

IKI Small Grant Training Series on Fundraising

Introduction webinar 2

01.10.2024

Supported by:



Federal Ministry
for Economic Affairs
and Climate Action

Federal Foreign Office



IKI Small Grants is carried out by GIZ on behalf of the German Federal Ministries BMWK, AA and BMUV within the International Climate Initiative IKI.

on the basis of a decision
by the German Bundestag



Objective of the introductory webinar 2

WORKSHOP OBJECTIVE

Participants will learn about different donor structures and gain insight into upcoming sessions. The webinar explores the fundraising landscape, emphasizing its role in organizational sustainability and introducing various donor types. Participants will leave with a clear understanding of how the training series can boost their fundraising capabilities and which sessions will best align with their goals.

LEARNING OBJECTIVES

- Reflect on key takeaways from the previous session, including common challenges in fundraising.
- Identify the key components of a successful fundraising strategy and understand the roles and responsibilities in its development and implementation.
- Gain insights into donor motivations and expectations, as well as best practices and common pitfalls in fundraising efforts.
- Recognize the importance of internal knowledge management for fundraising and explore tools for enhancing institutional fundraising capacity.



Key takeaway from webinar 1

Capacity and Operational Challenges

Limited fundraising skills and proposal writing capacity, alongside a need for training and reliable data for impact measurement.

Strategic and Structural Challenges

No clear funding strategy, difficult to identify funding opportunity, communication.

External Funding and Environmental Challenges

Restricted funding opportunities, short-term funding sources, competition with other organizations, and external issues.

Key takeaway from webinar 1



Capacity and Operational Solutions

- Creating dedicated fundraising committees
- Arranging learning sessions with experienced partners

Strategic and Structural Solutions

- Forming cooperations & partnerships.
- Aligning with donors who share similar goals:
- Framing narratives in exciting ways: Developing compelling stories.

External Funding Solutions

- Seeking recommendations from current or previous donors



Homework Discussion & Reflection



Key components of a successful strategy





Key components of a successful strategy

1. Clear Vision and Purpose: Define your NGO's mission and long-term goal

Example: "Restore 50 hectares of degraded coral reefs in our region by 2025, supporting local biodiversity and climate resilience"

2. Market Analysis: Identify funding opportunities for climate and biodiversity projects

Example: "Research government initiatives or global funds for climate action (e.g., the Green Climate Fund or local environmental grants)"

3. Competitive Analysis: Understand similar organizations and what makes your NGO stand out

Example: "Differentiate by focusing on community-led conservation, while others may focus on larger-scale policy work"

4. Goals and Objectives: Set measurable, actionable goals

Example: "Secure \$30,000 in grant funding within 6 months to plant 5,000 coral"

5. Marketing Plan: Outline how you will communicate with donors

Example: "Use media to share community success stories of restored habitats and increased biodiversity"



Key components of a successful strategy

6. Operational Plan: Detail how funds will be used

Example: "\$15,000 for coral planting, \$5,000 for community training, and \$10,000 for monitoring biodiversity improvements"

7. Financial Plan: Develop a clear, transparent budget

Example: "Break down costs to show funders exactly how each dollar will contribute to conservation efforts"

8. Implementation: Organize and track the execution of the plan

Example: "Ensure planting of 5,000 coral is completed by the start of the rainy season, with ongoing monitoring by volunteers"

9. Evaluation and Adjustment: Regularly assess progress and adapt as needed

Example: "If local engagement in coral planting is low, adjust by collaborating with schools or local cooperatives to boost participation"

Donor motivations and expectation



Motivations:

IMPACT

Donors want to support initiatives that align with their values and demonstrate meaningful outcomes.

PARTNERSHIP

Many donors seek collaborative relationships where they can be involved beyond providing financial support.

INNOVATION

Funders may prioritize novel approaches or solutions to problems that show potential for scalability.

Expectations:

TRANSPARENCY

Clear reporting on how funds are used.

RESULTS

Measurable impact and alignment with agreed-upon goals.

ACCOUNTABILITY

Compliance with grant terms, financial regulations, and timelines.



Who should be involved in fundraising

Fundraising Is Everyone's Role!

Establishing successful fundraising activities takes time and requires commitment from the whole organisation

Who is responsible for fundraising in your organisation?



Who should be involved in fundraising

Team Fundraising Approaches

1. Board-Driven Fundraising

- **Responsibility:** Board of Directors leads fundraising efforts.
- **Example:** A 5-member board of a small biodiversity NGO organizes a "Reforest Our Future" event, makes direct donor appeals for tree planting, and assists with grant applications. The Executive Director focuses on overseeing conservation programs.

2. Staff-Led Fundraising

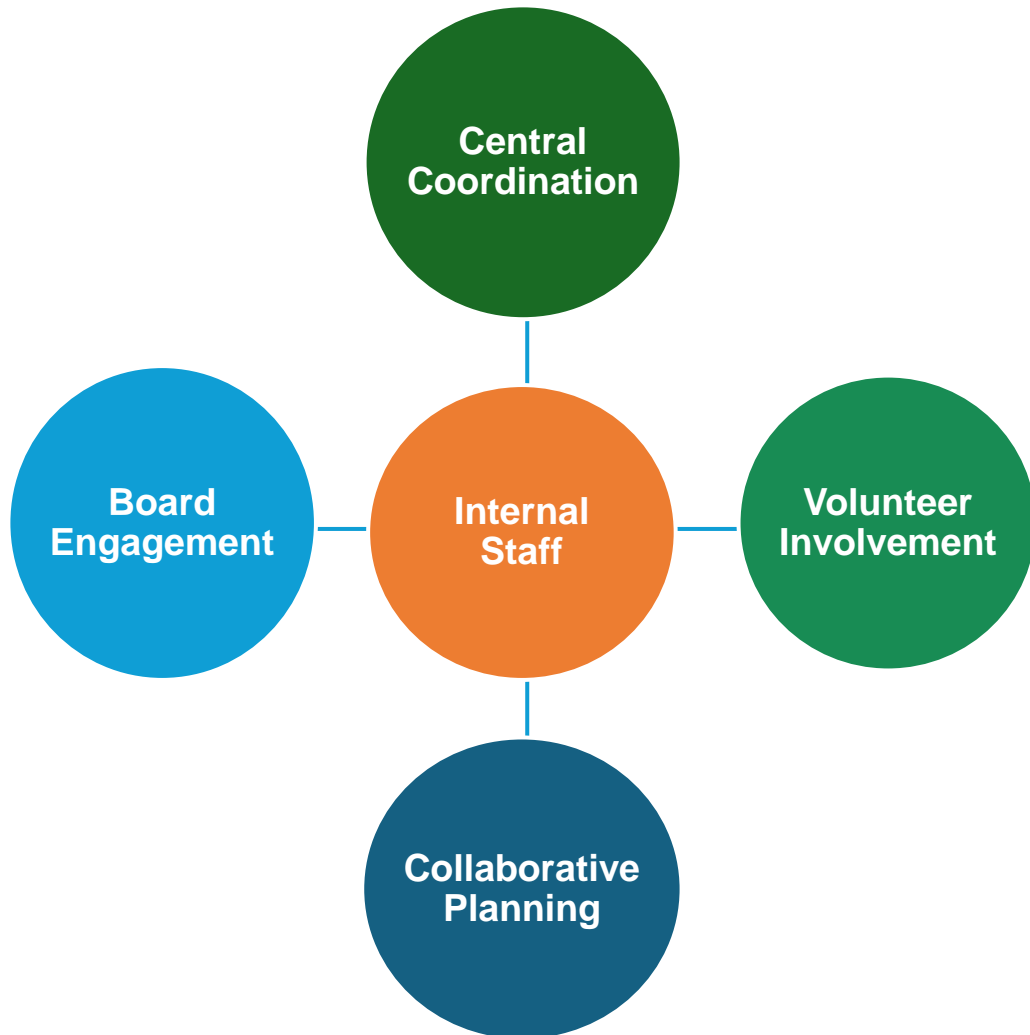
- **Responsibility:** A dedicated staff member (e.g., Development Director) leads all fundraising activities.
- **Example:** A small climate action NGO hires a part-time fundraising manager to handle grant writing for habitat restoration projects, manage donor relationships, and run crowdfunding campaigns, with the board offering strategic guidance.

3. Collaborative Approach

- **Responsibility:** Board, staff, and volunteers work together on fundraising.
- **Example:** An environmental advocacy group with a part-time development coordinator. Committees are formed for specific initiatives—board treasurer for major donors, program manager for community fundraising events.

Each approach leverages different resources (board, staff, or both) depending on the organization's size, mission, and capacity.

Who should be involved in fundraising



Central Coordination :Designate a fundraising coordinator (staff member).Responsible for overall strategy, coordination, and tracking progress

Board Engagement: Set clear fundraising expectations for board members, Utilize board members' networks and skills strategically.

Staff Integration: Integrate fundraising responsibilities into relevant staff roles.Provide training and support for staff fundraising activities

Volunteer Involvement: Offer various ways for volunteers to contribute based on skills and time availability

Collaborative Planning

- Annual fundraising planning session involving board, staff, and key volunteers
- Regular review and adjustment of strategies



The hybrid fundraising model

The Hybrid Fundraising Model unfolds across four key stages, each involving the board, staff, and volunteers in varying capacities.

Planning Stage

- **Staff Coordinator:** Facilitates meetings, drafts plans
- **Board:** Sets goals, provides strategic input
- **Internal Staff:** Offer program insights, identify funding needs
- **Volunteers:** Provide community perspectives, grassroots ideas

Preparation Stage

- **Staff Coordinator:** Develops materials, establishes systems
- **Board:** Refines materials, prepares networks
- **Internal Staff:** Gather program data, prepare for donor interactions
- **Volunteers:** Receive training, form initiative committees

Implementation Stage

- **Staff Coordinator:** Manages activities, oversees communications
- **Board:** Engages in major donor outreach, hosts events
- **Internal Staff:** Integrate fundraising into programs, assist with grants
- **Volunteers:** Execute community events, lead campaigns

Follow-up Stage

- **Staff Coordinator:** Oversees donor stewardship, manages reporting
- **Board:** Engages in donor relations, reviews outcomes
- **Internal Staff:** Provide program updates, impact reports
- **Volunteers:** Assist with donor acknowledgment, feedback collection



Do's and Don'ts In Fundraising

Do's:

- **Build Relationships:** Cultivate long-term relationships with donors by understanding their interests and maintaining regular communication.
- **Tailor Communication:** Personalize your proposals to match the specific donor's mission and preferences.
- **Follow Up:** After submitting proposals, follow up respectfully with updates or queries.
- **Report Transparently:** Provide detailed, accurate reports on how funds are being used and the project's progress.

Don'ts:

- **Don't Rely on One Donor:** Diversify your funding sources to reduce reliance on a single donor.
- **Don't Overpromise:** Set realistic expectations on what can be achieved with the funds.
- **Don't Neglect Reporting:** Failure to provide timely reports may damage your relationship with the donor.
- **Don't Ignore Rejection:** Use feedback from unsuccessful applications to improve future proposals.



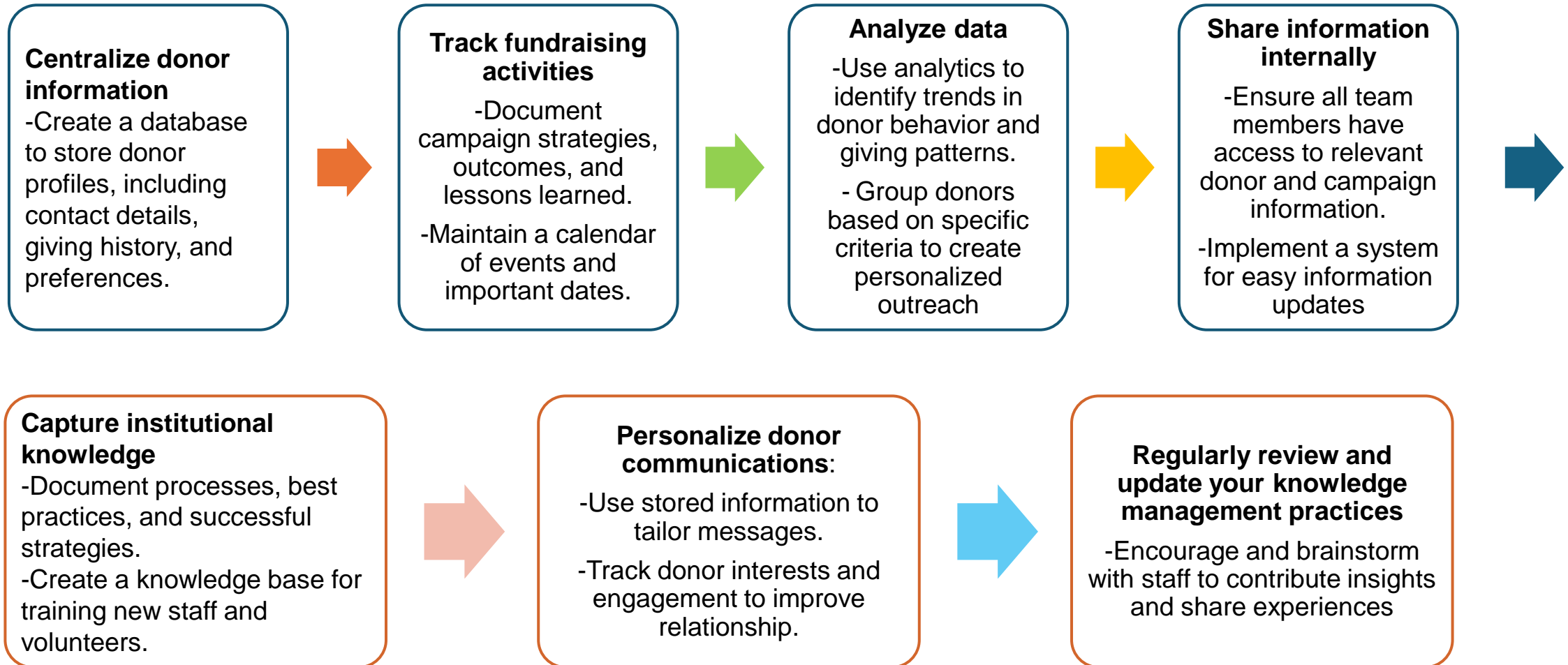
The Importance of knowledge management

**KNOWLEDGE IS POWER, AND LETTING IT
WALK OUT THE DOOR IS NOT ONLY A LOSS,
BUT ALSO A FAILURE IN LEADERSHIP**

capturing everyone's knowledge before any big changes happened, all critical information needed to be documented.



Leveraging knowledge management





Knowledge-driven donor engagement

Demonstrate the value of your work

Demonstrate the value of your work and build trust with donors and other stakeholders. sharing success stories, data and metrics about your impact, and making your annual reports and other materials easily accessible

Engage with your stakeholders

Using social media and other online platforms to share updates and information about your work, conducting surveys and gather feedback, hosting events and other opportunities for stakeholders to get involved.

Collaborate with partners and donors

sharing knowledge and resources, you can more effectively coordinate your efforts and leverage the expertise and resources of others to drive greater impact

Tailor your fundraising efforts

Using data and analytics to better understand your donor and developing targeted fundraising campaigns.

Knowledge tools for fundraising



Free online Courses: Platforms like [Atingi](#), [Grantili](#) offer specialized courses on fundraising strategies and proposal writing.



Search Engines and Databases: Tools like [Portal 365](#), [Environmental Grants](#), [Terra Viva Grants Directory](#), can help identify potential donors and funding opportunities.



Fundraising platform: Solutions like [Pledge](#), [Give Lively](#), assist in tracking and managing donor relationships, also establish free donating platform.

Project and documentation management platform

They provide features like knowledge bases, real-time editing, task management, and integration with other platforms. By centralizing information and workflows, these tools improve team communication, streamline processes, and enhance productivity.

ClickUp

<https://clickup.com/>

Zendesk

<https://www.zendesk.com/>

Document360

<https://document360.com/>

Guru

<https://www.getguru.com/>



Upcoming training series

Introduction webinar 1

Introduction webinar 2

Accessing Public Sector Funding

Funding the Future: Inside Public Donor Operations

Time : 15th Oct, 9:00 am-11:00am CET/4pm-6pm CET

Navigating the Private Sector: Mastering Private Sector Engagement: From Mission Models to Pitch Decks

Time : 29th Oct, 9:00am-11:00am CET/4pm-6pm CET

Digital Campaigning

Time : 12th Nov, 9:00am-11:00am CET/4pm-6pm CET

Meeting with donor: After each in-depth training topic, we have arranged a meeting with donors to explain their funding programs.

Small group consultant : We have scheduled group consultations for organizations with current needs. The selected organizations will be given an assignment to complete before the meeting can be scheduled.

Thank you for your attention !

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