

The Worldwide Fundraiser's Handbook

*A Resource Mobilisation Guide
for NGOs and Community Organisations*



Michael Norton

In association with Resource Alliance

DSC

THIRD
EDITION

The Worldwide Fundraiser's Handbook

*A Resource Mobilisation Guide
for NGOs and Community Organisations*

Michael Norton

In association with Resource Alliance

THIRD EDITION

DIRECTORY OF SOCIAL CHANGE

Published by
Directory of Social Change
24 Stephenson Way
London NW1 2DP
tel. 08450 77 77 07; fax 020 7391 4804
email publications@dsc.org.uk
www.dsc.org.uk
from whom further copies and a full books catalogue are available.

Directory of Social Change Northern Office
Federation House, Hope Street, Liverpool L1 9BW
Policy & Research 0151 708 0136
Directory of Social Change is a Registered Charity no. 800517

First published 1996
Second edition 2003
Third edition 2009

Copyright © Directory of Social Change 2009

All rights reserved. **No part of this book may be stored in a retrieval system or reproduced in any form whatsoever without prior permission in writing from the publisher.** This book is sold subject to the condition that it shall not, by way of trade or otherwise, be lent, re-sold, hired out or otherwise circulated without the publisher's prior permission in any form of binding or cover other than that in which it is published, and without a similar condition including this condition being imposed on the subsequent purchaser.

ISBN 978 1 906294 33 5

British Library Cataloguing in Publication Data

A catalogue record for this book is available from the British Library

Cover design by Kate Bass
Text designed by Linda Parker
Typeset by Keystroke
Printed and bound by CPI Antony Rowe

Contents

Foreword	v
About the authors	vii
About the contributors	viii
Preface	ix
1. Introduction	1
1.1 Why fundraising is important	1
1.2 The challenge for fundraisers	3
1.3 Who should read this book	4
1.4 How this book is structured	5
2. Getting started	7
2.1 Some key principles of fundraising	7
2.2 The skills required in fundraising	12
2.3 Who should do the fundraising	17
2.4 Equipping a fundraising office	25
2.5 Engaging a fundraising consultant	28
3. Fundraising strategy	30
3.1 Developing a fundraising strategy	30
3.2 Testing, evaluation and control	45
4. The sources	48
4.1 Individual donors	48
4.2 Government grants	55
4.3 International grant aid and development funding	60
4.4 Foundations	77
4.5 Company giving	90
4.6 Business sponsorship	102
4.7 Other sources	112
5. Generating income through self-financing	119
5.1 Self-financing – the poor relation	119
5.2 Profits for non-profits – the red herring	120
5.3 Amateur night or social entrepreneurs?	122
5.4 What are the options?	125

Contents

5.5	What does it take to make a success of self-financing?	131
5.6	Is self-financing a viable alternative to fundraising?	134
6.	Techniques	138
6.1	Setting up a local fundraising group	138
6.2	Organising a fundraising event	144
6.3	Collections	158
6.4	Direct mail	164
6.5	Committed giving and membership	175
6.6	Personal solicitation	183
6.7	Legacies and memorials	188
6.8	Capital appeals and big gift campaigns	191
6.9	Raising money from young people and in schools	196
6.10	Gambling activities that generate money	199
6.11	Advertising for support	203
6.12	Digital fundraising	208
6.13	Trading	229
7.	Working with people	233
7.1	Working with volunteers	233
7.2	Working with patrons and celebrities	239
7.3	Working with trustees and committee members	241
7.4	Getting the most from your donors and supporters	244
8.	Communication skills	251
8.1	Developing a brand identity	251
8.2	Writing a fundraising proposal	259
8.3	Producing effective printed materials	270
8.4	Appeal letters	275
8.5	Annual reports	279
8.6	Using the telephone	280
8.7	Market research	283
8.8	Marketing	286
8.9	Public relations	289
	Afterword	295
	Sources of information	
	Useful organisations	297
	Useful publications	313
	Index of organisations	317
	Index of topics	320

Foreword

It is now more than ten years since the first edition of this handbook was published. In that time the world of fundraising has changed greatly. Perhaps the most obvious area of change is in the field of technology. The use of email and online payment systems are now pervasive, and the recent growth of social networking websites is further extending the potential for fundraising in the virtual world.

The integration of new media channels with traditional techniques such as direct mail, and the increasing speed and sophistication of databases, gives fundraisers the opportunity to combine channels and media in ways never possible before.

Yet there is still a core set of basic truths about fundraising which any practitioner needs to learn. With the growth of civil society around the world and increasing interest in the potential for local fundraising, more and more people are acquiring this knowledge. Some learn by trial and error, others through attending workshops and courses, which are expanding in number as the demand grows.

The number of associations of fundraisers has grown, with more than 30 countries now having an association of some sort. A global ethical code has been developed and the different associations are starting to map out ways to collaborate so as to strengthen the provision of education and training in fundraising. More and more books and online resources are becoming available to support fundraisers in different parts of the world.

In the sphere of philanthropy we have also seen much change. Big donors like Bill Gates and Warren Buffet are being emulated by other wealthy philanthropists around the world – people like Carlos Slim in Mexico and Victor Pinchuk in Ukraine. In April 2008 the *China Daily* reported that China's top 100 philanthropists had donated \$1.8bn over the previous five years. At the other end of the spectrum, websites like Kiva and Global Giving are mobilising gifts from ordinary citizens through connecting the donor directly with the recipients.

Alongside the growth in giving there appears also to be an increasing demand for evidence of impact, for results-focused programmes with demonstrable outcomes. 'Social enterprise' is a concept which has caught the imagination of many of the 'new' philanthropists – a section of the giving public which looks to market-based approaches. They aim to nurture social interventions which can fund themselves through a business approach. This, they believe, is the route to true sustainability.

Wherever you are, this is an exciting time to be in fundraising. Though at the time of writing the global economic outlook is far from sunny, I'm sure we'll look back and see this as just a temporary dip in the overall history of increased giving. Even at times of economic contraction there are many fundraising opportunities. Some would argue that it is in tough times that experience, knowledge and skilful execution really count.

This handbook is designed for both novice and experienced fundraisers. It is a comprehensive guide to all the main sources of income and the techniques associated with these different sources. For the third edition, the book has been extensively updated and many new case studies have been included. Some of these case studies have been taken from the Showcase of Fundraising Innovation and Inspiration (SOFII) – a project of the Resource Alliance. SOFII is a free online library of great fundraising. Visit www.sofii.org for more examples of the techniques described in this book. In fact, why not share your own stories with SOFII?

Simon Collings
CEO, Resource Alliance
May 2009

About the authors

Michael Norton

Michael is the founder of the Directory of Social Change and was its director until 1995. Since then he has created several other highly successful enterprises. In 1995 he founded the Centre for Innovation in Voluntary Action (CIVA) encouraging innovation and new thinking on the role of charities.

Michael has also established Changemakers, challenging young activists to design and manage their own community projects. He is a founder of the Youthbank UK and also a founder and trustee of UnLTD – the foundation for Social Entrepreneurs, which makes awards to over 1,000 individuals in the UK each year who wish to create change in their communities. He also helped set up UnLtd India, and is currently working on parallel initiatives in South Africa and Canada.

Michael is currently promoting and supporting a number of projects including MyBank to promote young people's banking, Otesha UK where young people take out the climate change message and encourage action through bicycle tours and performances, and FoodWorks where young people cook meals for those in need using donated food in donated kitchen space. He also runs literacy and library programmes in India.

The Resource Alliance and Simon Collings

The Resource Alliance's mission is to help voluntary sector leaders worldwide acquire the tools to build the financial sustainability of civil society. It started as the International Fund Raising Group (IFRG) in 1981 and it is now in its third decade of supporting the NGO sector. The role of the organisation has expanded from being an event organiser to developing and running an international programme of information and training for fundraisers worldwide.

The Resource Alliance works predominantly in the global South, responding to the need for a participatory skills transfer and capacity building programme. To date the workshops and events that the Resource Alliance organises have attracted almost 12,000 delegates from more than 100 countries.

Simon Collings, is former CEO of the Resource Alliance and is now CEO of Global Village Energy Partnership. Before working for the Resource Alliance, Simon was Director of Fundraising at Oxfam.

About the contributors

Richard Holloway

Chapter 5 on ‘Generating Income through Self-Financing’ was written by Richard Holloway. Richard, is presently the director of the Civil Society Programme at the Aga Khan Foundation in Geneva, following a 40-year career in the field of civil society and rural development in Asia, Africa, the Caribbean and the South Pacific. He has been a grass-roots worker, a project manager, an aid administrator, a trainer, and a consultant, and has published books, particularly handbooks, on different aspects of not-for-profit management. In particular, he authored *Towards Financial Self-Reliance*, a guide to resource mobilisation strategies for the non-profit organisations in the South.

Derek Humphries

Chapter 8 on communications was originally written by Derek Humphries and has been updated by Michael Norton. Derek is a director with Think Consulting. He has directed the creative and strategic elements of communications for over 100 not-for-profit organisations – from small local charities to international causes. His work has won many industry awards.

Derek served as Managing Director of Burnett Associates for eight years until 1999. He is a founder member of the UK’s Institute of Direct Marketing, has been Vice-Chairman of the UK’s fundraising institute (IoF), and also served on the board of the UK’s national fundraising convention.

Jason Potts

Section 6.12 on digital fundraising was written by Jason Potts. Jason is director of digital activities with Think Consulting Solutions. He is widely recognised within the global not-for-profit community as an expert on direct-response fundraising and as a pioneer in the development of the e-commerce and e-business market place.

Jason speaks regularly at conferences around the world about the future of digital media for the sector and writes widely on the subject. Jason has worked with many global NGOs on using the medium both to communicate their mission and deliver revenue. This work has meant gaining experience of markets outside Europe, including; North America, Latin America and Asia Pacific. You can find out more at www.thinkcs.org or follows his tweets @Leneva.

Jason would like to acknowledge the contribution to his section by Martin Gill from HomeMade Digital, UK for his technology insights and Spanish market knowledge. Also thanks go to Philip King of Artex Interactive, Canada, for his thoughts on global peer-to-peer digital fundraising and to WSPA for being brave enough to share detailed case studies with the rest of the sector.

Preface

This book was originally published in 1996 to provide a comprehensive overview of fundraising practice and techniques for those whose job it is to raise money for a charity or a development organisation – whether as a volunteer or as a paid fundraiser or as an external fundraising consultant.

A note on terms used in this book

This book is intended for people fundraising for non-profit organisations, and this includes the following:

- **NGOs** (Non-Governmental Organisations). This term may have different meanings in different countries, and in some countries there is a formal procedure for registering an NGO.
- **CSOs** (Civil Society Organisations). This term is increasingly being used by Northern donors to describe a wider range of organisations and activities that can play a role in creating social change.
- **Charities**, which are organisations established for charitable purposes under charity law, which again will differ from country to country. Some of these raise money for particular purposes, such as health care or the welfare of the elderly. Others have their own programmes of work that they are raising money for.
- **Development Organisations**, which seek to promote community development. These are not charities in the real sense of the word, as they seek to empower and enable people to do things for themselves, rather than provide services for those in need – although most are constituted under charity law.
- **Community-Based Organisations** and **People's Organisations**, which operate at the grass-roots level and are often informally constituted, and which often need to mobilise support locally.
- **Campaigning and Advocacy Organisations**, which seek to promote change through research, information, campaigns and lobbying. There is now a great deal of emphasis placed on advocacy as part of the development process.
- **Trusts and Foundations**, which are grant-making bodies, usually established under charity law with the specific function of making grants for charitable purposes. Many are endowed, but some have to raise money if they are to make grants. The two terms 'trust' and 'foundation' are used interchangeably. 'Trust' is used because many foundations are constituted under trust law.

All these organisations are **Voluntary Organisations** and form the **Voluntary Sector** (sometimes also known as the **Third Sector**). The term 'voluntary' is used because these

organisations share a common feature – that they are all managed by a voluntary management board and they operate independently of government. These organisations all need to obtain resources for their work, which they will try to do from a variety of sources.

This book is particularly aimed at the Southern fundraiser, and has been written from that perspective, and is illustrated with examples from many Southern countries. *North* refers to the developed world; *South* to the countries of Asia, Africa and Central and Southern America, where most of the world's poor people live.

There are two major differences between NGOs and voluntary organisations operating in the South as compared with their Northern counterparts:

- The availability in the South of large amounts of aid and development money from foreign sources, including governments, NGOs and charitable foundations.
- There are far fewer opportunities for raising money locally.

Overseas funding has helped a great many voluntary initiatives to get started, to develop their work and even to grow into substantial institutions. International donors have been willing to part with quite large sums of money (at least in terms of purchasing power) and often for relatively long periods of time (in the UK a three-year grant is considered long term!). NGOs have been able to expand their work, obtain grants to meet their capital needs and even create corpus funds (sometimes known as endowments) as a 'nest egg' for their future.

But international help is fickle. This year's concern may not be next year's. In India, the NGOs in some of the Southern States are fearful that donors are becoming more interested in putting their limited resources into the more 'backward' States of Bihar, Madhya Pradesh, Rajasthan, Uttar Pradesh and Orissa. Donors may decide to withdraw from a country for a variety of reasons, including political instability, corruption, and conflict. For example, international funding is harder to get in Kenya than in Uganda, and several important donor agencies have been reviewing their commitment to Zimbabwe. Or donors may transfer their affections completely to other countries, such as Rwanda after the genocide, or for the reconstruction of the constituent countries of the former Yugoslavia, where they feel that there are real and immediate challenges for them. They may decide that countries such as India, which are undergoing relatively rapid economic development and which have even faster growth rates than in the North, are now able to look after themselves. Or they may have seen political change at home, where the 'old idea' of helping the world's poor has become less fashionable, as has happened in the Netherlands, despite the pressure from the 2002 World Summit on Sustainable Development to increase the flow of development aid from the North.

Whatever the reasons, and there may be several, it is not a very satisfactory situation for any organisation to make itself the victim of the whims and practices of foreign donors – who are often in a position to determine whether an organisation continues and to exert a great deal of control over the nature and style of its work. This is where domestic fundraising can begin to play an important role.

Domestic fundraising can:

- Help your organisation develop its own sources of income, and therefore give you more control in deciding your own agenda and your organisation's future. More income also means that you can do more work, and this will become increasingly important as the role of NGOs in promoting development continues to grow.
- Develop links between the organisation and the local communities in which the work is being done, for example by developing funding relationships in the local community with individual and corporate donors or mobilising cash support and volunteer time in the local communities where you are doing your work.
- Create an important support base of people who share your views and are prepared to give money to make things happen. If you are fighting child labour, you will become a much more powerful organisation if you have thousands of local supporters than if you are entirely foreign funded.
- Encourage those who are actually doing the work to understand the urgency and importance of what they are doing – which they will need to do if they are to communicate their need for support successfully to those with the power and the resources to help them.
- Create new lines of accountability. If you fundraise locally or generate support within your own community, you are no longer just accountable to large overseas agencies, which are often remote and bureaucratic. You are accountable to every man, woman and child who gives you money for your work. The fact that they live nearby and you can easily communicate with them is also important.

Southern NGOs and voluntary organisations can succeed in fundraising, just as their Northern counterparts are doing. Two examples from India spring to mind:

- Lok Kalyan Samiti (LKS) is an eye hospital in New Delhi. It now raises all the money it requires from a direct mail fundraising programme involving more than 30,000 active supporters. LKS is now coordinating a network of over 30 eye hospitals in South Asia that are seeking to adopt similar fundraising methods.
- CRY – Child Relief and You – is an Indian donor agency that successfully raises money from India's middle class and corporate sector, and also runs a substantial greetings card operation that contributes half its annual budget. CRY started with a few concerned individuals deciding to do something and pooling their small donations. It now has tens of thousands of individual and corporate donors all contributing regularly. CRY believes that it is only scratching the surface, and that the alleged 300 million-strong Indian middle class presents a real challenge for fundraisers.

In Africa, and indeed in Central/Eastern Europe and Latin America as well as in Asia, there are similar possibilities for developing local fundraising. Techniques including direct mail, organising fundraising events and involving volunteers are all being used successfully. There are many local companies as well as local branches of multinational companies that are willing to give support in cash or in kind.

As well as raising funds, there is another possibility of gaining an income for NGOs and voluntary associations – making your own money (or generating your own income). Many NGOs have pioneered techniques by which they sell their services (in part or in

whole), run an enterprise (either linked to their main activity or not), or in some way generate income that they can use for their main humanitarian activities.

The problem is not so much a lack of opportunity, but rather knowing where to start and finding ways of building your fundraising (or your income-generation scheme) from a small or not-yet-existent base. The important thing is to get started. You will probably not be able to raise a huge amount immediately, but you should be able to build up your fundraising so that you raise more and more with each year that passes. We hope that this book will provide you with the ideas, the techniques and the necessary skills to be successful. We hope that it will not only encourage you to identify the opportunities, but that it will also give you the enthusiasm and the confidence to make a good job of your fundraising and your income generation.

Michael Norton

May 2009

CHAPTER 1

Introduction

1.1 Why fundraising is important

Fundraising is extremely important for your organisation's success. Here are some of the reasons why.

Survival

Every organisation needs enough money to survive. It has to meet its project costs and develop its programmes for the future, pay the wages and salaries of its staff plus all its administrative overheads, keep its buildings and vehicles in a good state of repair, and pay for any new equipment that it needs. The list is endless. And the stark truth is that if the money is not raised, the organisation will not be able to carry out its work. And if the work is not done, all those pressing needs will remain unmet.

The tool you will use to manage your fundraising is your annual budget. This will show the amount of money that you plan to spend. It will also show the amount of money that has already been raised or which has been promised, and what extra support needs to be raised during the year so that you can meet all your planned outgoings.

You will monitor your progress in achieving your targets by keeping a record of money that has been received or promised, and by discussing your management accounts at regular management committee meetings (which you might hold monthly, or perhaps quarterly for smaller organisations). If the income isn't coming in as you have planned, you will need to take some sort of action – put more effort into your fundraising, cut costs, defer planned projects, or agree to subsidise the likely deficit out of your reserves.

Expansion and development

If your organisation is to meet the challenges of the future, you may need to expand the work, improve the quality of service, extend your activities into other areas, carry out research, add campaigning and advocacy to basic service delivery, and continue to innovate. All this requires more money – money that you will need to raise.

You may want to prepare a proper business plan. At the very least you will need a 'sketch budget' for the next few years so you can start to plan for any major developments or expansion that you wish to undertake. This will provide you with a starting point for raising the resources you will need to do this. Remember, fundraising always takes longer than you think. The more you plan ahead, the more likely you are to get the money when you need it.

Reducing dependency

Many organisations have one or perhaps several major donors who provide most of the funds they are spending. This situation can lead to a state of dependency. If one of your large grants is withdrawn, this could create a financial crisis. Not only this, but this dependency can make it difficult for your organisation to determine its own agenda since it will be constantly having to adapt to the priorities of its donor organisations.

Broadening your fundraising base by bringing in other donors and by generating other sources of income can reduce your dependency. But it is up to you to decide whether your organisation is too dependent on any one source, and if this is the case, whether to negotiate some form of long-term funding partnership with your current donors or to develop other sources of income.

Building a constituency

Fundraising is not just about the amount of money you raise; it is also about the numbers of supporters you can attract to your cause. Each supporter is important to you. They can be persuaded to give again and to give even more generously. They might like to volunteer or might be able to persuade friends and contacts to support you. Their numbers are an indication of the level of support that your organisation is attracting, and this can add strength to your lobbying and campaigning work.

You need to think about the sorts of people that you would like to mobilise and who will be attracted to the kind of work you are doing. Is it businesses? Or middle-class people? Or students and activists? Or women? Or retired people with time on their hands? Or doctors? Or lawyers? Or some other special category? And then you will need to think about how best you can reach them and the sort of message they will respond to.

Creating a viable and sustainable organisation

Fundraising is not simply about generating the resources you need to survive from this year to the next, and paying for any planned expansion and development. It is also about helping to create a viable and strong organisation which is able to sustain itself into the future.

There are many ways you can do this. One is to build a substantial and active donor base – getting people to support you who feel involved and important to the organisation, and who will continue to give their support over a long period of time. Other ways include: organising successful fundraising events (which can be repeated and run even more successfully in subsequent years); creating capital within your organisation, such as buildings and equipment (which reduce your need for running costs or can help you generate an income) or an endowment or ‘corpus’ fund; and developing some sort of income-generating activity within the organisation itself.

Many organisations are addressing long-term needs: for example, through community development that will not yield immediate results, or by looking after disabled or elderly people where you will have a continuing commitment to provide them with care. It is important that you create an organisation that is financially strong and positive about its future, rather than one that is plagued by annual deficits, which is running at or near bankruptcy, and where the financial concerns are beginning to affect the morale of

everyone involved. If you think carefully, you should be able to find ways of strengthening your organisation's financial position and developing a sensible fundraising strategy for the future.

1.2 The challenges for fundraisers

Fundraising is never easy. But there are particular challenges for Southern fundraisers:

The development of fundraising

Fundraising in the South is not as well developed as it is in the North. This means that the Southern fundraiser has to help in developing the habit of giving, finding fundraising methods which work well within the local culture, and identifying and mobilising those constituencies of support you would like to tap. In the North, there is plenty of experience, good practice, published case studies, practical training and support services for the fundraiser to draw upon. The South is starting lower down on the learning curve. Which is perhaps where this book comes in!

Growing need

Many poorer countries have underfunded health, welfare and educational programmes, and this particularly affects poor people. In those countries where population growth is outstripping economic advance, poor people will be growing poorer year by year. And even where countries are experiencing rapid economic growth, the rich may be getting richer, but wealth is not trickling down to the marginalised and the dispossessed. Then there are always new needs and new concerns – from the problems of water scarcity to the consequences of rapid urbanisation.

The challenge for NGOs is to develop solutions to people's needs rather than simply provide services that improve the quality of life. They need to create more imaginative and effective approaches to the problems that exist in society, so that they can respond to the growing levels of need without necessarily creating a continuing demand for funding that is just not there. The challenge for fundraisers is to find the funds to make this happen.

Establishing a vibrant local NGO sector

There is a growing recognition that NGOs should be playing a more important role in partnership with government and business as delivery agencies for poverty alleviation and development programmes. If the flow of development funding increases – as was promised at the G8 Summit in 2005 and as part of the arrangements for debt relief – this should lead to a greater availability of international development funds for NGOs.

You will be competing for these funds with country-based branches of the large international development agencies, such as Oxfam. In the long run, your job is to develop the local NGO sector so that it is seen as competent, creative and accountable, and to obtain a growing share of international development assistance for locally run and led NGOs, including your own.

Competition

The fundraising world is extremely competitive. More organisations than ever are thinking about fundraising and beginning to develop independent sources of income for themselves. This means that many of the more obvious sources, such as larger local companies and rich individuals, are receiving increasing numbers of requests for support – and they can't support all of them, however worthwhile each request is.

Then there are the large international networks, such as HelpAge International (welfare of the elderly) and SightSavers (blindness), who may have developed far better-resourced local fundraising than you could ever hope to do. Increasingly you will be competing with international development agencies, such as PLAN or Oxfam, which are starting to develop their local fundraising as well as seeking to access grants locally from large international donors, many of whom now decide their grants in the regions or countries where the money is being spent.

You will also be competing with new organisations, full of energy and enthusiasm. These may be addressing similar needs to those that your organisation is tackling. Each of these 'competitors' will be striving to show that they are 'the best'. Your job then is to persuade donors that your organisation is successful, effective, cost-effective, innovative and lively – in short, that you are the best recipient for the donor's funds.

The difficulty of making money

People are now talking about income generation as a way forward for funding NGO work. However, it is not easy to start and sustain a money-making enterprise. Most NGOs are largely inexperienced in business methods. Many have doubts about the whole idea of making money as part of a sensible financial strategy. If you do decide to go down this path, there will be plenty of good opportunities for NGOs to manufacture and sell products or services that are closely linked to their main work, or to provide their expertise to others on a consultancy basis. A growing body of experience on income generation is being built up. Hopefully this book will encourage you and others to explore the possibilities.

1.3 Who should read this book

The simple answer is that everyone who has any sort of fundraising responsibility needs to understand the fundraising process:

- **Board members** will want to know what to expect of fundraisers, how to employ them, what qualities they should have, and what support they will need to succeed. They will need to understand fundraising sufficiently to agree a fundraising strategy and to explore the options for income generation.
- **The director and other senior managers** may need to play a significant part in the fundraising process. They also need to know when it's time to employ specialist fundraisers or fundraising consultants and how to manage them to achieve the best results.
- **Fundraisers** will of course need a good background guide to the many techniques available to them, and an understanding of which are most likely to be relevant to their organisation.

- **Volunteers** who are raising money for you should read the book so that they can develop ideas for improving their own contribution.
- **Consultants and advisers**, who will often be charging for their services, need to know the fundraising process inside out to ensure that they are giving the best fundraising advice and helping their clients raise real money.
- **Trainers**, who might wish to use some of the material as handouts or checklists for people attending their courses.

This book has been written from as many points of view as possible, taking into account the interests of both large and small organisations, those with some experience of fundraising and those considering the possibility for the first time.

1.4 How this book is structured

The book is divided into eight sections:

- **Introduction** – this section – which sets out why fundraising is important and the challenges for fundraisers.
- **Getting started**, which describes some of the key principles of fundraising (to give you a better understanding of the process) and some of the personal skills required in a fundraiser (so you will know your strengths and weaknesses for the job). It also explores who should do the fundraising, and what is needed to equip a fundraising office.
- **Developing a fundraising strategy**, which describes some of the factors to take into account and suggests ways of developing a strategy for your own organisation. This section also covers testing, evaluation and control, to enable you to be more cost-effective in your fundraising.
- **The sources**, which covers international aid and grants, grants from government sources and programmes, foundation support, company giving and business sponsorship, getting support from individuals, and a range of other sources that you might want to consider. This section will give you an understanding of how money is given away, and will help you identify opportunities for getting support for your own organisation.
- **Making your own money**, which covers the opportunities for developing income-generation schemes to earn money for your organisation, as part of a strategy for creating greater financial independence and reducing reliance on grant aid.
- **Techniques for raising money**, which covers everything from house-to-house collections and direct marketing to organising a fundraising event, getting a legacy, raising money from overseas non-resident communities and running a capital appeal. The full list of topics is given on the contents page.
- **Working with people**, including volunteers, overseas volunteers, celebrities and patrons, board members and donors.
- **Communication skills**, which will help you articulate your fundraising need and communicate this to people with the resources to help you. This section covers writing fundraising proposals and appeal letters, producing leaflets and reports to support your fundraising, using the telephone, marketing and market research, and effective

public relations (which is an essential ingredient of successful fundraising). It also gives advice on how to present your organisation to the public – everything from your name and logo to the way you answer the telephone and the impression people get when they visit your office.

CHAPTER 2

Getting started

This chapter covers some of the key aspects of fundraising. It will help identify the people, the attitudes and the approaches that you will need to get a successful fundraising programme under way.

2.1 Some key principles of fundraising

'Fundraising is a science. But its rules are more like a rainbow than a formula. You need to paint with the most delicate shades of colours and moods. You will surely become a success if you paint with love and friendship.'

Ekaterina Kim, Contacts-I, Moscow

You have to ask

A piece of research commissioned by a major charity asked people who had not yet supported it what was their main reason for not giving. The answer was simple – *they had never been asked.*

So to raise money, you have to ask for it. And there are plenty of opportunities available for doing this. Some fundraisers do not get around to asking those who might wish to give. Others ask, but do so ineffectually. The good fundraiser must ask clearly for exactly what they want, having regard to the donor's ability and willingness to give when deciding what to ask for. They may need to repeat the message in order to emphasise the point. The call to action, the punch line which asks people to give, is the essential part of the message. And you must make it as easy as possible for the donor to respond.

The personal approach

The general rule is that the more personal you can make your approach, the more effective you will be. So:

1. Asking in person at a **face-to-face** meeting is better than . . .
2. Giving a **presentation** at a meeting to a group of people, which is better than . . .
3. **Telephoning** someone to ask for support, which is better than . . .
4. Writing a **personal letter** to someone, which is better than . . .
5. Sending an **email** to someone, which is better than . . .
6. Sending a **circular letter** to lots of people, which is better than . . .
7. **Mass emailing** all the addresses in your address book.

Many fundraisers prefer to work by sending letters asking for support. This is not the most effective way of asking, so you may need to think carefully about how to make your approach more personal. Two other points are worth considering:

A meeting at your project where the prospective donor can see your work and meet some of the beneficiaries is often the most effective method of all. If that can't be managed, you can try to illustrate your work with a short video, or with photographs, or by taking along some of the people you are working with to fundraising meetings.

A request from someone who has given or from someone important (such as a business leader or an expert in the field) can often be more effective than a request from a fundraiser or from the project director. Part of the skill in fundraising is knowing who is the best person to do the asking.

Understanding the donor's viewpoint

When deciding to give, the donor may be motivated by a wide range of feelings and thoughts. It is important for the fundraiser to understand a donor's thought processes when deciding how to ask.

The act of giving includes elements of faith, hope and charity. *Faith* that the fundraiser truly represents the cause and will act as an efficient conduit for the donor's money. *Hope* that the gift, however small, will make some difference. *Charity* because giving is an act of altruism, providing support without the expectation of any material return.

It is also important for the fundraiser to understand that the donor might have some personal reason for wanting to give, and that it is useful to be able to build on that interest. People may want to support a cancer charity, for example, through fear that they might get the disease, or because a family member or close friend has recently died of it. They may feel strongly about an issue – such as the environment – and want to do something about it. In supporting your cause, they are also supporting their cause, doing something that they feel needs doing and which they want to see done.

The return to the donor

People support charity without the expectation of any material return. But they do want something for their money, even if it is intangible. For example:

- **A feeling of having done something worthwhile**, and perhaps of having made a difference to someone else's life.
- **Recognition from other people** and from the public of their generosity – although some people prefer to give anonymously.

Fundraising is a people business

People do not give to organisations. They do not give to abstract concepts. They give to help other people or to do something positive to create a better world. Your job as a fundraiser is to show how you are helping do this. One way of showing this is by using case studies – illustrating your work with actual examples of the people you have been able to help, showing how you have been able to change their lives, showing what you have done to create a better environment and so on. In this way you can demonstrate to donors how their money can make a difference.

Another way is to focus your fundraising on particular aspects of your work: the beekeeping project you are planning to introduce in the school, which will provide skills that pupils will be able to use in their future lives and will at the same time generate income for the school; the community publishing programme you are developing, which fills you with excitement about its potential. Focusing on specific projects rather than the overall work of your organisation makes it far easier to enthuse your donors.

How to turn a goat into an ox

Arume is a widow who lives in the Boreda area of southern Ethiopia. Seven years ago she found herself unable to make ends meet for herself and her three children. When we started work in her village, she decided to apply for a loan under the small animals credit scheme we were targeting at female-headed households. Using the loan, she was able to purchase a goat. This initially provided the family with milk; but subsequently the goat reproduced, and the offspring were sold to generate an additional income for Arume. With this profit, Arume was able to purchase a draught ox, thereby enhancing her capacity to engage in agricultural activity. She is now a proud mother, having met the food and other requirements of her family, with her elder son soon to complete school and go on to college.

Source: This story was provided by Action for Development, Addis Ababa, Ethiopia, and was illustrated with a picture of Arume ploughing with her ox.

Fundraising is selling

Fundraising is a two-stage process. The first stage is showing people that there is an important need which you can help to meet. If they agree that the need is important, and that something should be done; and if they agree that your organisation is doing something significant to address that need; and if you can show them how some extra support could enable you to do even better – then asking for money becomes easy. Fundraising is more about selling an idea that the donor can make a difference than about the actual asking for money. Once people have been sold the idea, you will find that they will want to give. This is why fundraising is more about ‘selling’ than ‘telling’. It is about persuading people to give, and showing reasons why the work is important. Your success depends on your ability to inspire people to do something to help.

Credibility and PR

People prefer to give to organisations and causes that they have heard of. This means that your organisation’s credibility and good public relations are both extremely important. Press coverage of your work, trumpeting your successes in the newsletters you send to supporters, and getting endorsements of the quality of your work from experts and prominent figures can all encourage people to recognise the importance of what you are doing. If they are confident you are doing something both worthwhile and successful, they are much more likely to support you. Putting some effort into strengthening your organisation’s credibility and getting good publicity for what you are doing is extremely

important. You need to recognise this and devote sufficient time and effort to this aspect of your fundraising.

Donors don't know how much to give

One problem is that donors don't know how much they are expected to give. They may not want to give an enormous amount. On the other hand, they may not want to give too little, and so seem mean.

Ways of asking for a specific amount

- **Ask for a specific sum** to cover an item of expenditure: for example, £200 to sponsor an afternoon eye clinic at the hospital.
- **Provide a shopping list** of different items at different prices: for example, if you are equipping a hospital, you can list all the items you will need to purchase and ask a donor to contribute to one or more – the Lok Kalyan Samiti eye hospital suggests donations of Rs100 (£2) per patient for eye care and Rs200 per patient for cataract operations, and asks donors to sponsor one, five or ten patients.
- **Give examples of gifts** already received. This will give people a good idea of how much to give, depending on their level of generosity and on whether they see themselves making a largish or a smaller gift.
- **Break down the total** into the numbers of gifts of different sizes that you will need to achieve if you are to reach your target.

Saying thank you

Saying thank you is extremely important. It recognises and values the donor's generosity. It can also be an act of enlightened self-interest on your part: if you can get your donors to feel more warmly about your organisation, they may consider giving again at some time in the future.

Many organisations only say thank you when they have actually received a donation. Those who say thank you on every appropriate pretext will see the effort of doing this repaid handsomely in donor loyalty and may well be surprised at the level of repeat-giving it will stimulate. Not saying thank you, however small the donation, can generate ill will towards your organisation. Donors complain that many of the organisations they support never even bother to say thank you!

Saying thank you can pay

A former director of a major aid charity made a point of telephoning donors who had given £500 or more at home in the evenings to thank them personally. 'We're thrilled with your support. We're going to put it to good use immediately by using it to help establish a new health clinic for the Turkana. And we'll keep you in touch with progress.' All this makes the donor feel that the organisation is doing a good job

Useful organisations

Capacity-building organisations

These organisations provide training and other support in a range of areas including general management, financial management and governance. Some work locally in a specific region or country.

Ashoka

Ashoka Headquarters Office
1700 North Moore Street, Suite 2000
Arlington, VA 22209
USA
Tel: +1 703 527 8300
Fax: +1 703 527 8383
<http://www.ashoka.org>

Association for Progressive Communications

Executive Director's Office
PO Box 29755
Melville 2109
South Africa
Tel: +27 (0)11 726 1692
Fax: +27 (0)11 726 1692
<http://www.apc.org>

AVINA Foundation

PO Box 1474
8640 Hurden
Switzerland
Tel: +41 (55) 415 1111
Fax: +41 (55) 415 1150
<http://www.avina.net>

Board Source

1828 L Street NW
Suite 900
Washington DC 20036–5114

United States

Tel: +1 202 452 6262
Fax: +1 202 452 6299
<http://www.boardsource.org>

Capacity.org

ECDPM
O.L.Vrouweplein 21
NL 6211 HE Maastricht
The Netherlands
Fax: +31 (0)43 3502 902
<http://www.capacity.org>

CEMEFI

Centro Mexicano para la Filantropía
A.C.
Cda. de S. Alvarado #7
Col. Escandón
México D.F. 11800
Tel: (55) 5277–6111
Fax: (55) 5515–5448
<http://www.cemefi.org/>

The Civil Society Development Foundation (CSDF)

H-1117 Budapest
Mészöly u.4. III/3
Hungary
Tel: +36 1 385 2966
Fax: +36 1 381 0011
<http://www.ctf.hungary.org>

Global Legacy International

26 Trevor Place
London SW7 1LD
UK
Tel: +44 (0)779 695 1448
<http://www.globalegacy.com>

INTRAC

PO Box 563
Oxford OX2 6RZ
UK
Tel: +44 (0)1865 201851
Fax: +44 (0)1865 201852
<http://www.intrac.org>

**Leadership for Environment and
Development International (LEAD)**

Sundial House
114 Kensington High Street
London W8 4NP
UK
Tel: +44 (0)870 220 2900
Fax: +44 (0)870 220 2910
<http://www.lead.org>

MANGO

Chester House
George Street
Oxford OX1 2AU
UK
Tel: +44 (0)1865 433342
Fax: +44 (0) 1865 204836
<http://www.mango.org.uk>

Mwengo

PO Box HG 817
Highlands
Harare
Zimbabwe
Tel: +263 4721 469
Fax: +263 4738 310
<http://www.mwengo.org>

The Non Profit Partnership

1st Floor Scat House
19 Loop Street
Cape Town 8000
South Africa
Tel: +27 (0)21 425 0386
Fax: +27 (0)21 425 0389
<http://www.npp.org.za>

Pact

1200 18th St NW
Suite 350
Washington DC 20036
United States
Tel: +1 202 466-5666
Fax: +1 202 466-5669
<http://www.pactworld.org>

Poverty Eradication Network

Kenya
PO Box 4932 00200
Nairobi
Kenya
Tel: +254 (0) 20 445 0656
<http://www.penkenya.org>

The Resource Alliance

56-64 Leonard Street
London EC2A 4LT
UK
Tel: +44 (0) 20 7065 0810
<http://www.resource-alliance.org>

**The South African Institute for
Advancement**

PO Box 818
Green Point
Cape Town 8051
South Africa
Tel: +27 (0)21 425 7929
Fax: +27 (0)21 425 7990
<http://www.inyathelo.co.za>

South Asia Fundraising Group

Surat Sandhu
 D-7 / 7346, Vasant Kunj
 New Delhi – 110 070
 India
 Tel No. 91–11–26132024/
 26132086
 Email: ceo@safrg.org
<http://www.safrg.org>

Synergos

51 Madison Avenue
 21st Floor
 New York NY 10010
 USA
 Tel: +1 (212) 447 8111
 Fax: +1 (212) 447 8119
<http://www.synergos.org>

Ufadhili

PO Box 14041
 00100, Nairobi
 Kenya
 Tel: +254 2 343061
<http://www.ufadhilitrust.org>

Union of International Associations

Rue Washingtonstraat 40
 B-1050 Brussels
 Ixelles / Elsene
 Belgium
 Tel: +32 (0)2 640 18 08
 Fax: +32 (0)2 643 61 99
<http://www.uia.org>

Venture for Fund Raising

Unit 2801 Jollibee Plaza
 Emerald Avenue
 Ortigas Center
 Pasig City
 Metro Manila
 Philippines 1605
 Tel: +63 2 634 8889
 Fax: +63 2 637 3545
<http://venture-asia.org>

YANAPAY Foundation

Av. de las Américas 4–43 y
 Abraham Sarmiento
 Cuenca-Ecuador
 Tel: 5937 845097
<http://yanapay.sphosting.com>

Civil society networks

These organisations publish newsletters covering issues relevant to philanthropy and fundraising (for example, legal tax issues, impact and effectiveness), and hold workshops and conferences.

BOND

Regent's Wharf
 8 All Saint's Street
 London N1 9RL
 UK
 Tel: +44 (0)20 7837 8344
 Fax: +44 (0)20 7837 4220
<http://www.bond.org.uk>

CEDES

Cedes
 Sánchez de Bustamante 27
 (C1173AAA) Buenos Aires
 Argentina
 Telefax: (54 11) 4865–1707/04/12
 Email: cedes@cedes.org
<http://www.cedes.org>

Index of organisations

A

ACCORD 33–4, 115
ActionAid 60, 68, 91, 115, 173, 181
Action for Development (Ethiopia) 9
ADD 69
Africa Online 108
African Prisons Project 69
Afrika-Aszia Forum (Hungary) 125
Aga Khan Foundation 6, 78, 85
Aide et Action 68
American Express 93, 109
American Red Cross 222
Amnesty International 175, 179
Anglo-American plc 98
Anti-Apartheid Movement 247
APD 55
Asha for Education 118
Association for Physically Handicapped,
Bangalore 172

B

Banana Box (Kenya) 115
Baphalali, Swaziland Red Cross Society
232
Barclays plc 108
Beit Foundation 79
BESO 68
Big Lottery Fund 80, 83
Bliss Foundation 125
Bolshoi Theatre 40–1
Bombay Community Public Trust 78
Book Aid International 69
Botswana Red Cross Society 202–3
British Airways 93
British Petroleum 95
Brot für die Welt 68
Business in the Community (UK)
99–100

C

Cadbury Schweppes plc 108
CAF America 82
CAFOD 113
Can Too 153
Cancer Research UK 225
Care 60
Change for Good 93
Chintan 87
Christian Aid 68, 113
Citibank 105
Civil Society Development Programme
(Hungary) 81
Clinton Global Initiative 80, 85
Coco-Cola 108
Comic Relief 80, 82, 225
Commonwealth Foundation 83, 269
Commonwealth Secretariat 83
Commonwealth Youth Exchange
Council 84
Community Chest, Hongkong 154
Concern India Foundation 51, 97, 276
CRY, Child Rights and You 79, 118, 186,
236
Cure Cancer Australia 153
CUSO (Canada) 238

D

Deepalaya (India) 109
Department for International
Development (UK) 66
Diana, Princess of Wales Memorial
Fund 83
Directory of Social Change 82, 93
Dream a Dream 101

E

ECHO 67
Engineers without Borders 68
EuropeAid 67

European Foundation Centre, Brussels
83

European Union 60, 67–8, 265

Excellent Development 69

F

Farm Africa 69

FEBA Radio 147–8

Food and Agriculture Organisation 64

Ford Foundation 78, 80, 84

Foundation Center (USA) 93

Foundation for Medical Research,
Bombay 276

Friends of the Earth 281

G

Gates, Bill and Melinda, Foundation 80,
85

Gatsby Charitable Foundation 83

Global Giving v, 215, 223, 225

Good Angel organisation 227

Grameen Bank/Trust 127

Green Deserts 69

Greenpeace 179, 252, 255, 258–9;
Argentina 222; India 186–7

Guinness 104–5

H

HelpAge India 118; International 4, 68

Hewlett-Packard Foundation 97

Home-Start 259

HOPE 127

Hospital Well Wishers 179

HSBC India 98

Hunger Site 108

I

INAISE 132, 137

India Foundation for the Arts 79

IndiCorps 118

INSIST (Indonesia) 129

International Association of Lions Clubs
114

International Labour Organisation 64

International Planned Parenthood 68

International Red Cross 124, 252

Invest India 53

J

Joseph Rowntree Charitable Trust 83

Just Change India 117

Just Giving 229

K

Karuna Trust 69

Kenya Breweries 104–5

Kiva.org v, 215, 222, 223, 225

Kutch Navnirman Abhiyan 87

L

LEPRA 69

M

Malaysian Nature Society 181

Malaysian Red Crescent Society 107

Marie Stopes International 69

Marlborough Brandt Group 117

Médecins sans Frontières 68, 177–8

Medical Foundation for Victims of
Torture 38

MESO, Multi Environmental Society
(Tanzania) 115–16

Microsoft India 98

N

National Foundation for India 79

Nature Conservancy 124, 137; of Canada
190

Nelson Mandela Foundation 222

NESA, New Entity for Social Action 20

NESsT, Non-profits Enterprise and Self-
Sustainability Team 124–6 *passim*,
137

NIOK (Hungary) 125

Nivara Hakk, Bombay 276, 277

Novartis 98

Nuffield Commonwealth Programme 84

O

Open garden (Hungary) 126

Oxfam 3, 4, 20, 60, 66, 68, 174, 205, 225;
India 69

P

Paraguayan Red Cross Society 162–3

Partners Hungary 125

'Path to Life' Medical Rehabilitation and
Therapy Centre (Ukraine) 151–2

Paul Hamlyn Foundation 83, 87

Peace Corps (USA) 68, 238

PEAS, Promoting Education in African Schools 69
 Pizza Express 109
 PLAN 4, 60, 68, 70–1
 Practical Action 69
 PRADAN (India) 32
 Prince's Charities 84
 PROSALUD 127

R

Radda Barnen 68
 RAFAD (Switzerland) 133
 Rajiv Gandhi Foundation 78
 Resource Alliance 23, 24, 119, 175;
 Ethical Statement 37–8
 RNLI 255
 Rockefeller Foundation 84
 Rotary International 114

S

Sakhya Anti-Dowry Guidance Cell,
 Bombay 277
 Samaritans 233
 Save the Children 66, 68, 40, 252, 289
 SEARCH, Bangalore 32
 Send a Cow 69
 Shalom India-Israel Centre, Mumbai 17
 SightSavers 4, 69, 204
 Sisters of Mercy (Mother Theresa) 69
 Social Entrepreneurs Trust 69, 144
 SOS Sahel 69
 South Asia Coalition on Child Servitude
 63
 SpeakersBank 105

T

Tamizdat (Czech Republic) 126
 TC/DC (Tanzania) 128
 TOMS Shoes 70
 Tools for Self Reliance 69
 Traidcraft 231
 Transitions Online (Czech Republic)
 126

U

UN agencies 60, 64–5
 UN Children's Fund (UNICEF) 64, 93;
 Trick or Treat 163–4
 UN Development Fund for Women
 (UNIFEM) 65

UN Development Programme (UNDP)
 65
 UN Programme on HIV/AIDS
 (UNAIDS) 64
 UN Educational and Scientific
 Cooperation Organisation
 (UNESCO) 40–1, 64, 65
 UN Environmental Programme (UNEP)
 65
 UN High Commissioner for Refugees
 (UNHCR) 65
 UNLtd India 69, 105, 144
 UN Population Fund (UNFPA) 65
 UN Volunteer Programme 238
 USAID 65

V

Venice in Peril Fund 109
 Vodafone UK Foundation 95
 Voluntary Service Overseas (UK) 62,
 238
 Vydra (Slovakia) 126

W

WaterAid 69
 Woodland Trust 204
 World Bank 60, 65, 126
 World Food Programme 65, 109
 World Health Organisation (WHO) 64,
 65
 World Society for Protection of Animals
 218–19, 225
 WorldVision 60
 Worldwide Fund for Nature 109, 110,
 289

Y

Yayasan Tengko Sitoru (Indonesia) 128

Z

Zain Group 222
 Zambian Red Cross 129

Index of topics

- Advertising** 93, 107, 152, 203–8, 225, 247
Costs 206
Door drops 206
Handbills 207
Issues 207–8
Loose inserts 206
Posters 206–7
Press advertising 203–5; acquisition 204;
awareness 205; disaster 204; legacy 205
- Applications** *see also* **Fundraising Proposal**
For agency grants 71–7
To companies 95–102, 107–8
To foundations 87–90
For government grants 58–60
- Big Gift Campaigns** 41, 191–6
- Branding** 251–9
Commercial 254, 255
Definition of 251–2, 256–8
Importance of 253–4
Organisation-wide commitment 259
Toolkit 258
- Campaigning** 249–50, 290–1
- Capital Appeals** 2, 31–2, 41, 191–6
Leadership 194–5
Planning 192–4
Private phase 195–6
Public phase 196
- Celebrities, working with** 150, 239–41,
293
- Collections** 46, 142, 158–64
Boxes in public places 163
Boxes in supporters' homes 159
Checklist 160
House-to-house 55, 159–61, 281
Street 161–3
Trick or Treat 163–4
- Committed Giving** 175–82
Frequent giving 180–1
Keeping in touch 178–9
Promotion 176–7
Standing orders 176
- Committees** 1, 17, 18, 195, 233,
243–4
- Communication** 248–94 *see also*
Branding; Printed Materials
Campaigning 248–50
Principles 270–4; KISS 273
- 'Corpus Funds'** 2, 31–2, 34
- Dependency** 2, 32, 63
- Digital Fundraising** 208–29
Broadband 209, 226, 228
Choosing right tools 217–18
Interactive TV 210
Internet 25–6, 208–9, 223–8 *passim*
Mobile phones 210, 216–27, 220–22,
224–7 *passim*, 229; 3G 221
Online fundraising 218–20, 224–7;
giving 215, 223–8, 311–12
Peer to peer fundraising 216, 220, 224,
229
Project management 214–15
Social media 209–10, 220, 224, 229
Technologies 210–18; CRM 211–12;
CMS 212–14

- Virtual market entry 218–20
 What to do next 228–9
- Direct Mail** 46, 164–75, 183
 Advice and consultancy 174–5
 Budget 172
 Cold mailings 168–71; issues in 169–70
 Components 166–9 *passim*
 Costs 45, 170–2, 271
 Finding right lists 170–1
 Getting started 171–2
 Improving response 167
 Mailing Guide 174
 Management 172–4; list 173–4
 Personalising 166
 Reciprocal 171
 Types 165–71
 Warm mailings 168
- Donors** 1–29, 48–55, 164–88, 244–50,
 252, 260–9, 280–1, 283–5, 287–8,
 290 *see also* Sources of Funding
 Agencies 34, 70–7
 Dealing with 15, 71–7, 244–50
 Dependence on 2, 32, 63
 Don't know how much to give 10
 Getting the most from 244–50
 Individual 48–55, 117–18, 164–82
 Involvement/commitment 11, 247–50
 Pyramid 173
 Reasons for giving 7, 8, 49–51; rejecting
 14
 Research 89, 283–5
 Thanking 10–11, 59, 75, 91, 244–7,
 258–9
 Understanding point of view 8
 Ways of giving 49
- Events** 2, 34, 45, 113, 142, 144–58,
 184–5, 196, 293
 Budget 148–9
 Costs 45, 148–9
 Deciding what to organise 146–8
 Five ingredients 145–6
 Generating extra income 152
 Management 148–9
 Organising 157–8
- Presentations at 184–5
 Promotion 150–1
 Reducing risk 149–50
 Spin-off for future fundraising 153
 Sponsored participation 154–7; checklist
 155–6
- Evaluation** 45–7, 77
- Expatriates** 117–18
- Foundations** 77–90 *see also* Giving by
Foundations
 5 don'ts in dealing with 81
 International 80–5; in Europe 83
 National and local 79; UK 82–3
 Religious 85–6
- Fundraisers** 3–4, 17–24, 28–9
 Budget 21
 Challenges for 3–4
 Professionals 18–24, 28–9
 Recruiting 21
 Selecting 29
 Targets 22
 Training 23
 Volunteer 18–19
- Fundraising** 1–47, 138–234, 244–7, 253,
 259–69
 Accountability 11, 77, 143
 Budget 1, 20, 21, 47, 266–7
 Competition 4
 Costs 19–21, 43–7 *passim*, 266–7
 Face-to-face street 185–6
 From individuals 53–5
 Getting started 7–29
 Importance 1–3, 23
 Is a people business 8–9; is selling 9
 Key principles 7–11
 Personal approach 7–8, 99
 And PR 289–91, 293–4
 Proposal 73–4, 259–69
 Reporting back 11, 75–6
 Saying thank you 10–11, 59, 75, 91, 160,
 163, 244–7, 258–9
 Skills required 12–17
 Strategy 30–47

Techniques 39–42, 138–232
Volunteers in 18–19, 142, 188, 196,
233–4
Who should do it 17–24

Fundraising Office 25–8

Fundraising Proposal 73–4, 259–69
Approach 260, 261
Budget/costs 266–7
Content 261–9
Deciding how much to ask for 10, 264–5
Dos and don'ts 268
Getting in touch 268
Targeting 261
Timing 265

Fundraising from Schools and Young

People 112–13, 196–9
Making approach 198
National competitions 199
Publications for schools 199

Fundraising Strategy 30–47
Assessing opportunities 34–6
Constraints 36–9
'Corpus' funds 2, 31–2, 34
Developing strategy 30–44
Funding mix 42–3
Identifying sources 34
Measuring effectiveness 45–7
Other principles 43–4
Resources available 38–9
Response rate 46
Risk avoidance 44
Techniques 39–42; SWOT analysis
39–40; stakeholder analysis 42
Testing, evaluation and control 45–7

Fundraising Techniques 39–42, 138–232

see also individual entries
Advertising 203–8
Capital appeals and big gift campaigns
191–6
Collections 158–64
Committed giving and membership
175–82

Digital 208–29
Direct mail 164–75
Gambling activities 199–203
Legacies and memorials 188–91
Organising events 144–58
Personal solicitation 183–8
Raising money from young people and
schools 196–9
Setting up a local group 138–42;
constitution 141; key questions 143
Setting up an overseas group 143–4
Trading 229–32

Gambling 199–203

Draw 110, 202
Prizes 200–1
Promotion 201–2
Types 200

Giving by Companies 34, 90–102

see also Sponsorship
Advertising in publications 100
8 ideas for getting support 101–2
Kinds of companies that give 92–5;
multinationals 93–4
Projects companies reject 92; support
91–2
Questions companies ask 96–7
Reasons for giving 90–1; rejecting 92
Support in kind 34, 94, 97–8
What companies give 92–3

Giving by Donor Agencies 34, 68–77

Dealing with 71–7
How they raise money 70–1

Giving by Foundations 34, 77–90

International 80–5; European 83; US 82,
84–5
National and local 79; UK 82–4

Giving by Government 34, 55–60

Local government 57–8
National government 56–7

Giving by Individuals 34, 48–55

Reasons for giving 49–51
Ways of giving 49

Giving by International Organisations

- 34, 60–77
- Bilateral 60, 65–8; European Union 67–8; UK 66–7
- Donor agencies 34, 70–7
- Issues in 61–3
- Multilateral 64–5; UN 64–5
- NGO 68–9

Giving by Other Institutions 112–18

- Embassies 112
- Expatriates 117–18
- Membership bodies 112
- Religious bodies 113–14
- Returned volunteers 116–17
- Schools and young people 112–13, 196–9
- Tourism/tourists 114–16
- Trade unions 112

Income generation 2, 119–37

- Costs 130
- Fees for services 34, 126–7
- Ideology 123
- Joint ventures with business 130
- Money-making enterprises 125–30; tourism 128
- Pre-requisites for success 131–3

Legacies and Memorials 34, 176, 188–91, 259

- Getting started 190–1
- Memorial giving 190
- Target audience 189–90

Marketing 286–9

- Place – how people are asked to give 288
- Planning and market analysis 286–7
- Price 287–8
- Product 287
- Promotion 288–9

Market Research 283–6

- Donor 89, 283–5
- Public opinion 285–6

Membership 32, 34, 112, 179–82

- Administration 182
- Costs 181

- NGOs 3, 34, 37, 62–3, 66–71, 102–3, 110–11, 122, 130, 213–14, 251, 288

Patrons

- Working with 239–41

Producing Printed Materials 26, 252, 270–80

- Annual reports 26, 74, 246–7, 279–80; criteria for 279–80
- Appeal letters 275–8
- Costs/budget 271
- Design 272, 274–5
- Getting into print 274–5
- Writing 272–3

Public Relations 9–10, 52, 88, 196, 219, 289–94

- Campaigning 290–1
- Damage limitation 290
- Letters 291
- News releases/press conferences 291–2
- Photocalls/events 292–3

Rejection 13, 14, 92, 269**Religious organisations** 48, 53, 69, 113–14, 199**Response rate** 46, 171, 175, 278, 280–2 *passim***Self-financing** *see* **Income generation**

- As alternative to fundraising 134–5

Solicitation, Personal 183–8

- Costs 186
- Face-to-face 183–6 *passim*
- Meeting potential supporters 184
- Pre-requisites for success 187–8
- Presentations at events 184–5
- Warm visiting 183–4
- Your own events 185

Solicitation, Telephone 187, 281

- Pre-requisites for success 187

Sources of Funding 36–8, 48–118

see also individual entries

Companies 90–112

Donor agencies 68–77

Embassies 112

Expatriates 117–18

Foundations 77–90

Government 55–60

Identifying 34

Individual donors 48–55, 117–18

International 60–77; European Union
67–8

Other 112–18

Short-term and long-term 36

Sponsorship 34, 37, 92, 93, 102–12,

149–51, 154–7 *passim*, 178

Business 102–12

Contractual issues 108–9

Costs 109

Identifying possible sponsors 106

Joint promotions 109–12; issues 111–12

Package 106–7

What can be sponsored 104–5

Who sponsors? 103–4

Targets/Targeting 22, 54, 172–3

Taxation 27, 50, 90, 121–2, 176, 184,

187, 190

Telephone, Use of 25, 280–3

Donation lines 280

List 282–3

Phonathons 281–3

Thanking 10–11, 59, 75, 91, 160, 163,

244–7, 258–9

By gift 246

By letter 245

By meeting 246

By public acknowledgement 246–7

By telephone 245

By visit 245–6

Tourism/Tourists 114–16, 128

Trading 34, 229–32

Catalogues 231

Charity shops 230

Other activities 231

Trustees/Management Board 17,

241–3

Trusts *see* Foundations

UN agencies 60, 64–5

Values 255–6

Volunteers 18–19, 116–17, 148, 160, 163,

188, 233–9, 250, 263

In fundraising 18–19, 142, 188, 196,
233–4

Management 9, 237

Overseas 237–9

Recruitment/selection 235–6, 250,
263

Returned 116–17

Thanking 160, 163

Types of work 233–4

Working with 233–9

Young People 112–13, 196–9

Competitions 199

Making approach 198

Publications 199

The Worldwide Fundraiser's Handbook

Now in its third edition, this fully revised and updated edition is the essential fundraising handbook for the developing world (including Africa, Asia, Latin America and countries of Eastern Europe). Using case studies and examples of good practice, it offers:

- guidance and advice on establishing effective local fundraising
- the opportunity to tap into a wide range of sources of funding (including government, companies and charitable foundations)
- fundraising techniques and good practice
- sources of information and help.

This new edition incorporates:

- changes in fundraising practice
- new case studies
- a completely updated and rewritten section on internet fundraising
- an expanded 'Useful organisations' section.

This is an ideal book for fundraisers working to mobilise local resources and funding, for funders and for those seeking to support them.

'Fundraising is an art, but it needs expert knowledge, techniques and tools to ensure success. This book will provide you with the vital toolkit to help you succeed.'

Tony Elischer, Managing Director, THINK Consulting Solutions

'A must for millions of non-profits in emerging markets.'

Anup Tiwari, Donor Relations Specialist, UNICEF India Country Office

'A serious and substantive guide...a reassuring affirmation of the universality of good fundraising principles.'

Amanda Seller, Director of International Fundraising, UNHCR

Front cover image
by Peter Morison
© Peter Morison



Mixed Sources
Product group from well-managed
forests and other controlled sources

Cert no. TT-COC-002706
www.fsc.org
© 1996 Forest Stewardship Council

Michael Norton. Now in its third edition, this fully revised and updated edition is the essential fundraising handbook for the developing world (including Africa, Asia, Latin America and countries of Eastern Europe). Using case studies and examples of good practice, it offers guidance and advice on establishing effective local fundraising and the opportunity to tap into a wide range of sources of funding (including government, companies and charitable foundations). It also offers fundraising techniques and sources of information and help. This new edition incorporates changes in fundraising pr "The Conscience of the World: Influence of NGOs on the UN System.Â The funds raised through the Every Member Campaign (EMC) will continue to support educational programs and scholarships/bursaries in the Canadian chaptersâ€™ geographical areas. These funds will also support AFP Canadaâ€™s national objectives. The Association of Fundraising Professionals (AFP) Foundation for Philanthropy â€œ Canada, exists to advance the charitable objectives of AFP through targeted funding for strategic initiatives all across Canada , source: The Journal Of Prison download epub <http://rehset.com/books/the-journal-of-prison-discipline-and-philanthropy-volumes-11-12>.