Week 1: Fundraising & Communications

### Agenda:

* Learning Objectives
* Branding
* Communications Planning
* Fundraising: Sources of Revenue
* Annual Fundraising Plan
* Building your Crisis Funding and Communications Teams
* Developing a Crisis Communications Plan
* Review, Resources, Wrap Up

### Learning Objectives:

By the end of the day, you will:

* Understand components that create an effective brand, are able to assess how their brand is perceived, and understand strategies to use their unique brand to emotionally appeal to their target audience;
* Be able to identify various communications and their purpose and practice the initial steps necessary for building out a donor campaign including modality, objective, and success metrics;
* Be comfortable setting out an annual fundraising plan by assessing historical revenue streams, and practicing the initial steps to outline SWOT;
* Understand how to plan ahead for a crisis by developing and implementing a crisis management plan for communications and fundraising; and
* Understand the elements of a crisis communications plan, how to build one and then implement it.

# Branding, Parity and Differentiation

Consider the ways your organization is similar and different to other conservation NGOs.

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| **Parity** | **Differentiation** |
| Characteristics of the organization that are **similar** to other organizations. | Characteristics of the organization that are **different** from other organizations. |
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To what extent do your communications highlight the things that make you unique?

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| **Platform** | **Is your point of differentiation clear?****(Yes / No)** | **Can you improve the visibility of your organization’s uniqueness?****How?** |
| **Website** |  |  |
| **Social Media** |  |  |
| YouTube |  |  |
| Facebook |  |  |
| Twitter |  |  |
| Instagram |  |  |
| **Direct Communications** |  |  |
| Newsletters |  |  |
| Thank You Emails |  |  |
| Drip Campaigns |  |  |
| Fundraising Requests |  |  |
| **Other** |  |  |
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# Audience and Purpose

Work with your team to complete the information in the below table and prioritize areas of focus for your organization.

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| **Audience** | **External Communications** | **Internal Communications** |
| **Donors** | **Potential Donors** | **Partners** | **Employees &****Volunteers** |
|  | IndividualsPrivate CompaniesGrantors | Social media followersPeople who are connected to existing donors | GovernmentOther NGOs |  |
| **Purpose** | Celebrate SuccessesInformation on new initiativesProgress towards goalsGrant reportsSeek funding | Funding applicationsPolicy / Advocacy reports or requestsReports | General information / updatesChange management  |
| **How is this audience being reached?***(Example: Newsletter, website, etc.)* |  |  |  |  |
| **What has been successful?***(Example: Increase in social media followers, reached a fundraising goal, ect.)* |  |  |  |  |
| **Which audience is a priority for increased / improved communications?***(Example: Rank audience by priority,* *make notes about focus areas, etc. )* |  |  |  |  |

# Communications Assessment

Think about how you are using communications to reach your audience. Document your current communications, their effectiveness, and next steps to continue improving.

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| **Communication****Platform** | **Audience** | **Purpose** | **Frequency** | **Effectiveness** | **Next Steps** |
| **Examples:**Social Media (Twitter, Facebook, Instagram, etc.)NewslettersEmail campaignsWeb Page | **Examples:**DonorsPotential DonorsCommunity Stakeholders | **Examples:**Maintain connections with donors and potential donors. Engage audience and inform of current programs and success.Provide overview of mission of organization and capture new donors | **Examples:**WeeklyMonthlyUpdates made regularly to stay up to date with current projects.As needed. | **Examples:**Average likes / comments / shares on socialDonations receivedEmail open rate and click rate | **Examples:**Convert potential donors to donorsImprove SEO to increase visibilityTest different subject lines to increase open rate |
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# SMART Goal Setting Template

 What’s the fundraising goal you have in mind?

Expand on this goal using the SMART attributes.

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| **S** |  **What do I want to achieve? What are the requirements? What are the constraints?** Be precise. |
| **Specific** |   |

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| **M** | **How will I know when I’ve reached my goal?** What are the metrics and milestones I need to hit along the way? |
| **Measurable** |   |

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| **A** |  **How can the goal be accomplished? What are the logistical steps I should take?** Be precise. |
| **Achievable** |   |

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| **R** |  **Why is this goal worthwhile? Do I have the necessary resources to accomplish this goal?** Does it support the wider objectives and mission of the organisation? |
| **Relevant** |   |

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| **T** |  **When do I want to achieve this goal?** Write down a target date. |
| **Timely** |   |

Now rewrite your initial goal as a concise, defined SMART goal.

**Track your goal progress**

**What are the action steps you need to take to achieve this goal?** Order these by priority or by their due date.

● Action:

● Action:

● Action:

**Am I on track to achieve this goal?** What obstacles have come up and what support do you need?

● Obstacle:

● Support:

● Obstacle:

● Support:

● Obstacle:

● Support:

**Milestones achieved.** Note down every time you hit one of your measurable milestones along the way.

● Milestone 1:

● Milestone 2:

● Milestone 3:

**Target date.** Have you achieved your goal?

# Further Reading and Resources for Fundraising Initiatives

## Monthly Recurring Gifts Program

Resources & Takeaways to build on this::

Management software tools <https://doublethedonation.com/tips/nonprofit-software-and-resources/nonprofit-membership-management-tools/#fonteva>

<https://donorbox.org/nonprofit-blog/nonprofit-membership-program/>

## Peer-to-peer fundraising

* Define campaign & determine financial goal
* Will it be a rolling option on your website year round or time based tied to a specific campaign or cause month?
* Recruit volunteers and advocates
* Provide simple resources for them to use (show the impact of donations raised)
* Have the function for sharing on social media channels simply to amplify reach
* Track progress

Resources & Takeaway to build on this:

Classy 12 Tips for P2P Fundraising campaigns <https://www.classy.org/blog/peer-to-peer-fundraising-campaign-tips/>

QGiv P2P the ultimate guide:<https://www.qgiv.com/blog/peer-to-peer-fundraising/>

## Grants

A few resources to research international grant opportunities include:

Foundation Center - https://fconline.foundationcenter.org/

GrantStation - https://grantstation.com/

Funds for NGO’s - https://www2.fundsforngos.org/

Grants.gov - https://blog.grants.gov/2016/10/12/exploring-eligibility-can-foreign-nonprofits-and-ngos-apply-for-u-s-federal-government-grants/ (this article explains how non US-based NGO’s can apply for US federal grants

Terra Viva Grants - https://terravivagrants.org/

## Special Events: Virtual

* Determine the goal of the event - to make money, to increase visibility, to create connections, etc.
* It is important to create a budget for events
* The budget will help you to evaluate the costs of hosting the event versus the income it might generate. The amount of hours it takes for staff (paid or volunteer staff) to support the event must also be taken into consideration. Then, compare the projected net revenue with the amount of time that will need to be invested to make an informed decision on whether or not the organization should move forward with the event.
* Critical to the success of the event - a planning committee that meets regularly and takes ownership of and responsibility for the event.

Takeaway Resources:

Virtual eco-tourism: <https://ecotourism-world.com/nature-cams-and-virtual-tours/>

<https://www.wildlifetrusts.org/webcams> has a constantly updating arrangement of live nature cams covering a variety of avian species and badgers.

<https://www.wildcenter.org/virtual-visit/> has a virtual tour called the ‘Wild Walk’ where virtual visitors are able to walk through the centres nature area, including across wood bridges and climbing tree-house like wooden structures.

<https://www.crea-panama.org/cocobolo-nature-reserve/virtual-tour/> Cocobolo Nature Reserve in Panama offers a selection of 6 area virtual tours: virtual traveller is able to transport themselves virtually to crystal clear waters and lush vegetation in the local ecosystem

## Annual Fundraising Planning:

Takeaway links and resources:

<https://cdn2.hubspot.net/hubfs/190333/_guides/2017-09-build-annual-fundraising-strategy-kit/classy-strategy-kit-annual-fundraising.pdf?t=1506912629695&utm_source=hs_automation&utm_medium=email&utm_content=56290358&_hsenc=p2ANqtz--dVJnOxeCv0F51mKRkSc6KD8qsjTKeMfapotQ95mPcrQ2ghKoWz_XfRNEYDDZL5taGzlE564CQmMdDFOCIUVCccRE2Rw&_hsmi=56290358>

## Fundraising Calendar Planning

Resources:<https://www.causevox.com/blog/fundraising-plan-calendar/>

# **Crisis Management Tools**

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| **Crisis Management Stakeholder List** |
| **Stakeholder Name***(Individual or Organisation)* | **Stakeholder Group***(Internal Or External)* | **Method Of Contact***(Phone, email, social media, post)* | **Contact Details***(Phone number, email address, web site or social media site, address)* |
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| **External Crisis Communications Plan** |
| *Comms**Platforms* | *Ease and Speed of Platform Use* | *Risks* | *Stakeholders* | Purpose of Comms | Measuring Effectiveness | Frequency |
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