Resource Development Training

Module 4: Donor scoping and donor engagement

Part 1: General principles →

1.1 Spotting funding opportunities that include older people

1.2 Principles of donor scoping and engagement

At the end of Part 1, you'll be able to:

- Understand how to look for opportunities for funding projects that focus on older people
- Describe some general principles of donor scoping and engagement

Part 2: Reputation management →

2.1 Building credibility

2.2 Online reputation management

2.3 Social media

At the end of Part 2, you'll be able to:

- Describe some methods of establishing your credibility among donors
- Use tools for donor mapping and donor prioritising
- Be aware of fundraising scams and how to avoid them

Part 3: Donor scoping →

3.1 Researching donors

3.2 Donor mapping

3.3 Deciding which donors to approach

3.4 Donor due diligence and how to avoid scams

Annex A. Online resources for funding opportunities

Annex B. Template for donor mapping

Annex C. Boston Matrix template

At the end of Part 3, you'll be able to:

- Describe and use tools for the planning of donor engagement

Part 4: Donor engagement →

4.1 Planning for donor engagement

4.2 Tools and methods of donor engagement

4.3 Donor engagement after rejection

4.4 Pipeline management

Annex D. Capacity statement template

Annex E. Templates for donor engagement plan

At the end of Part 4, you'll be able to:

- Understand different tools and methods that can be used for donor engagement
- Describe and use tools for pipeline management

Part 5: Donor retention →

5.1 Accountability to donors

5.2 Reporting

At the end of Part 5, you'll be able to:

- Understand the steps to take to retain donors
- Understand the key components of good reporting for donor accountability

Samir Bol/HelpAge International

Part 1. General principles

HelpAge International

Part 1. General principles

This is the fourth Module of the training course on Resource Development and focuses on the crucial area of your organisation's relationship with donors. It is crucial because if a Non-Government Organisation (NGO) gets this wrong then all the other good work may go to waste. The idea of 'friend-raising' and treating the donors as partners rather than simply as cash machines is the key here – everything else flows from this basic principle.

The Module will look at the principles of donor scoping and suggests some tools to support you in donor mapping and donor engagement. It ends with a special focus on 'donor retention' which emphasises that once a donor has started funding your organisation, your organisation should do everything they can to keep them on board so that they will continue to support your organisation and its mission.

1.1 Spotting funding opportunities that include older people

There are not many (if any?) donors in the world that have older people's rights as a key part of their strategy and therefore it is rare to see 'ageing issues' or 'older people' as a focus of a donor's call for proposals. But that does not mean you cannot apply for opportunities just because 'older people' are not mentioned explicitly. There are two ways of responding to this situation:

a. Always read donor calls for proposals with 'older people' in mind and think about how your project idea can be included. If a donor does not explicitly outline a specific target group such as, children under five, then we can always consider older people under the call for proposals. Some examples are given in Figure 1 *(next page →)*.

b. Influence donors as part of your marketing, communications, and advocacy strategies. Make a plan to put the rights of older people more explicitly on the donor's agenda. This can be done through both direct and indirect influencing to the donor and other relevant stakeholders.

'Friend-raising' means building a relationship with your donor and treating them as a business partner, not simply a source of funding.

Figure 1: How to find opportunities for projects that might support older people

Objective in donor guidelines	How older people could be included
To promote a meaningful and structured participation of Civil Society Organisations (CSOs), but in particular women, youth and marginalised groups in governance at all levels, and in development activities.	In this objective, 'older people' are not mentioned explicitly, but 'women' presumably includes 'older women' and 'marginalised groups' could include older people. 'Older women' are doubly disadvantaged through age and sex discrimination and may live with a disability also. In your proposal you can refer to the life-course approach being taken to understand these differences in characteristics, and you will need to demonstrate to the donor that older women are as disadvantaged as other women and/or that older people are marginalised. In both cases you will need to provide evidence e.g. health data, livelihood data, education data, gender-based violence (GBV) data.
Stimulation of policy innovation and improved responsiveness of socio-economic policies to the needs of local communities.	The 'needs of local communities' includes the needs of older people. So a powerful case could be made for older peoples' needs and how policy innovation and/or implementation can further the cause of older people's rights. It can also include work undertaken with and through Older Peoples Associations (OPAs) that addresses this.
Projects promoting evidenced-based policy contributions in sectors where there is demonstrated receptivity from government counterparts.	A proposal would need to show that the government is already supportive of, or engaged in, a policy dialogue concerning older people.
Projects supporting other forms of civic engagement by civil society.	This might be engagement by your organisation or perhaps by community-based organisations such as OPAs.
Priority will be given to proposals building capacities with specific emphasis on: • Promoting women's economic and social rights and empowerment. • Enhancing women's voice and leadership, and participation in social and economic life. • Promoting gender equality so as to improve access to resources and guarantee equal rights.	In this example there is a choice of how to include older people: • Make a case for promoting older women's economic and social rights. • Demonstrate the need or importance of including older women specifically. This does not need to be exclusive – you can still argue for all women to have enhanced voice and leadership but that it should include older women. • Make the case for greater gender equality throughout the life course – and emphasise that life for women does not end at 49 (as many data-sets do) but continues into older age. Provide evidence of how older women are impacted by inequality and unequal rights.
Priority areas: • Maternal, new-born and child health • Nutrition • Sexual and reproductive health and rights • Drug use and its health consequences • Health in prisons • Tuberculosis and multi-drug resistant TB • Malaria • Health systems strengthening Partners are welcome to propose activities related to thematic areas not mentioned above, when the inclusion of these activities would increase the reach and impact of the program. However, these activities should be included as part of an overall program focused on the core health areas and should be aligned with the National Health Plan.	At first glance this call may seem unsuitable for a programme focussing on older people BUT there are several possible entry points, all of which would need to be accompanied by compelling narrative backed with evidence: • Older people and nutrition • Older peoples' sexual health rights • Drug use among older people • Older peoples' health in prison • TB and malaria (this would only be applicable if older people were included as part of a broader group) • Health system strengthening (especially, to ensure that the needs of older people were included) The last paragraph also gives a little window of opportunity to focus on core health areas and your country's National Health Plan, but how big an opportunity would depend on your National Health Plan.

What the examples in Figure 1 (*previous page* →) show, is that older people are not mentioned in the donor guidelines or objectives, but they **DO fit provided that you have evidence that can support your case**.

In summary:

- Civil society themes could include strengthening your organisation, OPAs, networks, platforms etc.

- Health themes could include older people – especially with respect to non-communicable diseases (NCDs), health service access and health systems.

- Education themes could include older people in lifelong learning, literacy etc.

- Themes on gender should always consider gender inequality and inequity among older people.

- Humanitarian projects should always include the needs of older people and responses be more age, gender and disability inclusive.

> **Almost any theme can be inclusive of older people IF you present the evidence to support your case.**

1.2 Principles of donor scoping and engagement

a. FRIEND-making. Asking a donor for funding can be both difficult and stressful. Approaching a new donor can feel very impersonal; not knowing who will receive your message. Even after making contact, maintaining that contact takes a lot of work. To successfully build and maintain relationships with donors, it is very important to take an interest in their work, what they are looking for and interested in. Do not overthink networking and instead focus on having a good conversation with that person about the important work your organisation does and the impact it has.
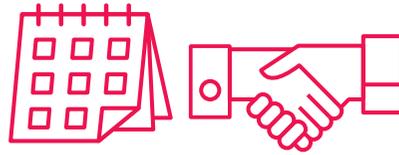
Forge long-term relationships
with your donor. Be pro-active and keep in touch. If you've not engaged with them for a long time, find a reason to contact them.

b. Long-term relationships. Remember that the relationship needs to be managed throughout a long journey, so be pro-active! If you find that you have not engaged with a potential donor for a long time, find a reason to contact them e.g., send them your annual report, or research report. **Your organisation's donor engagement plan is crucial in setting out a clear way to engage with the donor in the long-term**.

c. Understanding donor motivation. Understanding what motivates each donor and what they want to accomplish is key in structuring your approach. Donors often have their own goals and you need to make sure your organisation's goals and the goals of the donor align or overlap. Donors are most often driven by making a change or improving the lives of the beneficiaries. Once the donor funds your organisation, use the partnership as a chance to demonstrate that their support and your team were able to bring about the desired results. This can result in a desire to give follow-up grants.

d. Donors are busy. Donors sometimes have hundreds or even thousands of people asking for support with limited time. Therefore, try to make it easy for donors to work with you and your organisation! Be patient, do not waste their time, keep emails concise, have all necessary information ready and easily accessible by the donor. Do not ask donors questions or for information that could easily be found online. **Building rapport is really great, but first try and identify if the other party has the time and is interested**.

e. Donors have their own way of doing things. Donors typically manage multiple grants at once and so like to have some consistency in the way applications are submitted, how accounts are kept, how monitoring and evaluation is run etc. Try to work within the donor's parameters as much as possible.

f. Donors have worries of their own. Donors may have to report to their government, tax authority, accountants, board members, the public etc. and are expected to be transparent, show improvement and maintain a good public image. As a result, many donors are very risk-averse, maintain high due diligence requirements and set high reporting standards. While this can make donors bureaucratic and slow at times, it is important to understand why these steps are in place. The partnership should be mutually beneficial, so think of ways you can provide information or support back to donors.

g. Donors can give more than just money. Funding is only a part of what good donors can offer you. Many donors are field experts and can advise you on current trends as well as on the technical aspects of running a project. Donors are often well-connected and may be able to recommend other potential partner NGOs, consultants, and sometimes even other donors. When investing in long-term relationships keeping donors updated with the work you are doing is important to build trust. Relationships should be mutually beneficial, so think of ways you can provide information or support back to donors.

h. Donors cannot read your mind. While many donors are field experts, you should never assume all donors understand the exact context your NGO is operating in. For applications, it always helps to give some relevant background information. Do not just explain the project, but why the project is important. Try to avoid using acronyms or jargon unless you know the readers and their level of experience.

i. Donors like to be involved and appreciated. Thank donors and make them feel good about funding the organisation; write thank-you letters, send updates, and even invite them to the field or visit the country office. Donors will appreciate the invitation. While many will decline or have no budget to travel, some will say yes and that might be the start of a stronger funding relationship. It is also important to acknowledge the donor in all publicity including websites, publications, public meetings etc.

j. Donors are partners. Large donors typically focus on a specific problem they want to solve. And without NGOs, many donors cannot achieve their mission! When you discuss funding with a donor the initial topic of conversation should be on how to help them achieve their goal. You are not there to beg for funding, but to offer a solution as a partner. HelpAge network members often have built strong and trusted relationships with target groups such as older people and people with disabilities that many donors want to access. Showcase how your organisation can be a partner to help donors achieve their goals.

k. Donors may accept unsolicited proposals. When donors indicate they do not want to receive unsolicited proposals or that they only fund pre-selected NGOs, this does not mean you cannot get funding. But it means that you have to find another way to build a connection and interest in your work. The best way to do this is to contact the donor, asking for an opportunity to discuss their goals and to present ways in which your NGO can help achieve those goals. The more senior the person you can meet, the better. If they are interested in a discussion, a solicitation for a proposal may sometimes follow. The other NGOs they currently fund had to start somewhere as well!

l. Assess risk. Some donors are willing to fund innovative and untested programs, whilst others are more comfortable picking the tried and tested methods just to ensure there are fewer risks and no surprises. Review the donor guidelines and try and assess the degree to which that donor will welcome relatively innovative and untried methods.

Part 2. Reputation management

Jonas Wresch/HelpAge International

HelpAge
International

Part 2. Reputation management

2.1 Building credibility

Reputations can take years to build but can be damaged very quickly.

> Before even thinking about applying for funding from a donor, think about how the donor may perceive your organisation. What reputation does your organisation have in its field of work?

Credibility and reputation are heavily influenced by the positive impact of your work, the opinions of your beneficiaries on the work you do, by whether and how, you engage in policy dialogue, and how well people perceive the organisation's work. To ensure that your organisation is viewed well, organisations must have a good communications strategy, or at the very least a way of engaging with the media so that they portray your organisation's work in a positive light. When you meet potential donors, you can ask if they are aware of the work of the organisation and if they have any feedback on the information and resources available. That question is a good conversation opener and also a useful indicator of how well known the organisation is.

Section 2.2 → focuses on building an online reputation, which is important. However, there are key steps that can be taken to build an organisation's reputation in other ways:

a. Develop ambassadors. Remember that all staff (current and previous), directors, and volunteers are ambassadors for the organisation. Their words are important, so make it clear who is allowed (and who is not allowed) to speak to the media on issues relating to the organisation. Project 'beneficiaries', older people and your partners may also be keen to be involved to support the organisation in different ways such as when they talk to different stakeholders or share their experiences of working with the organisation.

b. Focus on messaging. It is a good idea to develop simple messages for staff, volunteers and directors to say when they are asked 'what does your organisation do'? They should all know the organisation's vision and mission statement off by heart, so if they get stuck for something to say, at least they will be 'on-message' if they are ever put on the spot. The important thing is to encourage those stakeholders to speak positively about your organisation at all times.

c. Collate references. When applying to a donor for the first time, apart from looking at the organisation's website and/or social media pages, they may ask for references. Have organisations or individuals, including current and previous donors, on hand to provide you with references.

d. Have a clear communications strategy. This should focus on getting 'good news stories' into the public domain. But there should also be a strategy for managing negative/bad news, so that damage is limited. Therefore, having a clear strategy to engage the media in positive ways is important.

e. Plan policy engagement. Engaging in policy dialogue can be boosted by the organisation's online presence but, even without it, if the organisation is positively engaging in policy dialogue with the government and other agencies, then its reputation will be boosted as very often donors will also be aware of these discussions.

2.2 Online reputation management[1]

With the internet becoming an integral part of everyone's lives, online perception and reputation have taken centre stage for any business or organisation. In this context, many studies have been conducted to enable us to understand the trends, interests, and the needs of customers. This data is being used by organisations to implement practices in line with what people want and what can get organisations more customer attention and recognition. In the NGO world too, the internet is transforming the landscape and non-profit organisations must work in this direction along with the whole ecosystem, to ensure they build and maintain their online presence and reputation.

To understand why NGOs should build and maintain a positive online reputation, it is important to understand how donors search NGOs online. There are millions of NGOs worldwide and the competition for a share in the funding pie is getting tougher day by day.

Who are the target audiences?

a. Institutional donors/funding organisations. Whether it is a concept note that has been submitted or a proposal, most institutional donors and funding organisations look up applicants on the internet. The purpose is to ensure credibility, professional and legal status of the applicant organisation, and also to gain a general view of the organisation.

b. Individual donors. With higher disposable household incomes in both developed and developing countries, there has been a spike in giving- owing to the growing propensity and willingness to give, and recent trends have seen more and more people 'giving' online. For those individual donors, the internet is the place to go to find out about organisations doing good work in the sector. But many more avenues and individuals are yet untapped because they do not know of trustworthy organisations to support.

c. Enablers. These organisations enable NGOs to do what they do best, work towards achieving their mission. They also become the audience for your organisation's online content. Your donors and even funding organisations may seek inputs and vetting from such organisations before funding the NGO. An example is the CHS Alliance which advises, guides and trains organisations and manages the accreditation process for the Core Humanitarian Standards for NGOs.

d. Employees and prospective applicants. Every NGO strives to have and retain the best of human resources. Most applicants look for online reviews and reputation of an organisation before applying for a role. So, maintaining a good online reputation can even help you in finding the best candidates for your teams.

What can your organisation do to build a good online reputation?

a. Website. A website alone does not build credibility, but it can raise the interest of a donor and leave them wanting to know more about your work. Your website is where your donors will find details about your organisation first. Make it easy for them to find what they are looking for.

Key tips:

- Make your website mobile-friendly as most donors are using their mobile phones to look up websites

- Make the website interactive and engaging

- Respond to queries raised via the website quickly

- Keep the language on the webpages light and easy for a non-specialist to understand. Always remember that the NGO world is all about storytelling. Engage the audience with the stories from the field, stories in the voices of beneficiaries themselves – what issues do older people in your community face, what would help resolve these issues and what impact your organisation's work is having. Adding blogs, videos, pictures will make your work and web presence unique to the cause and stand out from the rest.

b. Social media. People are increasingly engaging with organisations of their interest on social media. Establish your organisation's presence on social media platforms like Facebook, Twitter, and other popular platforms in your country/region. What you publish on social media portals must engage with your target audience, but what is equally important is what others say about the organisation and what action they take in sharing information and resources. Social media is the easiest way to reach many people, so it makes sense to invest in building a social media profile. There is more on social media in the next section *(Section 2.3 →*).

c. Press and online reports. What others say does matter! Donors and even the general public go to third-party and authentic portals for information about NGOs. Some examples can be press articles and platforms, online journals and reports through search engines like Google. You can try proactively to enhance your position on the search pages by ensuring your activity on these kinds of reports. It is also an advantage to have publications that will show up in a Google search. Try Googling the name of your organisation and see what comes up – do the top references help to give you a positive reputation?

d. Legal and other compliances. Many funding organisations, corporate foundations, government bodies, bilateral agencies etc. can accept your status as a non-profit or non-government status for their processes, only if you comply with certain standards like getting registered on certain national compliance portals. For example, in India such a portal is called NGO Darpan. This portal provides the registered NGOs with a Unique ID, which is mandatory to apply for grants under various schemes of ministries/departments/government bodies. This varies country to country, and organisations should check in their own jurisdictions.

e. Fundraising and vetting platforms. Platforms like Global Giving, JustGiving, Ketto and many others are becoming increasingly popular for online giving. It is because of the ease of giving they offer to the donors, their processes like vetting and verifying, monitoring and due diligence that is being done by these platforms themselves. Donors love this no-hassle arrangement where they can make gifts to the organisations/causes of their choice easily. Presence on these platforms is also driving the online perception and image of many NGOs.

f. Keep it current! Once your online presence is established, keeping it up to date and maintaining it is really important. If someone visits your organisation's website frequently and always sees the same content, they will soon think you are not doing anything new. Keep adding new content!

g. Fact check before you publish. Whatever your choice of media it is important to check facts before the content is published. Make sure that you use reputable sources of data and quote the source wherever possible.

h. Assign responsibility. Engaging online needs to be the responsibility of at least one person in the organisation. If nobody is explicitly responsible for online planning and content, it will not have any impact. It is important for senior staff to be involved in developing a plan, as it helps ensure everyone in the organisation understands and contributes.

How much your organisation can do online is likely to be a reflection of your resources – though bear in mind that an enthusiastic volunteer may be able to maintain your Facebook page or Twitter account if your organisation does not have paid staff to do so.
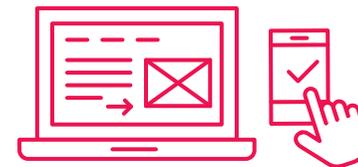
Websites matter
so make sure yours communicates your cause clearly and is interactive, engaging, and mobile-friendly.

2.3 Social media[2]

Facebook

Facebook is an important platform for many organisations and can be an effective way to stay in touch with supporters, to build a base of people committed to your mission, to spread the message about your organisation, and even reach beneficiaries with program interventions. A Facebook strategy should be a core part of your communication efforts and needs to complement other communication tools.

Strategise: It is important to plan how you use Facebook, thinking about who the organisation wants to engage with on its page, the types of conversations it is important to ignite amongst supporters, and how to open up new opportunities for the organisation. Facebook is an interactive platform that enables engagement with people in new ways; it is an opportunity to hear what others have to say about your organisation's work and offer a meaningful way to participate. For success on Facebook, as on other communication channels, the key is to understand the audience and this should be an important part of strategic communication planning. Once there is a good understanding of who the target audience is, the reach, the tone and message should follow.

Engage in professional branding: Investment in good, clear images and logos for the cover page and profile picture promotes a more professional image of the organisation. It is important to have clear messages, with high resolution images on the organisation's page. The tone taken on social media platforms is important as it is a representation of the organisation. Keep a conversational, yet professional tone to make the viewer feel welcome, while still looking professional.

Boosting: Consider using tools for marketing/boosting. Within Facebook there is a paid for service that can boost a page with new groups of people, to get more people to view it. You can also specify to Facebook the audience that you want to reach. This could be used for a planned campaign to increase the number of people viewing a page and the cost can be included in the budget.
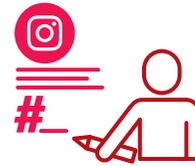
Instagram

While Facebook clearly has more user profiles, Instagram, with one billion users, is a strong storytelling platform with a unique and engaged audience. Instagram is an effective tool to share your vision, mission, impact, appeal for donations, call for volunteers, stay connected with donors and raise awareness through photos, videos and Instagram stories or live streamed events.

A business profile: Instagram for business is incredibly powerful in helping you understand and interact with your target audience. It also reflects a professionally run organisation, and a complete profile can help users contact you directly via Direct Messages, phone, email etc.

What's in a hashtag? Any word on your Instagram caption or comment if preceded with a hash sign (e.g., #word) becomes a searchable and indexed entity. So, when you click on or search for #word on Instagram the search results will show all posts where it has been mentioned on a single page. #olderpeople #rights #equalageing

Instagram story: This is a very widely used feature on the platform. Story is a vertical format picture or video that disappears after 24 hours of being uploaded. They are fun and there are lots of options to experiment with, each soliciting a different response. With an older person's consent, you may look at engaging beneficiaries to feature in your organisation's Instagram stories.

Instagram Live: Live helps an organisation connect with its followers in real time. As most communication is pre-planned and thought through, Instagram Live gives this platform a spark of spontaneity. Followers get to interact with a real person on the other side of the screen. For example, your organisation could look at holding an Instagram Live where you discuss a policy or service which has negative impact on older people in the community.

Twitter³

Many NGOs now have a Twitter account and use it effectively to boost their credibility in the public domain, including with donors. The use of 280 characters can be enormously powerful if used in the right way.

Research shows that Twitter users raise much more funds online than those NGOs who do not use Twitter. Apart from fundraising, it can also result in increased awareness about a cause, more active volunteer engagement, brand-building, and much more.

Some first steps to get started with Twitter and make the best use of this platform are:

- **Define who you are:** It is important to customise your account. The account should define who the organisation is, what it does and how it does it. It should include links to the website, social media platforms and blogs, plus a brief description of the organisation.

- **Start following:** Start following people or organisations linked to your own cause. Do not wait for others to start following you. About half the people you follow will follow you in turn, so 'follow' a lot of relevant people and organisations. Observe and analyse what they post and how frequently. Start sharing, 're-tweeting' their newsfeed or 'tweets'.

- **Start creating interesting content:** Once familiarised with the basics, start posting interesting and 'retweetable' content. It can be anything, pictures from the field, pictures of staff, updates about your upcoming campaign, or a recent event or the larger picture, any latest news about the sector the organisation works in, policy debates, advocacy, and campaign content etc.

- **Create a calendar:** To make life easier and to ensure relevant content reaches the target audience when wanted, a calendar for the Twitter handle can be useful. Decide what will be posted on each day of the week with which links and photos, such as picture from the field on Monday, a news update on Tuesday, a link to a new report on Thursday etc.

- **Use #hashtags smartly:** Hashtags link your tweet to a stream of tweets or content, and it is a powerful approach to get more attention. But use them smartly, do not overuse them or the tweet will end up looking vague, messy, and difficult to read.

- **Give links in your tweets, wherever possible:** To lead the reader to more information or another page, use links wherever possible. You may include links to online resources, your websites, blogs, donation options, etc.

- **Thank donors and other partners:** They can then easily retweet, and it might increase your followers.

- **Present data in interesting ways:** Using infographics, charts, graphics, pictures, and other interesting ways to present your data will increase the chances of readers retweeting your content. It will also make them read and explore more about the organisation, more so if appropriate web-links are provided.

- **Use Twitter analytics:** Twitter's analytics dashboard sums up all the information you need about how your account and tweets are performing. Using this feature, it is easier to understand what is working for your handle and you can use the lessons to improve.

- **Be creative:** Making your account and content stand out is important and will need a creative approach and innovative ideas. Observe what others are doing and take inspiration to add value for the organisation with the help of Twitter.

LinkedIn[4]

LinkedIn is also used by NGOs to boost their credibility and as part of their fundraising strategy. Some tips to use it effectively include:

1. Make it part of the big picture: If using LinkedIn to achieve specific goals and further your NGO's mission, then make sure that the LinkedIn strategy is an integrated part of the organisation's communications strategy. Understand how your organisation can best use LinkedIn to achieve your goals – increase the number of followers, the number of shares, number of people who support your organisation or take action on a campaign etc.? How will you know your LinkedIn strategy is working?

2. Make your profile stand out: Before starting with any activity on LinkedIn, make sure the Company Profile is complete.

- Add a 'profile picture': Aim for the profile picture to be your NGO logo (60 x 60 pixels). A logo on a white background will look better.

- Add a 'cover photo': Add an attention-grabbing high-resolution cover photo that will accurately represent the look and the feel of the organisation's brand. This could be a photograph of your staff members, your volunteers, your beneficiaries, or more.

- Develop a description: Make it concise and well-thought-out – describing your organisation's mission and opportunities to get involved.

3. Post regularly: By posting regularly, you are increasing the credibility of the organisation, keeping supporters and followers in the loop, establishing the organisation as a thought leader, interacting with others, and keeping your organisation in people's minds. These are just a few benefits. Examples of what can be posted include: job openings, new campaigns, testimonials, 'behind the scenes', reports, other organisations' content, press releases and upcoming events. The goal should be to maintain a presence without 'spamming' followers' newsfeeds.

It is also possible to share your fundraising and awareness campaigns on LinkedIn. By posting regular campaign updates and linking to relevant content, it increases the chances of receiving online donations:

- 74% increase in engagement by including a video in your company update

- 84% increase in engagement by including a link in your company update

- 147% increase in engagement by including an image in your company update

4. Create LinkedIn-specific content: Great content is essential to success on LinkedIn (as it is to success on any social network – in essence).

> *When marketing executives were asked where the top places to find relevant, high-quality content was, 91% said LinkedIn, while only 29% said Twitter and 27% said Facebook.*

5. Encourage people to link to your profile: Anyone affiliated with the organisation can link themselves to the profile. Employees can add your organisation to their experience section, and volunteers and board members can add the organisation to their own Volunteer Experience & Causes section. This will increase the chances of others finding the profile since the logo and name will be clearly visible on these personal profiles. It is possible to go through everyone who has affiliated themselves with the organisation. Under 'Careers'/'View all employees', you'll be able to see a list of everyone on LinkedIn who has listed the organisation as their current employer. It is advisable to remove any ex-employees who have not yet updated their LinkedIn profile, as well as people who are not employees but are claiming to work for you. Encourage staff members who do not have a LinkedIn profile up to set one up as this can further extend the reach.

6. Join LinkedIn groups: LinkedIn groups are a great way to position an organisation as a thought leader in a particular field of work. Before creating a new group, make sure there is not one already created under the same topic – to prevent many similar or competing groups existing. Starting a LinkedIn group is a great way to start a dialogue with supporters and friends of the organisation. In addition to creating a group, it is also very beneficial to participate in both local and international groups that relate directly to your NGO. Group topics can vary from development and fundraising ideas, NGO leadership, to marketing and finances for NGOs.

Social media coordination account

A final note on social media: consider using social media management tools that allows users to schedule and post updates to any page or profile for Facebook, Twitter, LinkedIn, Instagram, WordPress, and other platforms from one place. These are generally paid for online management tools, and many are available in the market (such as Hooteuite and ContentCal).

Jonas Wresch/Age International

Additional resources

Social media for non-profits:

https://blog.hootsuite.com/social-media-for-nonprofits/

Social media for non-profits: How to make an impact with little budget:

https://www.sendible.com/insights/social-media-for-nonprofits

Develop a social media strategy:

https://knowhow.ncvo.org.uk/how-to/how-to-develop-a-social-media-strategy-for-your-organisation

Fundraising and marketing for CSOs:

https://www.fhi360.org/sites/default/files/media/documents/Fundraising_and_Marketing_for_CSOs.pdf

Endnotes

1. Material is drawn from 'Funds for NGOs'

2. Material is drawn from 'Funds for NGOs'

3. Material is drawn from 'Funds for NGOs'

4. The information for this section is drawn mostly from https://donorbox.org/nonprofit-blog/linkedin-tips-for-nonprofits/

Quentin Bruno/HelpAge International

Part 3.
Donor scoping

HelpAge
International

Part 3. Donor scoping

In many ways it is difficult to separate the scoping of donors and engagement with donors, since engagement may form part of the scoping process. However, they are split in this Module so that in this Part 3 'scoping' focuses more on research, and in Part 4 'engagement' → will focus more on communication with the donor. There is however, considerable overlap between the two.

3.1 Researching donors

The chances are that if you have been working in a particular sector and country for a long time, you will already be aware of most active donors – but there is never any harm in doing fresh research. There is no short cut for this work – it involves a lot of time on websites and networking.

Here are some of the ways in which you can do a scoping exercise of the possible donors in your country:

- Check the websites and annual reports of International Non-Government Organisations (INGOs) and NGOs that are doing similar work to you in your country. Where does their funding come from? Many NGOs will list their donors on their website or annual report which are good places to start. You can usually find out which NGOs are working in your country by visiting the portal of the NGO Federation or equivalent e.g., NGO Darpan in India, or NGO Coordination Board in Kenya.

- Check databases and online directories. Some lists are free while others require payment or subscriptions. *Examples of online resources are included in Annex A →*. If there is an NGO Federation in your country, see what resources it has such as a donor database.

- Ask partners, colleagues, and current donors for suggestions.

Creating a long list of donors

Based on this research, draw up a long list of donors that you may want to approach, then go to their website and find out if they:

- Have funding available for NGOs. Very often NGOs will mistakenly send grant requests to other NGOs, businesses, or individuals that do not provide grants.

- Have an interest in your country and your programme area. Is there strategic alignment between the donor and your NGO?

- Are willing to fund NGOs of your size. Some donors prefer to only fund small NGOs, while others prefer to fund large INGOs. Check donor application guidelines and past giving history before applying.

- Have money to give when you need it. Many donors only release calls for proposals once a year, or otherwise have specific windows of funding opportunities. Do not send an application when it is clear the donor is not accepting them.

- Can fund for the period required. You should know whether the donor gives grants that last for a month, a year, or multiple years. For a first-time grant, shorter project timelines are more common.

A long list
of donors is a good starting point for the scoping process.

The ideal way of extending the research is to have a face-to-face meeting with the donor. However, it is often not possible or best to do this for many reasons:

- There are too many donors on your list to visit them all
- Some will not have an office in your country
- Donors are busy and may not be willing to meet you
- The timing may not be right. Think about a visit once you have a clear organisational strategy, and preferably something you can share with the donor e.g., your research report or a previous project impact evaluation. In your first visit to the donor, you should never ask for money but try and establish areas of common interest.

Have in mind that a meeting would be good, but plan strategically and be selective.

3.2 Donor mapping

Whilst researching you can begin to do a donor mapping exercise. Mapping your donors will help you to strategise and focus your time and energy by understanding the aspects which make some opportunities/donors a better fit for your requirements compared to others. **An Excel sheet or a Google sheet dashboard can be developed and maintained with brief information about each of the prospects. The first sheet can have this summarised version, and sheets can be added in the same file with more detailed information as the research proceeds.** Some of the key headings in a typical Donor Mapping Template are: donor prospect name, key focus themes, geographical presence, funding mechanisms, current partners/projects funded, typical budget etc.

An example of a Donor Mapping Template is included in Annex B →. The one shown is comprehensive but can be easily simplified.

3.3 Deciding which donors to approach

Having developed a Donor Mapping Template, the next step is to decide which donors to engage with and approach. In broad terms you can think of the potential partnership in terms of the factors in Figure 2 below:

Figure 2: Key factors in prioritising donor relationships

To analyse in more detail, two tools can be useful in making a decision:

a. Donor prioritisation matrix

Each donor is scored from 0–3 for each of the factors listed in Figure 3 below (other factors can be added depending on the NGO's aims). The ones with the highest total scores are prioritised for engagement. Figure 3 can be used to score the donors.

This exercise is best undertaken by a group of your staff, discussing each criteria one by one and reaching a consensus on whether to score 3, 2, 1, or 0. All potential donors can be analysed in this way, and those with the higher scores at the bottom of the matrix will give you a good guide as to which should be engaged with first.

Figure 3: Donor prioritisation matrix
Score on a scale of 3, 2, 1, 0 where 3 is the best fit for your organisation

Issue	Donor 1	Donor 2	Donor 3	Donor 4
Potential for technical cooperation				
Potential for policy engagement				
Potential for future growth				
Fit with your strategy and business plan				
Potential for charging overheads, and cost recovery				
Requirement for co-financing				
Length of potential contract				
Potential size of grants given				
History of funding in your country				
Volume of grants given per year				
Total Score				

b. Boston Matrix

The Boston Matrix is another tool which can be used to prioritise donors for engagement, as shown in Figure 4 below. This was created by the Boston Consulting Group (BCG) for businesses, but when adapted to the NGO world it categorises donors according to their potential and value. This will help prioritise donors in your engagement plan.

In this example of a Boston Matrix from HelpAge Tanzania you can see the four possible outcomes of the donor categorisation:

a. Low priority: have *low potential and low value*, therefore, not worth pursuing. Includes USAID, Foundation for Civil Society.

b. Question marks: have *high potential and low value*, therefore these would be considered on a case-by case basis as their value is quite low and a lot of time investment may not lead to big grants. But there may be good strategic reasons for engaging. Includes Irish Aid, EU etc.

c. Cash cows: have *low potential and high value* therefore there is not much potential for long-term funding but can be worth donor engagement for good short-term funding. In turn this may lead to other opportunities, so it is worth investing time. This includes donors such as ECHO, UNHCR etc.

d. Rising stars: have *high potential and high value* therefore it is definitely worth investing a lot of time in engaging donors in this category. Includes SADC etc.

See Annex C → for a blank matrix which can be replicated by your organisation.

Figure 4: Boston Matrix (created by HelpAge Tanzania for their donor prioritisation)

Question marks

Rising stars

Government of NDS
DFDA/FHI 360
Irish Aid
IKN
Pfizer
EU

Humanitarian pool funding via UN
SADC

USAID
Foundation for Civil Society

BPM
ECHO
UNHCR

Low priority

Cash cows

Potential

Value

3.4 Donor due diligence and how to avoid scams

Due diligence

Due diligence was covered in Module 1 in the context of ethical funding. Many donors are well-known and you may feel confident that their donation is legitimate, ethical, and without any problems. However, if a donor is new to your organisation it is worth putting in some effort to conduct a 'due diligence' which is broader than simply asking the 'ethical' question. For example, reading the donor guidelines to apply for funds offers an insight into their approach, which is important before deciding whether to go ahead with an application. Key questions to ask:

- Do they pay for overheads/core costs and if so at what rate? Core costs were considered in more detail in Modules 1 and 3 but essentially they are the 'overhead costs' that you need to pay for non-project costs such as office rent, certain non-project related staff salary, such as the CEO etc. If the donor does not pay these costs then it means that other donors are paying more than their fair share or the money comes from unrestricted income. If the donor will not pay any core costs, you will have to consider whether this is viable for your organisation, and how this affects your decision to apply for the grant.

- Do they pay 100% of your proposed project budget, or do they ask for matching funds? Matching funds were considered in Module 3 they are the additional funds that you must raise if the donor you are applying to does not pay 100% of the proposed project budget. If you have no other potential donor for the matching funds and are unable to secure funds from other sources, then your organisation may have to turn down the grant.

- Are the donor's reporting requirements manageable and reasonable? Most donors will ask for reporting which is proportionate to the size of grant. For example, if a donor is giving you £1,000 you should not expect to write a 40-page report to account for it. In cases where the reporting requirements are high but the grant size is small, you will need to consider if it is worth the implementation effort for your organisation.

Scams

Unfortunately, there are also 'scams' targeting NGOs and it is important to know how to identify genuine grant opportunities and donor organisations and avoid scams.[5]

What is an online scam?

An online scam is a fraudulent activity carried out over the internet by providing incorrect information for the purpose of stealing money or assets from victims. Online scams can end up with severe financial losses and mental and emotional harassment of victims. The **'Foreign Money Offers'** category is one of the top three categories that fraudsters use to lure NGOs (and individuals), especially in developing countries, giving them hope of receiving grants against payment of small sums of money.

What types of scams should NGOs be aware of?

- **False promise of grant funding or an award to NGOs:** This is one of the most popular scams going around the internet. NGOs unexpectedly receive an email or a social media post or a WhatsApp/text message which says that a certain foundation has selected your organisation to offer grant funding and you just need to respond to this email.

- **Conference participation:** Fraudsters announce that a huge conference is being organised in a foreign country and your NGO has been selected to participate in it. The fraudster promises to cover the entire cost of air travel and accommodation, but the conference registration fee needs to be paid by the NGO.

- **Large investment into your organisation:** NGOs also end up falling into the trap of fake investment scheme, though NGOs are not businesses and these investments bear no meaning to their work. Yet, the promise of large amounts of money makes some NGOs respond and even pay for the 'service'.

- **Scholarship or fellowship program:** This is another fake offer created by online fraudsters targeting students and young professionals with the false promises of giving scholarship or fellowship at a payment of a certain 'fee'.

- **Lottery win and hidden money:** Lottery win and hidden money scams are popular across different sectors, many NGOs also receive information about them and some end up becoming a victim.

- **NGO jobs and employment:** In this type of online fraud, messages are shared with NGO professionals about fake job offers in large and renowned international agencies such as the UN, the World Bank, and International Monetary Fund, against payment of money.

- **Phishing scams:** These types of sophisticated scams are different from outright offers of grants. Phishing is when online fraudsters use a fake identity of a legitimate organisation and ask you to provide sensitive information such as your credit or debit card, bank account details etc. to hack them and steal money from them.

How NGOs can identify signs of a scam?

Online fake offers of grants and similar scams are widespread across the NGO sector around the world. With so much information reaching them from all sides, it is often difficult for NGOs to identify the genuine grant offers from the fake ones. Tips that NGOs can use to identify whether certain grant information is genuine or not include:

- **All grant programs have an application process. Did your organisation actually apply for a grant rather than automatically receiving a grant?** If you have never applied, then the offer of a grant is almost certainly fake.

- **Genuine donor agencies will not charge money from you.** If you receive a grant or scholarship offer and the 'grant-maker' tells you that you need to pay some amount of money before you can receive this grant, then it clearly means that it is a fraud. No genuine donor agency will ever ask money from NGOs.

- **Check the message and the donor website.** The email, post or text message of a fake grant or scholarship has several signs that clearly give the indication that it is a scam.

  - Fraudsters only have email addresses and they send out millions of messages hoping that some of them will respond back and a few of them will end up paying money for them. That is why, they usually address you as 'Dear User', 'Dear Member', 'Dear Friend' or 'Dear Organisation'.

  - Messages are composed and sent by software programmes and likely to have grammatical errors.

  - You can check the website of the donor agency. Does it exist? Has the grant programme that they say you are to receive funding for been announced on the website?

  - Check the e-mail address of the donor. Real donors will have an organisational address.

What to do when you come across a scam?

- Never respond to a scam email.

- Report it to the agency whose identity has been misused.

- **Never pay money** because the fraudster is offering a grant opportunity.

Look out
for online scams, such as unexpected offers of grant funding or investment in your charity.

Additional resources

Using the Boston Matrix for fundraising:

https://www.managementcentre.co.uk/fundraising/the-boston-matrix-in-fundraising/

Researching and identifying new donors:

https://www2.fundsforngos.org/premium-resources/how-to-research-and-identify-new-donors-for-your-ngo/

Video series (need to sign up to view more detailed description):

https://www.nonprofitready.org/fundraising-courses

Series of videos on topics, including:

- Finding, identifying and applying for grants funds
- Checklist when searching for grants
- Introduction to fundraising planning
- Transitioning to complex fundraising campaigns

Endnotes

5. Material is drawn from 'Funds for NGOs'

Annex A.
Online resources for funding opportunities

Grant bulletins

www.fundsforngos.org/login-page/

https://ec.europa.eu/info/funding-tenders/funding-opportunities/find-calls-funding-topic/international-development-cooperation-calls-proposals-and-tenders_en

www.developmentaid.org/#!/home

Annex B.
Template for donor mapping

Country name	Last updated	DD/MM/YY	Updated by	Name

Donor sectoral focus

Donor name	Donor type	Donor contact details	Account manager	Specific budget line (if applicable)	Livelihoods /Age	Climate change	WASH	DRR/ Humanitarian	Gender	Health	Social protection	Governance	Advocacy/ Policy	Specific geographic interest	Funding cycle	Average grant size/range	Key contractual requirements	Key recipients	Relevant HelpAge programme	Funding status	Potential risk	Engagement priority	Other information

Annex C.
Boston Matrix Template

(Matrix: vertical axis labelled "Potential", horizontal axis labelled "Value". Quadrants: top-left "Question marks", top-right "Rising stars", bottom-left "Low priority", bottom-right "Cash cows".)

Instructions:

1. This is best done as a group exercise AFTER you have done your donor research

2. List all your potential donors

3. Place them in one quadrant according to their value and potential

Interpret like this:

Low priority (Low potential, low value). Therefore, not worth pursuing.

Question marks (High potential, low value). These would be considered on a case-by-case basis as their value is quite low and a lot of time investment may not lead to big grants. But there may be good strategic reasons for engaging.

Cash cows (Low potential, high value). Not much potential for long term funding but can be worth donor engagement for good short-term funding – and this may lead to other opportunities. Worth investing time.

Rising stars (High potential, high value). It is definitely worth investing time into engaging with donors in this category.

Part 4.
Donor engagement

Age International

HelpAge
International

Part 4. Donor engagement

4.1 Planning for donor engagement

After completing donor mapping and looking at how to prioritise which donors to engage with, the next step is to plan the donor engagement.

> Donor engagement is the methods and activities that an organisation chooses to use to interact with their donors and potential donors.

Key steps in planning donor engagement

Preparation

When preparing to engage with a donor, consider the following questions:

- How much time will engaging with this donor take?

- Is any research required before directly engaging the donor? Have I found out everything I can about the donor from their website and their social media platforms?

- Considering the research findings, what potential donor engagement activities can we undertake?

- Does our organisation have a clear offer to the donor? **In any engagement the donor will expect you to take the lead – so be prepared! It is good if you can prepare a standard one-page statement of what you do. What is your unique selling point that makes you different from other NGOs?** This statement might be combined with your capacity statement. If you have a communications specialist, ask them to help in designing any documents that you will give to the donor.

- Decide before the meeting exactly what you want to achieve. A first meeting should establish your credentials as a serious actor in your field and showcase what makes your organisation unique.

- What do you need to take to the first meeting – a capacity statement providing some key information on your organisation or a short proposal/concept. If you are meeting face-to-face it is also good to give the donor something to read later such as a brochure; annual report; research report (an example capacity statement template is included in *Annex D →*).

- Research and evidence building – can you show your organisation has an expertise, or a compelling argument to seek funding for their mission and programme?

- Capacity (internal/external): what is the level of confidence and capacity of staff to engage? Be sure to send the right person to engage with the donor. You want to make a good impression, so send someone who is experienced and can engage with the donor representative confidently. A more junior person can also attend, partly as a learning experience, and also to contribute appropriately. It is always good for each person attending to have a clear role in the meeting and prepare for it. It is also helpful to do a little research on the person you will meet – use Google and look up their LinkedIn profile.

Be prepared!
for donor engagement – its a good idea to create a one-page statement of what your organisation does and what makes it special.

Meeting a donor

You may remember from Module 1 that there can be **many entry points** to engaging with a donor (see Figure 5 below). It can be a good 'entry point' to engage with that donor at a technical and/or policy level by offering your knowledge of the situation of older people and their rights. This may take the form of a meeting; sending them your latest research report; inviting them to a forum you are organising; inviting them to visit the locations where you work, or any other method that they find convenient to learn more about ageing issues or the challenges faced by older people in your context. It may also happen the other way – where a small grant leads to opportunities to engage with that donor on policy issues or leads to a greater degree of technical cooperation.

The entry point to engaging with donors could be through any one of these three spheres – i.e. funding can lead to influence, technical programme cooperation can lead to policy dialogue, policy engagement can lead to funding, and so on.

Figure 5: Possible entry points for donor dialogue
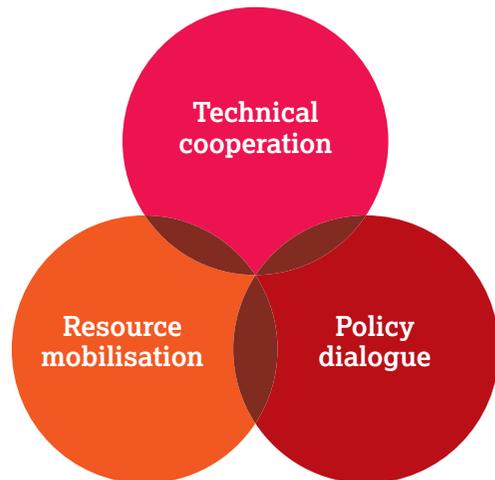
Simon Rawles/Age International

As a reminder from Module 1, Figure 6 below presents some of the entry points for technical cooperation, policy dialogue and resource mobilisation. You can reflect on these and see which is most appropriate for your organisation.

Figure 6: Possible entry points of donor engagement in detail

Technical cooperation	Policy dialogue	Resource mobilisation
Learning and exchanges	Joint advocacy and communication	Fund management
Joint programmes	Research evidence for policy debates	Grants, tenders and cooperative agreements
Knowledge management	Shared policy platforms	Building the capacity of partners for resource mobilisation
Norms and standards	Issue specific engagement	

These are the broad entry points, but in practical terms you can:

- **Write an e-mail** to the donor to request a meeting (this can apply to both face-to-face meetings and to Skype/telephone meetings). In the e-mail say who your organisation is, what your thematic interest is (make sure it coincides or can be linked with an interest of the donor), and why you would like the meeting. It is advisable that initially you look for a topic under the 'Technical Cooperation' or 'Policy Dialogue' banner.

- **Seek out and attend events** where donors may be present. These may be conferences, seminars, public meetings etc. Try and get the opportunity to meet the donor with your prepared 'elevator' pitch, give them a business card, get theirs, and make a note to follow up later.

Donor Engagement Plan

Having completed the Donor Scoping and the prioritising of the donors, the next step is to develop a clear plan of engagement with each donor (Donor Engagement Plan).

Whilst this can be presented in different formats, a simple example can be shown in Figure 7.

Figure 8 then presents an example from HelpAge Pakistan.

You can choose the level of complexity that you need for your organisation, and the style that makes most sense to you, and adapt these tools accordingly. A blank template for your use is included in *Annex E →*.

Figure 7: Donor Engagement Plan

Donor	Type of donor engagement	Timescale	Resources required (who, what)	Partner action
List the prioritised donors here i.e. the ones with whom you want to engage	This could include sending e-mails; arranging face-to face meetings; inviting donors to field visits; inviting donors to your conference	State when you expect this to happen	This is to state which staff members, Directors, or Board Members will be involved and materials required. Choose carefully to make the best impression	This is to note if you need to approach potential implementing partners for a particular proposal. If so, this may need to be a parallel process to the donor engagement

Figure 8: Donor Engagement Plan from HelpAge Pakistan

Donor	Type of donor engagement	Timescale	Resources required (who, what)	Partner action
European Commission (CSO call)	Develop one-pager on disability – focus of expected call Develop initial project ideas, based on AWP	January 2018 (call due March 2018)	Existing data and evidence on disability – national/global Moeez draft with Diana; Caitlin to review. Poppy to provide EC intel	Approach/confirm/consult with partners
EU delegation	Visit EU delegation BEFORE call issued to: • Gather intelligence on call • Pre-position HelpAge capacity and narrative	February 2018	One-pager on disability – focus of expected call	Join meeting?
EC CSO cfp	Develop proposal, and apply to cfp	March–April 2018	Moeez, Ibrar, RD, partner, Caitlin. PDF; PDDF; PCAF. EU guidelines on prop-dev Workshop budget. TIME!!!	Input to proposal

Figure 9 below shows a more detailed Donor Engagement Plan from HelpAge Mozambique for a specific donor – DFID.

Figure 9: Mozambique DFID Engagement – Action Plan (Feb–June 2016)

Date	Action	Target	Purpose	Resources/support required
Feb 2016	Meeting with the Social Development Adviser	Kate Smith	Talk about the complaint and grievance mechanism to the current cash transfer mechanism	BMZ concept and its strategic focus on community case management, documentation and dissemination
March 2016	Brown bag lunch at DFID	DFID programme development personnel	Make a presentation on violence against older women and social protection accountability programs	Support from Gender department in London and Resource development team in Southern Africa
May 2016	Invite DFID focal point on social protection for the BBL on the on-going longitudinal study	Social Protection Group where DFID personnel are present	Talk about the BMZ project approach and see how to create synergies with UNICEF monitoring tool	BMZ concept note and HelpAge Social Protection Programme Offer document
May 2016	Forward the fact sheet on better health based on the data and analysis	DFID Health advisor	Share our results on better health and keep them updated on the progress of the AID Match project	Better Health project annual report and data analysis report by HOT
June 2016	Technical session to present and discuss the results of the Longitudinal Study	Social Protection Group where DFID personnel are present	Make the group aware of the issues arising from the cash transfer project and position HelpAge as a credible partner on research and data collection	Longitudinal Study report
June 2016	Joint visit to project sites	Government (Ministry of Social Action), Bilateral (DFID, EKN, Iris Aid) and Handicap International	Show them how independent monitoring of cash transfer works and how important it is in bringing evidence for future improvements	Project manager and director to guide the team

Another style of Donor Engagement Plan might look like the one below in Figure 10.

Figure 10: Donor Engagement Plan

Country name		Last updated		DD/MM/YY		Updated by		Name	

Donor name	Donor type	Donor contact details	Main HelpAge contact/role	Objective of engagement, potential discussion topics	Activity	Date	Outcomes	Next steps

It can be helpful to summarise all the donor engagements in a planning tool such as the one in Figure 11 below.

Figure 11: Action Plan summary calendar

Action Plan	April–June 2021	July–Sept 2021	Oct–Dec 2021	Jan–Mar 2022
Donor Engagement				
Partner Engagement				
New resources required				

4.2 Tools and methods of donor engagement

As well as social media there are other common methods of engaging with donors. The common theme running through all these approaches is that they are opportunities to promote your organisation's work and achievements – so it is particularly important to carefully consider and craft what you say.

> It is important, as far as possible, to be in control of this engagement – the donor will not chase you, you will need to be pro-active.

a. E-mails

This is often the first communication with a donor. If the donor is not in your country then it could be a general enquiry about the type of partner they are looking for and what you have to offer. Note the following:

- Donors will not read long e-mails, so keep it concise.
- Introduce your organisation, identify any strategic alignment, explain that you are seeking a partnership and that you would like to explore this further in a meeting.
- Briefly mention potential areas of common ground and areas of focus.
- Request a meeting if the donor is in your country; if not in your country, say you would like to meet on Skype/Zoom/telephone if possible.
- Be polite and respectful: ensure that you introduce yourself and the organisation and the purpose of contacting the donor clearly in the email. If you do not get a reply after two weeks, follow it up with another e-mail. After one more week try a phone call.

b. Telephone calls

These are most effective if they are pre-arranged and should only be proposed after sending an e-mail. If the donor is already funding you, offer to give periodic updates by phone in addition to your written reports. They may not be interested but the offer shows you want to be accountable.

c. Statement of capacity and your 'offer'

Ideally these should be short and concise. They should be informative and very visual, with a photograph and/or a clear infographic. These can be used to give to donors to take away.

d. Invite donors and potential donors to events

If your organisation holds events; either for a specific project or wider organisation initiative, share the request with existing and potential donors. Events are a great opportunity to showcase your work and achievements. Project events may include 'day celebrations' or advocacy events involving the communities of the project and might be a good opportunity to invite the donor along to join in or make a speech. For example, activities and programmes you may be undertaking to celebrate International Day of Older Persons on 1 October. Similarly, if you have an evaluation dissemination event, invite the donor along to listen and participate. Organisation-wide events including conferences, seminars, anniversaries etc., are also great opportunities to invite donors.

e. Project proposals, concept notes and reports

Project proposal and concept note writing was covered in Module 3; and there is a section on report writing in *Part 5 of this Module* →. These are common ways of engaging with donors. They all leave an impression with the donor, either positive or negative. A poorly written proposal will likely not be funded and will also leave a negative impression of your organisation with the donor.

f. Annual Reports

An Annual Report is a document drafted by an organisation to share the results of all the activities designed and developed in the past twelve months. This report is very important for donor engagement as it gives the opportunity to share with donors, and a wider audience, the achievements of the organisation and exciting stories of change. Case studies and key achievements can also be shared on your social media. Consider these points in writing your Annual Report:

- An excellent report is consistent, clear, and easy to read.

- It is important to highlight the names of donors, the amount of money received, title of the project, rationale and main goals, methodology, activities implemented with their timeframe, and outputs.

- Once the report is drafted and approved by all relevant members of the NGO, send it to your donors. They will appreciate your efforts in developing and strengthening your working relationship with them.

- Publish the report on the organisational website and all the other public profiles the organisation might have (including social networks). This also strengthens credibility.

g. Visits to your organisation's office or field work

Invite donors to visit your office, or better still the places where you are implementing your projects (field work). Donors often do not have easy access to the field and will appreciate the offer, even if they are unable to take it up. If they do accept an offer to come to the places where you are implementing there are at least three key benefits:

- They see your work first-hand and, hopefully, will be impressed;

- They will be grateful to you for making the arrangements;

- You may have many hours to talk to the donor representatives that you would never get in a meeting. There will be plenty of time to impress and develop a strong relationship.

h. Videos

Videos are a powerful way to get the viewer to be told a story in the words of the people the project is supporting. Remember to ensure all videos and photos are taken with ethical consent of those participating; confidentiality of beneficiary information and consent are of paramount importance. Top tips for making a short video:

- Find a story about a person who displays your program intent or objective.

- Conduct in-depth interviews to understand the most significant change in the life of the person, as a result of the project.

- The video may start with an eye-catching figure or fact or data; something that intrigues the person watching the video and makes them watch further and think about the issue.

- The video should have a positive tone and outlook, focused on the voices of the people, telling the story of change themselves.

- The video may also feature the NGO staff or field workers working with the beneficiaries, the field workers speaking about the project, how they feel, their day-to-day activities.

- In the end, it may show the overall 'impact' of the NGO, the big picture, in terms of numbers, total beneficiaries, etc.

- If the video is part of a wider campaign, it might end with a 'call-to-action', stating how the viewer may support the project or what they can advocate for on behalf of the people supported. Share the contact details like website, social media page links, address, contact number in the last second of the video.

- Share the video(s) on your websites and social media accounts and inter-link the social media platform content.

i. Face-to face-meetings

If you are able to secure a face-to-face meeting, it will help build the relationship much quicker than via electronic media and the donor will say a lot more verbally than they put on a website. So, the benefits of a meeting are high. Usually the donor also wants to make a good impression and are likely to want to give some hope of a future relationship – not necessarily for funding but at least in some kind of cooperation. Having secured the meeting, make sure that you plan well for it. Planning well would include the following:

- **Carry out comprehensive research on the donor.** This is important so that you are informed about the donor's strategy and priorities, and so that you do not waste time in the meeting asking basic questions when the answers are available on the donor website.

- Most donors, after agreeing to meet, will typically give you **one hour maximum**. In that time you will need to strike a balance between raising awareness of and subtly promoting your organisation or cause and encouraging the donor to talk about their programme.

- Prepare what you will give the donor. Ideas include: a business card; a project brochure; a capacity statement (if you do not already have one *see Additional resources →* for some example capacity statements and *Annex D for a capacity statement template →*); your latest Annual Report; or a relevant research report.

- Be careful about giving the donor too much, especially in a first meeting. Assess their interest before giving them all the materials.

- Meeting content: Typically, a first donor meeting starts with the NGO making a short (10 minute) presentation on their programme and priorities. This should be focused on the interests of the donor. This can be done verbally, or sometimes if you have a good quality short video you can include that too. Invite the donor to ask questions for clarification and to present their programme. Listen carefully and try and spot areas of common interest – the donor will most likely be doing the same. You then have the rest of the time to explore these 'common interest' areas. Before ending the meeting look for opportunities for further engagement; note anything further that you can send to the donor if they are interested; see if the donor can commit to something – perhaps a further meeting, or another way of engaging. **The key is to not ask for funding directly, you can ask the donor about how they advertise their funding opportunities and whether they would welcome an application at the right time. If there is zero possibility, it is better to find out early than waste further time.**
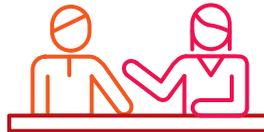
Face-to-face
meetings will always help build your relationship with a donor faster than online communications.

4.3 Donor engagement after rejection

It can be hard when a project proposal is unsuccessful. So apart from feeling rejected, what can your organisation do?

- Try and get feedback from the donor. Some donors give feedback automatically but not all. Some 'automatic' feedback may not be very helpful telling you that 'there were other proposals better than yours'. But some donors will try their best to give constructive feedback to help you improve next time. If the donor does not offer feedback automatically, try sending an e-mail and politely asking for it.

- Discuss with the donor whether they would be happy to receive a revised and amended application in the future. This is another opportunity for them to guide you to develop a proposal that fits within their criteria. Conversely, they may advise that the project is not something they wish to pursue, meaning that it can be presented to other donors.

- Request a call or visit to their office (if in-country) to discuss how the two organisations might be able to work together in the future. This will demonstrate a willingness to adapt as well as a commitment to working together that may provide dividends in the future.

- Engage the funder in a discussion about the organisation, its beneficiaries and projects. Try to gain an insight as to whether there is another project or area that they are keen to learn more about that might be a better funding opportunity than your original proposal.

- Propose that you keep them in touch with developments in your organisation and ask them if there is anything, they might be interested in learning about.

- Do not give up until or unless it becomes obvious that there will be no good matches between the donor and your organisation.
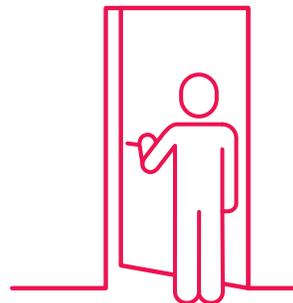
Don't give up
**if your project proposal is
unsuccessful. Think of ways
to keep the door open to your
donor relationship.**

4.4 Pipeline management

It is important to 'time-manage' the process of developing concept notes and proposals to ensure that no deadline is missed. This pipeline would complement the 'Proposal Development Schedule' (PDS) discussed in Module 3. A PDS is for one individual project, whereas the pipeline is a tool to give you an overview of all projects that are in development but that have not yet been funded.

The pipeline can be developed using excel spreadsheets, and can be divided into four sections:

1. Projects which need donor funding

2. Pre-submission i.e. projects that have been matched to a donor call, but the submission has not yet been made.

3. Submitted i.e. project proposals already submitted, but still awaiting the result.

4. Rejections i.e., proposals which have had a negative decision from a donor. It is useful to keep this list for lesson learning, and also to recycle them (possibly with amendments) with a new donor.

What the pipeline looks like depends on how many projects that you have in it. A simple pipeline may combine all the four categories and look something like the one in Figure 12 below.

Figure 12: Example of recording a project pipeline

	Donor	Amount	Submission deadline	Decision date	Comment
1	Australian Government	AUS$ 60,000	Submitted on 30.06.18	Mid-August	Not funding the Rohingya crisis
2	German Government	Euros 1.5m	Not known	Not known	HAD are enquiring about possibilities for 2019 funding
3	UNVFVT	US$100,000	30.07.18	Not known	Proposal being developed
4	UNHCR	US$650,000	16.8.18	Not known	Proposal being developed
5	DFID	US$650,000	No fixed deadline – requested ASAP	Not known	If funded, project will start 1.10.18

A more complex version for 'pre-submission projects' may look like Figure 13 below.

Figure 13: Pipeline of pre-submission projects

Donor deadline	Donor	Country	Project code	Budget range	Co-funding required	Thematic area	Internal approval (dated)	Gender sensitive	Status
Unknown	MACP Phase 3	Regional	ASR097	–	No	DRR	Not yet	–	Deepak has drafted CN. They will contact us early summer
11.4.19	MACP Emergency	Regional	ASR098	US$ 12,464	No	Emergency	Not yet	–	Invitation to submit a concept sent to JC on 15.3.19. Bert will have call with Andrew w/b 1.4.19
29.3.19	Disaster Tech Innovation	Regional	–	US$ 20,000 – 100,000	–	Disaster	Not yet	–	A brief idea was submitted. Shortlist will be announced on 3 May
TBC	AI	Indonesia	IDS036	GBP 15,000	No	Disaster	Not yet	–	Waiting for finalisation of Phase 2 Dec budget

And 'submitted' project pipeline may look like Figure 14 below.

Figure 14: Pipeline of submitted projects

Deadline date	Date sub-mitted	Decision date	Contract start	Donor	Country	Project code	Account manager	Project lead	Finance lead	Budget	Co-funding	Thematic area	Internal approval (dated)	Gender sensitive	Status
24.9.18	24.9.18	Unknown	1.7.19	University of Southampton ESRC	Regional	ASR092	Caitlin	Caitlin	Jongjit	GBP 23,668	No	Ethno-graphic research	Yes 22.09.18	–	Have to wait for news from UofS
3.10.18	3.10.18	Unknown	1.2.18	APG/ ASEAN-ROK	Regional	ASR091	Bert	Bert	Jongjit	US$ 1,000,000	No	Disaster manage-ment	Yes 3.10.18	–	There is a need to revise proposal and budget (reduce to US$1m for 12.8)
7.1.19	7.1.19	Unknown	Extended from Phase 1 (ending 31.3.19)	MACP Phase 2 extension	Regional	ASR685	Jerry	Deepak	Jongjit	US$ 375,000	No	DRR	–	–	Got approval on 1.3.19. Revised contract will be sent in April 19.
13.12.18	13.12.18	Unknown	11.3.19	Price Waterhouse Cooper/FCO (UK)	Regional	ASR696	APRO	Caitlin	Jongjit	GBP 3,683,810	No	NCD – Better Health Programme	–	–	Now waiting for the outcome (9.1.19)

In both cases the deadline dates are recorded along with information including donor name; which staff are responsible; the budget; and whether co-funding is needed. The last column gives the current status and the next action required. These sheets can be reviewed on a weekly basis and be updated whenever new information becomes available.

Rejected proposals can be recorded using a simple spreadsheet like the one in Figure 15 below which makes the reasons for rejection easy to recall. If you wish you can add a column for follow up actions.

Figure 15: List of project proposals rejected by donors

Date submitted	Decision date	Donor	Reason if known
30.5.17	31.8.17	KOICA	Not known
15.6.17	16.10.17	EIDHR	See EC sheet; cost effectiveness major reason
17.8.17	1.10.17	Planet Wheeler	Not known
1.10.17	6.11.17	DFID GSMA	275 applicants

Jonas Wresch/Age International

Additional resources

Institute of Fundraising:

Building a case for support
www.youtube.com/watch?v=0lMX2I9g7ZE

Understanding your marketplace
www.youtube.com/watch?v=S_ZTHIumauQ

Categorising donors
www.youtube.com/watch?v=Iwzzg794e5E

Donor Engagement cycle:

www.causevox.com/blog/donor-engagement-cycle-inspire-learn-engage-ask-thank-show-impact/

Open University online course:

Building relationships with donors
https://www.open.edu/openlearn/money-business/business-strategy-studies/building-relationships-donors/
content-section-0?active-tab=description-tab

- Appraise the skills used in asking for contributions
- Identify ways of sustaining and developing donor involvement
- Make recommendations on how an organisation might most appropriately acknowledge contributions
- Contribute to thinking on the actual or potential role of 'big gifts' in an organisation's approach to fundraising
- Enhance the approach to legacy fundraising

Managing relationships
https://www.open.edu/openlearn/money-business/leadership-management/managing-relationships/
content-section-0?active-tab=description-tab

- Explain where the activities associated with winning resources and support fit into an organisation and its wider context
- Think more critically and creatively in contexts relevant to fundraising and campaigning
- Draw on the concepts of stakeholders and customers in solving problems about professional dilemmas

Example capacity statements:

https://plan-international.org/publications/capacity-statement-early-childhood-care-and-development-emergencies
www.actionagainsthunger.org/sites/default/files/publications/Somalia_Capacity_Statement.pdf
www.worldlearning.org/wp-content/uploads/2018/05/healthSystems_capacity-statement.pdf

Annex D.
Capacity statement template

Capacity statement

Add logo

Name of organisation

*Add a paragraph about your organisation,
with a top line summary of what it does,
mission and strategic objectives and unique
selling point / niche.*

*Include a map if relevant to show where you
work/different projects, or*

*Include headline stats or data such as older
people reached or OPAs set-up.*

Technical capacity / core competencies

**Add title of first technical area
e.g. Age and Disability Inclusion**
*Include a paragraph succinctly explaining
the area of expertise your organisation has in
this area, what it offers and has capacity to
deliver.*

**Add title of third technical area
e.g. Protecting the Rights of Older People**
*Include a paragraph succinctly explaining the
area of expertise your organisation has in this
area, what it offers and has capacity to deliver.*

**Add title of second technical area
e.g. Health System Strengthening**
*Include a paragraph succinctly explaining
the area of expertise your organisation has in
this area, what it offers and has capacity to
deliver.*

*... add more boxes as needed for additional
technical areas.*

Programme experience

*List current and past projects delivered with
minimum information: project names,
amount, dates of delivery and donor.*

*For longer statements you can add further
information about headline achievements.*

Donors and partners

*List or include the logos of your partners and
donors to demonstrate current and past
support from donors and the wider network of
partners the organisation works with.*

Add logo   Add logo   Add logo

Include a photo from one of your projects.
*If including a person, ensure you gain written
consent for the taking and use of their image.*

HelpAge International

Annex E.
Templates for donor engagement action plan

Option 1

Donor	Type of donor engagement	Timescale	Resources required (who, what)	Partner action

Option 2

Last updated		DD/MM/YY			Updated by			
Donor name	**Donor type**	**Donor contact details**	**Main contact/role**	**Objective of engagement, potential discussion topics**	**Activity**	**Date**	**Outcomes**	**Next steps**

Part 5.
Donor retention

HelpAge
International

Part 5. Donor retention

5.1 Accountability to donors

Module 1 discussed how important it is to put deliberate effort into retaining current donors as part of a Resource Development strategy. This is a crucial part of donor engagement. It is important to look for new donors, but also to ensure good 'stewardship' of the funds that you already have. This means that you need to be accountable to your current donors, and you also need to put in the effort to develop good relationships with them.

Phillip Sheppard/LSHTM

A relationship with a donor starts long before funding arrives, so all of *Part 4 →* on donor engagement is relevant to donor retention. It is about building the relationship, 'friend-raising', and seeing the donor as a partner rather than as a cash machine.

Here is a reminder of the key questions that we asked in Module 1: whether your current donors are members of the public, or corporations, or large government institutions, these questions apply to all:

- How loyal are they? What is their history with you? Have they been with you a long time? How long?

- Do you take them for granted? Do you assume that they will always be with you? Is there a danger of complacency?

- How are you accountable to them? Are you giving them want they want such as reports (narrative and financial) and success stories – and are they of good quality? What you give may differ according to type of donor e.g., institutional, corporate, trust, individual. Have you checked with them that they are satisfied with your reports?

- What are you doing to keep your current donors on board? And what more could you do? Better reports? Stories for their publications? Field visits? Meetings? Do you have a clear communication plan? *This topic will be revisited in Module 5.*

- Can you increase funding from current donors? Generally, donors want to start by giving small amounts, but may increase if they are satisfied that their donation is having a good impact?

Tips for donor retention:[6]

Research shows that donor retention rates are often poor, at a mere 25%, which means that much of the effort and resources spent raising new resources and acquiring donors are devalued. Key tips for donor retention include:

1. Know your donors: Knowing the donors and their intent towards investing in social causes is the first step for true engagement. Some donors might want to engage themselves, by means of volunteering and participation in the various events of the NGO; while others might be okay with timely reports received from NGOs without any 'hands-on' experiences. So, understanding a donor first will be instrumental for devising an engagement strategy.

2. Real engagement: Many donors want real engagement with the NGO, and often with beneficiaries. It is important to have the vision of a long-term engagement with the donor to make the best out of the relationship. Therefore, a donation should be seen as a step towards a more meaningful relationship. This will guide the NGO to make true engagement a part of its strategy. This type of pro-active engagement can include engaging the donor in technical and policy issues (sharing reports, inviting to seminars etc.) as mentioned previously. The relationship can be even stronger if it is reinforced by senior staff such as the CEO engaging at a strategic level. This may lead to a more strategic partnership and in some cases the donor may even decide to extend funding without going through a competitive process. This may not happen quickly but could be the result of long-term positive engagement. Donor engagement therefore needs to be seen as a long-term, managed process.

3. Do it better than others: No doubt, your NGO and staff are committed and highly motivated to work towards a social cause. But demonstrating your professionalism and ability to make yourself stand out is the key to get noticed by the donors. For example, in case of corporate donors, know which partners are associated with the donor, what they do, and how they are doing it. Demonstrate what more you can offer than your 'competitors'.

4. Make sure your donor funded project is managed well: Design projects with the right type of staff; ensuring that those staff have the right skills (either through good recruitment or through training); and monitor their performance. If you get all that right, it makes the reporting and accountability much more straightforward.

If you get it wrong, you may not achieve the expected results in the project and the relationship with the donor will therefore suffer.

5. Have a clear communications strategy: Work with colleagues to agree how to meaningfully communicate with your donors. It can be helpful to develop a 'communication calendar', similar to your project activity calendar or a Gantt chart. This should be a strategy that embraces all the work of your NGO, including all the projects that you have. This must be adjusted each time a new project is funded and maintained throughout the lifetime of the project.

6. Thank your donors: Acknowledge the donor's contribution and send 'thank-yous' along with other communications as per your calendar (e.g., annual reports, research reports etc).

7. Speak a language understandable to the donor: Understand that your jargon might impress the donor once but use of jargon and technical terms in routine communication may not appeal to everyone and mean that your communication material remains unread. Use language that is clear and understandable. Send them the information they want to hear, not what you want to share.

8. Share stories: Share stories, case studies, success stories to delight, encourage, and engage the donor. These stories bring the project to life for the donor and shows the impact their funds have had.

9. Ask for feedback: The best way to find out areas for improvement is to ask for feedback. Ask your donors what they liked, what they did not, and how they would like you to improve. It is important to take the feedback seriously and act on it.

Share stories
and case studies with your donor to help bring the work of your organisation to life.

5.2 Reporting

When we think of 'accountability' with donors, we usually think of the progress reports that we send to them. These may be quarterly, half-yearly, or annually, depending on the donor. Whilst there are other forms of accountability as we have seen above, **the periodic report remains the key accountability tool**. Like the proposals, the format of the report must follow the donor guidelines – and most donors will issue guidelines for reporting as they want all their grant recipients to follow the same format to make reviewing them easier. This would apply to both financial and narrative reports. Apart from following the donor guidelines, here are some tips on how to write a good report:

1. What to report?

- What did your organisation say it would do? What did your organisation say it would achieve?

- What did your organisation actually do? What did it actually achieve?

- Why was it different?

- What have you learned and how has the programme been adapted?

- Have the external conditions changed and, if so, how has the project been impacted?

- Has the internal capacity of your organisation or your partners changed significantly?

- What is planned for the next period?

- Include both narrative and financial sections.

2. Put yourself in the position of the reader

The reader should be able to:

- Read the report easily from start to finish i.e., it should flow well. Adapt your style according to the reader/donor.

- Understand everything in it, even if s/he is not an expert in the field.

- Be convinced by the use of data.

3. Reports should:

Be accurate: Check the data presented; make sure that the source of data is clear; and get at least one other person to read it (at least two pairs of eyes over everything!).

Be evidence based: Base conclusions on the evidence, not on emotions. If the evidence is not clear, then be honest and say so (and say how it will be clearer next time).

Be clear: Choose words carefully. Use words that you understand well. Try and avoid jargon, but if you must use it or acronyms, then ensure that it is explained e.g. in a footnote.

Be concise: Do not write more than needed but write enough to convey the message clearly and with all the essential details. The writer should ask themself: 'Is it necessary for this information to be included?'.

Be consistent and minimise repetition: Write a draft. Then leave it for a couple of days and read it again. Make changes then ask someone else to read it. Make further changes.

Avoid pointless words: Some words and phrases, like *basically; actually; obviously; undoubtedly; each and every one;* and *during the course of our investigation* – are commonly used in reports. Yet they add nothing to the message and often can be removed without changing the meaning or the tone. Try leaving them out of your writing. You will find your sentences survive, succeed, and may even flourish without them.

Be interesting: If you are bored by the report, undoubtedly the reader will be too!

Be analytical: Project reports should be a detached analysis of project performance; not simply a detailed description of everything you did during the reporting period.

4. Also remember when writing a report to:

Follow the donor format where one exists.

Be honest! Donors usually respond well if we explain why things have not gone well and what we have done to address the problems – they respond badly if we try and cover it up or do not show learning in our reports. Also, do not exaggerate your achievements.

Use reporting processes for reflection. The process of reporting is as important as the report itself. Producing a report, whether monthly, quarterly or annual should not be completed by just one person, but a group of staff, plus perhaps other stakeholders, to sit and reflect on progress to date, and to discuss why some things have been achieved and others not. It is an opportunity to analyse and learn from each other. In going through this process, it should also be possible to plan together for the next period, quarterly or annual.

Use the Logframe as a basis for reporting. It is a tool for identifying strengths and weaknesses in a project and making good and timely decisions. Information about the work and about the external environment needs to be collected and analysed on a continuous basis. The reporting system therefore must be closely linked to the monitoring system if it is to be useful. The essential components of the monitoring system are:

- The selection of good indicators;
- The collection of data concerning the indicators;
- The analysis of data;
- Presenting information in an appropriate way – i.e., it is relevant and understandable to whoever needs to use the information, including, project staff, other stakeholders and donors;
- Using the information to improve the work.

5. Common errors in report writing

Acronyms: Either no list included or using acronyms that others will not understand or not spelling them out. The acronym should be spelt out the first time it is used in the summary; and again, the first time it is used in the text with the acronym in brackets.

No spell-check completed: Ensure you click 'spell check' for all submissions but be careful not to click on 'change all' unless needed.

Repetition: Sometimes repetition is inevitable due to the donor reporting format – but keep it to a minimum.

Incorrect use of data and evidence: Either not using evidence to back up claims or using data with no comparison. You should look at focusing on comparison questions such as: Is there a trend? What was it last year? National data comparison? SDG data comparison? For example, if you simply write "25% of women in district x are now literate" this does not mean much to the reader unless you also quote the baseline, the eventual target, and perhaps a national comparison. Data is often used inconsistently too; see the confusing example in the box below taken from a real report:

> *"Altogether, 80 over 60-year-old people with mild and moderate malnutrition were enrolled in the centres and they have regained normal weight after four weeks (two weeks in centre and two weeks at home). Older people over 75 have regained their weight to normal weight".*
>
> This is confusing (are the over 75-year-old people included in the over 60-year-old figure? Why mention it twice?)

Not being specific enough: For example, if you say 'hard to reach' do you mean geographically? socially? economically?

Terminology and local terms: These are often used but will not be understood by outsiders: For example "Awareness on key issues through local radio, Deuda, pregnant mother gatherings, ….." (unless you are from Nepal, you will not know what 'Deuda' means). Either translate it the first time you use it or if there is not a good translation explain it concisely as a footnote. Be consistent with the terms that you use.

Lessons learned: Write only genuine learnings and how you will use these lessons going forward or in future projects (if you are sending quarterly reports, you do not always have lessons learned. If that is the case, leave it blank. However, in annual reports there should be lessons learned from the previous 12 months).

Additional resources

Report writing guidelines:

www.networklearning.org/ngo-skills/online-guides-librarymenu-140/77-guidelines-for-writing-reports

Improving donor retention:

www.nonprofitpro.com/post/7-methods-to-improve-donor-retention-with-fundraising-tech/

Endnotes

6. Material is drawn from 'Funds for NGOs' website