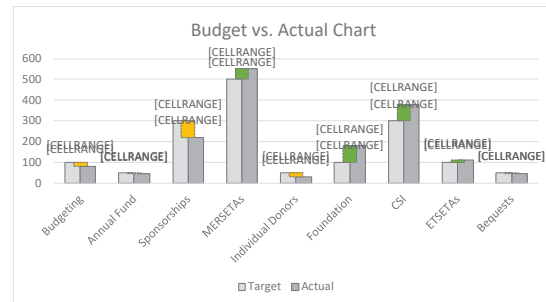
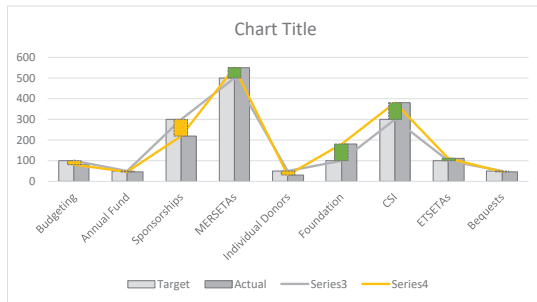
# TEMPLATE 21:

## BUDGET VS ACTUAL TRACKING WORKSHEET (ADVANCED)

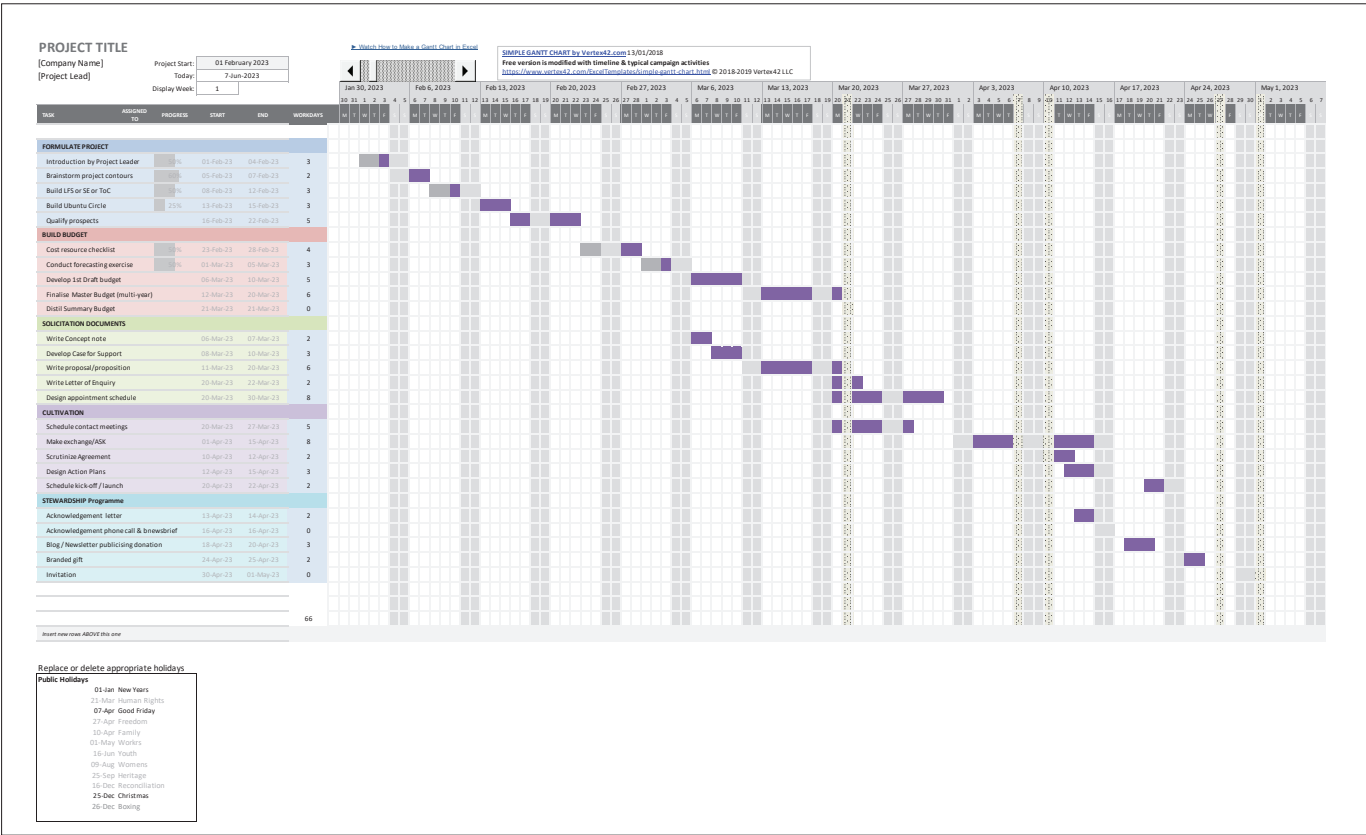
### Budget vs. Actual Chart Template (Advanced)

Data		Calculations					
Category	Target	Actual	Var	Var %	Symbol	Var 1	Var 2
Budgeting	100	80	-20	-20%	☹	☹ 20%	
Annual Fund	50	45	-5	-10%	☹	☹ 10%	
Sponsorships	300	220	-80	-27%	☹	☹ 27%	
MERSETAs	500	550	50	10%	☺	☺ 10%	
Individual Donors	50	30	-20	-40%	☹	☹ 40%	
Foundation	100	180	80	80%	☺	☺ 80%	
CSI	300	380	80	27%	☺	☺ 27%	
ETSETAs	100	112	12	12%	☺	☺ 12%	
Bequests	50	48	-2	-4%	☹	☹ 4%	
	50	5	-45	-90%	☹	☹ 90%	
	50	5	-45	-90%	☹	☹ 90%	
	50	5	-45	-90%	☹	☹ 90%	
	50	5	-45	-90%	☹	☹ 90%	
	50	5	-45	-90%	☹	☹ 90%	
	50	5	-45	-90%	☹	☹ 90%	
	50	5	-45	-90%	☹	☹ 90%	
	50	5	-45	-90%	☹	☹ 90%	

Symbol Mapping	
%	☺
-100%	☹
-5%	☹
0%	☺
10%	☺
25%	☺



# TEMPLATE 22: GANTT PROJECT MANAGEMENT CHART



# TEMPLATE 23: FUNDRAISING TASK TRACKER

## FUND DEVELOPMENT CAMPAIGN — TASK TRACKER

Tasks Completed  
0/13

TO DO LIST	WHEN COMPLETED	ITEMS NOT COMPLETED
Identify appropriate RFPs OR new project	<input type="checkbox"/>	Identify appropriate RFPs OR new project
Brainstorm project fit	<input type="checkbox"/>	Brainstorm project fit
Outline project requirements & risks	<input type="checkbox"/>	Outline project requirements & risks
Develop Toc/LFA/Impact plan (Success Equation)	<input type="checkbox"/>	Develop Toc/LFA/Impact plan (Success Equation)
Develop Concept Note (if necessary)	<input type="checkbox"/>	Develop Concept Note (if necessary)
Secure organisational approval	<input type="checkbox"/>	Secure organisational approval
If appropriate, begin prospect research	<input type="checkbox"/>	If appropriate, begin prospect research
Develop grant proposal / sponsorship proposition	<input type="checkbox"/>	Develop grant proposal / sponsorship proposition
Finalise solicitation document (proposal/proposition)	<input type="checkbox"/>	Finalise solicitation document (proposal/proposition)
Develop solicitation schedule (where relevant)	<input type="checkbox"/>	Develop solicitation schedule (where relevant)
Design stewardship schedule	<input type="checkbox"/>	Design stewardship schedule
Additional task 1	<input type="checkbox"/>	Additional task 1
Additional task 2	<input type="checkbox"/>	Additional task 2

# TEMPLATE 24: RASCI MATRIX TEMPLATE

Although not included in the text, this RACI template is a useful compliment to the Gantt chart. A RACI matrix helps you figure out which stakeholders fit into which categories for better project management. It identifies and defines the roles and responsibilities of team members in relation to the tasks in a project and uses the letters **R,A,C,** and **I** to categorise team responsibilities. RACI stands for **R**esponsible, **A**ccountable, **C**onsulted, **I**nformed. As each letter is inserted, the cell colour will change for easy recognition. A RACI Matrix is the guiding document that every team member will refer to as the project progresses. It keeps a project on track by clearly defining who is responsible for what. When every team member knows exactly what their responsibility is, a team can avoid miscommunication, wasted time, and the confusion that often comes from "too many cooks in the kitchen" situations. An added benefit would be if names of those responsible could also be inserted. The insertions here are, of course, merely examples and should be changed to suit your unique configuration.

**RACI Matrix Template**

Adapted from the free Project Manager RACI Template

Project Tasks	Project Leader	Office	Formulation	Planning	Budget	Prospect Research	Solicitation	Stewardship	Consultant (where appropriate)	Director
<b>Project Formulation</b>										
Budget development	A				R					R
Feasibility study	I	I			C	C			A	R
<b>Planning Phase</b>										
Outlining (ToC, LFA, SE, etc.)	R		A							I
Budget build (forecasting, gift chart...)					R					I
Fundraising plan	A	I		R						C
Prospect research				I	I	R	I		C	C
Scheduling	A	R					I			C
Write solicitation instruments	I	I					R		C	A
<b>Execution Phase</b>										
Solicitation plan	A	I					R		C	I
Events scheduling	A	R								R
Solicitation plan	A						R		I	C
Database maintenance	A	R					I			I
<b>Agreement</b>										
Scrutiny & negotiation	A	I						I		R
<b>Stewardship Phase</b>										
Acknowledgement	A							R		C
Recognition	A							R		C
Write closure report	R							R		
Follow-through programme	R	I					I	R		A

Colour Coding: Responsible (Red), Accountable (Green), Consulted (Blue), Informed (Purple)

**NOTE:** As each cell is classified (RACI) it will change to the appropriate colour.

**Responsible (R)**  
This is someone who is responsible for getting the work done. When labelled "responsible" in a RACI matrix, it indicates that the person is expected to be hands-on when executing the task.

**Accountable (A)**  
This is the person who is responsible for overseeing the task and making sure the work gets done properly. They are not hands-on with the work, but instead, they are managing and ensuring the completion of the work.

**Consulted (C)**  
This person assists by providing information and support about a particular task or deliverable. They are not directly responsible for a task, but instead, they provide necessary information that will help the R get their work done.

**Informed (I)**  
This person or group of people is to be kept up to date on the progress of a task or deliverable. This is commonly upper-management or a client who should understand the progress of the project, but does not have immediate input on the completion of the work.

## TEMPLATE 25:

# COMPREHENSIVE CAMPAIGN: READINESS ASSESSMENT

Replace greyed out data with your own			
READINESS FACTOR	YOUR RATING	WEIGHT FACTOR	SCORE
Board / Council gifting	3	4	12
Top 10 donations	5	4	20
Relevance	5	4	20
Fund development history	3	3	9
Urgency of appeal	3	3	9
Prospect cultivation	5	3	15
Development Office capacity	2	3	6
Board /Council & staff enthusiasm	4	2	8
External factors	3	2	6
"X" times annual/recurrent income	2	2	4
Fiscal integrity	5	2	10
Campaign budget	3	2	6
Campaign chair	3	2	6
Volunteers	3	2	6
Executive leadership	4	1	4
Constituency acceptance	5	1	5
Board /Council involvement	5	1	5
<b>Total Score</b>		<b>151</b>	

**Excellent if you scored = 175 - 215**

**Good if you scored = 140 - 175**

**Fair if you scored = 100 - 140**

**Poor if you scored = 43 - 100**

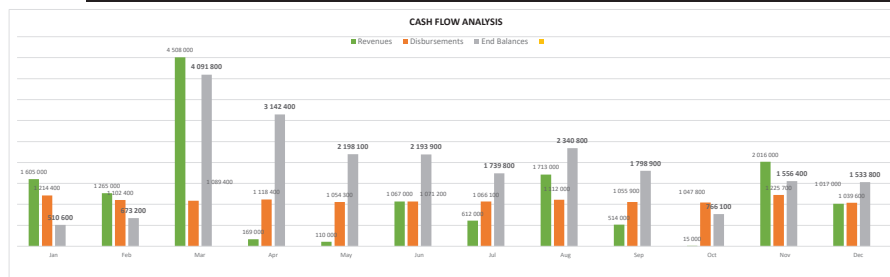
# TEMPLATE 26: CASH FLOW BUDGET

## CASHFLOW WORKSHEET

te: Replace the sample greyed-out data with your own

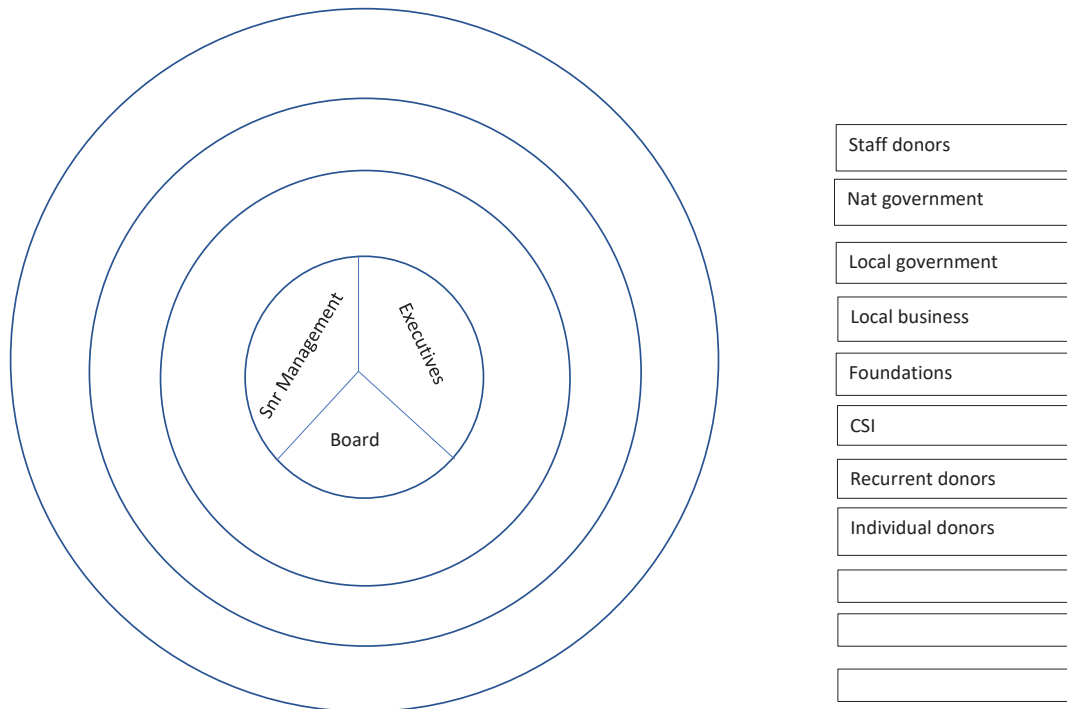
Adapted from [Popel Nonprofits](#) free template

	January	February	March	April	May	June	July	August	September	October	November	December	Year total	
<b>Cash on Hand (beginning cash)</b>	120 000	120 000	510 600	673 200	4 091 800	3 142 400	2 198 100	2 193 900	1 739 800	2 340 800	1 798 900	766 100	1 656 400	21 252 000.00
<b>Accounts receivable</b>			12 000											12 000.00
<b>Anticipated contract / Advisory services</b>			45 000											45 000.00
<b>Fees due at time of service</b>		500 000												500 000.00
<b>Funds released from restricted sources</b>														-
<b>Grants - anticipated</b>		600 000	500 000	4 000 000		100 000	500 000		1 000 000		2 000 000			8 700 000.00
<b>Grants - confirmed tranches</b>		500 000	600 000	500 000	100 000		500 000		700 000	500 000		500 000		3 900 000.00
<b>Individual contributions (recurrent)</b>		5 000	7 000	8 000	9 000	10 000	11 000	12 000	13 000	14 000	15 000	16 000	17 000	137 000.00
<b>Rent/facility use</b>			34 000				98 000							90 000.00
<b>Special events</b>							600 000							600 000.00
<b>Sponsorships</b>		67 000		60 000									500 000	627 000.00
<b>Ticket sales</b>														-
<b>TOTAL RECEIPTS</b>	<b>0</b>	<b>1 605 000</b>	<b>1 265 000</b>	<b>4 508 000</b>	<b>169 000</b>	<b>110 000</b>	<b>1 067 000</b>	<b>612 000</b>	<b>1 713 000</b>	<b>514 000</b>	<b>15 000</b>	<b>2 016 000</b>	<b>1 017 000</b>	<b>14 611 000.00</b>
<b>Accounting &amp; audit</b>														-
<b>Benefits and staffing expenses</b>		35 000	35 000	35 000										105 000.00
<b>Blogging &amp; Newsletter</b>														-
<b>Branded merchandise</b>														-
<b>Cell phones</b>		12 000	12 000	12 000	12 000	12 000	12 000	12 000	12 000	12 000	12 000	12 000	12 000	144 000.00
<b>Conference fees</b>		17 000							21 000					38 000.00
<b>Database</b>		3 000	3 000	3 000	3 000	6 000	3 000	3 000	8 000	3 000	3 000	3 000	3 000	44 000.00
<b>Donor database subscriptions</b>		5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	60 000.00
<b>Equipment leases</b>		3 000												3 000.00
<b>Internet</b>														-
<b>Landline telephone</b>		3 000	3 000	3 000	3 000	3 000	3 000	3 000	3 000	3 000	3 000	3 000	3 000	36 000.00
<b>Legal expenses</b>				4 000							6 000			10 000.00
<b>Levy</b>														-
<b>Loan repayments</b>														-
<b>Maintenance, repair</b>		10 000		5 000			10 000			5 000		3 000		33 000.00
<b>Mortgage/Bond payments</b>														-
<b>Office exp (phone, postage, supplies)</b>		15 000	10 000	10 000	9 000	7 900	6 800	5 700	4 600	3 500	2 400	1 300	200	76 400.00
<b>PAYE</b>		400	400	400	400	400	400	400	400	400	400	400	400	4 800.00
<b>Payments on past due obligations</b>														-
<b>Payroll</b>		1 000 000	1 000 000	1 000 000	1 000 000	1 000 000	1 000 000	1 000 000	1 000 000	1 000 000	1 000 000	1 000 000	1 000 000	12 000 000.00
<b>Printing</b>														-
<b>Printing and marketing</b>		2 000	1 000			4 000				8 000				15 000.00
<b>Programme-related</b>														-
<b>Rent</b>		25 000			30 000				30 000			100 000		185 000.00
<b>Staff advances/loans</b>		25 000												55 000.00
<b>Training</b>		15 000			21 000				18 000			15 000		54 000.00
<b>Transport</b>		45 000			15 000				15 000			67 000		142 000.00
<b>Utilities</b>		11 000	11 000	11 000	11 000	11 000	11 000	11 000	11 000	11 000	11 000	11 000	11 000	132 000.00
<b>Website</b>		5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	60 000.00
<b>TOTAL DISBURSEMENTS</b>	<b>1 214 400</b>	<b>1 102 400</b>	<b>1 089 400</b>	<b>1 118 400</b>	<b>1 054 300</b>	<b>1 071 200</b>	<b>1 066 100</b>	<b>1 112 000</b>	<b>1 055 900</b>	<b>1 047 800</b>	<b>1 225 700</b>	<b>1 039 600</b>	<b>13 197 200.00</b>	
<b>NET CASH FOR THE MONTH</b>	<b>0</b>	<b>390 600</b>	<b>162 600</b>	<b>3 418 600</b>	<b>-949 400</b>	<b>-944 300</b>	<b>-4 200</b>	<b>-454 100</b>	<b>601 000</b>	<b>-541 900</b>	<b>-1 032 800</b>	<b>790 300</b>	<b>-22 600</b>	<b>1 413 800</b>
<b>ENDING CASH</b>	<b>120 000</b>	<b>510 600</b>	<b>673 200</b>	<b>4 091 800</b>	<b>3 142 400</b>	<b>2 198 100</b>	<b>2 193 900</b>	<b>1 739 800</b>	<b>2 340 800</b>	<b>1 798 900</b>	<b>766 100</b>	<b>1 656 400</b>	<b>1 633 800</b>	<b>22 665 800.00</b>



## TEMPLATE 27: CONSTITUENCY (UBUNTU) CIRCLE

To insert information, type a label in the text boxes on the left. Drag each text box to an appropriate location in the Constituency circle. To delete the text box frame: select the target text box. While selected, in Format Shape, then select 'no outline' and 'no fill'.







# TEMPLATE 29: PROSPECT INFORMATION WORKSHEET

## Basic Prospect Donor Profile

Development Officer responsible:

Volunteer:

Reason for considering Donor:

Background and research:

Personal referral   Website                      Publication(s)                      Public profile

Donor profile:

Programme/project focus/interest area(s):

Geographic focus (if any) :

Known financial gift range:

Deadline dates (if any):

Previous donations to similar interest areas:

Donation character:

Once off                       Multi year                       In kind:                       Service:

Preferred Approach:

Meeting(s)       Contact Letter       Marketing materials       Proposal       Application form

**Additional information on cultivation approach:**

**Contact Person and details:**

    Tel:

    Email:

    Physical Address:

## TEMPLATE 30:

### KEY QUESTIONS GRANTMAKERS ASK

The many webinars and blog posts that deal with aspects of proposal writing would suggest that even the most seasoned fund developers are beset with butterflies when faced with building a proposal application. Most of us consider the proposal to be at the heart of the fund development process and to be the most daunting aspect of the process, however, a methodical approach might ease these anxieties and trepidations.

Perhaps a useful primer would be to begin by answering the questions a grant-maker is most likely to ask of a proposal. Here is a checklist you may wish to complete to help you collate the information and data.

	Key questions Donors/Grantmakers ask	Your response
PROJECT / PROGRAMME	1. What is being proposed, a <b>project</b> or a <b>programme</b> ?  <i>Will it advance a fresh, different, and/or innovative activity or enquiry?</i>	
	2. Is the proposed programme/project <b>exemplary</b> and/or innovative - methodologically, organisationally, and socially?  <i>How and in what way?</i>	
RATIONALE	3. What are the main <b>questions or/and issues</b> the project will tackle?	
	4. What is the <b>main reason</b> for the project?  <i>Why is it important to the organisation/institution? Will it benefit different constituencies and/or sectors?</i>	
	5. What are the project's <b>key goals</b> ?  <i>What does the project wish to accomplish?</i>	
	6. What are the project's specific <b>objectives</b> ?  <i>What specifically will the project produce?</i>	
	7. What are the <b>expected outcomes and benefits</b> of the project?  <i>What will the project actually achieve? What affect will it have on its beneficiaries? Will it meet a specific donor's requirements?</i>	
CAPACITY	8. What <b>length of time</b> is needed to realise project goals and objectives and achieve the specified outcomes?	
	9. How will the project be <b>mainstreamed</b> and sustained beyond donor funding?  <i>Can and will the initiative be absorbed into the host organisation/institution when the grant ends?</i>	
	10. Who is the <b>Project Leader</b> ?  <i>Does the project leader have the requisite <b>knowledge and expertise</b> to direct and manage the project? Has the Project Leader <b>directed and managed</b> a project of this nature and size before?</i>	
	11. What <b>preparatory steps</b> will the project leader take to formulate /shape this activity?  <i>Outline, LFA, Theory of change, So that...Success Equation?</i>	

	Key questions Donors/Grantmakers ask	Your response
	12. What monitoring, evaluation, and stewardship activities will s/he incorporate?	
IMPLEMENTATION	13. What will be the main <b>approaches or strategies</b> to achieve project goals and objectives?  <i>Is there an explicit and clear <b>implementation plan</b> for executing the programme? How would key activities be pursued, when and by whom?</i>	
	14. Does the proposed project connect with the <b>strategic vision and plan</b> of the institution or organisation?  <i>How does it address the institutional plan?</i>	
	15. Does the proposed project exist elsewhere? If so, <i>why pursue a similar project?</i>	
	16. Would there be any institutional/inter-institutional and local/national/international <b>collaborations</b> ? <i>What kind of partnerships will be formed?</i>	
	17. What would ultimate <b>success</b> look like?  <i>What criteria would be used to articulate/describe success?</i>	
VALUE	18. Does the project address questions of <b>equity, diversity, and inclusion</b> ?  <i>How does the project/programme and its host institution define and approach equity, diversity, and inclusion?</i>	
	19. Does the project advance <b>equity</b> ('race'/gender/other kinds), <b>diversity and inclusion</b> ? <i>How and in what ways?</i>	
	20. Does the proposed project have <b>importance or value</b> beyond the host organisation/institution – e.g. <i>for other institutions, nationally, continentally, and globally?</i>	
FINANCES	21. Is the <b>budget requested realistic</b> for the success of the project and in relation to the capacities of the project leader, the project team, and the host organisation / institution?	
	22. Do the <b>budget amounts</b> cover every year of the project, the total period of the project?  <i>Will the rows and columns all tally and be visually displayed (graphs)? Will every line item be explained?</i>	
	23. Is the <b>budget requested realistic</b> for the success of the project and in relation to the capacities of the project leader, the project team, and the host organisation / institution?	
	24. Is there <b>congruence</b> between the budget and proposal narrative?	
REPORTING	25. How will data & details be <b>captured</b> on the database?	
	26. Will there be a <b>reporting schedule</b> ?  <i>How will the project/programme report to the donor?</i>	
	27. Will the project be implemented in phases for the donor to schedule site <b>visits</b> .	

## TEMPLATE 31: ARTIFICIAL INTELLIGENCE (AI) PROMPTS

The old GI-GO (*garbage in – garbage out*) or WYSIWIG (in this case ‘*what you send is what you get*’) principles may rear their ugly heads as we begin to use Artificial Intelligence (AI) generating apps, like ChatGPT<sup>7</sup>. To get the most out of AI searches, the instructions (prompts) should be precise and comprehensive. Here are sample questions (AI *prompts*) that [www.Keela.com](http://www.Keela.com) proposes we use to full effect for fund development.

Please note:

- *the text generated by AI should only be regarded as a draft; a beginning; a start. Copying the exact text will run the risk of others doing the same and donors receiving identical wording. This could severely prejudice both the intention and certainly, the reputation of your organisation. Proposal writers should be hyper-aware of this eventuality and stringently resist the urge to simply copy ‘n paste,*
- *These prompts presuppose that there is adequate online information on a respective organisation to cross-reference,*
- *the syntax for such instructions does not necessarily follow conventional grammar rules.*

### *Large/Comprehensive/Capital campaigns:*

- Develop a compelling case statement for a project campaign that outlines [organisation name]’s goals, accomplishments, and specific funding needs, to inspire potential major donors to make a significant investment.
- Craft a personalised thank-you note for a donor who recently made a substantial contribution, expressing gratitude and emphasising the transformative outcomes their support will bring about for [your organisation name].
- Write an email to schedule a face-to-face meeting with a prospective major donor, conveying the importance of discussing their potential partnership and exploring ways they can make a significant impact on [organisation name]’s mission.

---

<sup>7</sup> ChatGPT is a language model developed by OpenAI. It is designed to generate human-like responses by considering context and providing relevant answers, explanations, and suggestions. ChatGPT can be used for various tasks, including answering questions, engaging in conversation, or by providing assistance. It has been trained on a large dataset from the internet and is continually learning and improving through user interactions.

### *Campaigns*

- Compose an attention-grabbing campaign slogan or tagline that effectively captures the essence of *[organisation name]*'s *[project/programme]* fundraising campaign that resonates with potential donors.
- Write a series of social media posts for *[organisation name]*'s *[project/programme]* campaign, using storytelling, visuals, and a clear call to action to engage followers, encourage donations, and create a sense of community around our cause.
- Develop a script for a campaign video or crowdfunding pitch, effectively conveying the mission, goals, and desired outcomes of *[organisation name]*'s *[project/programme]* fundraising campaign, that will inspire viewers to contribute and become active advocates.

### *Recurrent donors:*

- Compose a persuasive email to your supporters, encouraging them to join *[organisation name]*'s monthly giving programme and highlighting the benefits of regular, sustained support for your organisation's mission and programmes.
- Create a dedicated webpage or landing page for *[organisation name]* website, providing information about the importance of monthly or quarterly giving, outlining the various giving levels and associated benefits, and making it easy for supporters to sign up for monthly donations.
- Develop a script for a phone call or personalised message to existing donors, inviting them to convert their one-off donations into recurring monthly or quarterly contributions, and highlighting the additional benefits they can enjoy as regular supporters.
- Craft a compelling text for *[organisation name]*'s annual giving campaign, showcasing success stories and emphasising the importance of regular donations to sustain our programmes and make a lasting difference.
- Develop a script for a fundraising phone call to annual donors, expressing gratitude for their past support and inviting them to renew their commitment by making a meaningful gift to *[organisation name]*'s annual giving campaign.
- Develop a compelling text for thank you letters for one-off, and for regular donors expressing appreciation for their support and encouraging them to visit and explore *[organisation name]*'s *[project/programme]* fundraising campaigns.
- Create a donor impact report for *[organisation name]*'s annual giving programme, highlighting the successes made possible by the support of our regular donors, and sharing it as a digital or print resource to inspire continued giving.

*Bequests*

- Craft an informational brochure about legacy gifting options, outlining the various ways individuals can include [organisation name] in their estate plans and emphasising the profound impact their legacy gifts can have on our programmes and initiatives.
- Create a dedicated webpage on [organisation name]'s website that provides comprehensive information on legacy giving, including testimonials, FAQs, and step-by-step instructions for donors interested in making a planned gift.
- Compose a heartfelt letter to [organisation name]'s long-time supporters, expressing gratitude for their loyalty and inviting them to consider leaving a legacy through a planned gift that will support your mission for future generations.

*CSI & Sponsors*

- Create a case study highlighting a successful corporate partnership or sponsorship, illustrating the tangible benefits and measurable outcomes achieved through the collaboration and sharing it as a compelling resource to attract new corporate partners.
- Compose a persuasive proposal letter to a potential corporate partner, highlighting the alignment between [organisation name]'s mission and their corporate values, and outlining the benefits of a strategic partnership or sponsorship.
- Craft a sponsorship package for corporate partners, detailing the various sponsorship levels available, the corresponding benefits and recognition, and the specific initiatives or events their support will impact.

*Proposal Writers (please refer to my cautionary note about using the exact text that AI generates)*

- Craft a comprehensive grant proposal, outlining the problem or need [organisation name] addresses, providing evidence-based solutions, and presenting a clear and detailed plan for implementation and evaluation.
  - Develop a budget narrative for a grant proposal, explaining how the requested funds will be allocated and demonstrating the financial sustainability and accountability of [organisation name]'s project or programme.
  - Create a repository of compelling impact stories and statistical data to support grant applications, illustrating the positive change and transformative outcomes the [organisation name] has achieved through previous grants and funding partnerships.
-

## TEMPLATE 32: CONCEPT NOTE TEMPLATE

**CONCEPT NOTE: xxxxxxxxx**

**A PROJECT OF THE**

**of the  
XXXXXX**

**at the**

**XXXXXXXX**

**Prepared by:**

**Place:**

**Date:**



## 1. PROJECT SUMMARY

## 2. DONOR'S VALUES / PRIORITIES & FUNDING INTERESTS

Our intervention would, ideally, appeal to supporters who:

## 3. PROBLEM ANALYSIS

## 4. PROJECT GOALS & OBJECTIVES

The xxx steeps its activities in the following xx principles:

- 
- 
- 

Our objectives are to:

- Promote ....
- Secure ....

## 5. ACTIVITIES

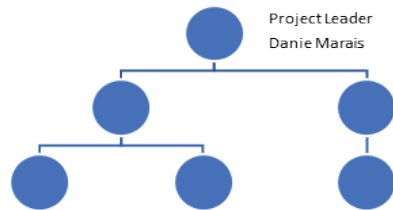
The programme of activities rolls out on the following axes:

- Advisory:
- Establish:
- Secure:

## 6. OUTCOME

## 7. PROJECT MANAGEMENT

The project management staffing establishment is:



## 8. PERFORMANCE INDICATORS & EXPECTED RESULTS

The project will gauge progress via three factors: *metrics*, *feedback loops*, and *implementation*.

This project expects to make both physical and cultural changes to and within its beneficiaries.

Among the accomplishments is this broad set of to:

- Decrease unemployment level by xx%
- Increase food security by xx%
- Ensure community healthcare
- **Goal 1:** Establish xx secure social grant pay-out points in a xx km radius
- **Goal 2:** Establish xxx to create xxx jobs
- **Goal 3:** Ensure xx basic food outlets in a xx km radius
- **Goal 4:** Ensure healthcare facilities within every xx km radius
- **Goal 5:**

Prompt and high-quality reporting to donors will come in the form of both narrative and detailed financial reports. Whether stipulated or not, we will use the Results-based Management (RBM) template, viz.

<b>RESULTS-BASED MANAGEMENT</b> Summary of Planned to Actual Results for the Period Date, 20xx – Date, 20xx, Phase xx, Year x				
<b>Progress to Date in Achievement of Outcome 1: XXXXXX</b>  The project made significant achievements in the xxx some very important goals, such as xxxxx expanded xxxx, without the necessity of xxxx				
Priority Outputs	Results Planned for this Period	Actual Results for this Period	Variance of Actual to Planned	Progress Towards Results to Date
Output 1:				
Output 2:				

## 9. ORGANISATION BACKGROUND

## 10. RESILIENCE (RISK IDENTIFICATION & MITIGATING STEPS)

The xxx recognises the need to:

- Dramatically increase its public *voice and visibility*, and
- To develop a steady, *discretionary income stream*.

To raise and fortify its current modest public image, senior management will consider consulting with a reputable public relations firm to expand the public reach and offerings, such as the Advisory offerings and make the organisation and its project attractive to social investors.

We also plan to launch, and vigorously service, an Annual Fund campaign to attract recurrent individual donor income. Donors will be afforded the opportunity to contribute a minimum amount (to cover bank and administrative charges) and direct their contributions to their preferred (aspect of) project.

## 11. BUDGET

---

# TEMPLATE 33: LETTER OF ENQUIRY TEMPLATE

<p><b>LOGO</b>          Street Address / Postal Address          Suburb          Website          email address</p>
---

DONOR Address

Date

Dear Mr/Ms ....., **(MUST BE ADDRESSED TO THE APPROPRIATE PERSON!)**

We have formulated a project/programme that will *serve/enquires into/produce* ..... .  
Our research shows that one of your interest areas is ..... — an area into which our project appears to be most suitable.

We have xx years of experience in ....., ....., and ..... and will apply the many lessons learned to conducting our latest/continuing venture into *making/tracking/serving/researching/developing/producing* ..... . Our anticipated outcomes are:

- 
- 
- 
- 

XXXX is a registered NPO/PBO/CBO with registration number 12345678. Our team who will work on this project consists of :

- 
- 
- 

These 3 are drawn from among out overall staffing complement of xx headed by XXX as CEO and XXX as chair of our Board.

We have xx projects related to this xxxx project and our beneficiary stories best reflect the success we've enjoyed from our engagement with xx community.

Testimonial 1

Testimonial 2

Testimonial 3

May I/we hear from you soon, please?  
Sincerely,

## TEMPLATE 34: PROPOSAL TEMPLATE

[PROJECT TITLE]

Prepared by:

Organisation:

Place:

Date:

### Executive Summary

The purpose of the Executive Summary is to provide a short, concise introduction to the project. The best time to complete the Executive Summary is after you have completed the proposal. By all means write a rough draft of your Executive Summary, but refine and finalise it after you have completed the document. At that point you have a much clearer idea of what is important and what needs to be highlighted. Your Executive Summary should address the following:

IMPORTANT INFORMATION TO INCLUDE
What problem or need will be addressed?
What is our solution or reaction?
Why is this solution necessary and different?
Why should xx address this problem?
Describe what the project aims to achieve in an overview. Provide measurable objectives. <i>Consult the <b>PURPOSE</b> block in the LFA.</i>
What is the time frame?
Where will it operate (geographical area)?
What will have changed as a result of the project?
Who will benefit and how?
Include the credentials of the project leader.
What is the total project budget?
What is the amount requested from the donor? Place this amount in <b>BOLD</b> .
Where will the balance come from?
How will this project help the donor realise their vision and mission?
<i>Length: one page</i>
<i>Is the Executive Summary brief, clear and interesting to catch the reader's attention?</i>

### Table of Contents

Generate a detailed table of contents including subheadings and page numbers.

### INTRODUCTION

[Enter your text]

IMPORTANT INFORMATION TO INCLUDE
Provide a brief summary of the problem the project aims to resolve.
Provide an overview of the proposed method or solution.
Establish credibility by describing anticipated outcomes and/ or accomplishments.
Explain why this project is the best approach.
List the project's past achievements.
Convince the donor that this project can make a real difference.

IMPORTANT INFORMATION TO INCLUDE
Tell a success story of your project.
<i>Is this introduction brief and interesting?</i>
<i>Length: one page</i>

### CASE STATEMENT

[Enter your text]

This section provides a detailed analysis of the problem or need the project will address. Never confuse the problem with the solution. The section should include the following information:

IMPORTANT INFORMATION TO INCLUDE
What is the context and cause of the problem?
Is this problem general or local?
Identify specific aspects the project will address.
How does the project match with the donor's ideals/ values?
What solution does the project offer?
Is this approach new or original?
Can the project be replicated?
Who is involved in similar work? What can we learn and will we work with them?
Define precisely the problem to be solved, so that there is no doubt in the donor's mind that a real problem exists.
Use data, statistics, and quotes from authorities to support your case.
Explain which elements of the problem this project will address.
Provide possible support or endorsements of credible agencies.
What are the general benefits for the target audience?

### ORGANISATIONAL INFORMATION

The purpose of this section is to provide the donor with a brief introduction to XXX and the department that will implement this project.

Please provide information on the department/centre that will be responsible for the project implementation. This section should include the following information:

IMPORTANT INFORMATION TO INCLUDE
Which department will implement this project and why is the department the best for the project implementation?
What does the donor need to know about XXX?
What do you want the donor to know about XXX?
Is this information relevant to the project?

### PROJECT OBJECTIVES

In this section state clearly what the expected project outcomes will be. This is achieved by describing the specific goals you have set, as well as the specific objectives through which you will achieve these goals. The goal is a broad statement of what you want to accomplish. The objectives are specific things you will do to accomplish the goal and should be measurable. The following information should be provided in bullet format:



IMPORTANT INFORMATION TO INCLUDE
Do the activities match the objectives?
Are your objectives measurable?
What is the project goal?
<i>Consult the <b>GOAL, PURPOSE, and OUTPUT</b> blocks in your LFA.</i>

### TARGET AUDIENCE AND BENEFICIARIES

Indicate the target audience and beneficiaries of this project by answering the following:

IMPORTANT INFORMATION TO INCLUDE
Who will the project target?
Who will benefit from this project?
How will you select the target audience?
How many individuals will benefit from this project? Be specific.
<i>Note that the beneficiaries and target audience might differ, for example, the project might train teachers to assist learners. The teachers will be the target audience and the learners will be the beneficiaries.</i>
<i>Complete and/ or consult the Excel project chart</i>

### PROPOSED SOLUTION

Explain in detail what methods you will use. Clearly direct or tie your methods to the objectives and explain how the methods will help you to achieve your objectives. In cases where different methods were used to address a similar problem, it might be necessary to explain why this specific method will be more successful.

IMPORTANT INFORMATION TO INCLUDE
How will the project undertake the activities (method)?
Why will your activities and methods produce the best results?
Why have we chosen these activities and methods?
Do these activities match the objectives?

### ACTIVITIES AND TIMELINE

The activity plan provides a breakdown of exactly what the project team will do during the different phases of the project. This includes every single activity from the planning phase to the evaluation phase at the end of the project. The activity plan is the exact activities and tasks to be performed to achieve each of the different objectives. Add the timeframe to the activity plan to indicate what you will be doing, the duration, and the deadline of each activity. This section should include the following information:

IMPORTANT INFORMATION TO INCLUDE
Is a timeline included?
List the project activities.
<i>Complete and consult the Excel project chart.</i>
<i>Consult the <b>ACTIVITIES and OUTPUT</b> blocks in the LFA.</i>

### PROJECT TEAM

Indicate the human resource requirements. State how many of the personnel on the project will have to be paid out of the project budget and why. The section should include the following:

IMPORTANT INFORMATION TO INCLUDE
Who will do financial management?
Who will ensure implementation and project management?
Who will ensure the project outcomes?
Who will report back to the donor?
Identify which project members will be responsible for each project activity. <i>Consult the Excel project chart for this information.</i>
Why are these project members the best in what they do?
Provide a project team/organisational structure.
Attach a <i>curriculum vitae</i> of all project team members in the résumé template.
Is the project team BEE compliant?
What is the team succession plan?
Is there capacity building in the team?
Will these appointments apply to XXX's recruitment practices?
<i>Consult the RESOURCE block in the LFA.</i>

### PARTNERS

This section should include the following information:

IMPORTANT INFORMATION TO INCLUDE
How will the relationship with your other partners be managed?
Who are the other partners?
What is this organisation/individual's experience in this field?
Attach marketing material of these partners.
What are the partners' mission and vision?
Relate a success story of your partner.
<i>Complete and/ or consult the Excel project chart</i>

### SOLUTIONS TO IDENTIFIED RISKS

Indicate to the donor that you have thought about all the possible risks that might occur and provide solutions to these risks.

IMPORTANT INFORMATION TO INCLUDE
What are the risks?
Who will deal with these risks?
How will you deal with the risks?
<i>Check the AUSSUMPTION columns in the LFA.</i>

### BUDGET

Complete the Excel budget template. Do not include the budget in this template. **The fund development unit should compile a strategy for your project where different donors may be approached for different items on your budget.** The Excel budget template will allow the unit to customise budgets to contain the items that each donor requires. It is important that your budget is realistic and not inflated.

Include a budget narrative to address the following information:

IMPORTANT INFORMATION TO INCLUDE
Provide cost centre/ledger number, if applicable.
How will the money be managed?
Indicate whether you require the entire budget at once or whether it can be paid in phases. Many donors prefer to pay in phases because it gives them control over the project and money.
<i>Complete the Excel budget template.</i>
<i>Consult the <b>ACTIVITIES</b> and <b>RESOURCES</b> blocks in the LFA.</i>

### SUSTAINABILITY

This section should address the following:

IMPORTANT INFORMATION TO INCLUDE
How will the project's success be judged?
Does the project have a fixed life or will it sustain itself later on?
If the project has a fixed life, demonstrate why the required investment justifies the return.
Where will the resources come from?
Do you have a long-term fundraising strategy? <i>(Consult the fund development unit for your fundraising strategy).</i>
Is there a synergetic organisation/community to take over the project?
Will the initial investment be wasted if the sustainability plan fails?

### EVALUATION

Describe the plan to ensure that the project meets the goals and objectives that have been set. The plan does not have to be too elaborate, but it is important to show to donors that you have not forgotten about it.

IMPORTANT INFORMATION TO INCLUDE
How will the success of the project be judged?
When will you report?
How will the data be collected and analysed?
Will there be one evaluation or a series? Why?
Who will conduct the evaluation?
Is there any value in disseminating the information to others?
The target audience for disseminating information?
The mechanism to disseminate information.
Will you evaluate the objectives and outcomes?
Will you analyse and assess the processes, methods, and strategies?
Where is the evidence that the project delivered what it promised? <i>Consult the <b>MEANS OF VERIFICATION</b> and <b>PERFORMANCE INDICATORS</b> columns in the LFA.</i>
<i>Never use a % without a base number.</i>
<i>Consult and/or compile the Excel project chart.</i>

**CONCLUSION**

This is your last chance to really sell your project. Your conclusion should:

IMPORTANT INFORMATION TO INCLUDE
Shift from goals to aims.
Shift from outputs to benefits.
Reiterate XXX's commitment.
What will the benefits be?
What will change?
How will the project help the donor to realise their vision and goals?
Last sentence must be powerful!
<i>Length: half a page.</i>

**APPENDICES**

The appendices are secondary documents that support the proposal. Attach the appendices in separate electronic files. The appendices should include the following:

APPENDICES / ATTACHMENTS
Résumés of project team.
Complete project budget.
Endorsement letters.
LFA (and/or Success Equation, ToC).
Project marketing material, e.g. brochures, pamphlets, etc.
Project team/organisational chart,
Partner marketing material,
Photographs relevant to the project,
Quotes for equipment/ external services,

# TEMPLATE 35: RESULTS-BASED MANAGEMENT REPORTING

**Results-Based Management**  
**Summary of planned to actual Results for the period**  
**Beginning xxx , Phase xx, 20xx**

**Progress to date in achieving Outcome 1:** \_\_\_\_\_

This project made significant progress in xxx. Some significant goals, such as xxx expanded to xxx without the necessity to xxx.

Priority Outcomes (long-term results)	Priority Outputs (Achievements)	Results Planned for this Period	Actual Results for this Period	Variance (if any) of Actual Results	Progress Towards Results
Intended product 1					
Intended product 2					
Intended product 3					

**Progress to date in achieving Outcome 2:** \_\_\_\_\_

This project made significant progress by adding xxx to xxx at minimal cost by partnering with xxx.

Priority Outcomes (long-term results)	Priority Outputs (Achievements)	Results Planned for this Period	Actual Results for this Period	Variance (if any) of Actual Results	Progress Towards Results
Intended product 1					
Intended product 2					
Intended product 3					



# TEMPLATE 37: SPONSORSHIP ASSET INVENTORY

INVENTORY VALUATION

ASSET	TRAFFIC	COST P/VIEW	BRAND VALUE	ASSET TOTAL
<b>NAMING PRIVILEGES:</b>				
Named XX event	200,00	2,50	50,00	25 000,00
Presenting privileges at award event	100,00	0,75	2,50	187,50
<b>ATTENDANCE:</b>				
Executive/Snr Management	10,00	3,00	5,00	150,00
Junior academics	40,00	2,00	2,00	160,00
Postgraduates	30,00	2,00	2,00	120,00
Snr undergraduates	40,00	1,00	1,00	40,00
Junior undergraduates	50,00	0,15	0,05	0,38
Public	50,00	0,10	1,00	5,00
<b>ON SITE:</b>				
Display space at events	100,00	0,20	0,75	15,00
Distribute product brochures at events	100,00	0,50	5,00	250,00
Distribute XX brochures at events	100,00	0,15	0,75	11,25
<b>ADVERTISING:</b>				
Full page advert of the xx in newspaper	2 000,00	1,50	20,00	60 000,00
Half page advert of the xx in newspaper	2 000,00	1,50	15,00	45 000,00
Quarter page advert of the xx in newspaper	2 000,00	1,25	12,00	30 000,00
Full page advert of the xx in event brochure	2 000,00	0,75	20,00	30 000,00
Half page advert of the xx in event brochure	2 000,00	0,60	15,00	18 000,00
Quarter page advert of the xx in event brochure	2 000,00	0,35	12,00	8 400,00
Branded merchandise	800,00	1,25	4,50	4 500,00
<b>WEBPAGE:</b>				
Link from institution/Accountancy dept. website/page	500,00	2,50	10,00	12 500,00
Link on xxx webpage	500,00	1,50	25,00	18 750,00
<b>SOCIAL MEDIA:</b>				
Sponsored post on xxx Face Book	700,00	1,50	3,50	3 675,00
Sponsored post on xxx Twitter	900,00	2,00	2,00	3 600,00
Sponsored post on xxx LinkedIn	700,00	1,50	3,00	3 150,00
Sponsored post on xxx Instagram	200,00	2,00	1,75	700,00
Sponsored post on xxx Pinterest	100,00	0,75	0,75	56,25
<b>SIGNAGE:</b>				
Logo at award event	100,00	0,25	5,00	125,00
Logo at xxx event	1 000,00	0,25	8,00	2 000,00
Logo at internal event	100,00	0,55	12,00	660,00
Company banner display	100,00	0,45	10,00	450,00
<b>EMPLOYEE BENEFITS:</b>				
Employee invitations to event	100,00	12,00	3,00	3 600,00
Employee engagement/volunteering/mentoring	25,00	12,00	3,00	900,00
<b>PUBLIC RELATIONS:</b>				
Sponsor mention in press release	1 000,00	2,50	3,00	7 500,00
Sponsor signage at press conference	25,00	1,00	2,00	50,00
<b>PROGRAMMING &amp; SPEAKING OPPORTUNITIES:</b>				
Acknowledgement in welcoming speech at award event	200,00	1,20	0,75	180,00
Acknowledgement in welcoming speech in xx event				-
Prime mention in keynote speech at xxx event	200,00	2,50	0,50	250,00
Prime mention in keynote speech at xxx event	200,00	5,00	5,00	5 000,00
Sponsor speech during the xxx event	200,00	10,00	25,00	50 000,00
Sponsor's speech at the xxx supplemental event	200,00	20,00	50,00	200 000,00
Verbal recognition from the podium	200,00	20,00	0,15	600,00
<b>PAID MEDIA:</b>				
Logo listed in paid media ads				-
<b>TOTALS</b>	<b>20 870,00</b>	<b>119,00</b>	<b>341,95</b>	<b>505 585,38</b>
Total value of tangible assets:				
<b>Total brand Value:</b>	-	-	-	-
<b>Fair Market Value:</b>	-	-	-	-

These are the estimated values of a sponsor. Consider the cost of the event Sponsor to determine these values.

FOR INTERNAL USE ONLY!

ROI Ratios	EVENT			
	COST	Ratio	Benefit	%
	175 000,00	2:1	252 792,69	50%
		3:1	168 528,46	33%
		4:1	126 396,34	25%

## **TEMPLATE 38:** **SAMPLE SPONSORSHIP PROPOSITION**

This template contains sample data for a typical Golf Day fundraising event to illustrate the extent and level of detail required to develop sponsorship.

NAME OF ACTIVITY

Prepared by:  
Senior Manager  
Fund Development Department



**EVENT DETAILS:**

Date &amp; Time:

Location/Venue:

Target demographics:

Cost:

Parking &amp; Transportation:

**OVERVIEW:**

What is the event?

What will happen?

Who will participate?

Who else will sponsor/exhibit/sell?

Who will attend?

Why have they come?

What benefit will YOU get from the sponsorship?

How will the sponsor benefit (overview only)

**TARGET AUDIENCE:**

Our promotional campaigns are aimed directed at the following demographic and psychographic groups (i.e. demographics that determine the attitudes and tastes of a particular segment of a population):

1. Golf enthusiasts
2. Up and coming males who play golf for both recreation and business networking and play at least one game per month
3. Males 18-30-yrs-old occasional to regular golfers who golf in (business) groups and share middle-to-upper income tastes & wants
4. Males 35+ who golf regularly, generally fathers/grandfathers with similar psychographic as above
5. Other markets — people who would rather play a game than stay home, fathers who want to golf with their daughters or sons, or even with someone whose existing plans were cancelled for one reason or another.

Although this is our first annual golf day and we don't have statistics to rely and plan on, we will undertake a comprehensive market research survey. We will be happy to include up to four xx-related questions on your behalf and will provide you with the full results of our research.

**ON-SITE ACTIVITIES:**

Hospitality:

On-site Displays:

On-site sales:

**MEDIA SUPPORT:**

Based on our target market research, we have created a media plan that will generate interest in and awareness of the \_\_\_\_\_, while specifically targeting our key markets.

Our total budget for paid and promotional media is R\_\_\_\_\_ (xxx thousand, xxx hundred Rand) and with that we have been able to negotiate R\_\_\_\_\_ in media value. A full media schedule and an audience profile are appended to this proposal.

**Television:**

Our comprehensive TV campaign focuses on two main areas:

- Two 4-week media promotions, run in conjunction with SABC/ETV/DStv's society programmes, xxx, xxx, xxx that reaches \_\_\_\_\_ men & women golfers.
- Paid media schedule on SABC's *Top Billing* programme that reaches \_\_\_\_\_.

**Radio:**

We have negotiated a three-week drive time promotional schedule with SABC Radio 5/.../.../..., and "\_\_\_\_", and on "\_\_\_\_\_". These stations and programmes match our target audience exactly.

This schedule will be augmented by a two-week limited airing on \_\_\_\_\_ and \_\_\_\_\_ to reinforce the messages on the SABC & xxx stations. This will ensure maximum coverage of our markets in the lead-up to the Golf Day.

**Newspaper:**

The Daily Dispatch is a major sponsor and as part of our partnership we have negotiated a series of xx 1/6<sup>th</sup> page advertisements in the Sports section per week leading up to our event.

**Magazines:**

We are undertaking a limited magazine campaign and will only place adverts in\_\_\_\_\_.

**Other event promotions:**

Along with paid and promotional media, we will engage a comprehensive and non-media publicity campaign.

**Publicity:**

We have harnessed the services of one of East London's top publicists, \_\_\_\_\_, who has/have designed a campaign targeting both general and niche media. The campaign will launch with a media briefing on xxx and will continue to the Golf Day itself.

We will provide media access to top expert and celebrities including \_\_\_\_\_ and \_\_\_\_\_....

As this is the first Annual Golf Day, we will concentrate a large portion of our publicity effort on the promotion. \_\_\_\_\_ will benefit greatly from our promotion of the \_\_\_\_\_ services that \_\_\_\_\_ offer.

**Signage:**

For two weeks prior to the Golf Day, and on the day, we will have xx XXX banners alongside xx \_\_\_\_\_ banners at the entrance, reception and tee-off areas of the East London Golf Course and on its electronic billboard(?).

**Website:**

The University website generates \_\_\_\_\_ hits annually, with \_\_\_% of those hits expected in the month of the Golf Day, October, our sponsors can be assured of appropriate media exposure.

**Direct Mail:**

As we have a highly effective database system and internet presence, we conduct our direct mail using email to the \_\_\_\_\_ people who may have requested information and early ticket booking. We will be contacting them, including a link to our site xx weeks ahead of the Golf Day and again, two weeks prior to the day.

**SUGGESTED PROMOTIONAL OVERLAYS:**

Since golf correlates strongly with *travel, sports apparel, and business*, we suggest the following promotions to make this partnership relevant to your key customers:

*Travel/product/services packages:*

Sportswear/sports equipment:

Business interests:

(use your Inventory List to add to these benefits)

**BENEFITS:**

As a major sponsor of the \_\_\_\_\_ Annual Golf Day, \_\_\_\_\_ will receive the following comprehensive package of benefits:

*Sponsorship:*

- Naming opportunity
- 1 of only 3 major sponsors
- Official .... Carrier/service supplier
- Exclusive opportunity to sell ....

### *On-site:*

- 00 m x 00 m site in prime, central location in the xxx area. This location will be fully cabled for electricity and telephone connectivity
- Opportunity for sales
- Logo acknowledgement on .....

### *Hospitality & networking:*

- Host status
- Ability to invite up to \_\_\_\_
- Introduction to all participants
- We will facilitate opportunities for cross-promotions with other, related, sponsoring agents.

### *Media profile:*

- Use of XXX as an intrinsic component of the promotions of the 1<sup>st</sup> Annual \_\_\_\_ Golf Day event
- Logo/name inclusion on all paid and promotional material and publicity
- Assistance with developing and implementing a publicity plan for \_\_\_\_'s key marketplaces.

### *Tickets:*

- \_\_\_\_ VIP passes to the event
- \_\_\_\_ VIP car parking spaces
- \_\_\_\_ adult/family passes to the event to promote the event to your business partners and customers.

### **INVESTMENT:**

Your investment for this comprehensive sponsorship will be:

- R\_\_ cash
- R\_\_ domestic air travel for use by ... and to be used by \_\_\_\_\_
- R\_\_ for car rental to \_\_\_\_
- Commitment to strongly promote the \_\_\_\_ Annual Golf Day to you customers/clients in \_\_\_\_.

Half of the cash component will be due upon signing a contract, with the remainder due on \_\_\_\_\_. The entire \_\_\_\_ [domestic air travel] fund should be made available by the \_\_\_\_\_ upon signing the contract.

## **TEMPLATE 39:** **SAMPLE STEWARDSHIP PLAN**

NOTE: Not every section will apply to every organisation.

[Organisation's Name]

Stewardship Plan  
20xx — 20xx

**Prepared by:**

**Rank:**

**Date:**

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### **Vision Statement**

The Donor Stewardship programme will ensure a comprehensive and quality programme of stewardship, which cultivates, engages, and recognises all donors and prospective donors to further the efforts of external support. This will be accomplished by developing ongoing relationships and partnerships with through timely and appropriate donor acknowledgement, recognition, and communication about the importance of their contribution(s).

### **Mission Statement**

Central to the mission of the XXX, has always been a commitment to long-term relationships with our donors and the understanding that exceptional courtesy and stewardship is essential to our success.

Building on this distinctive legacy, the XX values stewardship practices that are rooted in authentic relationships where donors know the impact of their donations and recognise their essential role in the life and destiny of the organisation/institution.

### **Defining Stewardship**

We understand stewardship to be the conducting, supervising, or managing of something; especially the careful and responsible management of something entrusted to one's care. The fund development staff commits to be fully responsible for developing long lasting relationships with our donors. We intend to maintain three key elements of stewardship with each of our donors:

- acknowledgement,
- recognition and
- reporting of donor activity.

### **Guiding Principles**

- a) To maintain the highest degree of courtesy in our contacts with donors.
- b) To steward the resources entrusted to our care.
- c) To communicate openly, frequently, and honestly with our donors.
- d) To honour the privacy of our donors and friends.
- e) To value diversity in all its forms and respect the dignity of the individual.
- f) To ensure we meet both the letter and the spirit of the values and ethical code that govern our work.
- g) To promptly provide each donor who qualifies, with a tax concession certificate [for those organisations that are registered and approved to issue such certification].

### **Implementation**

The Stewardship manager will in consultation with the Director of Fund Development, implement the Stewardship Plan.

This plan will complement the Marketing, Communication, Fund development, and Alumni Relations.

Fund development will pursue the following Stewardship Goals:

**Goal 1: Acknowledgement**

Thank every donor **within** 32 business hours (4 business days), including a “promise to comply”, and an invitation to discuss further.

Actions to Achieve	Person Responsible	By Date	Status
Ensure receipt is properly & fully processed and tax concession is issued (where applicable).	Manager	Not later than 32 hours	Tentatively in place
Draft various donor acknowledgement letter texts & load onto database (1st gift, 2nd gift, & for various amounts, etc.).	Manager	Drafts should exist on database	3+ letter texts loaded
Draw letter from database.	Stewardship Officer /Manager	Not later than 32 business hours	Activated
OR Draft personalised acknowledgement letter.	Manager	Not later than 24 hours	When needed
Designate Senior Administrator/Personal assistant to dispatch.	Manager	Not later than 32 hours	When needed
Monitor weekly turnaround toward report monthly dashboard.	Manager	Each Friday	Ready
Add thank you phone call (top donors get call from CEO/VC).	Director Fund development	Alert CEO/VC office & schedule	When appropriate
Create a ‘new donor’ package with XXX info, ways to participate, etc.	Marketing	As needed	Have on hand and update regularly

**Goal 2: Recognition**

Provide appropriate, desired recognition of every donor to every fund that provides satisfaction to the donor and is likely to inspire potential donors.

Actions to Achieve	Person Responsible	By Date	Evidence
Ensure accuracy of donor data collection.	Database Administrator	Per day	Database entries
Create donor listing, including a message of fiscal accountability (financial protocols).	Database Administrator	Annually / semi / quarterly	Annual Report
Identify opportunities for permanent recognition at vents, special occasions, etc.	Manager	When appropriate	Donor wall, plaque, citation



Actions to Achieve	Person Responsible	By Date	Evidence
Order appropriate awards, books, blog, multi- media.	Manager	When appropriate	Have on hand
Invitation to high-level events when appropriate.	Manager	When appropriate	
Implement recognition of donors at fundraising events.	Manager	Per event	
Send follow-up recognition to event donors who indicate they are unable to attend.	Manager	When appropriate	Database note
Add special acknowledging note on donor report for top donors who attended?	Manager	Ongoing?	Database note
Consider a polite enquiring call or note to invitees who RSVP-ed, but did not attend.	FD Staff	Within a week of event.	Database note
From the Events' Calendar, develop a list of photo opportunities at events – for newsletter articles, blog posts, etc. and where warranted, send framed copy to donor.	Marketing	Schedule from Events' Calendar	Hard copies on file & note on database
Designate management committee member or senior executive to contact major donors, extending extra invitations to some gala event	Manager	Ongoing	Database note

### Goal 3: Stewardship for Everyone

To increase the satisfaction and joy of donors by providing outstanding stewardship to every donor.

Actions to Achieve	Person Responsible	Measure	Evidence
Capture contact details & focus areas for every prospective donor & donor agency.	Prospect researcher	Min xx records daily	> xx Monthly in Dashboard
Capture names, addresses and email for every donor.	Database Administrator	Per receipt	Database
Identify one impact story to feature, interview & take photos.	Marketing	By when?	Blog/newsletter / media
Deliver one email stewardship “postcard” on newsworthy item(s) to each donor.	Manager	Ongoing	Database
Mail stewardship letter to each donor (if no email address).	Manager	Ongoing	Database

## DEVELOPING DONOR SUPPORT

Actions to Achieve	Person Responsible	Measure	Evidence
Describe the impact of giving in each suitable newsletter & blog story. Hhow many? When posted?	Marketing	Ongoing	Publication & Database
Identify and “script” at least one person to deliver stewardship message at each event e.g. events.	Manager	Ongoing	Database
Add a second or third “stewardship only” communication to each donor - if reasonable.	Manager	Ongoing	Database
Consider designing a “thank-a-thon” with project staff, HoDs, & Executives, etc.	Manager	Annually	
Design and send a “donor satisfaction survey” to all donors, phone follow-up to all who return, or all giving over R100,000 by using a database, Survey Monkey, or similar system.	Manager	Ongoing	

### Goal 4: Stewardship for the Critical Few

To provide tailored and personalised “high touch” stewardship, based on personal philanthropic values, motivation, and institutional interests, to our most important donors.

Actions to Achieve	Person Responsible	By Date	Status
Establish a stewardship management panel of the fund development evaluation committee to help plan and implement stewardship strategies.	Director	Semi-annually	
Identify the of extent leadership donors, link to education & training, profession, etc.	Alumni Relations	Ongoing?	
Design and implement one additional stewardship piece for donors over R100,000.	Manager	Ongoing?	
Make personal visits (by staff, CEO or Board) to an exceptionally high-level donor to share the impact of their gift personally.	Manager/ Project Leaders	As appropriate	
Conduct a “donor satisfaction survey” with each donor, preferably face-to-face to identify reasons & context(s), expectations, etc. for giving.	Manager	Once in each Semester	
Plan delivery of personal stewardship message, from the VC, Manco, or Development team to top donors at each event.	Manager	Ongoing	

Actions to Achieve	Person Responsible	By Date	Status
Create separate recognition/stewardship event (s) for top donors.	Manager/ Events Officer	Once in each Semester	
Create photo albums, flash drives / digital photo frames of visits or other interactions with each top donor.	Marketing	Quarterly	
Send a monthly “insiders” letter/blog to all top donors from the VC.	Manager	Monthly	

### Goal 5: Creating A Stewardship Culture

To create a donor-centred and staff-centred culture throughout the institution/organisation, ensuring that every donor and potential donor feels valued and appreciated and every staff member feels valued.

To ensure that every member of the institution/organisation regards donor stewardship and valuing both donors and potential donors as part of their portfolio, regardless of their primary responsibilities.

Actions to Achieve	Person Responsible	By Date	Status
Deliver at least one stewardship message to all staff members, annually.	Manager	January and/or December	
Attend/organise all meetings where stewardship is discussed. Speak to specific experiences the Stewardship team had.	Manager	On-going	
Identify a few staff “opinion leaders” to help share your message of the power of giving.	Manager	May/ August	
Include non-fundraising staff in fundraising activities or events with specific, limited roles with donors.	Director	Ongoing	

### Lifetime Donor Recognition Privileges

The *Lifetime Donor Recognition* category aims at increasing the recognition and involvement of your most generous donors who have earned the philanthropic leaders' status at XXX. Their gifts have made a tremendous impact on the organisation, and on your mission.

### Benefactor Levels

#### Centennials - *Truth, fact, accuracy, and honesty*

1. Annual invitation to the Chancellor/Chair's Gala Dinner.
2. Recognition in the Annual Chancellor/Chair's Gala Dinner Programme for lifetime gifts totalling over **R1,000,000**.
3. Yearly special recognition in the organisation/institute's annual report.
4. Recognition in the organisation/institution's publications and website.
5. Prominent donor name recognition on a major-donor wall.

#### Top 100 - *Integrity, soundness, and charity*

1. Annual invitation to the Chancellor/Chair's Gala Dinner.
2. Recognition in the Donor Gala Programme as lifetime gifts of **R500,000** and above.
3. Special recognition in the annual report.
4. Recognition in the organisation/institute's publications and website.
5. Prominent donor name recognition on the major-donor wall.

#### Zeal - *Charity, love, affection, esteem, favour, dearness*

1. Annual invitation to the Chair/Chancellor's Gala Dinner.
2. Recognition in the Donor Gala Programme as lifetime gifts between **R100,000 - R499,000**,
3. Special recognition in the organisation/institute's annual report.
4. Recognition in the organisation/institute's publications and website.
5. Prominent donor name recognition on the major-donor wall.

### Special Memberships and Stewardship Programmes

#### The Chairperson/Chancellor's Circle

The Chairperson/Chancellor's Circle is a special organisation to ensure members have a vital role in helping the chair/chairperson during her/his term to address critical issues facing access to the mission, workforce, and infrastructure development.

A **R25,000** unrestricted annual gift to the organisation/institute provides membership in the Chancellor's Circle. Connections include a wide array of exciting opportunities to interact with the Chair/Chancellor and other key organisational advocates:

1. Annual invitation to the Chair/Chancellor's Gala Dinner.
2. Recognition on The Chair/Chancellor's Circle honour roll.
3. Chair or Chancellor's Circle corporate logo lapel pin.
4. Listing in the organisation/institute's publications and website.

### Legacy Society

Another way to support the organisation/institute is to create study scholarships, best practice visits, learnerships, and enhance education & training in our community. This can be done through membership in the Legacy Society. Donors may designate gifts for the future by leaving a legacy of learning through planned giving. Benefits include:

1. Annual invitation to the Chair/Chancellor's Gala Dinner.
2. Recognition in organisation/institute's publications and website.
3. Invitation to the annual donor gala evening.
4. Corporate/Institution's lapel pin/brooch.

### [Where applicable] Alumni Association

The XXX Alumni Association was established by a group of committed alumni to provide support to and promote XXX. A 50,000-member organisation, the Association currently works to develop a sense of community among alumni, and to promote the lifelong personal, educational, and professional growth of the alumni and students of XXX.

Members will qualify for a special (gold) XXX lapel pin and other branded merchandise.

The Association focuses its efforts on five main areas:

- a) volunteerism,
- b) scholarship programmes,
- c) recognition programmes,
- d) academic support programmes, and
- e) programmes and services to meet the diverse needs of members and future members.

Membership information and materials may be obtained by contacting the Alumni Relations Office at (xxx) xxx-xxxx or by visiting the Association's website at www.xxx.xx.xxx.

### Annual giving Levels and Privileges

#### Annual Fund/ Recurrent Income

Each year, staff, alumni/retirees, students, parents, and friends choose to support everything from sport to research and development at XXX. These gifts are then deployed to fund research, provide emergency student/staff assistance, assist with travel to conferences and more throughout the year. By supporting these activities and services at XXX donors who make monthly, quarterly, six-monthly or annual donations contribute to the organisation/institute's resilience and good standing. For these monthly gifts of R30,000 or more we are profoundly grateful.

#### Leadership Fund

The Leadership fund is targeted at both internal and external senior staff — Board/Council, Senior Executives, Directors, HOD's, and Corporate Chairpersons who many find resonance with the ideals and needs of XXX.

**R5,000 – R10,000** annual gift to XXX.

- a) Invitation to the Chair/Chancellor's Dinner.
- b) Annual invitation to the XXX Donor Gala evening.

### [WHERE APPLICABLE] 'GRADitude Fund'

The 'GRADitude Fund' targets new XXX graduates who want to assist in the needs of the organisation/institution either in a direct debit order from their salary, or by electronic funds transfer (EFT) at their own discretion. This fund provides income for specific and *ad hoc* projects and is managed and reported on by the Alumni Relations Office.

**R3,000+** annual gift to XXX.

- a) Funds may be designated to a specific scholarship fund.
- b) Annual invitation to the Chair/Chancellor's Dinner.
- c) Annual invitation to the XXX Donor Gala evening.

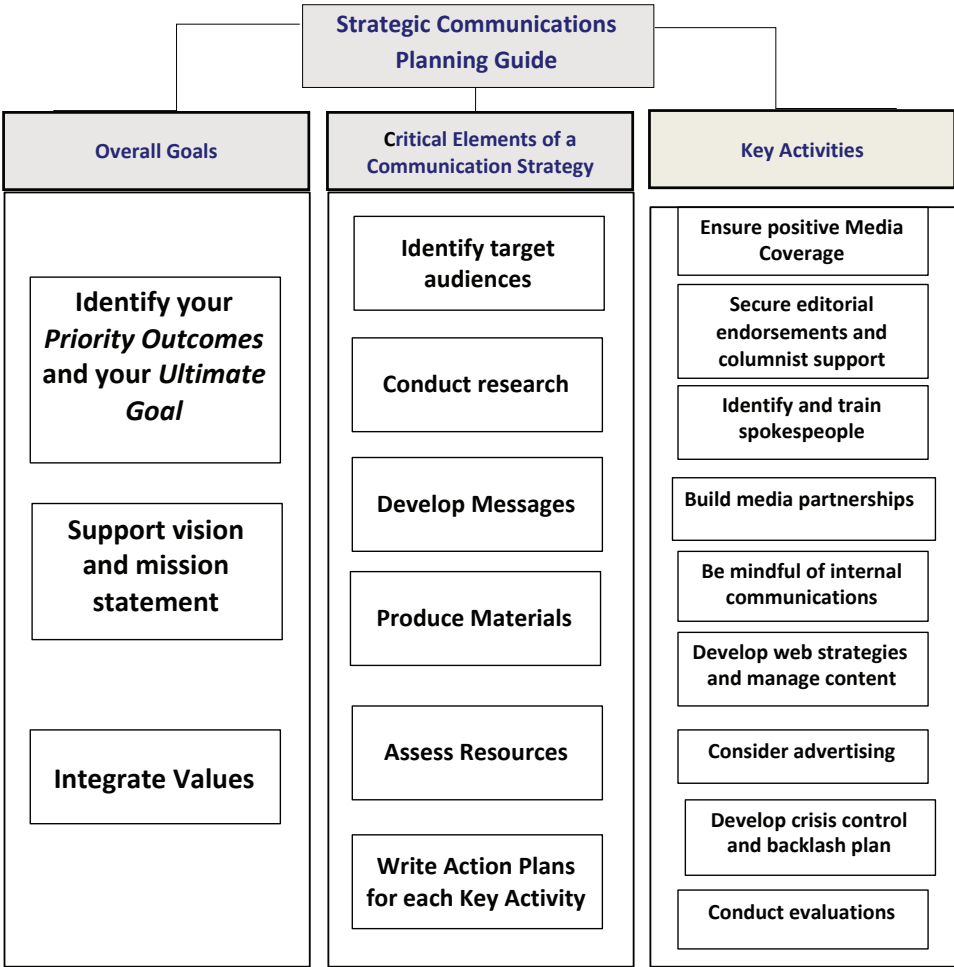
### Sponsorship and CSI

This fund is aimed at raising funds for corporate events through sponsorships, like Golf Days, Auctions, Gala Events etc. Each year, XXX will identify appropriate Corporate Social Investment programmes and develop funds from them.

All stewardship protocols will apply to such donors except that such CSI funders may not be eligible for tax concession certificates.

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# TEMPLATE 40: STRATEGIC COMMUNICATIONS PLANNING GUIDE



## TEMPLATE 41: COMMUNICATIONS PLAN WORKSHEET

OBJECTIVES	ACTIVITIES	TARGET AUDIENCE(S)	SUCCESS INDICATORS	DUE DATE
To strengthen internal communications				
Increase public or profile of development interests				
Publicise exceptional project achievements				
Increase the profile of the development office to internal clients				
Design & distribute promotional materials				
Cultivate publicity materials for specialist/focussed campaigns				
Develop an interactive, dynamic website with a donations' facility				



# TEMPLATE 42: COMMUNICATIONS SCHEDULE

Medium	When	Why	How Often	Objective	Milestone	Achievement/ Variance	Owner
Blog							
Newsletter							
Bulk mailing							
Call-backs							
Ordinary mailings							
In-person contacts							
LinkedIn							
Instagram							
Facebook							
X							

## TEMPLATE 43: WORKLOAD INVENTORY WORKSHEET

CATEGORY	TASKS (Enter only yours)	TIME PLANNED	ACTUAL TIME SPENT	RETURN ON TIME & EFFORT INVESTED
Project Formulation	<ul style="list-style-type: none"> <li>• Brainstorming</li> <li>• ToC</li> <li>• Success Equation</li> <li>• LFA</li> </ul>			
Budget Building	<ul style="list-style-type: none"> <li>• Update checklist</li> <li>• Pricing research</li> <li>• Master worksheet</li> <li>• Summary worksheet</li> </ul>			
Prospect Research	<ul style="list-style-type: none"> <li>• Newspapers</li> <li>• Business press</li> <li>• Database subscriptions</li> <li>• Online trawling</li> <li>• Qualify prospects</li> </ul>			
Solicitation Documents	<ul style="list-style-type: none"> <li>• Outlines</li> <li>• Proposals</li> </ul>			
Cultivation	<ul style="list-style-type: none"> <li>• Meetings</li> <li>• Plan event logistics</li> <li>• Attend Events</li> <li>• Follow-up strategies</li> </ul>			
Database	<ul style="list-style-type: none"> <li>• Input</li> <li>• Interrogate</li> <li>• Produce briefing note</li> </ul>			
Sponsorship	<ul style="list-style-type: none"> <li>• Identify prospect</li> <li>• Identify &amp; cost assets</li> <li>• Build proposition</li> </ul>			
Stewardship				
Board Business				
Administration				

## This book is about selected aspects of the *mechanics* of professional fundraising

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I read this book with great interest and all I can say is **Wow!**

It is very refreshing, even for me, who I want to believe falls in the seasoned fundraiser category. It is definitely a jewel for any fundraiser, at any level. I like the practical, systematic approach to donor development and the useful links and templates that come with it... it will definitely be a resource that I would like to use in best practice sessions that I regularly have with my team, especially those elements of the development process where we lack experience, i.e. *theory of change*, *log frames*, *success equation*, to name a few.

The systems thinking approach should be a standard in fundraising entities – its makes for a focussed and disciplined workflow. The many illustrations concretise the concepts and the templates are invaluable worksheets – be it for *letters of enquiry*, *proposals*, *propositions*, *forecasting* or *cashflow* simulations. The templates are extremely useful, so too are the sections on *progress dashboards*, *performance development* (not performance management) and workload.

The seven (7) parts of the book provide a very clear, holistic overview of the elements that are critical in ensuring the success of any donor development office, succinct, to the point, thus making the tool very user friendly.

**David Marupen**, Director: Major Gifts and International Engagement  
Development and Alumni Relations, University of Stellenbosch

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### **This book is really great!**

There's a ton of information and knowledge contained and I have nothing but praise and positive comments. It is very comprehensive and practical. One of my colleagues has said it should be a standard requirement in development units at our universities. Thank you for this great contribution to the field!

**Zwakele Ngubane**, Director: Advancement and Alumni Relations,  
Durban University of Technology

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The guide is comprehensive...it's great to see a variety of frameworks like the *Theory of Change* and *Impact Planning* templates included to offer a well-rounded approach. The sections on *Finding Donors* are very practical and I particularly appreciate the questions to qualify donors - it is a great resource for hands-on application.

The section on *determining value propositions* is also a valuable tool and one I plan to incorporate into our team discussions. Similarly, the suggestion to use internal reviewer panels that mimic funder panels is also useful. The *Write tight*, *Be donor-centred* sections, and the points pertaining to *Capital Campaigns* are crucial and practical.

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**NON-FICTION**

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