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Continuing Medical Education Office

FUNDRAISING:

A Practical Guide for Patient Advocacy Groups

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FUNDRAISING: A Practical Guide for Patient Advocacy Groups

Author: Joan Brown

Design and Execution:
Creative Communication Services - Faculty of Medicine - American University of Beirut

For further information please contact:
Continuing Medical Education Office

Tel. +961-1-350000 **Ext.**: 4752 or 4717
Fax +961-1-744467
Email: cmeoffice@aub.edu.lb

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Joumana Kalot, MPH
Activity Director

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I. INTRODUCTION

YOU HAVE A BIG JOB.

Investing your time and effort with a Patient Advocacy Group that serves patients and families and advocates for the allocation of resources to address unmet medical needs in your community is an important commitment.

The truth is that the work of Patient Advocacy Groups, including yours, cannot move forward and meet their important missions without funding from a variety of sources. And the work of finding and tapping into that funding is an ongoing challenge.

This reference guide is meant to be a foundational resource to help you by reviewing the major facets of a strong fundraising program and giving you a starting point for strengthening your own program.

YOU HAVE RESPONSIBILITIES.

Before you begin, it is important to note that the country in which your Patient Advocacy Group operates will dictate many of aspects of fundraising for you. You carry the responsibility of knowing what is permissible in the locality of your operation and how best to work within government regulations around fundraising.

You also know your community. Understanding why people give and how they prefer to give is at the core of a successful fundraising program.

- If religious convictions are behind most giving – whether Muslim zakat and sadaquah or Christian oshour (tithing) and bokour – one of the goals may be anonymity in giving and you must recognize and accommodate that desire.
- If Pharma companies provide a main portion of your funds, you must comply with any regulations around those contributions and work to maintain a climate of transparency that assures patients and families your priority is to their well-being.
- If political concerns exist in your region around contributions made to PAGs, you must address those concerns and be forthcoming about your purpose and your associations and collaborations.

YOU HAVE THE POWER TO INFLUENCE.

One of the keys to being an effective fundraiser for your organization is to adopt a positive attitude about fundraising. How you approach fundraising will influence the way that donors respond. While some might think of fundraising as apologetically begging people to contribute, fundraising is really the **noble task of inviting others to partner with you** in work that is changing the lives of people in your community.

You are a conduit between community members who have the capacity to give and want to use their resources effectively and individuals and families who have an unmet need. You stand in the gap between someone with a challenge in life and someone with resources to help.
You are a change-maker!

Successful fundraising, whether you are working as part of a professional staff or serving as a volunteer, depends on maintaining your own sense of enthusiasm and optimism and staying connected to your mission. Remember that:

- **The best fundraising is based on building relationships.** Focus on your donors as friends and partners in your work, then treat them as such.
- **Passion is contagious!** The more you can share your passion about the life-changing work your organization is doing, the more others will be excited and want to help.
- **Show gratitude.** Be grateful for all the good things and the good people associated with your work. Thank your donors. Thank your volunteers. Thank the people who clean your office. Everyone you meet has the capacity to connect you to someone who will identify with your mission. Treat every connection as a gift.
- **Be a life-long learner.** No one is ever finished with learning about fundraising. Things change *(like technology)* and your cause grows and new donors come into your circle. Look for opportunities to increase your knowledge and put what you learn to work.

You can read this reference guide straight through to get an overview of important keys to fundraising success. The reading will walk you through the donor cycle, the foundation of most fundraising activity. But let it serve as a touchstone as you build your fundraising program. Add notes as you go along and as you uncover your own resources for improving your fundraising efforts.

Wishing you great success in your life-changing work!

II. GETTING THE RIGHT START: DEVELOPING THE CASE STATEMENT

WHAT'S A CASE STATEMENT AND WHY DO YOU NEED ONE?

A case statement is a document aimed at an external audience that sets the stage for all your interactions with potential funders. It is, at its most basic, a collection of reasons why someone would invest in your organization and inspiration that will lead them to do so. The case statement makes the case for the public to partner with you in accomplishing your important goals.

While you may not hand a copy of your full case statement to everyone you meet, the information contained in your case statement will be shared in many ways with a variety of constituencies. You can utilize your case statement in informal conversations about your cause, more formal appeals, on your web site, in printed materials, and in working with the media.

Doing the work to compose a great case statement will provide your organization with a common platform from which to speak. Your volunteers, staff, family members and everyone in your support circle can use the language in your case statement to speak with a shared voice about the cause that you are supporting and for which you are advocating.

In addition, your case statement will provide the basis for many formal grant requests aimed at foundations and corporate funders. You will be able to use the points found in your case statement to respond to many of the questions found on typical grant applications.

It's worth the work to formulate a case statement that you are proud to use, one that represents your organization well, and is clear to all who might read it. While you do need to revisit your document on a regular basis to make certain the all information is relevant, you shouldn't need to do a complete reworking of the case statement unless you are embarking on a major campaign or are changing some direction in your mission.

COMPONENTS OF A GREAT CASE STATEMENT

While you can order the components of your case statement in the way that seems most appropriate for your organization, case statements generally include the following pieces:

1. A strong, inspiring introduction
2. Mission and vision statements
3. Specific challenges that your organization is addressing
4. Services you provide *(how you go about meeting your mission)*
5. Results you are trying to achieve
6. Description of your funding needs, both short and long-term
7. How interested parties can connect to you

1. A STRONG, INSPIRING INTRODUCTION

The best case statements begin by drawing the reader into your story right from the start. While many case statements choose to begin with the history of the organization, compose your statement to first pique the reader's interest and emotions.

Rather than: Organization XYZ began in 1998 when founders Mr. and Mrs. Black began advocating for patient well-being. They began to bring together other individuals who also had health concerns and the organization began to grow.

You might start with:

When Maryam was diagnosed with a rare disease, more changed in her life than just her health status. Her family was confused about her condition and was unable to provide the emotional support that she needed. On her own, she faced financial, logistical, and bureaucratic challenges to obtaining the quality care that she desperately needed, and she lacked people in her close circle who could understand the position she was now in. Through our PAG, Maryam has found both practical and emotional support. Everything we do, all our work, is centered around being fully present for individuals such as Maryam and advocating for their good at an individual and policy level.

This illustration gives a name to your cause and helps potential funders see that what you do matters to real people and that any investment they make will be providing concrete support to individuals not so different from their own families and friends.

2. THE ORGANIZATION'S MISSION AND VISION STATEMENTS

A mission statement lets the world know what you're all about. It is about the present, what your organization is trying to accomplish now. Mission statements are clear, succinct, and often quite simple. Some examples from organizations similar to yours:

- "TRIO is a non-profit international organization committed to improving the quality of lives touched by the miracle of transplantation through support, advocacy, education, and awareness."
- "Avery's Hope raises money and awareness for rare, ultra-rare and undiagnosed pediatric GI patient families, assisting with out-of-pocket and insurance denied expenses."
- "The mission of Recordati Rare Disease Group is to reduce the impact of extremely rare and devastating diseases by providing urgently needed therapies."
- "The Mission of the AORTIC Advocacy SIG is to improve care and outcomes (survival and survivorship) of cancer patients across Africa through active engagement of patient advocates embedded throughout health care and research/clinical trial systems."
- "The MECFA *(Middle East Cystic Fibrosis Association)* mission is to improve cystic fibrosis patient health outcomes in the Middle East, North Africa, and Central Asia."
- "The mission of Patients Rising is to provide education, resources, and advocacy for people living with chronic and life-threatening illnesses."
- "The mission of NORM *(National Organization of Rheumatology Management)* is to be a forum by which we promote and support education, expertise and advocacy for rheumatology practice and their patients."
- "The mission of Dubai Cares is to break the cycle of poverty by ensuring all children have access to quality primary education."

A vision statement shines a light on your ultimate goal, the way you want things to be in the future. Often vision statements begin with phrases like "We envision a world in which . . . ". If you accomplished what you're working toward, what would the world look like?

For example:

- "Leukemia & Lymphoma Society: We envision a cure for leukemia, lymphoma, Hodgkin's disease and myeloma, and improved quality of life of patients and their families."

- “Kiva: We envision a world where all people – even in the most remote areas of the globe – hold the power to create opportunity for themselves and others.”
- “MECFA: All patients born with cystic fibrosis living in the Middle East and surrounding countries are diagnosed early and have access to quality care, medication, and equipment that extends their life expectancy and quality of life.”
- “The vision of Patients Rising is an inclusive healthcare system where all patients have transparent, affordable access to the treatments they need.”
- “Barbara Nassar for Cancer Patient Support: Every patient receives his treatment with dignity.”
- “Friends of Cancer Patients *(UAE)*: To see a world where cancer no longer has power over our lives.”

3. CHALLENGES OR PROBLEMS THAT YOU ARE ADDRESSING

Statistics here can help you show why your work is important. How many people are affected by the work you are doing? What gaps in service exist that you are trying to fill? What are the results of individuals not being able to access care or having the advocacy that you are providing? It’s important to show some sense of urgency. Let your reader know that these challenges need to be addressed now, that the well-being and health of individuals depend on action.

4. THE SERVICES THAT YOU PROVIDE FOR BENEFICIARIES

What do you do that improves the situation and addresses the challenges? In this part of the case statement, you are shining a light on the strengths of your organization, the actions that you are taking to make lives better, the programs that you conduct. While you aren’t talking about your needs in this section, you are setting the stage for the potential contributor to understand your work and why support is important and why you are uniquely qualified to provide these services.

5. RESULTS THAT YOU ARE TRYING TO ACHIEVE

This section can include a brief description of your short- and long-term goals.

For example:

- We are working to develop educational programs to educate nurses, nutritionists, dieticians, and physicians in the management of the disease so that patients receive more consistent, comprehensive care. Over the next two years, we hope to have professionals from at least six medical centers participate in this training.
- We aim to increase early screenings amongst adults between the ages of 18 - 35 for this disease in our region by 25% in the next 12 months. Over the next three years, our goal is that early screenings will increase by 60% over today’s screening rate.
- We seek to bring together organizations, both national and international, in an active collaboration to further the knowledge among policy makers concerning care for uninsured individuals with an end goal of seeing countries enact policies of protection.

6. DESCRIPTION OF YOUR FUNDING NEEDS

Be specific. How much money will you need to complete this project? If you can divide the funding for the project into segments, this may be helpful to funders that will not be funding the entire project, but would like to fund a concrete, identifiable part of the project.

For example:

We are seeking 50,000 USD for a public awareness campaign to reduce the stigma surrounding diseases of the blood. This project will include public service announcements through various media channels, a conference with expert guest speakers, and printed materials that can be shared with patients, families, caregivers, and the public. Details on each segment of the campaign will be outlined in a full proposal to follow. For now, we expect the costs of each segment to be as follows:

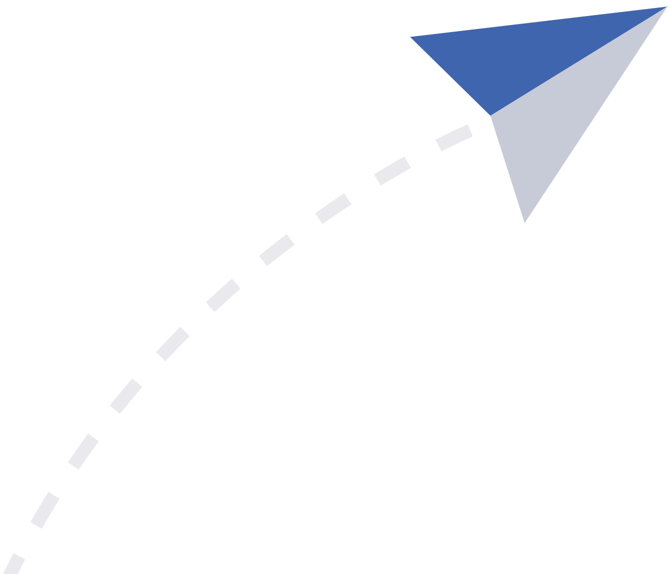
Public Service announcements to be produced at local new outlets	**10000 USD**
Speakers' fees for Advocacy Conference	**20000 USD**
Venue/accommodations for Conference	**10000 USD**
Printed materials for broad distribution	**10000 USD**

Of course, an actual breakdown of the funding that you are seeking may be much more complicated, but it needs to make sense to a prospective funder and allow them to understand, in this case statement, the scope of your project and how their investment can help.

7. WAYS FOR CONTRIBUTORS TO BECOME INVOLVED

You may tailor your case statement for each specific potential funder, but in general, in this section you are letting donors know that you are equipped to receive support in ways that will be convenient for them and in compliance with any country regulations. Online contributions, bank transfers, personal cheques are vehicles for contributing. You may have other options for donors as well. In addition, let potential partners know if they can support by attendance at specific events, by participating in advocacy actions, or by becoming involved as volunteers in patient support.

The following page contains a very simple worksheet for gathering information for your case statement.



WORKSHEET FOR A SIMPLE CASE STATEMENT

Your case statement is a collection of the reasons and the ways that people can support your work. You will have one case statement for your entire organization but may also write statements for individual projects. It may be helpful to gather the following information as a beginning to crafting your case statement.

1. Share a compelling story about how your organization has affected the life of a particular person *(while you won't want to share a person's actual name, you do want this to be a true story that illustrates how important your work is and how powerful your mission is).*

2. What is your organization's mission statement? Your vision statement?

3. What specific challenges or problems does your organization address? Why is this an urgent problem to solve?

4. What programs or services do you provide to address those challenges? What is unique about the way your organization approaches this problem?

5. What specific things are you trying to accomplish? What are your goals?

6. What are your immediate and long-term funding needs? How do you want people *(individuals, foundations, corporations)* **to be involved with you? What direct impact would their generosity have?**

SETTING THE RIGHT TONE FOR YOUR CASE STATEMENT NARRATIVE.

Once you've gathered the basic information that you want to include in your case statement, you can formulate the narrative. Writing your case statement with your audience in mind is so important. You may be deeply knowledgeable about the cause that you champion, but your reader may not share that knowledge. You will want to speak *(or write)* in a way that is accessible to a broad group of potential supporters and advocates.

The following chart gives some practical guidelines for formulating accessible language throughout your case statement – and all your communications with potential funders.

A GOOD STATEMENT	A BAD STATEMENT
Uses Language your constituents use	Uses jargon & doesn't understand your audience
Is emotionally stirring	Is logical and cold
Communicates the "WHY"	Communicates only the "WHAT" or "HOW"
Is concise	Is really long
Uses simple, powerful sentences	Uses rambling paragraphs
Sounds good spoken out loud	Is full of clauses & hard to say
Surprises	Is dull
Is Actionable	Can't be quantified
Is specific	Is vague

Adapted from NonprofitHub.org: Why We Have Mission Statements.

Things to remember as you write your case statement narrative:

- Write your case statement in a friendly, accessible manner
- Use the word **"you"** frequently, helping the reader to see themselves as part of the solution to the challenges you are addressing.
    - Your partnership will help us reach these important goals.
    - Maryam's story has a happy ending because partners like you are supporting our work.
    - With your help, we can provide screening for twice as many children next year.
- Be certain that your case statement addresses the question that most donors leave unasked – **"What will my contribution accomplish in terms of human lives?"**.
- Utilize key statistics to highlight the need for your service, but don't let your case statement be just a recitation of facts and numbers.
- Focus on the benefit of your work, rather than the financial need.
- Write with passion! It's contagious.

A clear, well-written case statement can serve as the basis for all your donor communication and will be an important asset as you work to widen your circle of support.

Most organizations prepare their case statement with attractive layouts and graphics for their website and then produce simpler, printed versions as handouts or to be shared by email.

HDF *(Human Development Foundation) in Pakistan uses this simple visual to show their areas of service in their case for support statement in a campaign.*
Making your case with graphs, charts, and clear visual tools will help prospects understand what you are trying to accomplish and why you are qualified to attempt the work.

While your case may not be as highly developed as the following examples, you can easily identify the main components of a good case statement and adapt those principles to your own case.

For Pete's Sake Cancer Foundation Case for Support – *a complex printed case statement but with some sections that you may want to use for inspiration*

A fairly straightforward case for support with powerful statements *such as "Did you know it takes $2500 to help a cancer patient throughout the first year of their journey?"*

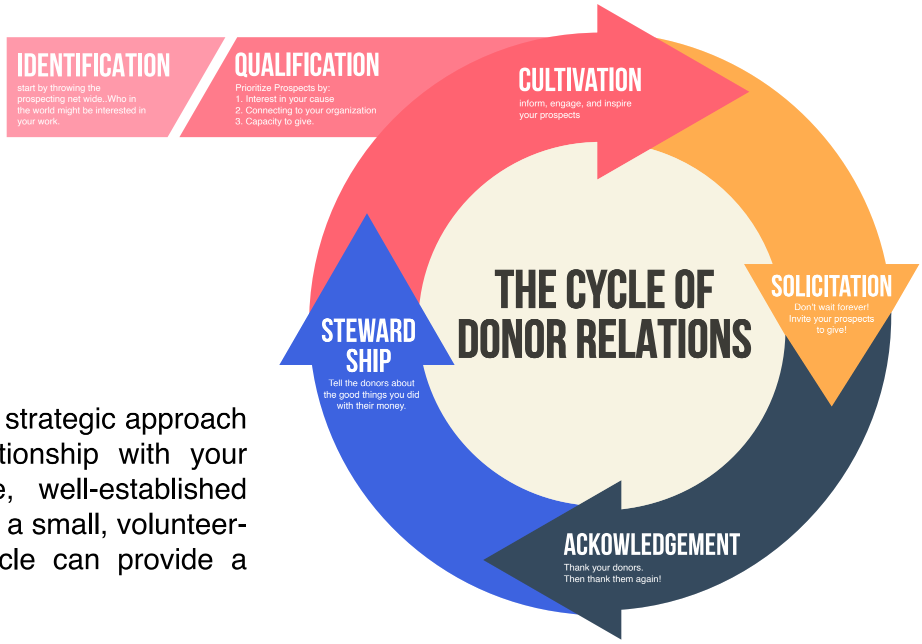
A very simple case statement to raise funds *for a particular piece of medical equipment*

A well laid-out international case for support

A very good example of starting a case statement with a story

III. THE BASICS OF FUNDRAISING: UNDERSTANDING THE CYCLE OF DONOR RELATIONS

As your organization seeks to encourage potential contributors, remember that bringing someone into close partnership with your work is a complex process, never just one meeting or interaction. You will need to develop insights into what motivates each donor or prospect to give and develop effective strategies to engage these donors.



Adapted by Alex Jonathan Brown from Front Range Source, The Cycle of Donor Relations.

The Donor Cycle is a universally accepted, strategic approach to moving the donor into a closer relationship with your organization. Whether you are a large, well-established organization with a loyal group of donors or a small, volunteer-led group just starting up, the donor cycle can provide a framework for your fundraising work.

It is a sequence of processes and practices involved in establishing and renewing the connection of donors and their values to your work.

This diagram shows how potential partners enter a relationship with your organization, how you can move the relationship to deeper, more productive places, and how to maintain those relationships over time, resulting in stable, growing funding for your work.

Donors give according to their values, and your organization's mission and case statement define the purposes for which donations will be used. **The central objective of the donor cycle is to discover where the donor's values and your organization's mission align.** This alignment, and helping the donor to understand it, is the key to successful fundraising efforts.

Your donors won't be aware of the cycle, but it can help you map how you will carry out the systems and processes to support growing relationships. While the diagram shows the cycle as separate steps, they really do blend together and you will be continually moving along the cycle and thinking about engaging and re-engaging with your partners and friends.

III A. IDENTIFICATION:

The work of bringing people into your circle starts with identifying people who will hear your story and want to walk alongside you in finding solutions and advocating for your cause.
Finding those potential funders requires research and planning and casting a wide net into all the categories of people who might find some connection with what you do. You will want to begin by thinking "big", building a large list of potential funders, including all possibilities, brainstorming and being inclusive in your thinking.

As you begin building a list of possibilities, remember that your potential funders will come in different forms:

- Individuals
- Foundations and other grant-making organizations
- Corporations
- Government entities
- International agencies that may give through a dedicated channel such as a foreign ministry, embassies, or international NGOs

WHERE MIGHT YOU LOOK TO BEGIN LOOKING FOR INDIVIDUAL DONORS?

Start with your own circle. Family, friends, associates, colleagues, and neighbors who know of your passion will often want to partner with you on your journey. These might not be your largest donors, but they will be your most loyal partners. Because you care so much, they will care as well. Then ask them to introduce their circle of associates to your work.

Widen the circle. The patients and health care professionals that you work with also have their own circles. Their families, friends and colleagues care deeply about treatment, cures, advocacy, and public policy around the diseases with which you are concerned.

Be aware of individual philanthropists. Private individuals with wealth can be drawn into your work through your outreach and storytelling. Many people with significant wealth live modest lifestyles so getting to know your friends and their friends can often open unexpected doors. Be attentive to news of individuals who are involved with organizations like yours or who are championing health causes in your community. They may not be supporting you – yet – because they do not know of your mission.
Check your social media followers. Individuals who have enough interest to follow your organization's social media accounts are important prospects for individual giving. Compare your list of followers to your list of current donors. Those who are not already giving belong on your prospect list.

HOW DO YOU UNCOVER GRANT-MAKING ORGANIZATIONS?

Check out foundations funding organizations with missions like yours. Look at other PAG and health-related NGO web sites for their list of grant funders. Their social media posts may also reveal recently received grants and recognize their funders. Annual reports are also good sources of possible funders.
Talk with your partners and collaborators. While grant seeking is a compe titive practice, talking with those in your field can often uncover grant makers that might otherwise be difficult to find. Share information that you have gathered and others will do the same for you.

Websites about global funding can provide some lists of grant funders.

For example, the site **Advancing Human Rights: The State of Global Foundation Grantmaking** lets you drill down to a specific area of support *(health, for example)* and then a region *(Middle East & North Africa)* to find top foundations funding in that area. Other websites for grant funders can be found in the resource section at the conclusion of this guide.

Publications. Periodicals that focus on philanthropy can reveal foundations and corporate funders that are actively supporting health-related causes.

- UAE-based Philanthropy Age hosts a website and publishes a magazine that highlight philanthropists and foundations that are investing heavily in regional causes.
- The Chronicle of Philanthropy, both print and online, features news about grants made in many categories, including health.
- Nonprofit World Magazine, published by Society for Nonprofits. Subscription includes a membership to GrantStation.com, a good source for information about US-based funders.
- Inside Philanthropy, an online digest with articles highlighting which funders are supporting which causes.

WHERE DO YOU CONNECT WITH CORPORATE DONORS?

Think out of the box! Your corporate donor prospects will not all be health-related businesses. Most large companies have a philanthropic arm. A report prepared in 2020 showed that in South Africa, 22% of all the funding for NGOs came from corporations.

* The percentages are even higher in the MENA countries where mega-gifts from corporations effect the overall giving picture. But even for small organizations who do not attract these mega-gifts, corporate partnerships can be very productive. You will be looking for the philanthropy departments – often called community engagement or social responsibility departments – of banks, retailers, manufacturers, real estate developers, and tech companies.

*Murisa, Tendai. (2020). Country Report 2020: South Africa. Global Philanthropy Tracker. Retrieved from scholarworks.

Businesses related to your cause will be interested in your work.
Pharmaceutical companies are understandably a rich prospect field for you, but you can dig deeper in the health field. Doing a simple internet search for *"healthcare"* companies in your region will produce an interesting list of companies that may want to show support for your cause in a public way. Insurance companies, home health care, large health systems, medical supply firms, and others will have reason to want to connect with you. Look at companies that sponsor booths at conventions or have speakers hosting sessions and try to have conversations with those representatives at conferences to introduce them to your organization's work.

HOW DO YOU CONNECT WITH GOVERNMENTAL FUNDING AGENCIES?

Start by talking with local health officials and let them lead you to regional, national, and international potential funders. The internet can be a great source to find RFPs *(Requests for Proposals)* from government agencies that have funds to distribute and are looking for projects to support. Your volunteers may also have connections to these agencies and can help you make connections.
What international agencies and NGOs support your kind of work and how do you find them?

International NGOs often have regional or local offices through which you can introduce the potential funder to your organization and discuss possible collaborations. You can also contact embassy offices to inquire about their funding priorities. As with all funders, if you can establish some personal contact with a local representative, you can begin to build a productive relationship.

III B. QUALIFICATION:

Your research and conversations within your circles of acquaintances will yield a long list of donors and you may not have time or manpower to develop a relationship with each of those prospects. Your next step is to qualify these prospects so you know where best to focus your time.

It's tempting to think about qualifying as just determining whether a prospective donor – an individual, corporation, or grant-giver – has wealth. Just rating donors for their wealth won't deliver the most productive prospects for you. Comprehensive prospect research identifies those that have both wealth (the capacity to give) and warmth *(an affinity for your cause)*. You are looking for donors who can give and have a reason to give.

When qualifying your prospects, here are some things to consider:

1. The person *(or organization's)* ***existing relationship*** with your organization if there is one. The prospects at the top of your list will always be people who already know something about your work. Are you keeping good records that allow you to track past interactions with individuals and organizations such as volunteering, event attendance, or past interaction as a patient or family member? If not, now is a great time to start. Your system can be simple but keeping good data can guide the way you communicate with prospects.

2. ***Donations*** that your prospects have made to other nonprofit organizations, especially those with missions like yours. This information lets you know where that prospect's interests lie. People give to things they care about and seeing where people give provides insight into the things that they are passionate about. Knowing this allows you to tap into those interests when reaching out to them. Check web sites of organizations like yours and annual reports for listings of contributors.

3. If your prospect is an individual, pay attention to any ***professional or personal networks*** that they may be a part of. This also gives you clues into what the prospect chooses to invest time and resources. ***LinkedIn*** and other social media postings can clarify a potential donor's networks and connections.

4. Do you have necessary ***demographic and contact information***? Having a great list of prospects won't be useful if you don't have contact information or know any details about this prospect. Background information helps you build a strong profile for your potential donor. This is another reason that a database of some sort is essential for good prospecting.

5. Do you have ***access*** to this person or organization? If you look at a foundation as a prospect but you see that they will not accept any unsolicited proposals, it will be difficult to get a proposal into their hands. You may discover an individual of considerable wealth, perhaps even an interest in health causes, but if you are unable to contact them, to find a connection, you won't be successful in recruiting them to your cause. But do not give up easily.

Think of all the ways you might approach potential donors:

- To gain access to a foundation or corporation, consider submitting a letter of introduction about your organization – no request for funding, just an introduction and a request for an introductory meeting to learn about possible collaborations.

- Talk with volunteers, patients and families, and others involved with your organization to see might make an introduction to a prospective individual donor

- Attend events connected to your cause and be forward about introducing yourself to others in attendance. Exchange contact information with anyone who might have connections that would help you.

- When you host events, be certain to get the contact information of all attendees to ensure access to these interested people after the event.

- Utilize social media platforms to encourage potential donors to visit your organization, attend events, sign up for your newsletter, or read new studies about the cause you represent. Their engagement will provide you with access for the future.

You may find that only a few prospects meet ***all*** these criteria, but those that do are the most promising people and organizations to invest your time in getting to know. If a prospect meets none of these criteria, you take confidently take those off your list and focus your attention elsewhere.
Many will meet two or three of the criteria and they should stay on your list of possibilities.
To help prioritize the contacts that you gather, you can use a simple matrix to map what you know about prospective donors.

Donor	Existing Relationship	Current donor	Professional networks/ occupation	Do we have contact info?	Who knows them?	Family connection
Prospect A	None	No	Healthcare worker LinkedIn	Mailing Adress	Volunteer	No
Prospect B	Follow us on Facebook	Yes		Yes	Family	Yes, Uncle of family we're serving
Prospect C	None	No	Physician at Medical Center	Yes		No
Prospect D	None	No	Regional Philanthropist with healthcare interest	No	Unknown	No

Keeping an up-to-date prospect matrix can help you decide when and how to approach the potential donors that you've uncovered. If you look across your matrix *(you may want to add your own categories)* **you should be able to identify those with whom you have the strongest connection and access. You will also be able to identify information you still need to discover.**

Prospect A has a relationship with one of your volunteers. Have a chat with the volunteer to get their advice for the best way to gain access to the prospect. Would they invite them to your next event? Or invite them to meet with your beneficiaries? Ask them to share your most recent newsletter with this prospect, adding a note saying how important this organization is to the volunteer.

Prospect B knows about you, has a family connection, is interested enough to follow you on Facebook. This prospect is ready to become a contributor and you have easy, meaningful access. Don't hesitate to invite them into a donating relationship.

You have contact information for the physician **(Prospect C)** but no existing relationship. While they may be an excellent prospect and have the ability to give, you will have to find a way to introduce your cause to them. You may decide to email your latest newsletter or a personal invitation to an upcoming event. Consider who in your organization would be best to issue such an invitation.

Now **Prospect D** is a genuine challenge. While you've read of their interest in the healthcare of your region and their generosity to organizations like yours, you have no direct contact information. You will need to be a detective to uncover a way to introduce your cause.
Does the philanthropist have a foundation? If so, contact information should be fairly easy to find.
Look at the other organizations they support. Might you have connections there that could be helpful? Speak among volunteers, families, and current supporters to find someone with the ability to open the door to communications with the prospect.

III C. CULTIVATION:

Once you've refined your prospect list, it's time to think about how to begin, or deepen, your relationships. Getting to know these potential partners and helping them learn more about your work is essential if you hope to receive support from them in the future. Don't worry about making an ask right away. Like all friendships, these relationships might take some time to develop, but investing that time can have rich rewards for both sides.

Cultivation is simply finding ways that you can connect people to your mission. Everyone involved with your organization can bring their creative thoughts around growing relationships by considering the three things you need to do to help interested parties become first time donors: **Inform, Engage, and Inspire.**

- **Inform:** Potential donors want to learn as much as they can about your organization. What programs are you carrying out? What people do you serve? What successes are you having? Your website is a powerful vehicle for informing the public about what you do. It is the first place many people go to learn about an organization that they've heard about. Is your website giving potential partners the information they need to decide about supporting you? Some interesting examples of sites that do a good job of informing.

Organization	Web Site	How they inform
Rare Diseases South Africa NPC	www.rareduseases.co.za	Short, informative video introduction to their work
Friends of Cancer Patients	www.focp.ae	Pillars of work are very clear
Virginia Hemophilia Foundation	www.vahemophilia.org	Areas of work are prominent
National Psoriasis Foundation	www.psoriasis.org	Appealing way to show services for patients in different situations
I Battle Disease (IBD)	https://ibattledisease.org	Clear link to comprehensive annual report
Childhood Cancer Foundation So. Africa	https://choc.org.za	Informative video, impressive statistics, opportunity to sign up for newsletter

Other ways of informing are to invite everyone you encounter to follow your social media streams. Make certain you are providing informative posts that give insights into how you approach your mission.

Don't make the mistake of assuming that everyone who visits your *Facebook* page or your *Twitter* account understands your organization. If someone visits your *Facebook* page for the first time, will they be able to gain a good understanding of your recent accomplishments?

*Read more about social media's role in fundraising in **Section VII**.*

Well-written *newsletters*, whether they are printed pieces or electronic newsletters, give potential donors a regular, thoughtful way of learning about your programs and services and often also give them information about your organization's leadership. Having a sense that they are beginning to "know" your organization encourages giving. Having a prominent place to subscribe to your newsletter on your website will grow your base of informed prospects.

- **Engage:** Much of your work to inform will be one-way communication, where you are sending information out to an audience. To engage, you will need opportunities for two-way communication, opportunities for potential contributors to interact with you.

Create opportunities for volunteers. Volunteers often become the most generous, loyal supporters, so when you can invite people into your organization as volunteers, they gain an understanding of your work that is impossible to match. It's the best kind of engagement.

Open your doors! Take every opportunity to invite people to see your work, to meet the beneficiaries of your efforts *(being cognizant of privacy concerns)*, and to experience how you are fulfilling your mission. When in-person meetings are difficult, invite foundation officers, corporate funders, and individual prospects to join you for a video chat about recent developments in research, service, or public policy. When appropriate, you might invite a patient or family member to share how much your organization has meant to them. Never miss the chance to get to know more about these friends as they learn more about you.

Share victories, large and small, as personally as you can. Sending a personal email, in addition to emailed newsletters or mass updates, to a potential donor can have such an impact. *"I just wanted to let you know that we experienced a great step forward this week*" lets an organization or individual know that you are achieving results and making progress and will strengthen their reasons for giving.

- **Inspire:** Informing and engaging go a long way in moving people from your prospect list to your donor circle, but to become contributors, most people need to be inspired by what they are learning about you.

They need to hear the *first-person stories* of how your organization is making a real difference in the lives of people in your community, region, or country. They need to believe that what you are doing is making a difference in a way that is different than other organizations.
While you want to be respectful of the privacy of those you work with, having patients, families, and advocates tell their own stories is the most powerful way to inspire all those who are following your work. Presenting a realistic vision of what you believe you can accomplish in the future, with the help of funders, is also quite inspiring.

Funders want to be part of successful organizations that are making smart plans to continue their success.

III D. SOLICITATION – INVITATION TO GIVE:

At some point, you do need to make a direct ask! If you've identified and qualified prospects carefully, then informed, engaged, and inspired, a few people and organizations will give on their own. But usually, you will need to directly invite people to become contributors to your organization.

How you ask will depend on who you are asking and what you are asking for, but there are some general things to consider when asking:

- Make certain you are asking for what you need. Asking for what you think the donor wants to fund, rather than what you need, will end up complicating your relationship with them in the long run. Not every prospect will be a good match for you and trying to fit your mission into their priorities can cause you to take on projects outside your mission.

- Most organizations need unrestricted funds, contributions that are made to you without restrictions so that you can use the money where it is most needed.
Finding funders who make unrestricted gifts is getting easier, but it is still challenging to find this support. ***Individual donors are the best means of raising unrestricted support.***

- Many foundations and corporations prefer to fund specific projects and will only give funds for a clearly identified need with stated outcomes. Funders may require reports showing that you met the restrictions of the grant. If you are seeking funds to help pay for prescriptions for a certain segment of your beneficiaries, you will need to show that you did so. You won't be able to use the money for any other purpose unless you ask permission from the funder first and in some cases, if you fail to meet the grant requirements, you could be asked to return the money.

Inviting individuals to give

- **Written Appeals.**

You will want to plan a simple schedule of appeals to individual donors, giving those who are on your prospect list, email list, and social media streams an opportunity to respond to an "ask". These asks may be tied to a particular time of the year, to a special organizational need, to a time of growth in services, or to tap into religious practices that encourage generosity.

As you think about writing your next ***(or first!)*** appeal to individuals, decide on an approach that will best convey your message. You won't want to send the same appeal repeatedly and changing up your approach will keep potential donors interested.

Classy, a US-based fundraising platform *(www.classy.org)*, produces an informative blog about a variety of fundraising topics. Classy's blog highlights these approaches to the individual appeal:

- The "act now" approach creates a sense of urgency around a particular set of circumstances. If your region is involved in a crisis and your organization has a role to play in helping, that's an "act now" situation. If a corporation or foundation has offered to match contributions that are given in a time frame, you will certainly want to give donors the opportunity to take advantage of such an offer and stress the urgency of acting now. You can also use the "act now" approach if you have urgent needs. "We have patients in need of critical support services now. Your contribution today can change their world."

- With the "identity" approach, the appeal draws a direct connection between potential donors and the impact of their donations. Using phrases like "friends like you made it possible for us to advocate for a change in policy" draws the reader into your accomplishments and the things you hope to do. "Maryam no longer feels alone because you help make her support group possible." When they identify strongly with you and your success, they are very likely to support with their resources.

- You might also consider the "unexpected approach". Presenting an unusual twist on your work or on the immediate need can cause the reader to think about your work differently. Unexpected ideas cause us to pay attention and think about a problem or solution in a new light. The NGO Greenpeace built an entire commercial using **LEGO®** bricks and the song "Everything is Awesome" from the **LEGO® Movie** to highlight that everything is not awesome. It was such an unusual juxtaposition that 4 million people watched it on YouTube. Is there some aspect of your work that can be presented in an unusual and compelling way?
Try that approach in an appeal and watch people take notice!

Whatever approach you choose for an individual solicitation, keep in mind:

- Effective appeals use stories.
Stories allow readers to make an emotional connection to your work. They promote empathy and concern. Stories are easier to remember than facts *(actually, 22x more memorable than straight facts*)*. People will pass your stories on to others, which is important for spreading your message beyond your known circle, especially if you are posting your appeals on social media or sharing via email.

*Network for Good. Networkforgood.com How to Write Amazing Appeal Letters.

- Effective appeals choose words carefully.
"**You**" makes the appeal seem personal *(donors like you!)*.
"**Because**" signals that you have a real reason for asking and a reason for asking now.
"**Join**" turns a solicitation into an invitation.
You are doing something worthwhile and inviting others to come along.
"**Every bit helps.**" A study of the appeals done by the American Cancer Society showed that when donors were asked "Will you donate?" and "Will you donate? Every penny helps.", twice as many donors said yes to the second appeal.* Letting people know that even small gifts make a difference encourages readers to give.
*From a study done by Dr. Robert Cialdini in Influence: The Psychology of Persuasion
"**Immediately**" assures donors that their gift will be put to work right away in supporting and advocating for the families you serve.

- Effective appeals are **short.**
What do you need and why? Get to the point and let your reader know why you are reaching out to them right now.

- Effective appeals **lose the jargon**. Especially when talking about medical/health subjects, it is easy to leave your readers behind. When writing appeals for industry-insiders, you can use those scientific terms, but you want to write in a way that is understandable to all potential donors. Write simply.

- Effective appeals have a **call to action**. What do you need supporters to do and how should they do it? Make sure you include a link to your donation page within the appeal or otherwise give clear instructions how donors can partner with you.

TEMPLATE FOR A SIMPLE APPEAL LETTER

Date:
Name:
Street:
Locality + District:
Country:

Dear *Name*, **(ALWAYS write to a person, never Dear Donor)**

[Begin with an emotional anecdote or inspiring success story to pull the reader in. Try to make this as personal as possible. Short but powerful].

There are *[insert problem that you're trying to solve].*
While we already *[insert solutions that you're currently undertaking]*, we need your help to accomplish *[new solution].*

You can help *[insert your mission or project]*. Your support is key in solving this problem.

Would you consider donating *[amount]* to help us *[make this impact]*? Your donation will have an impact on *[group of people affected]* and will be used to [insert accomplishment].

We will follow up with a call and look forward to visiting with you.
You can also donate online at *[URL]*.

With warm regards **[or Sincerely,]**

Signature of the person telling the story
Typed name of the person telling the story

P.S. *Include a statement reiterating your call to action* – such as **"Remember that your support is crucial in providing critical services for families. We look forward to talking with you!"**

Template adapted from Qgiv.

SAMPLE APPEAL LETTER

(FICTITIOUS ORGANIZATION & NAMES)

31 January 2022
Zahid Jaboori
58 Blick Walks
Ras al-Khaimah, Hatta
United Arab Emirates, AE

Dear **Mr Jaboori**,

As if the adolescent years don't pose enough challenges for young people, 14-year-old Marlena is also managing the disease of psoriasis. Along with the physical complications, Maryam experiences the emotional challenges that accompany any health condition that affects physical appearance. A sense of isolation, embarrassment, and a hesitancy to participate in typical activities present a genuine risk to her personal well-being and self-confidence. At the Psoriasis Collaborative we have helped connect Marlena to volunteer counselors who know exactly what she is experiencing and, in this way, are improving the quality of her life.

Eight thousand new cases of psoriasis are diagnosed in our country each year and many are young people just like Marlena. We have been providing support for these individuals for the last ten years, as well as supporting research into promising treatments. Some advancements have been made, but there is much yet to be done. And more than 60% of psoriasis sufferers in the UAE receive no personal support as they struggle with this disease.

You can help provide life-changing services to both long-term patients and those newly diagnosed by supporting the work of the Psoriasis Collaborative. You can influence a life such as Marlena's with your very first gift.

Our goal is to partner with citizens like you to raise **100,000 AED** before the end of the year so that we can extend our services into four communities not currently being served. Because we know you are an individual who is committed to healthcare for all our neighbors, we ask you to participate as generously as you are able.

Thank you for considering this important work as you make charitable contributions. We will call within the next two weeks to answer any questions that you may have. We're grateful for your interest in the Psoriasis Collaborative and look forward to speaking with you.

Sincerely,

Shaffan Rahaim
Shaffan Rahaim, Executive Director

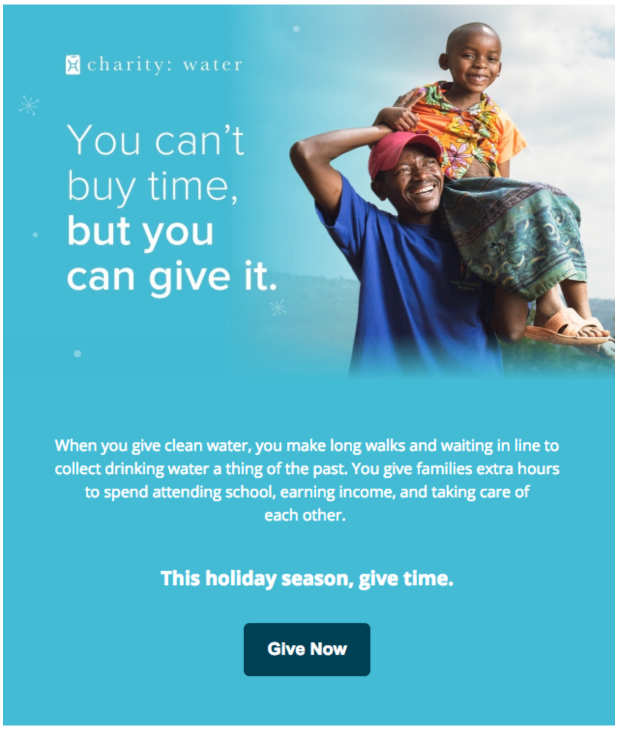
P.S. Please visit our website at www.psoriasiscollaborative.org for more stories like Marlena's.
And giving online puts your contribution to work immediately.

Email Appeals.

These guidelines for effective appeals apply to formal written letters that you send to individuals and to less-formal requests that you might make through email. However you submit appeals to individuals, making your requests clear, compelling, and interesting will result in contributions to your cause.

Email appeals have the added advantage of allowing you to include links to stories, to include pictures and infographics, and to link to articles about the latest research around the diseases, patients, treatments, and advocacy with which you are involved. Proofread your email appeals carefully to make certain the links work and are appropriate.

Some tips that apply to email appeals:



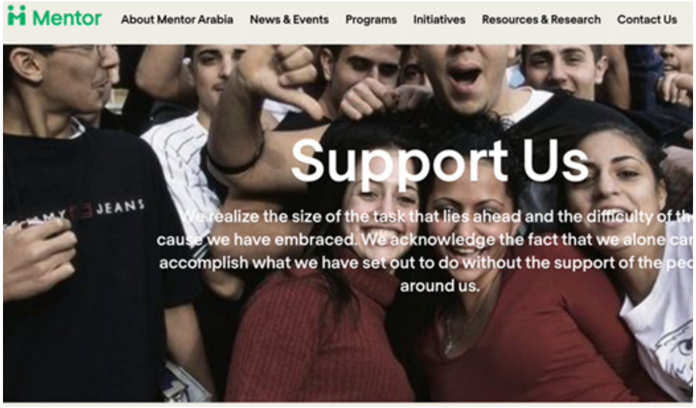
- Keep the email short and direct the reader to your web site where they have access to more detailed information. Don't try to put everything in one email.
- Make your call to action "DONATE" highly visible.
- If you have the technology to do so, use a personal greeting in your email using your prospective donor's name.
- If you can segment your email list, you can send very simple, powerful requests for support to those who already know about your work. This example from charity:water makes a powerful case for support in just a few words. And makes it easy to give.
- Use a design that is compelling. Make every word count.
- Choose a subject line for your email that is short, interesting and encourages the receiver to open the email:

  - *"It's never too late to help!"*
  - *"You can give the gift of health."*
  - *"Together we can do this!"*
  - *"YOU are the hero we need right now."*
  - *"A small gift can give a healthier tomorrow."*

In addition to written solicitations and emails, you can appeal to individuals with requests made through social media channels or crowdfunding avenues. You can find more information on utilizing social media and crowdfunding in Section VII.

Asking for support on your website

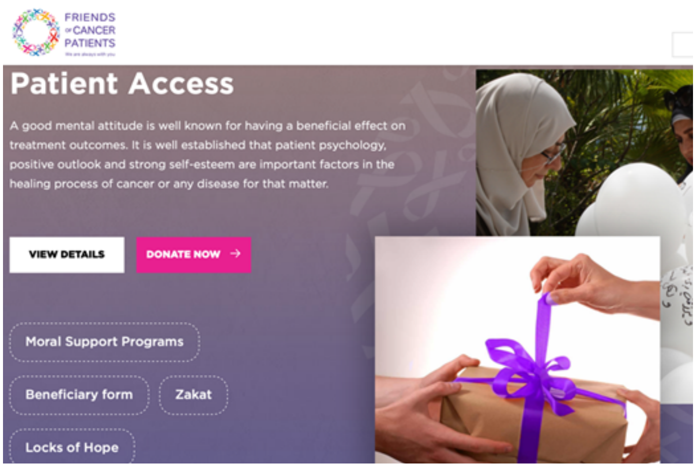
Your website is one of your most powerful tools for soliciting donations. Make sure your site is asking clearly and often. Throughout the pages of your site, the path to donating should be clear and easy to follow. Make certain that someone who is reading the inspiring stories on your site, learning about your success, and meeting the people you serve, has a simple route to invest in your mission.



Mentor Arabia, a regional NGO based in Beirut that encourages healthy lives and healthy choices for young people, has taken an interesting approach to asking for support on their web site.

They not only ask for donations, but also ask for ideas and volunteers.
It is a very appealing request for investments in their work.

Presenting the way donations will be used by stating your mission clearly on your website will help drive support toward your work. On the opening page of web site for **BASMA: Children with Cancer Support Association,** a banner lets any site visitor know how their contributions will make a difference in the lives of children.
"Give them a smile . . ." is a powerful way to ask readers to support the work.



Friends of Cancer Patients in the UAE uses a brightly colored "donate now" button in each section of its site to provide a straight path for inspired readers to give.

Also note that they provide a link to their Zakat campaign, with notes about the approval of the campaign for Zakat giving and how the funds will be used.

Special Events for Individual Fundraising.

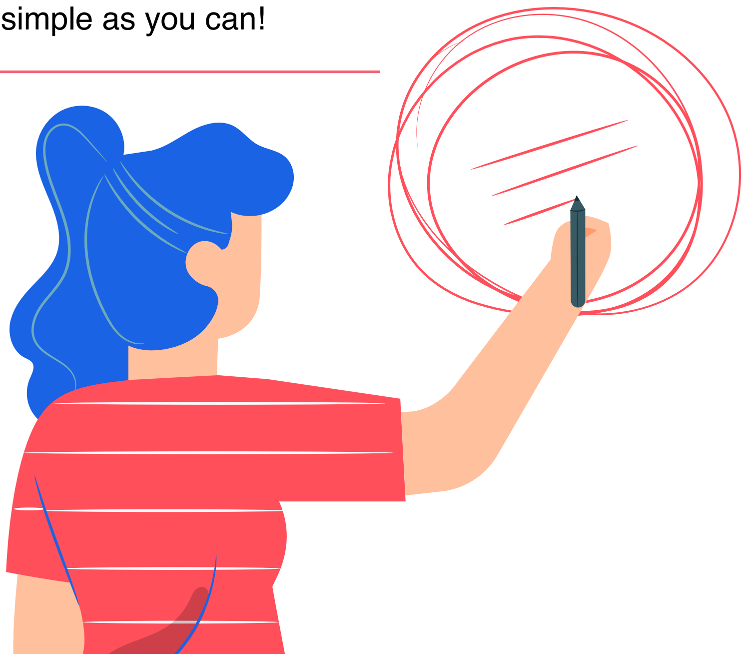
Another avenue for soliciting individual support comes through requests you make during events such as gala dinners, award presentations, or special speaker events. Every time you bring people together in the name of your organization, you should tell your story and invite them to participate by investing.

If your organization has already established a successful recurring event as a fundraising tool, good for you! It's not an easy thing to do. If you are thinking about adding an event to your portfolio of activities, you might want to give it some real consideration.

Note: ***You can find tools for evaluating special events in Section VIII at the conclusion of this guide.***

If tickets sales are part of your fundraising scheme, you will want to do all that you can to promote healthy ticket sales:

- Sell tickets online for convenience
- Utilize "table captains" – volunteers, family members, associates who will take the responsibility of filling tables for the event with their acquaintances
- Encourage group sales with discounts
- Cross-promote your event on your website, social media channels, other media outlets, emails, and direct mail. *(A general rule is that a prospective buyer needs 7-10 "touches" before they decide to buy something like event tickets.)*
- People buy tickets to events for two reasons: they get something from the event and they know they're supporting your important mission. If you want more people to buy tickets, make sure you communicate your mission and what they can expect to receive *(lovely dinner, excellent guest speaker, entertainment, storytelling related to your mission, evening with others who share their social concerns).*
- Create some urgency around purchasing tickets. Do you have a limited number of seats? Is there a deadline for ticket purchases? Be sure to communicate the need for timely response.
- Make ticket purchase as simple as you can!



The "ask" is the critical part of any event. To make certain you make the most of the interested audience in the room, consider these tips for making a request for funds:

- Put your best storytelling to work. Let your live event solicitation begin with a story, just like a written appeal might. Gather the attention of everyone in the room *(or on the screen, if you are virtual)* by telling the story of a real person affected by your work – *or better yet, let them tell their own story* – so that the full importance of your service and advocacy can be seen. A heartfelt story drives home the point that your work is critical, impactful, and worthy of support. You might use videos, testimonials, letters, or even poems or songs to make your message personal.

- Having a script *(and following it)* can make all the difference. Carefully choosing your words and sticking to those choices will mean a more powerful request for funding. Having a script will help ensure that you don't leave out any important details, like all the ways someone can give.

- Practice. Your ask should feel and sound natural, friendly, persuasive and connected to the audience. The more you practice, the more comfortable you will be making the request, as if you were offering a gracious invitation for your event guests to join you in working together toward a shared goal.

- Set the stage for generous giving. Make certain that during the event your guests have opportunities to learn about your work, gather some background on your organization, and the understand the purpose of your fundraising. The more they know and feel immersed in your mission, the more generous the contributions will be.

- Time the request for donation carefully. The ask should come at an emotional high point of the event. Even if your event is a small gathering, build momentum by sharing impactful statistics that will propel your guests to make their best gifts. If you are asking guests to each make a gift of **500 USD**, tell them specifically what **500 USD** will do for a patient or for your effort to educate or affect policy change. Letting them know that their donation can accomplish something specific can be incredibly influential.

- If a sponsor or supporter has offered to match gifts made at your event, be certain to announce that as you ask. Studies show that just by mentioning a matching gift, contributions go up by **19%** and that a matching gift increases the chance that an individual will choose to donate by **22%**.[*]

  *Small Matches and Charitable Giving: Evidence from a Natural Field Experiment. 2010, Journal of Public Economics, Dean Karlan, John List, Eldar Shafir.

- Be certain to recognize event sponsors and supporters. Giving proper recognition is part of cultivating those contributors to support your event again next year. Recognizing influential sponsors also makes individual donors feel confident about giving. If that successful, discerning company is investing in this organization, I will, too!

Everyone attending your event may not respond to your request for donations immediately. Follow up with a phone call or email! Check in with guests to see if they have any questions after the event. Thank them if they gave. Thank them for coming if they didn't. Remind them that support is always needed and that you hope they will invest in your work in the coming year.

Inviting corporate support

Corporate support comes from private companies that have some interest in your work or have a commitment to improving the lives of the communities in which they have corporate offices, employees, or financial interests.

Investigate a corporation's web site. Look for opportunities to sign up for notices of new grants, requests for proposals *(RFP)*, and notices of grants made. Seeing what grants a company makes can give you good insight into whether the time you spend in preparing a proposal for them will be time well spent.

Corporations, including Pharma companies, generally give through two different avenues. They award grants through **foundations** associated with *(but separate from)* the company and they enter into **sponsorship** agreements to support certain activities of a PAG or similar NGO. You will need to approach these avenues differently to receive funding. Building strong relationships with the associates of the corporation should help you determine which is the best fit for you.
In many instances, particularly if you host events such as gala dinners, you will be eligible for funds from both sources if the corporation has a direct interest in your programs and advocacy.
The following chart highlights some of the major differences in these two opportunities for corporate support.

Corporate Foundation Grants	Corporate Sponsorships
Funded through the corporate foundation	Funded through the corporate foundation
Generally an option with larger corporations	Both small and large corporations invest in sponsorships
Usually have set submission and reporting guidelines and rigid deadlines	Usually minimal guidelines and deadlines are rolling or nonexistent
Connect with the foundation manager and submit grant proposals following the foundation guidelines	Connect with the marketing department, providing a sponsorship package that outlines the value their sponsorship will provide to the corporation
Usually will want some recognition for the corporation. This can differ significantly between corporate foundations. Be sure to understand their expectations for recognition.	Definitely will want recognition and, in many instances, some advertising value. May want to have their name prominently associated with the event or program, depending on the sponsorship level
Desire for something in return will be minimal. In regions where the company has offices, may look for volunteer opportunities for associates.	May desire tickets to a sponsored event or opportunities for employees to participate in a sponsored project.
Follow up with outcomes for the project or program that the grant supported, as with any other foundation and meet all reporting guidelines.	Very important to follow up with event outcomes *(such as number of attendees, funds raised, etc.)* and corporate recognition associated with the event *(such as media coverage, website visits, email open rates around the event)*. Particularly in corporate sponsorships, return on investment is important.

One example of a corporation that has two separate ways of contributing to the community would be the Easa Saleh Al Gurg Group, a corporation that includes a significant portfolio of individual companies. The corporation invests some of its earnings in a large program of social responsibility, including efforts in beach clean-up, breast cancer and diabetes awareness, blood donation, and care bags that benefit laborers within the company.

The **ESAG** Charity Foundation, an entity separate from the corporation, supports education and health initiatives throughout the region, and aids individual students seeking educational opportunities as well as individuals with healthcare needs. In studying the website, while the corporate support might not be a match for most **PAG**s, the Foundation may be worth investigating for service and advocacy support.

Another example, with a different slant, is the support that pharmaceutical company, Johnson & Johnson, provided through its international foundation, Johnson & Johnson Foundation Scotland, to the International Rescue Committee for **COVID-19** Health Response for Vulnerable Populations in Jordan and Syria. The Foundation has clear guidelines for where it will invest funds and how it will partner with organizations. The Foundation does not accept unsolicited requests but works through established relationships with NGOs. Janssen Biotech, Inc., a subsidiary of Johnson & Johnson, sponsors a wider variety of events, educational offerings, and partnerships. Receiving funds from a subsidiary, such as Janssen, with whom you share mutual interests, may be much easier that trying to gain access to the parent company. While the funds may stem from the same umbrella organization, the access will be different for these two related funders.

You can find more information on both the *Johnson & Johnson* and the *Janssen* web sites.

Inviting Foundations and other grant-makers

Engaging with foundations and grant makers is a more complex process than developing relationships with individuals and even corporations.

Please find the section on solicitation of grant funders beginning on ***page 36.***

III E. ACKNOWLEDGMENT

Thanking individuals.

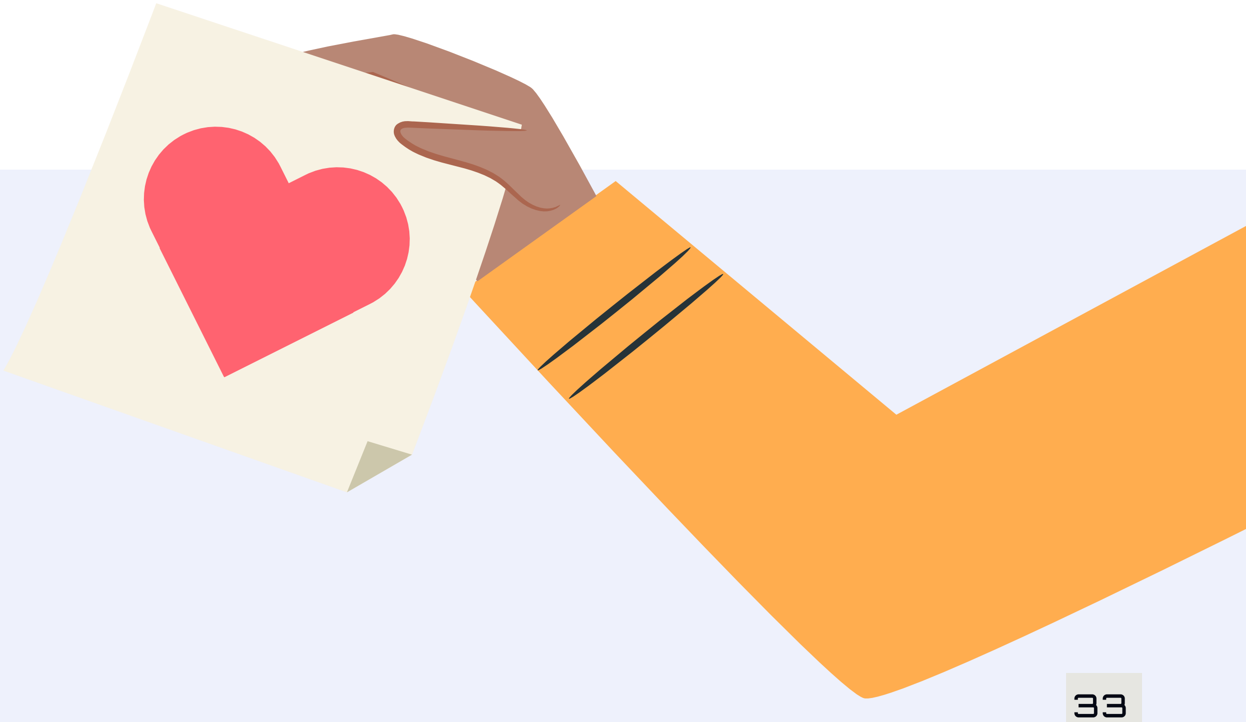
You've done the research, built a growing relationship with your donor, and received a generous gift! But your work is definitely not finished. Whether you have received funding from an individual, a corporate partner, or a foundation, and whether the gift is modest or generous enough to entirely change your work, carefully preparing an acknowledgment is an essential segment in the donor cycle. You can't hope for a second gift until you've properly thanked the giver for their first.

On the blog ***Get Fully Funded***, author and fundraiser Sandy Rees shares that while writing a thank you letter or email may seem simple, effective acknowledgements always have two parts. First, you need to make a connection to the donor's brain. Logical things need to be included: the amount they've given, the date of the gift, any pertinent tax information. You connect to a donor's brain when you spell their name correctly, give them the data they need, and thank them promptly.

The second part of an effective acknowledgement comes when you touch the donor's heart by letting them know that their generosity, great or small, is making a difference in someone's life. A thank you letter should make the donor feel special and important, as if they were personally providing life-saving medicine, or empowering education, or pushing important legislation forward. That emotional connection can made through a photo, a story, or as Sandy Rees says, using ***"hero language"***.

You want them to feel like their gift made a real change, which, of course, it has.

When you take time to craft the perfect thank-you, you do both. You provide the donor with the relevant information that they will be expecting and you touch their heart, which they may not be expecting. Finding that great balance is what results in a meaningful, effective acknowledgment.



Your thank-you communication should never be an afterthought, just a thing to check off your to-do list, but a careful, deliberate act of deepening your relationship with each donor.

To make the most of this opportunity:

- Invest time in writing a strong, meaningful thank-you letter template that can serve as a basis for your acknowledgments, but as much as is practical, make each thank-you personal. Always address the donor by name.

- If you have history with the donor, thank them for their loyalty and involvement, which shows them that you do know who they are. If you are using printed letters, you can add a quick personal handwritten note at the end.

- When the donor reads your thank-you, you want them to think, "I'm so happy to give to this organization. Their work is so important!". Choose words that make them ***feel***.

- Actively seek out and include short, succinct stories that beautifully illustrate the power of your work. Having a **library of stories** that show how you are changing lives makes writing personal, meaningful acknowledgements much easier. Volunteers and staff members who work with the people you serve can help you capture these stories. You don't need to take advantage of tragic situations or emphasize the trauma or misfortunate of the people you work with. Instead, highlight ways that your organization improves lives and how donors make that possible.

- Send thank-yous quickly. For contributions given online, you may be able to return an acknowledgment automatically and immediately. In most cases you will want to follow up with a more personal letter, but at least the donor knows their gift has been received. If you are sending actual letters, set an ambitious schedule of how quickly you commit to respond to gifts. In some organizations, staff and volunteers make certain that everyone receives a thank you within two days of contributing. It's a great goal to work toward! If the donor doesn't hear from you quickly, they may wonder if their donation was received and if it was appreciated and used for the purpose they intended.

- Use your "kitchen table" voice in showing your gratitude. Write like you talk, without jargon or formal language. Rather than "On behalf of every member of our organization, I send out deepest gratitude for your recent investment in our worthy work.", think about how you might thank someone if you were sitting together at your kitchen table. You might say something like, "I just cannot thank you enough . . .". "Our families have gone through so much in this past year, but generous people like you remind them that someone cares and they are not walking this difficult path alone."

- Make certain you give contact information so the donor will know who to talk to if they have questions about their donation or how it will be used.

Dear Mr Jaboori,

Sometimes words just fail us. Your generous gift has come to us at a time when the demand for the support services the Psoriasis Collaborative can provide exceeds our financial ability to meet that demand. You have given an unexpected and deeply appreciated boost to our cause and we don't really have words to express how much it means to us and those we serve.

When we spoke, you expressed concern for Marlena, the young woman we talked about in our recent letter. I want you to know that she is now involved in a support group for teen-agers with psoriasis and is also participating in a treatment trial. Gifts such as yours make this possible. It is not an overstatement to say that Marlena's life is being changed – at this very moment – because real heroes – like you – are investing in this organization.

Should you have any questions, don't hesitate to contact me directly through the contact information I've previously shared. You'll be receiving our periodic newsletter as well as regular updates about our work. We welcome you to the family of Psoriasis Collaborative supporters!

Sincerely,
Shaffan Rahaim
Shaffan Rahaim, Executive Director

THANKING CORPORATE AND FOUNDATION DONORS.

The same guidelines that are important with individual donors are important with foundation or corporate donors, too. Timely, warm, informative acknowledgements matter to the program officer at a foundation and the charitable contributions manager at a corporation, so put your best practices to work with these investors in your work.

While foundations, and especially corporations, give for generous reasons they also may hope to get additional value from giving to you. You may, depending on your agreement with the funder, want to offer some additional ways of acknowledging contributions from these donors.

- Write a highly, customized letter to these funders, not just a remake of your individual letter. You are writing to a person here, too, but the funds belong to an organization or company. Be engaging, grateful, and informative about how the funds will be used to further **their** charitable goals as well as yours.

- Many foundations and corporations want *(or require)* some public acknowledgment of their investment in your work. Ideally, you have been made aware of their expectations during the grant process and in signing a funding agreement. Meet those expectations as carefully as you are able. Do they want acknowledgment in a media release? In a plaque at your facility? Their logo on your website or in an event program? In general, these acknowledgements do not have any great cost to you and can be helpful in receiving consideration for a subsequent gift.

  You want might to go beyond the minimum requirements and feature the funder in a story on your website, in your newsletter, or in an annual report. Be sure to send them copies or links to the show how you've acknowledged their support.

- You can also express your gratitude by inviting program officers, foundation heads, and corporate leaders to be your guests at any events you hold, especially if the events feature projects they are funding. Welcome them graciously and recognize them publicly. While most foundation and company officials receive more invitations than they can accept, the act of inviting them is an opportunity to once again express appreciation.

- An invitation to visit your offices, meet recipients of your services (*and of the company's support)*, and learn of updates or new programs is a wonderful way to show gratitude, deepen the funder's understanding of your work, and make them feel as if they are part of your family. Just spending an hour with a funder in your office over a cup of tea can do so much to show them that their support has been meaningful and that you want the relationship to be a long-term partnership.

Dear Mrs Satter,

From all of us who benefit from the support and research of the Psoriasis Collaborative, I send our gratitude to all of you at the Foundation for Health for the grant we have recently received to fund services in three outlying areas of the country.

This investment in our work will extend our support into these regions where patients and their families have been asking for help for quite some time. Our volunteers are eager to begin this critical outreach and we expect significant results as we provide counselors and access to medical treatment.

We look forward to acknowledging this generous support on our website, through our social media channels and in our annual report and at our upcoming community engagement event on 3 June 2022. We do hope that representatives of the Foundation will be able to join us at this important gathering of the families we serve. I've included invitations for you to share within your organization.

As required by our grant agreement, we will be pleased to submit a mid-year report outlining our progress as well as a final report at the conclusion of the grant period. In addition, we will provide frequent informal updates as we make progress in establishing services in the funded areas.

It would be our pleasure to host you and your staff in our office at any time. You are truly our partner in this expansion of our services, and we do want you to feel connected to our mission and engaged in our successes. You are making that success possible.

Gratefully,
Shaffan Rahaim
Shaffan Rahaim, Executive Director

Whether with individual donors or institutional supporters, the point is to prioritize thanking donors. There's nothing more important than thanking a donor to strengthen your relationship and ensure that they will continue partner with you.

III F. STEWARDSHIP

If you take another look at the Donor Cycle, you'll see that Stewardship is the last step in the cycle before it starts over again. Stewardship and Cultivation are much the same. You cultivate prospects, people who have yet to give. You steward donors, people who have already made the decision, at least once, to support your work.

If you're a donor, no matter the size of your gift, and the only time you hear from an organization is when you are being asked for funding, you may wonder if the only reason that organization pays attention to you is because they want more of your money. That is an uncomfortable thought for anyone and doesn't foster a meaningful two-way relationship.

Stewardship, by definition, means the ***careful and responsible management of something or someone entrusted to one's care.*** It's really a lovely way to think about the care given to deepen relationships with those who make your important work possible. Note that you can only steward a person. Your relationships with foundations, organizations, and corporations can only be deepened as you strengthen relationships with the individuals that represent those organizations. Take time to get to know that foundation program officer or the corporate sponsorship coordinator, just as you would for a significant individual contributor.

While you may choose some high-profile ways to care for donors, such as honoring them publicly at events or in the press, it is important to carry through on personal ways of caring for your donors.

The simplest things can have the deepest meaning:

- **Keep in touch** on a regular basis. Keep a list of your loyal donors right on your desk. This will help you think of these important friends often. When something noteworthy and exciting happens in your organization, write them a brief email or give them a call. Be personal and friendly, as if you were communicating with your close group of friends. For your organization, these individuals are your friends.

- **Invite them to get involved**. When a donor makes that first gift, view it as a "first step". That donor is signaling their interest in your organization. In what other ways might they want to join you in your mission? Don't miss an opportunity to build the relationship beyond their contributions. Be creative in finding those opportunities:
    - Invite them to serve on a volunteer committee.
    - Tap into their expertise by asking them for their advice.
    - If appropriate, ask them to introduce their associates to your work.

- **Send videos and photos.** Even photos taken with a smartphone can go far in helping donors feel connected. You can show progress on a project better with a couple of pictures than many words. You might even take a short video of a staff member or a volunteer – or even someone you are serving, with their permission – talking about a new development.

- You don't have to host big events; **invite your donors for a quick tour.** For many donors, an informal and personal invitation can be much more appealing than a formal gathering. Get to know your donors so you have an idea of what they would most appreciate.

- **Show them the impact.** The best way you can care for your donors is to show them that the investment they made is making a difference. Any way that you can illustrate to your donors that you are accomplishing, even in small steps, what you have set out to do will be an encouragement for them to give again so that your work can continue to progress.
Don't let them wonder how things are going.

A SPECIAL NOTE ABOUT STEWARDING FOUNDATION AND OTHER GRANT-MAKING SUPPORTERS:

The best way to steward the relationship you have with grant funders is to do what you said you would do in the proposal.

- If you are required to submit reports on the project, always submit on time.
- If you run into difficulties, initiate a conversation with the program officer.
- If you are unable to complete the project in the specified time, arrange for a meeting to discuss alternatives.
- If you are unable to spend the money as the funder designated, tell them as soon as you become aware. Your transparency will make them much more likely to allow you to redirect the funds rather than return the grant.

Good stewards don't annoy their donors!
Balance actual appeals with informative, inspiring communications highlighting mission.
Think about a sending three pieces that focus on how donations are being used for every one outright ask for funding.
Once every thirty days or so is often enough to make direct contact with donors, not counting social media posts.
Use optimal sizes and quality when adding photos, videos, and graphics to communications such as newsletters. Most email hosts have their own requirements, but many require photos to be less than 600 pixels wide. Keep images under 1MB but aim for as low as possible *(100 KB or less is great)*. Pieces that take a long time to load may be ignored.
Industry research says that emails that are sent mid-morning *(9am – 12noon)* and mid-week *(Tuesday, Wednesday, Thursday)* have the highest **"open"** rates, but this may differ in your region. If you are using an email host such as MailChimp, Constant Contact, or MailerLite, you should be able to see what time of day has highest open rates for your communications.

And now, a special section on inviting Grant Funders to give.

While extending an invitation to give to individuals can take many forms, seeking support from foundations usually requires following their guidelines carefully. Grant funds generally come to your organization as support for a specific project or objective, rather than as operating funds.

Before grant funders accept an unsolicited proposal, they will often ask for a concept note or a Letter of Intent *(LOI)*. This preliminary step lets the funder have a quick look at what you are planning to do before they ask you to submit a full proposal. Some funders may have a prescribed form for a concept note, but often you will be composing the note in your own way, and you want it to be interesting and effective.
A simple version of it will include an introduction, some background, a summary of proposed objectives and results, and a budget overview. Ideally, **it should not be more than 2-3 pages** unless the donor has specific requirements.

A simple template can be found on the following page.

TEMPLATE FOR A CONCEPT NOTE OR LETTER OF INTENT FOR GRANT FUNDING

(Adapted from Introduction to Fundraising: Reference Manual, 2018. ©CME AUBMC.)

Logo and name of your organization – Set up your concept note like a business letter that looks professional and credible.

Title of the project *(one line)*

- Use a short, creative, and informative title that sums up the actual results of the project. Avoid using jargon or titles that are too lengthy.

Potential donor *(three lines)*

- Insert very brief information about the donor with one or two lines on why you think this donor is a match for your project. State which of the donors' program this project fits in. *(You are connecting the dots for the reader.)*
- ***For example:*** *"We are pleased to propose this project to the World Health Foundation due to its remarkable commitment to ensuring quality healthcare in Lebanon. We believe this project is a match for the Foundations' program/focus on urban hypertension management."*

Background and rationale *(one paragraph)*

- Explain the context and the problem you would like to address with the project.
- Be precise: insert figures and facts on target groups, issues, and geographical area, preferably with references that corroborate the affirmations you are making, giving them credibility.
- State what has been done *(or not)* so far.
- Don't use broad explanations.
- Finish with three sentences about:
  - Why it is essential to address the problem identified.
  - The opportunity for your organization to address it *(and why you are the most qualified to do so)* and how you will address it.

Goal *(1 sentence)*

- What is the long-term impact you would like to achieve *(or to contribute to)* with this project? Remember that the goal must be aligned with your organizational mission.
- ***For example:*** "Over the next five years, nursing staff members that care for pediatric and adult hematology patients will improve their understanding of these diseases, gain knowledge of new treatments, and gain practical experience helping to treat patients with more efficacy.

Objectives *(3 to 5 objectives maximum)*

- List here the specific short-term objectives of the project: what are the intended consequences of your project?
- Say *"During the last half of 2022 and throughout 2023, hematology care workshops will be held for pediatric and adult nursing staff on a quarterly basis at three medical centers within this region."*
- Avoid phrases like "Nurses will provide better treatment for hematology patients". (*An objective must be measurable.).*

Activities *(bullet points)*

- List the specific activities you will implement to reach your objectives.

Outcomes *(bullet points)*

- List the key expected results of the project.
- Outcomes are the results of the projects that support the overall objective. Numbers are very important: be precise.
- Say: “12 training sessions for parents of children below 3 in Tripoli”;
“One research published and disseminated to a network of 100 parents in Tripoli”.

Beneficiaries and impact *(2 lines)*

- State a number, gender, age group, geographical region that you are targeting.
- State also indirect beneficiaries
(Who will benefit from this work in addition to direct beneficiaries?).

Monitoring and Evaluation *(2 lines)*

- Describe how you will measure the effectiveness of your project, how you will measure progress toward goals, and how you will know when you’ve reached your goals.

Budget and timeline *(bullet points)*

- Total budget in the appropriate currency
(and give a brief idea of what the budget will cover.)
- What time period does this budget cover in concrete terms?
For example, twelve months (July 2022 – June 2023).
- What it will cover: trainers’ fees, publication of material, catering for participants during training, space rental.

Why is this project important or different or unique *(1 paragraph)*

- Adding this section can make your concept note shine. Show the potential funder the added value that only your organization can bring to this project. Why should the donor support you and not another organization addressing the same issue? What is it that you bring to the table that is unique?

About your organization *(1 paragraph)*

- Short summary of who you are, what you do, when you were founded, your track record of achievements and what your governance structure is.

Contact information
(name, title, email, website, phone number, Facebook page, twitter)

WRITING A SOPHISTICATED, WINSOME GRANT PROPOSAL

If your concept note has garnered interest from the funder, or if your personal cultivation of a foundation or corporate leader has resulted in an invitation to submit a full proposal, you should celebrate – *and then get busy!*

The composing of a proposal takes time, thought, and collaboration with others in your organization. The concept note, as well as your case statement, will provide effective building blocks for the proposal, but the full proposal will be much more detailed and specific.

The most important guideline for every proposal is to follow the funder's directions in every detail. If you are completing an online proposal form, you will have to take note of word count limits and make certain you are answering questions in the right spot. You should also understand whether you can save your work, leave the page, and finish later, or if the entire proposal needs to be completed in one sitting. The funder may have directions on which documents you will need to attach separate from the proposal.

If you are submitting a written proposal, the funder may give you the exact sections that you must include and the order in which to present them. They may provide a budget form for you to utilize in submitting organizational and project budgets. It can be tempting to substitute your own form, one that you already have completed, but remember that this funder wants to look at proposals that all follow the same protocols. You may receive instructions on how your written proposal should be submitted – via email with *Word or pdf* attachments, by post mail with postmark deadlines, or in rare instances, delivered in person.

Whatever format you choose *(or is required)* think of your proposal as a **story** with a beginning *(the problem or opportunity in your need statement)*, middle *(the solution in your project or program description)* and end *(the results in your expected outcomes)*. Be logical in your presentation so funders can easily follow and understand the story you are telling. This is important if you are writing a proposal with no direction from the funder as to format.

Throughout the proposal you are working not only to convince the funder that your project is realistic and will obtain the desired results, but that your organization is uniquely positioned to carry out this project successfully. Be certain to highlight your accomplishments, key staff or volunteers that will carry out the proposal, and your intimate knowledge of the challenge or opportunity the project addresses.

As you pull your proposal together, remember that a real person is receiving and reviewing your request. When possible, telephone the grant's program officer to ask for clarification or advice, rather than relying entirely on email. Foundation and corporate fundraising through grants **(like all fundraising)** are about relationships. Foundation staff are often receptive to phone calls because even a short person-to-person conversation can help you submit a better proposal. Well-prepared proposals make their job easier, too!

Most grant proposals will include the following:

Key Elements of a Strong Grant Proposal	Considerations for preparing each section
Executive Summary – may also be called an Abstract	If you've already written a concept note for this project, you should be able to use portions of that for this section. Here you present the important components of your proposal as succinctly as possible. If you don't have length restrictions, you may want to use a full page for this summary, but often this will need to be condensed into a single paragraph. Your summary should answer the following: ▪ What need are you addressing, the purpose or goal of your proposal? ▪ What are the outcomes you seek and how will you achieve those outcomes? ▪ How will you measure the success of your project? ▪ Very briefly, who are you and why are you qualified to meet this need? The instructions from the funder may also ask you to state the kind and amount of funding you are seeking in this summary. Follow their instructions carefully. You may also want to take note of key terms and concepts that the funder uses to describe their priorities and use those same terms, as appropriate, in your summary to show alignment with the funder's mission. The summary is usually the first section in a grant proposal, but you may want to write this section last. Wait to compose this short version of your project until you have completed the full proposal.
Institutional Background – may also be called Organizational Profile	In this section, you will describe your organization in terms of location, demographics, mission, relationship to the service area and past successes in the project area. You don't need to overdo historical information about your organization. The purpose here is to establish credibility as an organization that can realistically impact the problem or situation you are addressing.
Statement of Need – may also be called a Needs Assessment or Problem Statement.	Your project is important because it is responding to a critical gap in resources, knowledge, services, advocacy, or opportunity that needs to be filled. Clarifying the need that you are responding to establishes the real value of your project. Make sure that you establish the background of this problem early so the funder understands why you are asking for support. Because your problem affects a very particular population, describe that group of people and their unique needs, supported by data. While an academic or research aspect of your proposal may exist, it is important to clarify why this project is more than answering academic questions. How will people experience a positive impact from this project?
Description of the Project – may also be called Project Narrative or Goals, Objectives, & Methodology	You have established a need for your project. Now you will describe the project. Important questions to answer in this section include: ▪ What are the goals of your project, research, or advocacy? ▪ If all goes as planned, what will your project's outcomes be? Remember that grant proposal outcomes should be SMART – specific, measurable, achievable, realistic, timely. ▪ What methods will you use to achieve those outcomes? ▪ How will you know if/when you are successful? How will you measure the achievements of this project? ▪ How do you know that what you are proposing in this project will productively respond to the need or problem you have identified? ▪ What is the timeline for your project? This section should highlight the impact of your project because funders want to know you are being realistic about the benefits along with how you will measure and verify success.

Budget – may also be called Resources or Financial Position	Grant proposals may ask for two budgets – an operating budget for your entire operations and a separate budget for the specific project you are trying to fund. Budgets should be clear and easy to read and are often presented in a table. Figures should be clearly labeled and should include notes of explanation if any parts of your budget may not be clear to someone unfamiliar with your organization. Funders are looking for valid, reasonable costs that match your narrative. The project budget is another opportunity to tell your story and demonstrate your credibility. Treating the budget as an afterthought is a mistake as it may be the first thing the funder examines. Everything in your budget should be reflected in the narrative. The last thing you want is a budget that raises more questions than it answers.
Other Sections that May be Required	*Cover Letter* – The cover letter should not repeat information that will be found in the Executive Summary but serve as an introduction to you as the grant-seeking individual, establish your professionalism, and convey as positive sense of enthusiasm for a possible partnership with the funder. The cover letter should also express appreciation for the funder's consideration and interest in your work. *Organizational Qualifications* – If you have not included this information elsewhere in your proposal, you may need to devote a section to underlining your organization's ability to address the problem presented. You want the funder to understand the mission and function of your organization as well as past successes that you have had that relate to the current proposal. You are establishing your credibility as an organization that can realistically provide solutions. *Supporting Documents* – Most grant proposals will ask for a variety of documents to be attached to your proposal. Depending on your region, you may need to provide proof of your ability to raise funds in your country, tax status information, and financial records. You may also need to include endorsements, letters of support from partners or allies, or information about your organization's leaders, board members, or employees. Pay careful attention to the requirements of your specific funder and respond to all their requests for documentation.

Further tips for making your proposal a winning one:

1. Strictly follow all the guidelines in the instructions. This is not the place to get creative with presentation or format. Pay attention to parameters such as word count, font type and size, page limits. Be conservative in your choices if you don't have guidelines.

2. In all your writing, work to highlight your organization's strengths, not just needs. When you do talk about needs, focus on the needs of the community, the patients, the families you serve.
"We need new computers" may be true but it isn't a very compelling ask.
How would new computers allow you to elevate the strengths of your organization and improve the lot of individuals and the community? That has appeal.

3. Organize the ideas that you are presenting through lists when appropriate. Combining chunks of narrative with bulleted or numbered list helps hold the reviewer's attention and lends clarity.

4. Remember that each proposal must be customized to a specific funder at a specific time. While you can reuse well-written parts of proposals, never send the exact same proposal twice. Just changing the dates on a previously submitted proposal can signal laziness or lack of investment to a funder. Things change in your organization year to year and your proposals should note those changes. Don't send duplicate proposals to different funders. Every funder has its own perspective and priorities, and your proposal must speak to that.

5. Read and reread. Proof and reproof. Before submitting your proposal, make certain that you haven't made mistakes in grammar or typing that will distract the reviewer or cause them to feel you have not invested the appropriate time in preparing the proposal. Ask someone else to read the proposal to help identify errors or awkward wording.

6. Plan to submit ahead of the deadline. Technological problems and unforeseen complications can throw your well-planned schedule off. If you are trying to submit a proposal right at the deadline and your internet goes down, you will have no options. Allowing extra time will save stress and missed opportunities.

7. Ask for feedback. Grant winning from foundations and corporations is very competitive. If you aren't awarded a grant, do ask for feedback from the funder. Most grant officers want you to be successful in your important work and will be pleased to talk with you about where you missed the mark. Continue looking for funders who are passionate about the work you do and continue to submit requests for support. Keep writing and submitting!

How to follow up your grant submissions:

Once you have pushed the "send" button or dropped your proposal into the post, you may think of things you wished you had presented differently, but don't spend time second guessing your work. You did your research, followed the guidelines, told your story, and met the deadlines.
Congratulations! Whatever the outcome, this funder now knows more about you and your vision for a healthier, happier future for those you serve. It's time to move on to the next project while you wait for the results of your submission. Many funders will give you a time frame for announcing which proposals they will fund. If that date passes and you haven't yet received an answer, it's appropriate for you to check in to see the status of your request.

IV. PREPARING A SIMPLE FUNDRAISING PLAN

Even if your organization is volunteer driven with just one staff member (or none!), taking the time to put together a simple annual fundraising plan can be a great asset and help you keep on track. While there are many sophisticated tools to help you write such a plan, you can easily gather your team and put together a simple roadmap for your efforts.

It's not really the plan itself that improves your chances for fundraising success, but the act of planning. When you take time to reflect on your past activities, put goals in writing, and quantify what you hope to accomplish, you improve your chance of being successful and staying on track. Some simple steps can help you get a plan in place.

STEP 1:

Think about last year

(or whatever time period you like). Gather some important data. If you use a fundraising software, you should be able to pull the information you need. But even if you must rely on your memory, write down what you can recall. The answer to just three questions can give you a fair look at what you've done:

- How much did you raise last year from each of your fundraising efforts?
- What were your successes? Recall which of your efforts had great results and made you proud.
- What were your biggest challenges in raising funds? Look at the things that didn't go as planned or didn't have the results you were hoping for. You will find clues to where you should place more focus in the coming year. More meetings with foundations? Better results from appeals?
Finding new paths to relationships with Pharma?

STEP 2:

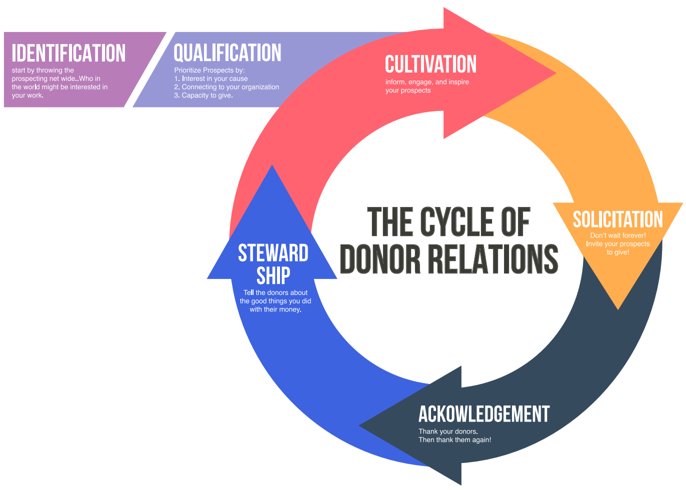
Inventory available resources.

What do you have to work with in carrying out fundraising plans? How much money will be available for fundraising? But beyond money, what resources are available in terms of staff, volunteers, technology?
And don't forget to include a consideration of how much time is available for fundraising.

STEP 3:

Use the donor cycle to identify activities to grow your fundraising.

Think about donor identification and cultivation, asking and thanking. Add activities that will help you encourage donors to give again *(stewardship)* and perhaps increase their giving. Typically, it takes much less time and money to keep a current donor than to find new donors, so devote resources to keeping and upgrading your current friends.



STEP 4:

Set goals for each activity you've included. If you don't set goals, you won't know when you've been successful! *You may want to set goals such as:*

- **Total funds raised**
  - Contributions from individuals
  - Contributions from foundations
  - Contributions from corporate donors

- **New donors acquired**
  - First-time individual donors
  - New grant funders
  - Corporate partners making first investment

- **Renewed gifts**
  - First-time donors making second gift
  - Lapsed donors *(last gift was more than 2 years ago)* contributing
  - Donors increasing their contributions from amount given last year

- **Grant funding**
  - Total number of concept notes and full proposals submitted
  - Visits with program officers
  - Total amount of funded proposals

Setting goals for each activity helps everyone in your organization move in the same direction and aim for the same result. Be ambitious but realistic. It's not helpful to set goals that are impossible to reach.

STEP 5:

Agree on 3 Focus Points.

Rather than trying to do everything at once, pinpoint three areas to focus on over the year to help meet the goals you identified in Step Four. If you've set a goal to acquire new donors, you might decide to participate in a #Giving Tuesday campaign. If you want to increase the sponsorship dollars you are raising, you might decide to focus on designing and producing an effective sponsorship packet. If you know that improving your success rates at winning grants is essential, you might focus on finding someone experienced in grant writing to work with you.

STEP 6:

Design a timeline for your activities and goals.

Even a simple plan can seem overwhelming if you look at it all at once. Set some realistic deadlines to serve as road signs to mark your progress and plot those deadlines on a calendar to help you see the flow of work. Use whatever tool works best for you: paper calendar, Excel spreadsheet, or an online tool that syncs with other things.

Fill in existing commitments that are solid—events, board meetings, grant deadlines, office closings, holidays, vacations. Then add activities that have more flexible times. Seeing your grant deadlines on the calendar will help you avoid piling other activities close to that date, especially if you will be doing most of the work yourself. If you've decided to focus on a Giving Tuesday campaign, you can work backward to get your publicity out in good time.

STEP 7:

Plan for and celebrate success!

Recognize what habits and practices help your team reach success. Be accountable to each other to meet deadlines. If you've identified an activity as especially important to reach your goals, schedule time for it. For example, if one of your goals is to increase the number of donors who make second gifts, set aside some time every week to make calls to those donors to update them on the impact their first gift has had. Hold regular team check-ins with everyone working on fundraising to report results, brainstorm, and share resources. And remember that every fundraising success, every donation, every grant, every completed event, is worth celebrating!

V. ETHICS IN FUNDRAISING.

In the world of fundraising, few concrete guidelines for ethical behavior exist. And even considering guidelines such as the International Statement of Ethical Principles in Fundraising, staff members and volunteers are often on their own to decide the appropriate course of action when faced with ethical dilemmas.

THE INTERNATIONAL STATEMENT OF ETHICAL PRINCIPLES IN FUNDRAISING LISTS THE FOLLOWING AS THE PRINCIPLES THAT SHOULD DEFINE ANY FUNDRAISER'S ETHICAL APPROACH TO THEIR WORK:

HONESTY:
Fundraisers will always be honest and truthful, upholding public trust and never misleading supporters or the public.

RESPECT:
Fundraisers will always be respectful of our beneficiaries and donors, following their choices and wishes, wherever possible.

INTEGRITY:
Fundraisers will always act with integrity, following legislative and regulatory requirements, and will always work for the best interests of our causes and supporters.

TRANSPARENCY:
Fundraisers will always be transparent, clear, and accurate about the work of our causes, how donations will be managed and spent, and report on costs and impact accurately.

RESPONSIBILITY:
Fundraisers will always act responsibly, understanding that we share a common objective to promote fundraising excellence for the benefit of the common good. We value and encourage diversity in our practice and our fundraisers, and continually seek to develop our professional standards.

In addition, the Statement reminds all who are involved with raising funds to accept certain responsibilities *(summarized)*:

1.Responsibility to fully comply with relevant legislation and regulatory standards:

- Fundraisers will work according to the legal obligations that apply to their organization in their specific location and will not take any action that would be considered misconduct or a conflict of interest.

2.Responsibility to supporters

- Fundraisers will respect the free choice of donors to give or not, as well as their preferences on communication and privacy.

- Fundraisers will be transparent with donors on how funds are being used and will be truthful in all communications.

In the event funds cannot be used as agreed upon, fundraisers will communicate openly with the donor.

3.Responsibility to their cause and beneficiaries

- Fundraisers will always be respectful of their beneficiaries and uphold their dignity and self-respect in the fundraising communications or materials that they use.

- Fundraisers will not accept donations where the acceptance of those gifts would not be in the best interests of the organization or be detrimental to the organization's reputation, mission, and relationship with existing supporters and beneficiaries.

4.Management reporting, finance, and fundraising costs

- Fundraisers will ensure that all fundraising reporting is transparent and accurate.

- Fundraisers will work with their organization to provide accurate reports on their organization's income and expenditure according to their national regulatory framework and publish clear information on their activities for stakeholders, beneficiaries, donors and the public.

5.Pay and compensation

- Fundraisers will not seek any personal benefits or gratuities in the course of their work.

- When fundraisers work with suppliers, partners, or third-party agencies, they will take all reasonable steps to ensure that those external parties work to the same standards that they are held to, and that they do not receive unreasonable and disproportionate payment for their work.

IN MOST CONVERSATIONS ABOUT FUNDRAISING ETHICS, THE FOCUS IS ON HOW FUNDRAISERS BEHAVE TOWARD DONORS. BUT OF EQUAL IMPORTANCE, OR PERHAPS GREATER, IS BEHAVING ETHICALLY TOWARD BENEFICIARIES.

How you speak about those you serve, how you utilize their testimonies, how and where you post photos of them, are important aspects of defining ethical behavior. If you don't currently have guidelines to help with decision making around these situations, have such conversations before you face difficult situations.

VI. FUNDRAISING IN THE TIME OF CRISIS.

Every organization faces times of grave difficulty. Sometimes these crises are triggered by environmental factors beyond your control, such as COVID19 or armed conflicts; sometimes by economic downturns that may be local, country, or region-wide; sometimes by crisis within your own organization, such as a loss of leadership or financial challenges.

It may feel, in times of distress in your community, that fundraising efforts should stop. You may feel uncomfortable moving forward with plans to engage others in your fundraising and wonder if you should discontinue your work. But your cause, the people who count on you for services and advocacy, need you to work past your discomfort.

Justin Wheeler, the CEO of fundraising platform Fundraise, was recently asked about the appropriateness of fundraising activity during crisis. His response is inspiring.

"Do you think it's insensitive to still make asks during a time of crisis?"

The instant I heard that question, a lump formed in my throat.
I can be an emotional person, but this is a difficult question for all of us in nonprofit fundraising right now. People are hurting and scared, and here we come asking for money.

Yet I know the correct answer: No. It's not insensitive to fundraise during a time of crisis.That's because my mind goes back to everyone I've met in my decades of fundraising experience with international NGOs. I think of the faces of the people I've literally cried with – heart attack and stroke survivors, desperately poor mothers and families, children with disabilities.

We don't fundraise for the organization. We ask for them.

We ask for Rosa, a child I met in one of the poorest areas of Guatemala during a DRTV shoot. She was born with a club foot and had never left the confines of her home, never went to school. Rosa was bullied and teased by other children and the community. She felt all alone and lived in the darkness, as many children with disabilities do in third-world countries.

I think of her face – both the sadness and the smile – knowing someone came to help her.

We ask for Dominquez, an 8-year-old boy in Mozambique whose father had recently died. His father had often told him about the moon, so Dominquez would go out to the fields to stare up at it on the nights he couldn't sleep. That gave him special comfort. Dominquez needed a good education and a chance to laugh and play with other children. The nonprofit organization I went with gave him that chance – to be the person of his dreams and to make his dad proud.

Yes, it's hard to ask right now. But we have to keep asking, because we're asking on their behalf.

Justin Wheeler, CEO of Funraise, international fundraising platform

People will still give in times of crisis, but their priorities may be changing along with their financial circumstances. The way that you communicate with them needs to acknowledge that for everyone, things have changed. Before you reach out to ask for support in troubled times, make sure that you are showing your donors that you are concerned for them, not just as funders, but as part of your organization's circle of friends.

- **When you communicate with donors, make it as personal as possible**. It is always important to personalize your outreach, but especially so in difficult times. Create personal conversations with donors and prospects whenever you can. When facing challenges like a pandemic, you may not be able to sit down with donors, face to face, so look for alternatives, such as a video chats and phone calls, to create opportunities for personal contact. Make extra effort to use your donors' name in written communication and digital contacts.

- **Focus on truly listening.** Contacting donors during crisis should focus more on what they have to say rather than what you have to say. Create a safe and comfortable space for a donor to ask questions they might have about how your organization is responding to the crisis.

Ask open-ended questions and ***listen*** to their answers. If you ask the right questions, you won't seem like you are trying to capitalize on a difficult situation. If you're not certain how to start the conversation, here are some suggestions:

- Ask them how they're holding up and how their families are coping.
- Inquire about how the situation is at their place of employment.
- Talk with them about the safety measures you've put into place in your organization or the adjustments you're making to cope with the situation.
- Tell them about the upcoming opportunities they can participate in (virtual events, campaigns, etc.) to stay engaged.
- If you have had to end some services temporarily because of the crisis, be open and share your hopes for reinstating these services.
- Ask for advice about how they would most like to keep in touch with you.
- Most importantly, let them know that you are concerned about them and appreciate their concern for your work. The best donor interactions always feel personal, not transactional. This is especially critical in times of chaos when your supporters are dealing with unusual circumstances and financial pressures of their own. Conversations that show your concern prove that they mean more to you than just dollars.

In times of crisis, most people are hungry for meaningful, positive interaction and talking about the good work that you continue to do – with their help – helps donors feel connected to something bigger than themselves. Fundraising does still matter and while this personal contact doesn't necessarily mean immediate contributions, it will strengthen your relationships for the long run.

Reinforce how much they have helped your cause. As you talk about the crisis, emphasize how much their past support has impacted your work and how appreciative you are for their partnership. Prepare for the call so you can provide details about how this donor has made a difference. Providing a concrete example can be so helpful to the donor as they are thinking about how they have made a difference in the past and what they might be able to do in the future.

The goal in this personal communication is to show gratitude for what they have already done, not to make a direct ask. But as part of this conversation, some donors will express their desire to invest in your crisis work. Be certain that you can direct them to your online giving platform or other ways to contribute.

- **Consider virtual events to strengthen a sense of community.** Depending on the crisis your community is facing, in-person events such as gala dinners, volunteer days, or patient and family gatherings may be out of the questions. But you can still find ways to support the ties between your service beneficiaries and your funders. Even small-scale events can be beneficial in encouraging donors to continue to give.

    - Host a video question and response session with your organization's director or volunteers and invite donors, sponsors, grant funders to join you. Casual, informative sessions can be reassuring to donors that you're managing well and being transparent about the effect the crisis is having on your operations.

    - If you were planning to host a conference or advocacy gathering, move it to a virtual environment. Most conference sponsors will be supportive if you show efforts to keep the work moving forward.

    - Interviews with constituents who have been helped by your organization posted on social media and on your website can keep interest in your work alive.

- **Stay engaged with corporate and foundation program officers** and make them aware of your increased efforts during the crisis. Many organizations step up their community support during times of shared disaster or difficulty. Letting them know that you are keeping your services available and your advocacy efforts active will keep you at the top of their lists should they have extra funds to expend. Pharmaceutical companies, especially, may have significantly increased community support budgets during crises such as a pandemic.

- **As much as possible, take the long view – this will pass**. It can be easy to panic and focus on the short term but taking a more strategic approach usually pays off. Keep your focus on maintaining the important relationships in your organization. You will need their support when the current crisis has passed and some donors will, undoubtedly, increase their giving because of your considerate treatment of them now. By recognizing that the crisis is making life difficult for everyone, not just your organization, and treating all your donors, including your corporate and foundation contacts, with compassion you will gather positive results in the present and in the future.

Global Giving: Access to Crowdfundamentals — *The Beginner's Handbook For Crowdfunding Success.*

The Giving Tuesday Global Network: *Resources for participating in the global social media movement.*

Wild Apricot: *The Ultimate Social Media Guide for Nonprofits.*

TechSoup's Social Media: 5 Social Media Trends for Nonprofits in 2021

VII. SOCIAL MEDIA AND CROWDFUNDING

In addition to your more formal fundraising efforts, don't overlook the many ways that you, your staff, and volunteers can engage people on social media in ways that can bring new friends to your organization and build your donor prospect list.

Damian Radcliffe *(School of Journalism & Communication, University of Oregon/Fellow, Tow Center for Digital Journalism, Columbia University)* has carried out studies of social media use in the MENA region since 2012, using more than 200 English and Arabic sources. The results of this work confirm that if you wish to communicate with people in this region about your work, social media should be a part of your toolbox.

According to Radcliffe's 2020 study*, people in the MENA region spend a lot of time on social media, averaging about 3.5 hours a day, across platforms. An average person in the Middle East is active on about 8.4 social media platforms during any given month. In the UAE, that average is 10.5 accounts – the highest per person, globally. So, if you want to connect with large audiences, a social media presence is a must.

The value of social media in fundraising lies primarily in social media's ability to spread the word about your work and promote projects for which you are raising funds.

Facebook use, for example, continues to grow in North Africa, namely in Egypt, Morocco, and Algeria. Egypt is the ninth largest market for Facebook in the world, with 44 million users, as of October 2020. Turkey is ranked 13th — ahead of Columbia and behind the UK, with 37 million users. *(Social Media Trends in MENA in 2020, World Association of News Publishers*). While social media usage isn't homogenous throughout that Arab world, a shift from more traditional news sources to social media is obvious, and for PAGs it means that **individuals interested in your work will look for you on social media** and even a simple presence will extend your reach.

Other social platforms that have large markets in the region include TikTok, Snapchat, and Instagram. While the quantifiable value of social media to fundraising is difficult to pinpoint, having a presence can only strengthen your brand and your relationship with those who care about your work and follow you on these platforms.

The power of social media in strengthening relationships

Social media is a powerful tool for many segments of the donor cycle.

- You can find potential donors by looking at people who have chosen to follow you on Facebook or Instagram.

- You can cultivate those prospects by sharing winsome information about the good that you are accomplishing and how people's lives are being affected by your work.

- You can reinforce your gratitude by thanking donors (with care about privacy) on social media channels. This, of course, would be in addition to, not instead of, a personal written thank you.

- You can thank individuals without mentioning names – they will recognize themselves in your posts. "This month we have been able to help twenty-five new families because of generous contributions from first-time donors! Thank you!"

- Foundations and corporations will especially appreciate posts that share news of their generosity.

Impact of COVID on social media behavior

The most discernible impact of the pandemic on social media use was that people in the MENA region were spending more time online than usual. Radcliffe's study notes that this growth was true for countries across the world, but it was the highest in the Middle East and Africa.

Region	Hours:minutes per day pre-COVID January – March 2020	Percent who have spent longer on social media due to COVID (May 2020)
Latin America	3:38	56%
Middle East and Africa	**3:32**	**57%**
Asia Pacific	2:08	44%
North America	2:06	32%
Europe	1:40	35%

*Radcliffe, Damian & Abuhmaid, Hadil. (2021). How the Middle East used Social Media in 2020. SSRN Electronic Journal. 10.2139/ssrn.3826011.

While you may not have the organizational capacity to be present and active on every social media channel that is popular in your region, choose one or two and build a strong presence. If you choose to take part in popular online fundraising efforts such as #GivingTuesday, your investment of time into a social media identity will pay off.

Crowdfunding, which started as a way for entrepreneurs to raise capital to start for-profit businesses, is a way to raise funds for a specific cause or project seeking small amounts of money from large crowds of people. Crowdfunding efforts are usually conducted over a fairly short period of time through online channels. Crowdfunding often uses social networks, making it easy for supporters to share the project and get widespread involvement.

In NGO fundraising, crowdfunding is gaining popularity and can be a useful part of your fundraising tools, but it's a unique tool and needs careful consideration.
While some crowdfunding is focused on businesses seeking capital for start-up or expansion, NGOs use crowdfunding for donation-based funding, where donors contribute to a total amount for a new project. For charitable projects whose ultimate beneficiary is not the donor, there may be some other perk or reward for funders.

Most crowdfunding sites that welcome charitable organizations have the following characteristics:

- Provide tools for you to set up a dedicated page to outline and promote your project or cause, post updates about your progress, and have a format for adding video.
- Accept online donations, making it easy for donors to give immediately upon learning about what you hope to accomplish
- Are well-suited to be shared on social media, allowing for a reach far beyond the circle of people you might already have on your list
- Will have some restrictions on what kind of organizations or projects can be featured
- Charge fees based on transactions and/or a percentage of funds raised.

Some platforms don't let you collect the money you raise unless you hit your funding goal amount, while others let you keep whatever you raise regardless. Some platforms charge a percentage of what you raise as a fee *(and some charge more if you fall short of your funding goal)*, while others charge a flat monthly fee to use their services. Some platforms facilitate the giving of rewards to your donors, while others do not. So, you will need to use your research skills to make sure you are using a platform that is appropriate for your campaign.

While a crowdfunding campaign is exciting and relatively easy to set up and run, keep in mind that less than half of the thousands and thousands of crowdfunding campaigns initiated each year reach their goals. The most significant challenge is to reach enough people so that the modest gifts add up to your final goal and to present a compelling story that causes people to give to the cause and share the project.

Special Note: Be certain that you understand any fundraising regulations of your locality, country or region that might affect your ability to participate in an online, crowdfunding campaign.

CROWDFUNDING PLATFORMS TO INVESTIGATE:

- **GoFundMe** – gofundme.com. With GoFundMe you keep all the funds raised in your campaign, whether you reach your goal or not. Fees are the same with either outcome.

- **Kickstarter** – kickstarter.com. Catering mostly to creative projects in the arts, Kickstarter does have a nonprofit option. However, you must be raising money for a specific project that will be shared with others, not general fundraising for your cause. Kickstart is an "all or nothing"platform. If you do not reach your goal, you will not receive the funds.

- **Zoomaal** – zoomaal.com. Based in Lebanon, Zoomaal is an "all or nothing" platform. You must reach your goal or the funds are returned to contributors. Zoomaal is unique in that you can set "milestones", intermediate goals, and collect funds that exceed your first milestone. Efforts must be project-based, rather than operating funds, such as producing a video about your work, compiling a book of patient stories, or hosting an educational conference.

- **YallaGive** – yallagive.com. Officially registered in the UK and UAE, YallaGive requires charities to register and be approved before beginning campaigns. Accepts cryptocurrency. Intuitive tools for setting up campaigns.

- **Launch Good** – launchgood.com. Worldwide fundraising platform for Muslims; Zakat-verified campaigns with no platform fee.

- **GoGetFunding** – gogetfunding.com. Designed for personal fundraising; provides an opportunity for your supporters to raise funds for you. South Africa, Egypt and worldwide.

- **Backabuddy** – backabuddy.co.za. Peer to peer fundraising platform where individuals can raise funds for registered charities in South Africa.

- **Global Giving** – globalgiving.org. First project needs to raise at least 5000USD from more than 40 different donors; then your organization has an opportunity for an ongoing spot on the platform. US donors can make tax-exempt donations to international organizations.

- **Chuffed** – chuffed.org. Campaigns are currently limited to 32 countries, including South Africa. Organizations must be raising money for a specific project. No fees for using the platform; the donor pays the processing fee, which varies depending on country.

- **FundRazr** – fundrazr.com. Platform that can be used in any country with the ability to send and receive payments via PayPal or Stripe. Extensive selection of support and training materials. No cost to the organization.

- Classy – classy.com; Bloomerang – bloomerang.co; CauseVox – causevox.com; Kindful – kindful.com.
These platforms each offer an entire suite of online fundraising tools, including crowdfunding, peer to peer fundraising, and tools for managing events. They also include a wide range of, educational tools to help with all aspects of online giving.
Their sites, even if you don't use their platforms, have valuable resources for fundraising.

VIII. GENERAL FUNDRAISING RESOURCES

EDUCATION AND TRAINING FOR FUNDRAISERS:

Philanthropy University – philanthropyu.org. Wide selection of online fundraising courses from Introduction to Fundraising to Monitoring and Evaluating Programs to Effective Storytelling.

Coursera – coursera.org. Beginning level fundraising training courses.

Udemy – udemy.com. Fundraising courses including "Fundraising from Scratch."

Candid *(formerly Guidestar)* – learning.candid.org. Virtual training including "Introduction to Finding Grants" and "Introduction to Proposal Writing."

Nonprofit Courses – nonprofit.courses. Significant collection of online courses around all areas of nonprofit management, with a good selection of fundraising resources.

FINDING AND WRITING GRANTS:

Funds for NGOs - fundsforngos.org. Grants and resources for sustainability plus learning tools for building strong, well-funded NGOs.

Arab Foundations Forum -- arabfoundationsforum.org. Membership organization for the region's leading foundations. Website gives information about funding initiatives and the focus of member organizations.

International Grant Watch – international.grantwatch.com. Funder listings for a wide variety of international grants.

Advance Africa – advance-africa.com. Resources for advancing scholarship and jobs in Africa with a section on grants for NGOs.

UAE Charity Directory - charitydirectoryuae.blogspot.com. Small directory of UAE foundations and NGOs. May not be up to date but highlights some funding possibilities.

Grantsmanship Center – tgci.com. Collection of resources for grant writing, including webinars and training on demand.

SPECIAL EVENTS CONSIDERATIONS:

Joan Garry's video blog – blog.joangarry.com/nonprofit-special-events/. The Problem with Special Events
.

The Fundraising Authority – thefundraisingauthority.com/fundraising-basics/fundraising-event/.
A 10 Step Guide to a Successful Fundraising Event.

Charity Village – charityvillage.com. Fundraising Q & A: How Effective are Your Fundraising Events?

CROWDFUNDING AND SOCIAL MEDIA:

Crowdfunding in the UAE: u.ae/en/information-and-services.Overview of regulations & resources.

Grassroots Collective: thegrassrootscollective.com. 10-module online course on crowdfunding for NGOs. Other helpful resources for small nonprofits.

Global Giving: globalgiving.org/learn. Access to Crowdfundamentals — The Beginner's Handbook For Crowdfunding Success.

The Giving Tuesday Global Network: givingtuesday.org/global/. Resources for participating in the global social media movement.

Wild Apricot: wildapricot.com/blog/. The Ultimate Social Media Guide for Nonprofits.

TechSoup's Social Media: blog.techsoup.org/. 5 Social Media Trends for Nonprofits in 2021

ETHICS IN FUNDRAISING:

CFRE International – cfre.org. Complete text of the International Statement of Ethical Principles in Fundraising, as well as the Bill of Donor Rights.

Markkula Center for Applied Ethics – scu.edu/ethics. Discussion of gift acceptance policies.

OTHER FUNDRAISING TOOLS AND OPPORTUNITIES:

Arab Giving Survey – arabgivingsurvey.com. Comprehensive look at trends in giving in Gulf countries with an emphasis on the patterns among high-net-worth individuals.

Arab.org – arab.org. A "click to donate" portal with a variety of tools for NGOs, a source of "updated and relevant information and services for civil society in the Arab World".

Dubai International Humanitarian Aid and Development Conference – DIHAD.org.
Held every year in March, the conference brings together government authorities, international organizations, NGOs, foundation, charities, academic institutions, the media, and members of the private sector to collaborate on the issues of aid and development.

SOFII *(Showcase of Fundraising Innovation and Inspiration)* – sofii.org. Imaginative collection of fundraising ideas and case studies, including resources for crisis fundraising.

The Resource Alliance – resource-alliance.org. Also includes the Resource Alliance Global Community. Hosts a yearly conference for fundraisers from around the world and provides online.