CoOp Ready Tools for Fundraising

For Youth Organizations

Cooperate to Operate

NorSensus MEDIAFORUM
FUNDAȚIA DANIS pentru Dezvoltare Managerială
ASSET TECHNOLOGY
SAMO FUNDACJA SAMODZIELNI ROBINSONOWIE
Youth Work Ireland

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AKTIV UNGDOM

CoOp Ready Tools for Fundraising for Youth Organizations

The ready tools for fundraising for youth organizations were developed within the framework of ***Cooperate to Operate – bringing together youth organizations and SMEs through corporate social responsibility (CoOp)*** project.

CoOp project (2017-2019) aims to enhance the collaboration between Small-Medium Enterprises (SMEs) and youth organizations, thus to promote and encourage private investment in youth development, and education. The main objective of the project is to support youth workers and youth organizations to diversify their funding sources and attract investments from the business sector, by professionalizing them in the field of CSR and fundraising from SMEs.

CoOp is co-funded by the Erasmus+ Programme of the European Union, through Norway National Agency for the programme - Aktiv Ungdom.

The project is the outcome of a partnership between Norsensus Mediaforum (Norway), Youth Work Ireland (Ireland), Fundatia Danis (Romania), Asset Tec (Greece) and Fundacja Robinson Crusoe (Poland).

CoOp Ready Tools for Fundraising for Youth Organizations were developed using relevant theory in the field of fundraising and corporate social responsibility, the common experience of the CoOp partners and their experts in the field, and the results of the research conducted within the CoOp project with the involvement of SMEs, youth organizations, CSR & fundraising experts from Greece, Ireland, Norway, Poland and Romania.

Contact us: **http://coop.norsensus.no/**

Funded by the Erasmus+ Programme of the European Union

Introduction and the fundraising tools

The ready tools for fundraising from SMEs aim to help youth organizations in improving their fundraising activities from SMEs, at two levels: planning and implementing some fundraising activities. In order to develop the most powerful fundraising methods, the partners run interviews with 25 internal and external experts from Greece, Ireland, Norway, Poland and Romania. The experts are all working in the field of CSR, fundraising, marketing, and youth development.

During the analysis, we correlated the experts' answers with the findings of the *CoOp Country Research on SMEs and youth organizations' involvement and cooperation in CSR activities*, looking in depth to what youth organizations and SMEs responded on the following issues:

- The needs of the youth organizations, in terms of resources and projects/activities;
- The experiences the youth organizations already have on cooperating with the business sector;
- The staff or volunteers from youth organizations that are responsible for fundraising activities;
- The profile of the businesses with which the youth organizations will prefer to work;
- Types and frequency of interactions between youth organizations and companies;
- Companies' motivation to be involved in CSR or community development activities;
- Companies' needs in regards to CSR or community development activities;
- Types of support and types of community projects and organizations companies prefer to support;
- Decision making process in the SMEs, in regards to the CSR and community development activities.

Based on both analyses, CoOp partners developed the *CoOp Ready Tools for Fundraising for Youth Organizations* which include the following tools:

1. **The case statement template**
2. **Needs Assessment Part 1 - Identifying The Gaps**
3. **Needs Assessment Part 2 - Defining The Ask**
4. **The fundraising mix template**
5. **List of prospects template**
6. **The donor profile model**
7. **Project proposal template**
8. **Communication plan for an event**
9. **Ten ideas on building relationships with your business supporters**
10. **Special events recipe**
11. **Steps to design an employee volunteer program**
12. **Steps to organize an internship program for young people in partnership with SMEs**
13. **Solicitation letters**
14. **The Story Map**
15. **Business Model Canvas**
16. **Report to your sponsor - model**
17. **A good first meeting with an SME scenario**
18. **Online resources on fundraising and on how a fundraiser/youth worker/NGO staff should prepare for the first meeting with a potential sponsor/donor from a SME**
19. **Online resources on how to build relationships with your donors.**

1. The case statement template

The tool

The case for support or the case statement is the rationale behind your appeal. *Why* do you need the support, *how* the organization will use the money or the in-kind gifts from your donors, and *what* exactly your organization will do to serve the people and address their needs.

The case statement could be one paragraph answering to these three main questions (why, how and what) or it takes the form of a document that you will use internally or externally for developing and delivering smaller or bigger fundraising campaigns or for developing new proposals and initiatives to be presented to potential funders. No matter the length and the form of the case statement, you should make sure it is compelling for your potential donors, like local companies, and that it creates a sense of urgency for your cause.

A comprehensive **case statement** will include the following information grouped in eight sections (adapted from Weinstein, 2009):

1. **The organization's history**
2. **The people the organization serves**
3. **The way in which you serve the people and address their challenges and needs**
4. **The organization's reputation and stability**
5. **The organization's planning process**
6. **The organization's goals for the future**
7. **The ways of using the donations**
8. **The ways to recognize the donors' contribution**

The case statement's main sections explained

(adapted from Weinstein, 2009)

The organization's history

Write about organization's identity story: why and how it was founded, by whom, what the major accomplishments are and the milestones in the organization's history are.

Whom does the organization serve?

Describe the young people you serve, using demographic information, such as age, ethnicity, gender, geographic area, socioeconomic background, and any other information you consider relevant to include about them. Talk about real young persons from your organization or situations they face, collect stories and testimonials, and showcase the challenges young people face, and present the pressing problems your organization can address.

How does the organization address these challenges?

Write the story of your work, how you address the challenges and the needs described before; describe the programs and services you design and provide, and show your uniqueness - what makes your organization different from other youth organizations with similar missions and activities.

What is the organization's reputation for managerial and business acumen?
Bring evidence on your organization's stability and reputation (longevity in the community, leadership longevity, long-term partnerships, etc.) and also on the financial stability and fiscal responsibility (the annual budgets you run, the gifts received before, years of deficit-free operations, etc.).

How is the planning process described?
Talk about how you chose to do specific programs, and how you planned the activities, how you involved the stakeholders and community leaders, especially the youth, what tools you used - everything relevant you want to mention about your organization's decision process in choosing the programs and solutions to address young people's needs and the community's challenges.

What are the goals for the future?
This is the most important section of the case for support. Write down your goals, showing how your organization wants to improve the lives of the young people it serves, and showing the outcomes you expect for youth. Also, include program, financial, technology, administrative, governance, and human resource goals.

How will the donor's investment be used?
Talk about the fundraising needs, show relevant key budget items that need donors' support, and how the planned expenditures relate to the organization's mission and the services provided to the young people the organization serves.

How will the donor's involvement be acknowledged?
Describe how your organization will provide recognition, naming opportunities, benefits to the donors.

How to use the case statement?

A comprehensive case statement will help the youth organization:

- To clarify the organization's thinking and get everyone's from the organization, including donors, going in the same direction;
- To give fundraisers from the organization ready answers for proposals prepared for companies or other potential funders;
- To provide useful language and relevant stories to key staff, members, volunteers when they have to present, online or offline, the organization to relevant stakeholders;
- To provide basic inputs and meaningful information and stories for the organization's promotion materials and fundraising campaigns materials;
- To have a ready, basic presentation tool for any solicitation the organization has to make from diverse types of donors.

This tool was adapted from Stanley Weinstein, The Complete Guide to Fundraising Management, 3rd edition, John Wiley & Sons, Inc., 2009.
Watch Simon Sinek's Ted presentation to understand how to use why, how and what rule:
https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action?language=en

2. Needs Assessment Part 1: Identifying The Gaps

What is needs assessment?

Through a needs assessment process you will identify the “gaps” your organization has between the current situation of funds, services/goods and expertise and the wanted assets to accomplish the mission of the organization and run all the programs. These gaps are the needs of your organization in order to reach its objectives and goals. These needs will be finally transferred into specific fundraising goals in the process of building your fundraising plan. The needs assessment is also often ‘gap analysis’ or even a ‘capacity development analysis’ and would often follow a SWOT (Strengths, Weaknesses, Opportunities & Threats) analysis for the coming period.

The tool

Needs assessment steps

Step 1: Pick an area to focus on (and define the period too)

This exercise can be done at the level of your whole organization, or for one site, or for one specific program. It is usually easier to start small and then feed into a larger assessment for the whole organization; as long as you are clear on what the scope of the assessment is.

NB: If you decide to work program by program first, when you put it together at organization level it might be that one program or site have some resources that can be passed onto another or shared with another. So your overall needs assessment may not be simply the sum of each local one, but instead you may find synergies that will either allow you to reduce the total needs or make it more efficient to look for CSR support for multiple programs together.

Step 2: What are your targets and goals?

These should be realistic and achievable, and fit within your wider strategic goals. Once they are defined, evaluate what resources you will need to achieve them:

What is the cost of things that must be paid for?
What is required in terms of goods and services?
Do you need any expertise you don’t currently have or more manpower?

Step 3: Determine the current state of things

Figure out the ‘current condition’, in other words the resources that you know *for sure* that you are getting for the upcoming period, in the same three categories:

Funding (include ‘restricted’ funding only if it is applicable to this program, plus any ‘unrestricted’ funding that could potentially be allocated to it – but make sure you don’t allocate it to more than one program!);

In-kind support such as free goods and services already secured (include those assigned to this goal already, or ones that could be re-assigned to it);

Expertise and skills volunteering and/or non-skilled volunteering, depending on what you need, that people already promised (for people’s time, take into account the fact that people change their mind and drop off, so be conservative here and try to ‘firm up’ the promise as soon as possible.)

Step 4: Determine the desired future state of things

Define what the ‘desired condition’ would be i.e. what you would need to have to achieve your goal. For each category, define what this would include:

Funding;
In-kind support such as free goods and services;
Expertise and skills volunteering and/or non-skilled volunteering.

Step 5: Identify the gaps between the two states

Now you have a clear understanding of the attributes of your ‘current condition’ and ‘desired condition’, it is easy to identify what you need to go and look for in terms of extra resources. What is the funding gap? What is the in-kind gap? What do you need to obtain to reach our goal?

Why and when should you run a needs assessment, and who should do it?

You should do this exercise for the time period you usually do your overall planning: for most people, January to December, especially if this is also in line with your financial year and the funding/reporting cycle for your main funders. This will make it easier to spot the gaps in your resources. It would however be advisable to do regular reviews, at least once half-way through the year, to deal with any promises of support that fell through, and adjust for new needs that arose unexpectedly, etc.

If you have just done a SWOT analysis and written a new strategic plan, this should feed into your Needs Assessment alongside your financial planning for the coming period (which includes an accounts review and a breakdown of income and expenditure projection).

This exercise has many benefits, but in particular it:

Prevents programs from failing due to insufficient resources;
Builds capacity;
Maximizes the allocation of the available resources across programs;
Focusses the staff and volunteers on what is required to achieve the goals.

This tool was adapted from the gap analysis methodology on https://creately.com/blog/diagrams/gap-analysis-tools/ and also inspired by a workshop given by http://www.2into3.com, https://www.needsassessment.org/.

3. Needs Assessment Part 2: Defining The Ask

The Tool

Now, that you have identified your gaps in resources, be they funding, in-kind or people's time and expertise, you need to refine this and turn it into **a list of asks**.

First make a list of what is definitely cash needs, and another list which includes all in-kind support.
Look at your needs in a strategic way, not just 'we need 10,000 and we only have 3,000 so we need to find 7,000', but look at the needs that can be fulfilled by alternative means: have volunteers make things, get free or reduced goods and services, get pro bono advice, etc. Note anything that could be fulfilled by in-kind support rather than cash, particularly if the CoOp research showed that in your country that SMEs give in-kind support for preference.

Secondly look at the timescale of the activities you need these resources for. Note when you need them, and highlight the urgent ones. As well as noting when you need to have the resources delivered to you:

Make a note of the likely lead time (for example, you got an agreement for a design and printing SME to produce leaflets for you – allow time for said design and printing to happen, bearing in mind that pro-bono work will not always be performed immediately as paying customers will take priority);

Go even further back and calculate when you should start asking potential donors (know that not all your prospects will agree to give, so you need lead time to ask several of them, meet a few, go forward and back over the ask, etc.).

If it looks like a lot of asks and you are unsure if you can manage the process, grade them in terms of importance between 'must haves' and 'nice to haves'.

Look at which items look easiest to achieve, in particular check if any of them are a good fit for an existing donor or partner/contact. Of course, there is no guarantee, but on balance these asks are likely to take less time than if you need to profile and prospect from scratch. If there are a lot of local firms in the line of business you need, again this will make the process easier and quicker than if you have to look further away from your community.

Start to think about who can assist you with these asks.
Maybe board members and volunteers can help you by having more contacts or more time available. This will feed into your fundraising plan, where you will assign 'to do's' to support your resourcing drive.

Why do all of these?

These steps break down your resourcing needs into specific asks so that you can start to

- Visualize what is involved in the ask (time, complexity, likelihood of success, etc.);
- Prioritize your asks and your potential targets;
- Stay realistic;
- Start to think about who will take on the ask. It is great to collaborate with SMEs and look for more support, but you need to be mindful of the workload and make sure staff can fit this into their work-plan or are happy to do it as extra work, before you rely it on it to fund your projects. If not, you must engage your board and volunteers instead/as well. Think ahead about the time required for follow-up and relationship building with the SMEs.

Finally…
All this should then input into your annual fundraising plan and be part of your fundraising mix. See template below for an annual fundraising plan.

Template for Annual Fundraising Plan

What is the target for the year?

Type of Fundraising	How Many? (number required to make the target)	What? (which event, grant, or sponsorship deal)	Where? (what is the venue or what is the partner organization)	When? (date of the event, or for grants /sponsorship: date the money is due in)	Who? (who is the lead: staff, volunteer, 3rd party?)	How much? (revenue? incl. worst case scenario)
Major gifts ? K	1-2	(annual event, large grant or corporate sponsorship)				
Medium gifts ? K	5?	(SMEs/smaller grant/ philanthropy, Lyons, Rotary, Christmas event, etc.)				
Community Fundraising ? K	10-20?	(church gates, bucket/flag days, raffles, personal sponsored events)				
In-Kind Support						

Suggestions & ideas for your fundraising mix

(adapt to your own charity/country/local area)

Major gifts:

Large grants;
Major corporate sponsorships;
Large annual fundraiser event.

Medium gifts:

Philanthropy and grants;
Clubs (Lyons, Rotary, Bikers clubs, Hunting clubs, Golf clubs, vintage clubs, bridge clubs, etc.);
Christmas events (Tree of Remembrance, Carroll Singing, Hamper Raffle, etc.);
Other events/challenges – either organize your own or 'piggy back' on them, your own event:

get people to be sponsored by their friends/family;
don't forget that many employers match whatever their employees have raised;
ask the organizers of an event to donate a % of the proceeds or they can suggest an optional top-up on the ticket price.

Community fundraising:

Church gate collections (check whether you need a collection permit);
On street flag days or bucket days (check whether you need a collection permit);
Bucket day on business premises (petrol station for ex, no permit required, less competition);
Bag packing (Try Christmas, Easter, Halloween, any national holiday or local celebration date for preference);
Try a pop-up shop of second hand goods;
Organize a table sale/car boot type event – people can sell their own stuff but they pay you a fee for the stall;
Cake sale;
Door to door collections;
Counter collection box;
Auctions of large value items (open or blind).

This list is of course not complete and some types of fundraising don't exist in certain countries, so add your own ideas to the list.

4. The fundraising mix template

The Tool

The fundraising mix is another tool you can use to plan and overview your annual fundraising activities, this time taking the perspective on the methods you are going to involve, the fundraising objectives of each method, and the cost-efficiency of each method - when looking to costs, time needed and human resources needed for implementation.

The fundraising mix table

<table>
<tr><th colspan="2" rowspan="2">Fundraising methods</th><th colspan="2">Fundraising objectives</th><th rowspan="2">Total estimated costs</th><th rowspan="2">Time period for implementation</th><th colspan="2">No of staff and volunteers needed</th><th rowspan="2">Type of funds: restricted/ unrestricted</th></tr>
<tr><th>total value of gifts</th><th>no of donors</th><th>staff</th><th>volunteers</th></tr>
<tr><td colspan="2"></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
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<tr><td colspan="2"></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td rowspan="2">Total incomes</td><td>Restricted</td><td></td><td rowspan="2">Total costs</td><td colspan="5" rowspan="2"></td></tr>
<tr><td>Unrestricted</td><td></td></tr>
<tr><td colspan="2" rowspan="2">Estimated raised funds</td><td>Restricted</td><td colspan="6"></td></tr>
<tr><td>Unrestricted</td><td colspan="6"></td></tr>
</table>

The fundraising mix template explained

We will explain the tool by giving an example. Let’s say that your organization’s fundraising goal for the current year is to raise 5,000 euro unrestricted funds (to cover overhead costs or co-funding in some grants you received from the European Commission, etc.), but also 10,000 euro restricted funds (needed to cover some of your regular activities you plan to have with the young people you serve). So, in total, you need to raise 15,000 euro.

Here is how a fundraising mix can look like to fulfill these objectives:

<table>
<tr><th colspan="2" rowspan="2">Fundraising methods</th><th colspan="2">Fundraising objectives</th><th rowspan="2">Total estimated direct costs</th><th rowspan="2">Time period for implementation</th><th colspan="2">No of staff and volunteers needed</th><th rowspan="2">Type of funds: restricted/ unrestricted</th></tr>
<tr><th>total value of gifts</th><th>no of donors</th><th>staff</th><th>volunteers</th></tr>
<tr><td colspan="2">Special event - Summer picnic for members, family and friends</td><td>4,200</td><td>150 individual donors
2 local companies</td><td>1500</td><td>March-June</td><td>2</td><td>10</td><td>unrestricted</td></tr>
<tr><td colspan="2">Sponsorship for project X (email solicitation & face to face solicitation)</td><td>7000</td><td>5 local companies</td><td>0</td><td>January-April</td><td>2</td><td>0</td><td>restricted</td></tr>
<tr><td colspan="2">Annual campaign - individual donors/members (online campaign at the end of the year)</td><td>2500</td><td>100 members</td><td>500</td><td>September-December</td><td>2</td><td>2</td><td>unrestricted</td></tr>
<tr><td colspan="2">Peer-to-peer fundraising (participation at Swimathon from your community) for project Y</td><td>3000</td><td>10 fundraisers
170-200 donors</td><td>500</td><td>April-July</td><td>2</td><td>13</td><td>restricted</td></tr>
<tr><td colspan="2">Selling merchandise products of the organization, in special events or online</td><td>1000</td><td>80-100 buyers</td><td>200</td><td>On-going</td><td>1</td><td>1</td><td>unrestricted</td></tr>
<tr><td rowspan="2">Total incomes</td><td>Restricted</td><td>10,000</td><td rowspan="2">Total costs</td><td colspan="5" rowspan="2">2,700</td></tr>
<tr><td>Unrestricted</td><td>7,700</td></tr>
<tr><td colspan="2" rowspan="2">Estimated raised funds</td><td>Restricted</td><td colspan="6">10,000</td></tr>
<tr><td>Unrestricted</td><td colspan="6">5,000</td></tr>
</table>

How to use the fundraising mix in your organization?

This planning tool, the fundraising mix, will help you:

- To have an overview of all fundraising effort you will conduct during one year;
- To keep a good balance in the income sources for your organization, making sure the organization does not become heavily dependent on one or two income sources;
- To plan and prioritize your resources - money, time, and staff and volunteers - for the fundraising resources;
- To make decisions during the year regarding adapting, redesigning, dropping out or adding new fundraising activities, depending on the results obtained or on the new needs that may appear;

To evaluate the results obtained through each fundraising method implemented towards the initial objectives;
To further develop your fundraising activities and fundraising planning, constantly improving the methods, based on the results you obtained in the previous years.

5. List of prospects template

The Tool

List of prospects table

	Prospect Name/Company	Maximum capacity to give/year	Interest in our organization	The relationship	Personal interests/hobbies/ passions/projects, etc.	Willing to ask?
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

The *List of prospects* explained

When do you need such a list?
If you want to organize a special event, an email fundraising campaign or any other fundraising campaign, you will need to start from a list of potential donors - individuals or companies, depending on your fundraising objectives. No matter if you think to individuals or companies, you will need to analyze their "potential" to become your donors using the following criteria:

- Their capacity to give;
- Their interest in your organization;
- How you can reach them;
- Their personal interests, motivation, hobbies, passions, projects, activities, etc. that you could use to "attract" them / to bring them closer to the organization, and in the end to make them give to you.

How and who should fill in the list?
The list should be filled out by the members of your organization. Ideally, it would be great if everyone, staff or volunteers could fill out such a list. But it is more important to think in terms of numbers - how many people/companies you want on that list? And how much support do you need?

For instance, if you want to raise 10,000 euro from 10 companies, then we would recommend to collect such a list with at least 40-50 companies. The same, if you want to raise 10,000 euro from 200 individuals, then we would recommend to have around 700-800 people on the final list of prospects. For instance, in the first case, two people/a small team from the organization, who know better the business sector from your community, could make that list of 50 potential business supporters. In the second case, you might need at least 8-10 members, staff or volunteers to come up with such a list which will include their families, friends, colleagues, etc.

The main sections of the list explained:
Prospect name/company
Keep in mind that in the case of the company you also need the name of the decision maker from the company.

Maximum capacity to give/year
Design a scale, for instance, from 1 to 7, to evaluate this capacity:
1 - being the smallest amount a prospect could give during one year (example: 1,000-3000 euro/year)
7 - being the biggest amount a prospect could give during one year (example: 35,000-50,000 euro / year)
And in between, you can have: 2 - 3000-5000, 3 - 5000-8000, and 4 - 8,000-12,000, 5 - 12,000-20,000, 6 - 20,000-35,000 euro/year. Design this scale in a way that is relevant for your context; in the end, you need to be able to group your prospects based on the amount they could give.

For companies, you could look to their annual turnover and calculate what could be the limit of their support, for which they will get some tax exemption from the government. For individuals, think about 10% of their annual income. If you cannot collect any information about this, just leave the cell blank.

Remember, this is NOT the amount that you would ask from them! For your fundraising campaign with a goal of 10,000 euro, if you have a prospect with a score of 7 score for capacity, then you know you could ask 3,000-4,000 euro, while from a prospect with a 1 score, you could ask 100-300 euro.

Interest in your organization
You could work as well with a scale to evaluate this interest:
5 - the person donated before to your organization, and is a constant supporter and loves your organization and talk a lot about it to others;
4 - the person donated once/twice to your organization and attends organization's activities;
3 - the person did not give yet and did not participate in activities, but he/she seems interested in the goals/programs of the organization;
2 - the person knows the name of the organization, but he/she did not demonstrate any interest in the organization;
1 - the person might not know anything about your organization, but you think he/she has the capacity to give.

The relationship (with the prospect)
You could use the following scale:
5 - best friends, families, close business associate
4 - acquainted and friendly
3 - met once or twice
2 - never met
1 - hostile relationship

This refers to the relation that the person who fills in the list has with the prospect donor - individual or the company/ the decision maker. Two members might write down the same name, for example, of a company from your community. This information will help you to decide whom to send as a solicitor or whom to ask to open the door or make the contact for you. You will always choose the member that has the closest relationship, but pay attention that too close relationships, sometimes and in some cultures, could make the member to feel uncomfortable to ask for support.

Personal interests/hobbies/passions/projects, etc.
Here, you could add any information that will help you in the cultivation (aka building relationship) or the solicitation process. For instance, maybe you found out that the company supported young people before, other events for young people - this will be worthy to be noted here. Or, maybe, from previous contacts, you found out that the company is interested in making its name better known in the community - this will help you to choose the right value you can provide to them as recognition for their support.

Willing to ask?
"Yes" or "no"… or it could be "happy to make the connection". Here you need to find from your members, staff or volunteers who fill in the list, if they feel comfortable to make a solicitation or if, at least, they could open the door for you, to reach the prospect donor.

How to use the list of prospects?

Once you have the lists from all those persons you involved in the process, you arrange the prospects in four groups:

Those that can be asked right away (high interest to give, close relationship);

Those that need to be cultivated and brought closer to the organization, with some small to medium effort (medium interest to give, medium to close relationship);

Those from which you need more information, and you also need more time and effort to cultivate and bring them closer to the organization (medium interest to give, cold relationship);

Those that have the capacity to give, but too much effort is needed to reach and cultivate them (low interest to give, no connection at the moment with them or hostile relationship).

You know that you have a very good prospect list if the majority of the names on the list have a medium to high capacity to give (in regards to your fundraising goal), have medium to high interest to give and there is at least a level 3 relationship with them. You are in trouble if most of the prospects have low interest to give and the relationship level, for most of them, is 1 or 2.

Then, for each group you decide what is the action you need to take:
1. *Go, ask for the money for your campaign!*
2. *Meet, inform, build the relationship!* or *Go, ask for the money, but only about half of what would you ask from group 1*.
3. *Find out more, meet, inform, build the relationship!*
4. *No action for the moment* or, if you have the time and resources, *Introduce your organization to them, first, and then plan for cultivation*.

This model of list of prospects was developed and inspired by Stanley Weinstein, ACFRE, The Complete Guide to Fundraising Management, John Wiley & Sons, Inc., 2009.

6. The donor profile model

The tool

Profile of Sponsor X

Sponsor name:
Mailing address:
Phone/email:
Website:
Link to sponsorship guidelines (if they exist):
Contact name & position:
Contact phone:
Contact email:
Assistant name, email, phone (if it is the case):
Estimate capacity to give/year:

Matching ways:

1. Target Markets matching

Sponsor's target markets Customers Suppliers, distributors, business partners Employees Shareholders	Common target markets	Your organization's target markets / your project's target markets Clients Indirect clients Suppliers/partners

2. Objective matching

Sponsor's objective	Common objective	Your organization's objective / your project' objective

3. Value/attribute matching

Sponsor's attributes/values	Attributes/values of common interest	Your organization's attributes/values / your project' attributes/values

Marketing & development objectives for the next year (if you can find them):

Needs/wants/interests of the sponsors in getting involved in the community:

Previous sponsorships / precedents /sponsorship guidelines:

Exclusions (what the company will never sponsor or support, according to their sponsorship guidelines or according to other information sources you have):

Special emphases (other information you consider relevant to write down about the company):

Approval process - when & how:

Who can referral your organization to the company? Through what network can you reach the company?

The *Donor profile* explained

The first sections of the template of a donor profile are self-explanatory, but keep in mind that the most important information you need to have there is the contact details of a person from the company who could make the decision for making a gift or who could open the door to the decision-maker for your organization.

Estimate capacity to give during one year refers to the total amount of money the company can give from its profit to community causes. Usually this amount is defined by the fiscal code of a country, which sets the upper limit of the gifts, in order for the company to benefit from tax exemptions for these community good deeds. So, first, you need to check the legislation in your country regarding sponsorship, and then you need to check from public sources the amount of profit made by the company in the last year. For instance, in Romania, one company can give up to 0.5% of its turnover, being allowed to ask for tax exemption up to 20% of the taxes it pays on the profit obtained during one year.

The **matching ways** are the areas in which you could find common interests with the sponsor, and which you could use as leverage in designing the project, in developing your pitch to the sponsor, and in enhancing the collaboration with the business. There are three such areas:

> "Target market - this refers to the profiles of the customers the company targets, the customers of your organization and the customers targeted by the project you want to develop in partnership with the company; think about current and potential customers, new segments of customers, but also think about internal "customers" (profiles of the employees of the company, shareholders) and intermediary customers (suppliers, distribution partners, etc.). More customers you have in common, the more chances you have to establish a partnership with the company.
>
> "Objective" - this refers to your organization and the company's general objectives in regards to the involvement in the community; sharing objectives will give you an advantage in gaining the company's support; for instance, your organization and the company could share a goal such as "promoting good nutrition to teenagers", or the goals could be complementary.
>
> "Value/attribute" - this means that your customers and company's customers, or your organization's projects and the company's products or services share the same values or attributes, such as "innovative", "modern", "sustainable", etc. ("attribute equals attribute" principle); or it could mean that the company's attribute solve your customers' attribute ("sponsor attribute solves sponsee attribute" principle) - for instance, the young people you serve needs to get relevant work experiences, and then a company that has internship programs could be a good sponsor of your projects.

If you can find common target markets, objectives and values or attributes with the sponsor, then your proposal is a perfect match for the company's support. It is hard to find common things in all the three areas, and sometimes even one match can be enough for developing a partnership, still common interests should be found at least in one area to be able to start a collaboration with the company.

Marketing & development objectives for the next year. It will be great if you can find out about the company's plan for marketing, in order to better establish the future matching ways between your organization and the sponsor. Questions you can think of: Do they target new customers segment, more customers? Do they want to promote themselves with new attributes and values? How do they want to build their brand?

Needs/wants/interests of the sponsors in getting involved in the community. What exactly does the company want to achieve through the community projects it supports? More visibility? Business network? Employees' loyalty? Customers' loyalty?

Previous sponsorships / precedents /sponsorship guidelines; Exclusions; **Special emphases.** What kind of sponsorships did the company provided before, to you or to other organizations? Think of what kind of support the sponsor provided, how much it provided, in which way, for what kind of projects or activities, etc. If the company has public sponsorship guidelines, summarize them here focusing on the rules and principles that are relevant for your proposal. The same guidelines can provide you with information on "exclusions" - what the company will never sponsor or support; for instance, some companies will never give support to individual cases or for some topics which they consider are already covered by the government or other private donors. Then, in the "special emphases" section add other information you consider relevant to write down about the company, such as new product launches, new services being provided, a new slogan, their competitive situation, new decision makers, new merge, etc.

Approval process - when & how. Make notes here on when it is recommended to send a proposal or a request to the sponsor, or if there is already an established submission process. You are also interested in how and who is making the sponsorship decisions.

Who can referral your organization to the company? Through what network can you reach the company? Write down the person that is close to your organization and who can introduce you or who can vouch for your organization. Include contact details, and how the person could actually be requested to help you.

How to use the donor profile?

This profile structure of your potential sponsor helps you to systematize your research on essential information you need to know about a company, before going to ask for its support. The information you collect helps you:

- To know better the company and understands its motivation and interest to get involved in the community;
- To better design your request of support or your projects ideas in which you want the company as your partner;
- To better plan the request process (the solicitation plan) and the meetings with the potential sponsor;
- To identify and find a way of connection with the decision makers from the company;
- To better estimate the type of support and the amount of support the company can provide;
- To find better ways of building the relationship with the company.

This model of the donor profile was developed using relevant information from Kim Skildum-Reid & Anne-Marie Grey, The Sponsorship Seeker's Toolkit, Fourth Edition, McGraw-Hill Education, 2014.

7. Project proposal template

The tool

This tool will help you plan out a project idea that you could present to a potential sponsor, like a company from your community. Also, this tool helps you to prepare the project idea in a format that will make sense to a sponsor, including information about why the community needs the project and about why the company should get involved and support this specific project.

A project proposal outline

- Cover page
- Executive summary
- Overview of the organization and its qualifications
- Total amount of request/The request for support
- Needs addressed by the project
- Target groups
- Goal and objectives
- Activities and time frame
- The core team of the project and other partners involved
- Results, sustainability and evaluation
- Sponsor benefits
- Volunteering opportunities for sponsor's employees
- Promotion plan
- Budget
- Contact info
- Appendices

The project proposal explained

Cover page:
Use a compelling title and a short compelling text about the proposal, your logo, and also a photo or a video (depending on the channel you use to send the proposal), which is representative for your project.

Executive summary:
Describe briefly who you are and what your project is about. Think about *why* this project is needed, why the company should support it, *how* you are going to provide results and impact, and *what* you will actually do to achieve the results you want. Watch Simon Sinek's Ted presentation to understand how to use why, how and what rule:
https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action?language=en

Overview of the organization and its qualifications:
Provide a short presentation of your organization, of the mission, main programs, number of the people you serve, target groups for which the organization is known in the community. In this short

part, your objective is to build your credibility, so make it compelling to the sponsor, and also include information on: the impact you generate, such as changes in the life of the people you serve and of the community, measurable results, directions for development for the following couple of years, main partners & other sponsors, etc. Make also references to similar experiences or projects you implemented before with the same target groups or on the same topics.

Total amount of request/The request for support:
Write here how much money do you need or what kind of support do you need from the company.

Needs addressed by the project:
What problem do you want to solve in your community? What needs to you want to respond to? Also, describe which will be the consequences of not solving this problem, and present the project's benefits for the community or for the people you serve, and how this project solves the identified need.

Target groups:
Answer to the following questions: Who are the people you want to help? Who are those affected by the problem or who have that specific needs you mentioned? How many people your project will serve? What do you know about them? Have you worked before with them? Why do you want to work with these target groups? Finally, think also to the people who are indirectly, but positively, affected by your project (indirect target groups) and explain how you reach them and how the project helps them as well.

Goal and objectives:
Describe what do you plan to achieve at the end of the implementation for the project, and formulate up to three main objectives of the project, in regards to the general goal you have. Express the objectives in a SMART way. Make sure the objectives refer to your target groups and the changes you want to happen in the life of these people.
Read here about what SMART - **S**pecific**, M**easurable**, A**chievable**, R**elevant**,** and **T**ime-related objectives mean: https://www.fundsforngos.org/proposal-writing-2/understanding-smart-objectives-project-proposals/

Activities and time frame:
Here you have to detail how you plan to reach the project's objectives. Describe the main activities of the project, and the order of their implementation. Use a work plan or timeline or a Gantt chart to present the calendar of the project's activities and the main milestones or responsible persons.
Read more about work plan, timeline and Gantt chart here:
http://proposalsforngos.com/articles/proposalsvocabulary/difference-work-plan-timeline-gantt-chart/

The core team of the project and other partners involved:
Present the core staff or volunteers you will involve in the project, what their qualifications and expertise relevant for the project are, and also what will be their roles and main responsibilities in the project. In this part of the proposal, you want to ensure the sponsor that your organization and staff is competent and fully prepared to achieve the proposed results. Also, if you need to involve in the project other partners/stakeholders, you could mention them here, talk about their expertise, why they are needed and how they will help your organization to achieve the promised results.

Results, sustainability and evaluation:
Here you have to explain how you expect your project to influence the identified problem, to describe the expected results and impact, and how you see the continuation of the project and of the work done with the people you serve. Also, you will have to talk about the methodology of evaluation you will use for the project (qualitative or/and quantitative methods, interviews with beneficiaries, evaluation survey, etc.).

Sponsor benefits:
Using the information you gathered in the donor profile (see the tool *Donor Profile Model*) related to the matching ways, identify the common interests between the project's target market, objectives and values/attributes promoted, and the company's target market, objectives and values/attributes. Also, use the same profile, to understand the company's marketing goals and motivation. Afterwards, based on these findings, present shortly the benefits for the sponsor for supporting and making this project to happen.

Volunteering opportunities for sponsor's employees:
These opportunities of volunteering for the sponsor's employees could be also part of the previous section, but it is better if you can emphasize them in a separate section. Design and present genuine, relevant and meaningful volunteering opportunities for the sponsor's employees, as part of the project's activities dedicated to the target groups, but they could also be involved in promotion or evaluation activities of the project.

Promotion plan:
Similarly, the promotion opportunities for the sponsor could be part of the "sponsor benefits", but if these promotion activities include a specific or a more organized promotion campaign, present it here. Help the sponsor to understand who will hear about its support, how the promotion will be done, how the company will be presented, how the audience will be reached, how often the promotion is done, and how the promotion results are measured. See how a promotion plan looks like by checking the tool: *The communication plan for an event.*

Budget:
The budget could be more or less detailed, in accordance with the company's sponsorship guidelines. If there are no specific requests, keep it simple and transparent enough. Use at least the following categories of costs: personnel costs inquired by the project activities, non-personnel costs inquired by the project activities (such as direct costs/participant) and indirect costs (administrative, promotion, etc.), and also present all income sources you plan to involve in the project.

Contact info:
Do not forget to leave details about the person who is in charge with the sponsor relations: name, position in the organization, email, phone number, etc.

Appendices:
These could be specifically requested by the sponsor, through the sponsorship guidelines, and could include the last annual report, the articles of incorporation, recommendation letters, etc. If they are not specifically asked, we would recommend you to insert here at least the link to the organization's last annual report.

How to use the project proposal template?

You will need to use such a proposal template when you want to present a project idea to a potential sponsor, a company from your community. Companies that have already established sponsorship guidelines, they will most probably also have templates for the proposals they receive from NGOs, and they might also have a clearly defined process of submitting and evaluating proposals. In that case, follow the template the company provides, always, but you could use this tool to prepare your portfolio of draft project ideas before starting to search for potential supporters.

Also, this kind of proposals could be sent to companies, after you had the first meeting with the company's representative. For instance, first, you could pitch your idea to an SME owner, and during the discussion you could mention you will send more details about the project through a follow-up email. Then, you will send such a proposal, detailing the main aspects of the project.

Or, you could apply with such a proposal for a "project market"/"project fair" type of event, in which NGOs enroll their projects and companies are "buying" the projects that fit their profiles and interests. Usually these events are organized by NGO resource centers or by business associations. Check if there are such events in your community.

In any situation from the ones described above, keep in mind that you need to be open to adapt the project idea, to add or leave out activities so that the project, in the end, will match better with companies' interests, motivation and capacity to support the project idea. You are building a partnership, so expect and allow the partner to contribute to the idea and to the implementation of the project.

Such a proposal can be one-page or 10-page or even more, depending on the level of details the potential sponsor expects from you. If there are not specific instructions given by the companies, we would recommend to keep the proposal very short (4-5 pages), and also make sure you have ready a one-page proposal summarizing the project idea. What we learned from CoOp research on the youth organizations and SMEs cooperation is that most of the time SMEs have no dedicated staff for taking care of the community involvement projects, and usually the PR or marketing person will deal with the process of receiving proposals and answering to them, after the decision is made by the senior managers team or by the SME owner. In other words, you do not want to waste anyone time, be clear and concise, and express in a simple way what you want from the company and what the expected impact and results are.

8. Communication plan for an event

The tool and an example of a promotional plan

To plan your communication campaign for an event you could start by using the Story Canvas developed by Digital Storytellers (Australia). In the following template, we summarized for you the main steps and questions you need to answer to, in order to fill out the canvas for your fundraising special event or for your fundraising campaign. You can learn more about how to use the Story Canvas here: https://www.digitalstorytellers.com.au/the-story-canvas/

<table>
<tr><td colspan="5">PURPOSE: Why this story / these stories need to be told? Why people should care about it?</td></tr>
<tr>
<td rowspan="2">3. Audience
Primary - take action
Secondary - hear your story

• Profile
• React (emotions)
• Impact</td>
<td>5. Key messages
(3 things you want your audience to remember about the problem & solution; and why now?)</td>
<td rowspan="2">Story

Concept
Structure
Type of story (explainer, vision, personal story, etc.)</td>
<td>4. People & Places (who & where)
People - relevant for you and the audience; how do you reach them
Places - relevant for people, for the story, for the “challenge” people had to take</td>
<td rowspan="2">8. Campaign
(how will you get your story out there? Create it *before* the story)

- Delivery channels (online / offline)
- Promotion channels
- Supporters
- Partners / partnerships
- Most important moments</td>
</tr>
<tr>
<td>6. Call to action
(what do you want your audience to do?)

Ex.: share the message to others, challenge themselves, sign a petition, protest etc.)</td>
<td>7. Style & Tone
(Look & Feel); connected to the emotions / reaction you want to get)

Colors, music, language, time of day, font, pace of story etc.</td>
</tr>
<tr>
<td colspan="2">1. Outcomes (raising awareness, shifts in perceptions, policy change, etc.)</td>
<td colspan="3">2. Indicators (SMART)</td>
</tr>
</table>

Once you have gone through the process, and you defined your outcomes, key messages, audience, call to action and the campaign steps, you can work on a promotional plan to be sent to the sponsors of your fundraising event or of your fundraising campaign that could take the below format. We filled out some of the rows to make it easier to understand how the plan could be done. Be aware that these are only some of the promotion activities, only examples, not a full promotion plan.

Promotion plan for XXX event - April 3rd 2018					
Pre-event promotion activities					
Action	**Channel**	**Key messages**	**Target audience**	**When**	**Other info**
Save the date email	Email	Save the date of the event, mention the name of the main sponsor	300 young and experienced entrepreneurs, from the warm list of the organization	26.02-01.03.2018	Get the ok on the message from the main sponsor.
Invitation to the event email	Email	Invitation to the event, teaser, mention the name of the main sponsor	300 young and experienced entrepreneurs, from the warm list of the organization	12.03-18.03.2018	Get the ok on the message from the main sponsor.
Social media ad	Facebook page & Instagram account of the organization	Event ad, mention the main of the sponsor	Over 5000 people from our city area, 25-45 years old	02.03.-25.03.2018	Get the ok of the main sponsor on the ad.
Agenda of the event email	Email	Send the agenda of the event, mention the name of the main sponsor	80-100 young and experienced entrepreneurs who confirmed their participation in the event	02.04.2018	Confirm the agenda with the partners and the main sponsor.
During the event - promotion activities					
Action	**Channel**	**Key messages**	**Target audience**	**When**	**Other info**
Facebook & Instagram post, with check in at the location event	Facebook page & Instagram account of the organization	The event is ready to start, photo with the visual of the event projected into the room, number of entrepreneurs waited there, the contribution of the main sponsor and host	Over 4000 followers of the social media channels of the organization	03.04.2018, 10-15 min. before the event starts	Check with the main sponsor if we should boost the post.
Facebook & Instagram post, with check in at the location event	Facebook page & Instagram account of the organization	Quote from the speech of the representative of the main sponsor of the event, the goal of the event, the number of entrepreneurs in the room, photo with the company's representative during the speech	Over 4000 followers of the social media channels of the organization	03.04.2018, during the speech of the company's representative	Check with the main sponsor if we should boost the post.
Post-event /follow-up promotion activities					
Action	**Channel**	**Key messages**	**Target audience**	**When**	**Other info**
Thank you email	Email	Thank you for participation, results of the fundraising event, remind how the money is used, promise a full report; mention the name of the main sponsor and include a photo album from the event (a link)	80-100 young and experienced entrepreneurs who participated in the event	04.04.2018	
News/blog post	The organization's website	Summary of the event, results, photos, thank you and plan to use the money raised.	1000 monthly users of the website	04.04.2018	

How to use the promotional plan?

Using the promotional plan for a fundraising special event will help your organization:

- To think in a systematic way to all the promotional activities you can and you should do, in order to provide the highest and most impactful coverage of the event and reach your sponsors' marketing objectives;
- To plan and prepare your communication content in advance, analyze the information and resources you need (text, quotes, photos, design services, ads, approvals from sponsors, etc.), and plan for these, so that the promotion activities will run smoothly before, during and after the event;
- To show your sponsors that you know what you are doing when it comes to promotion, that you know your target audience and the reach you can get for your messages;
- To get sponsors' approval and input in time for the content and for the communication channels you plan to use;
- To set clear deadlines and clear time frames for the promotion campaign of the event;
- To allocate the right time and resources to the communication activities of the event, so that the event will be a full success - to have all the guests and donors you want at the event, publicly recognize their contribution, enhance the organization's and the sponsor's visibility, raising awareness for your cause, etc.
- To give you clear guidelines and confidence for your communication activities, in the stressful moments of organizing fundraising special events.

The promotional plan template was developed based on the CoOp project partners in organizing special events and promotional plans for these events to be presented to sponsors.

9. Ten ideas on building relationships with your business supporters

CoOp research on youth organizations and SMEs cooperation showed that SMEs owners are really interested in developing a long-lasting relationship with the NGOs they support. One of the most important and common areas that came out of the interviews and focus groups conducted in the five countries with SMEs owners and representatives was related to the issue of trust. Thus, in four countries (Ireland, Norway, Poland and Romania), the SMEs owners or representatives insisted that the youth organizations should make sure they spend the necessary time on developing a trustworthy relationship with the enterprises, and that they present to the companies a trustworthy cause or project.

Ten ideas for donor cultivation

Below you can find **10 ideas you could use to build your organization's relationship with the local companies**, current or future supporters of your programs and activities. When we made the list with the activities, we thought these activities being dedicated to a specific person you are in contact from the company, such as the CEO, the SME owner or the CSR/Marketing person, as relationships are built by people with people.

Send **highly personalized emails** about your ongoing activities and recent results, and also take the opportunity to ask about their activities; if the relationship is close enough, you could also have a call to update each other. These emails will keep them informed about the organization's progress, and reminded them about the good deed they did.

Invite them to **your networking events**: they might be interested to network with other company-donors and business partners you have and make them their partners. Invite them to the networking events that make sense for the marketing and development objectives of the company.

Invite them to be part **of a task force to address a community problem or an organizing committee for an event or a campaign**: use their expertise, make their work relevant and meaningful for your work, and do not waste their time. This will help them in being more connected to the needs and challenges your organization addresses in the community, and they will feel that they are part of the solution and that they can make a difference with their expertise.

Invite them to **deliver speeches or give workshops for the young people you serve**, and talk about the topics they are experts in. For instance, they could tell the story of their professional success that could motivate the young people you work with. This will make them emotionally connected to your cause, feeling that their personal story can be easily connected to your cause.

Send them **personalized greetings on birthdays, holidays, or important events of their companies**. For instance, you could send a short video wishing him/her the best, a video made by some young people who were helped thanks to his/her generosity.

Publish the company's or their names and pictures in the organization's recognition materials (annual reports, websites, newsletters, etc.). Find the channels that are more relevant for the marketing objectives of the company.

Find nice **opportunities to give them small gifts**, such as the organization's merchandise products or products made by children/young people you serve, that will serve as reminders of their involvement in your cause, increasing their loyalty.

Invite them **to your annual gala or the annual event** of the organization, but make sure the event is meaningful for them through the people that attend the event, but also through the role you give them in the event or through the award/recognition you show them during the event.

Ask them to become **mentors of young people** you support through your programs. This will give them the opportunity to learn more about the needs your organization addresses, and to also connect emotionally to your cause.

Ask for an advice by email or in a face to face meeting. For sure, you encounter many problems that an expert like a CEO, SME owner or a marketing/CSR person will be able to solve for you. Do not waste their time, give them relevant "puzzles" that only they could solve for you and show them how their solutions, their advice helped the people you serve and the organization. This will help them feel that their expertise is appreciated and useful outside of their regular job, and it will help them find more about your way of operating and about your organization's values.

This tool was developed based on the CoOp project partners' experience in working with companies and getting their support for programs dedicated to youth.

10. Special events recipe

Fundraising special events

When you decide to organize a fundraising special event, you will have at least three objectives:

- To raise a specific amount of money for your organization or for one of your projects;
- To provide fun to your audience;
- To provide marketing opportunities for your sponsors.

Having these objectives in mind, define your event by thinking about the next five key ingredients for success. In other words, use this “recipe” for your event:

Special event plan

Audience:

Who are they?

How many people you want at the event?

What will they buy? (tickets, tables, minimum donation) and what is the price/ticket or table, etc.

How will you reach them?

In which other way you want them to make donations during the event?

What kind of other information you want to collect from them and how you would collect the information?

How much money do you estimate you can bring in from the audience?

Sponsors:

What companies do you have in mind?

What are their marketing objectives that could be connected to the event audience or to the event itself or to your cause or to the promotion you can provide with the event? Or what is appealing to them from your event?

What kind of support you need from them?

What sponsorship packages you can provide?

How much money do you estimate you can bring in from the sponsors?

____

The organization:

What is the cause you want to be supported through the event or the project?

____

How is this appealing to your audience, your sponsors and the performers?

____

The performers:

What performers connect with your mission/cause?

____

What will be appealing to your audience?

____

What will be appealing to your sponsors?

____

How much do the performers cost you?

____

The promotion plan:

What message you want to deliver to the audience to make the event appealing to them?

____

What message you need to develop to support the sponsors' marketing objectives?

____

What channels of promotion are appropriated to reach your audience?

____

What channels of promotion are appropriated to enhance the sponsors' marketing objectives?

____

The “special event recipe” explained

Audience
These are usually the individual donors for your event - people that will buy the tickets to your event (concert, play, show, gala, exhibition, party, fair, etc.), but they could also be businesses that will buy tables to your special gala dinners or special gala event for their employees, for instance.

First, think what will be of interest for this audience to attend, what will be fun for them; also, think in terms of numbers - how many current donors do you want to be involved in this event, or how many new donors will you need?

Second, think what ways of raising more money, during the event, you could design for this audience: will be they interested in an auction with some art objects or things donated by famous people? Will be they interested in a raffle with a prize sponsored by one of the sponsors, such as a city break or a bike or a free coaching session or a special dinner with a well-known person from your community? Will they buy nice merchandise products of your organization or products made by your clients?, etc.

Third, think how this audience connects to your mission, your cause, and how you could collect information from them, mainly if they are new donors, so that you can build a relationship with them, and transform them in constant supporters or donors of your organization.

Sponsors
You need the sponsors to cover at least some parts of your costs, providing them sponsorship packages, through which they can provide money or in-kind support. Think of categories of sponsors, such as main partner, golden sponsors, silver sponsors, and regular sponsors, based on their interest and capacity to be involved in the event. While they are helping you to reduce the risks of organizing the event, by covering a big part or all the costs of the event, they expect you will help them with their marketing objectives and targets they have. So, think about what kind of marketing opportunities your event can provide and choose the event type in accordance to that. They might be interested in reaching more clients, in reaching new segments of clients, in promoting their products or services, in developing their business networks, in motivating their employees, or in increasing sales, etc. Find out what concrete marketing objectives they have, and develop sponsorship packages and an event that looks appealing to them.

Finally, have in mind that when you make the budget and you calculate how much money you can bring in from sponsors and from your audience, you need to have at least twice more incomes than expenses, otherwise the event cannot be considered a worthy fundraising event - it is an event for promoting, for marketing, but if it does not bring enough money in, then it cannot be considered really a fundraising one.

The organization
To attract the sponsors, the audience and the “performers” (people, artists, arts, places, technology, etc.) you need to have a relevant cause/relevant project and a very good profile in your community. Also, your mission needs to match the content of the event. To exaggerate a little bit, but only to get the point, if you are an organization that protects animals and promote animals’ rights, then a Circus with animals event will not be a good idea for your organization.

The performers

The performers are the people or the moments or the things that bring the fun to your event. They could be a band that your audience appreciates it, or they could be some art objects or special Christmas trees that your audience will buy, or they could be some special high tech games that your audience would like to try out, or some special cars that your audience would like to drive, or some special food or wines that your audience would enjoy, etc. The performers could be everything that makes your audience happy, and it is appealing for your sponsors. Keep in mind that it is on their performance that the success of the event depends, and because of that, be ready to give them the money they ask for or try to obtain a discount, as it is for a good cause, by explaining that the profit made by the event is used in your amazing projects, and that they associate their names with a good cause/community cause.

The promotion plan

The online and offline promotion you or your media partners can provide for the event will help you in two directions: first, achieve some of the marketing objectives of the sponsors; second, reach the audience of the event; finally, enhance your profile in the community, bringing more visibility to your cause and to your work. Spend time to find the most appropriate promotion channels to reach all these objectives, and keep in mind that more does not necessarily mean better, target your audience and build powerful and relevant message.

How to use the results of “cooking” the special event recipe?

Once you make all your decisions in regards to the recipe to use for your fundraising special event , follow the next steps to organize and implement the event:

Identify specific objectives

How much money do you want to raise through the event?
How many donors would you like to have? How many they should be new donors?
How many sponsors do you want to have?
What are your promotion objectives or raising-awareness objectives?

Create a calendar and budget

Depending on the size of event, you will need three to six months to plan and arrange everything for the event. Design a calendar going backwards, from the day of the event you would like to take place. For budgeting, put down all the costs, see what kind of incomes you can bring in (from the audience - tickets and other methods of giving; from the sponsors) and: “If you don’t project raising at least twice as much as you spend, then don’t call it a fundraiser. That’s not to say you shouldn’t do the event, but think of it as a “friend raiser” or networking event to manage expectations” (Heyman, 2016, p. 119).

Recruit key people

Make sure you assign a team to organize the event, then to implement it, and then make sure you have the right number of volunteers to the event, who are well prepared for the event.

Secure performers

Contract the performers in time, talk with them what you want to do, obtain discounts, if it is possible, and sign a contract to make sure they will be there on the day of the event. If you have like performers things/technology/experiences, make sure everything is contracted, arranged and possible to be delivered in time. Keep in mind that without the performers, you have no event.

Secure sponsors
Identify the companies, send them the sponsorship packages, negotiate and sign the partnership contracts.

Find the right technology for selling tickets, for promotion, for sending invitation, for registration, for follow-up, for donation etc.
Choose this technology and the steps you want to make in accordance with the type of event, your audience and your sponsors.

Promote your event
Choose a powerful and relevant message for your cause, for your audience and sponsors, and the promotion channels that make sense for the audience and for the sponsors; also, develop a promotion plan that you agree with your sponsors. Keep in mind that a research conducted by Eventbrite showed that "email is the most effective way to recruit event attendees" (Heyman, 2016, p. 122). Also, it seems that typically people need to hear/see information about an event about six times before they decide to register/buy the tickets, etc. (Heyman, 2016, p. 122).

Create an agenda
Think to the agenda or the journey of your event - first from the audience perspective, how they will interact with your event, with the performers, and with your cause; what they will enjoy, how they can make donations, how will you thank them, how would you collect more information from them?, etc.; and then from the organizer's perspective, all the steps you need to take and what resources you need, what staff and volunteers you need and at what time during the event you need all these. Make sure you have everything in detail, and also plan Bs for some parts of the agenda that looks more risky not to happen as you plan for them.

Maximize your ask
Think and design additional ways of raising money from your audience, during the event (auctions, raffles, donation boxes, etc.). Also, think of ways of collecting information from the new donors, so that you can build the relationship with them, and make them recurrent donors.

Follow-up and debrief
After the event, say thank you to your audience, sponsors, performers, partners, and send them results of the event, and show them how the raised money will impact the people your organization serves and how the funds help your cause. Also, debrief the event with the organizing team, evaluate the event, see the profit you got for the cause/the project you want to implement, identify the things and steps to improve for the next event, and make the plan of cultivating donors and sponsors of the event.

This "recipe" for organizing fundraising special event was developed based on CoOp project partners in organizing special events, and on theory on organizing special events from:

Darian Rodriguez Heyman, Nonprofit Fundraising 101, John Wiley & Sons, Inc., 2016.
Michael Norton, The Worldwide Fundraiser's Handbook: A Resource Mobilisation Guide for NGOs and Community organizations, 3rd edition, Directory of Social Change, 2009.

11. Steps to design an employee volunteer program

The tool

With this tool, we want to challenge you to design an employee volunteer program from the companies perspective, and not from your youth organization's perspective. From your perspective, the steps are pretty clear: you start from a need you have in organization (for specific workforce, for specific expertise), look for companies that can match your needs through their employees' contribution, contact them, make the proposal, they come and volunteer, you recognize the efforts, say thank you and plan for future collaboration.

Here are **the steps that one company thinks about when starting an employee volunteer program (EVP)** (adapted from Volunteer Hub):

1. Assessment of the community's needs
2. Coordinate business and EVP objectives
3. Secure support from top executives
4. Seek out partnership opportunities
5. Match corporate giving with corporate volunteering
6. Quantifying and evaluation
7. Recognize and award
8. Publicize the program's effort

The EVP steps explained and recommendations on how to use the steps to enhance the collaboration with the company for a volunteer program

1. Assessment of the community's needs
The company will look to give its support and involve its employees in addressing needs that are relevant to the community. So, your job here is to make your cause visible enough, and compelling for the company, and to reach out to the company. The most successful strategy to reach the company is to do it through an employee that is already connected to your organization, who could recommend you to his/her colleagues, but also to the human resource department which might be in charge with the development of EVPs or directly to the owner of the company.

The company will be worry about things like:

- The name of the EVP and how the company name will be used;
- Paid or unpaid volunteer time for the employees;
- How appealing could be the volunteer activities to the staff;
- What kind of programs should consider: one-time group activities, individual activities, long-term commitment activities, in-house fundraiser activities, support the ongoing volunteer activities of its employees or add new activities, etc.

Be prepared to answer to these worries, to show benefits, advantages of what you propose with your EVP, but also disadvantages and risks and how you can handle them for the company.

2. Coordinate business and EVP objectives

The company will be interested that an EVP project to also answer to its marketing objectives, the EVP should reach potential customers or current customers, or to match the day to day business operations, which will allow employees to use their skills within the community while establishing them as experts in their sector. For instance, an IT company might be interested to involve its young developers in a volunteer program in which they could develop apps that could be used to address diverse needs from the community. This program would be also easy to communicate to the regular customers and business partners, enhancing company's profile. Thus, design the EVP you propose, so that you can answer to the business' needs in regards to its marketing and human resource goals and objectives.

3. Secure support from top executives

The employees need time off, need the resources, need paid time or unpaid time from work time to be involved in volunteer activities, and sometimes they need specific encouragement and role-models from their leaders to be involved in volunteer work. Your role in this step is to be prepared to support the employee or the HR manager to propose the EVP to the SME owner or the CEO of the company, making the case for your program, but also for the employees and for the benefits the program could bring to the company itself.

4. Seek out partnership opportunities

First, the partners that companies look for are usually NGOs and schools they could support. Children and young people, from what we found out through CoOp project research on SMEs and youth organization cooperation, are the groups that companies prefer to support. In other words, companies know that it will be much harder for them to develop EVPs without your contribution, so show your experience, and make a list with the responsibilities you will take for the implementation of a successful EVP, giving time for the company to take care of other things, and helping companies not to waste capital and human resources on doing things for which they do not have the expertise. Also, companies would like to involve their business partners, suppliers, relevant customers in these volunteer opportunities - so you could design the program so that it becomes relevant for such partnerships, which will allow for building relations between the companies, outside the regular partnership areas from their day to day business operations.

5. Match corporate giving with corporate volunteering

Usually, companies are interested to focus their both financial and in-kind support in the same area. So, have in mind to design EVP that could lead to financial support or fundraising activities from the company. For instance, the employees could fundraising among their teams for a volunteer activity they want to run (such as renovating a youth center), and the company could match their fundraising results, doubling the gift to the youth center.

6. Quantifying and evaluation

When it comes to the evaluation of an EVP program, the companies will be interested to collect data on:

Number of employees who volunteer;
Amount of time donated to each activity;

Number of organizations/projects served;
Number of individuals served;
Amount of money raised;
Dollar value of volunteers time;
The degree of satisfaction of the employees towards the volunteer opportunities and the impact on the community;
Return on investment of the volunteer activities to the company;
Changes in brand recognition and company's visibility in the community.

Talk with the company about the data it is interested to collect, make a plan for collecting the information and allocate time and resources for that. Take the responsibility for some of the evaluation actions you can take as the host organization of the EVP.

7. Recognize and award
Companies will be interested in providing to their employees who volunteer: certificates, plaques, coupons, or gift cards. They could also be interested to hold an annual ceremony to formally recognize volunteer efforts, which will also give them an opportunity to invite media for additional public awareness of the company's involvement in the community. Be one step ahead of the company, and come up with a plan of providing *together* the recognition and the awards to the employees who are part of the EVP - you want the employees to remember the cause and the organization they volunteer for. Also, you want to make the employees loyal to your cause as well, for future individual volunteer activities or even for future fundraising campaigns.

8. Publicize the program's effort
The company will be interested to talk about the program's accomplishment, to reach its PR, marketing and HR goals, as we said before. The company will use for sure its social media channels, newsletters, bulletin boards, websites, email, and even traditional advertising, to get both the employees and the community talking about the EVP they supported. You could support the company in the process, by collecting content from the activities you run together with their employees: stories about the young people the volunteers help with their work, stories about the cooperation between your organization and the company and its employees, stories about your organization and results, testimonials young people, testimonials from volunteers, photos and videos from the volunteer activities, etc. Also, you can use your own promotion channels to talk about the EVP developed together with the company. We recommend to use a promotion plan, like the one we introduced in this collection of *Ready tools for fundraising for youth organizations* (The tool: *The communication plan for an event*).

This tool was developed based on the steps of developing a successful Employee Volunteer Program, recommended to companies by Volunteer Hub: https://www.volunteerhub.com/blog/making-the-common-good-great-for-your-business-creating-a-successful-employee-volunteer-program/

12. Steps to organize an internship program for young people in partnership with SMEs

The tool

The main actors of an internship program are the following:

The interns - the young people (high school, university students or unemployed and not in study or training young people - NEETs);

The host organizations - the companies and *the mentors* assigned to the program by the host organizations;

The initiator/organizer of the program - the organization which sets the program for both the young people and the companies, providing services to both parties and bringing their interests and motivation together.

During the program implementation, you might need to decide on which specific groups of young people or host organizations you want to focus. For instance, you might think to address only high school students, or only university students or only NEETs. This focus depends on your community's needs, on your organization's mandate and interests, but also on the financial resources available for implementing the program and on the interests of these potential funders. Also, you might need to make the decision on what types of host organizations you want to focus on, based on how do you want them involved in the financial sustainability of the program, but also based on the categories of young people you want to support - what kind of working experiences would be relevant for them.

The steps of an internship program are:

1. Promotion of the program and application process for companies and young people
2. Matching between the young people and the companies
3. Preparation of the interns and the mentors
4. The internship program delivery
5. Monitoring and evaluation of the program

The internship program steps explained

Promotion and application

Promote the program to the companies/host organizations, get their commitment, collect the information about the internship positions they have available for young people;

Promote the program, and the internship positions to the young people;

Collect young people's applications through an online platform, in a given time period (two-three weeks), with a fixed deadline;

You could also organize a promotion event, in which companies/host organizations come and present the internship positions they have to the young people that apply to the program.

Matching

Evaluate young people's applications;

Organize pre-selection group interviews with the applicants, and select 2-3 young people for each position available;
Organize the final interviews or tests young people will take with the companies/host organizations;
Based on the companies' preferences, select the interns and announce the final results to the young people; confirm the young people's involvement to the companies.

Preparation

Sign an internship contract with each young person selected for the program, through which they commit to follow the whole program and respect the rules and procedures of the program and of the hosting organizations;
Sign a program contract with each company/host organization, through which it commits to provide the internship program to the young people, assign mentors, and financially support the program;
Provide a preparation workshop or other training courses to the young people, with a special focus on labor market and entrepreneurial initiatives, in accordance to their needs, but also in agreement with the companies' requests and interests;
Provide preparation materials or workshops to the mentors assigned by the companies/host organizations.

The internship program delivery

We would recommend that the length of the internship program to be at least six weeks and no more than three months (after three months, the internship looks more and more like a working relation, and both young people's and company's expectations change towards the direction of an employment contract);
We also recommend that young people spend 4-6 hours/day, and maximum 20 hours/week in the company, so that they can also dedicate time for their education;
Each intern together with his/her mentor prepare a work plan/work commitment, establishing together the learning objectives, the activities and tasks, and the estimated results relevant for both parts;
The internship should follow the work plan/work commitment made, and if it is needed, the intern and the mentor can agree on adding or adjusting some of the objectives and tasks in accordance to their needs that could change during the implementation of the program. Still, we would not recommend any changes in the length of the program.

Monitoring and evaluation

During the implementation, you are responsible to monitor both young people's and mentors' activity, by staying directly in contact with both parties;
Be ready to intervene in conflict or dropping out of the program situations, as the impartial actor in the program, following both actors' interests;
At the end of the program, you are responsible to collect feedback and evaluation forms from both the young people and mentors, and prepare an evaluation report to be shared with all the stakeholders;
Provide certificates to the young people finishing the program, but also recognition certificates for the mentors/host organizations who supported the development of the young people.

All these steps should be put in the calendar of each edition of the program. This calendar should be shared with the companies/host organizations from the very beginning, when you invite them in the program. Also, if you would choose to work with high school or university students, we would recommend to adapt your internship program to the school year structure, so that you can ensure the students' presence in the city, but also their involvement in the program.

How to use an internship program?

The steps presented here were developed based on CoOp project Romanian partner, Fundatia Danis, which runs the Internship Cluj program since 2006, and served in 13 years almost 1400 university students and 100 host organizations.

Internship Cluj is a program that brings together university students and companies from Cluj-Napoca (Transilvania, Romania). Cluj is a city that hosts approximately 90,000 students every year, also it is a city interested in keeping this educated workforce once it graduates. For that, Fundatia Danis decided to focus its program on supporting university students to gain working experience and get committed to the city that hosts them for at least 3-5 years. Moreover, the organization focused the program on providing internships mainly in the private sector, in order to be able to financially support the program - the companies showed from the very beginning their interests in supporting the program and the students, as a corporate social responsibility activity, but also as a human resources and employer branding strategy. Fundatia Danis started the program in times that there were no public funds available for such opportunities for young people, for enhancing their employability, thus the companies became the natural supporters of the program once they were approached them.

From Internship Cluj experience, here are some values that an internship program could provide to companies and one organization could use in getting business support for such a program:

- Direct access to potential future employees of the companies;
- Enhances companies' profile and employer brand in the community;
- Promotion and recruitment services to the companies;
- Prepares the interns on specific skills, reducing companies' costs on training the interns or potential future employees;
- Workforce to the companies, most of the times for activities and tasks the current staff cannot find the time for;
- Efficient and win-win corporate social responsibility opportunities to the companies;
- Valuable workshops/preparation sessions for companies' mentors, enhancing their work motivation and commitment to their employers, but also leadership/mentorship/coaching knowledge and skills;
- Networking opportunities with relevant stakeholders for companies: students/young people, universities, student unions, and other companies;
- A low-risk and low-cost opportunity to learn more about the new generation, and to help the young people to develop those specific knowledge and skills they ask from their future employees.

The program, as it could be observed, has two main clients: the young people and the hosting organizations, the companies. The young people, in many countries, do not have the financial power to support the program - usually they are students or unemployed young people searching for a working experience, and eventually for a job, with no financial constant resources. Thus, the business model can be developed only having in mind the financial resources coming directly from the companies.

The revenue streams from the companies can take at least the following forms:

- The companies pay a fee for each student that is selected as an intern and who stays committed to the program at least a certain period of time (agreed between the organizer and the company) within the program duration;
- The companies would sponsor from the CSR / promotion / advertising budgets the program (bulk money to be given and one company can be promoted as “main sponsor”, “main partner”, “sponsor”, etc. - different sponsorship packages can be planned in advance);
- The companies could pay for specific package of services from the program, the services they could choose as relevant for them (for instance, they could have their own interns and ask the organizer to train only their interns and mentors).

All these revenue streams can be implemented in one program or only some of them, but also other ideas can be added depending on the country or community context. The business model could also include compensations for interns’ work and involvement. Depending on the country’s legislation, this compensation could be done, for instance, through monthly stipends, program fellowships or, finally, working contracts, all supported by the companies.

Read more about how to develop an internship program in the guide prepared for youth organizations by Fundatia Danis: ENPower Mentorship Program.

13. Solicitation letters

What to keep in mind when writing solicitation letters to your donors?

DOs

- You should always introduce yourself and the charity.
- Always use official letter-headed paper and refer to your official charity registration number. Show you are serious and credible.
- Include as many personalized features as possible: ideally the name of the target person and the writer's signature are hand written. Even if you are using a computer package to do a large mail out, personalize as much as you can. Do your research as to who to address. Mention it in the letter if someone referred you/gave you their name.
- Quantify your activities and especially your impact and/or give a real story of a beneficiary.
- Create a sense of necessity and urgency ('without your help with service may not continue…' or similar).
- Break up the text and highlight important things, such as
    - Your ask;
    - What your 'theory of change' is in brief – in other words : Describe the problem your charity addresses AND Explain how it solves/ addresses the problem;
    - A personal story or a quote from a past beneficiary about how this helped them;
    - You can use bold letters, colors, a header, a text box, images, a PS (research shows that a lot of readers start with the PS!), anything to break up the block of text… if you can afford it you can even have information outside of the envelope;
    - Use images if possible. There are ethical debates in the fundraising profession about whether to show happy beneficiaries or show the suffering, and some approached work better in some cultures than others, you decide, but think carefully about it.
- Include all contact details to facilitate their preferred method, email, phone, social media, etc.
- Make it easy to donate (if this is an email, use a link to the donation page).

In thank you and follow-up letters the same principles apply: be personal, show the impact of the donation, always refer to their previous donations and be very grateful. If you have materials you can include such as newsletter or thank you gifts, do so, but there are debates as to whether or not to spend money on this, most donors don't like to see you spend too much on things like this.

How to adapt this template for email

- In email you need to keep it shorter.
- Research shows that the positive answers are usually less for fundraising emails than for real letters, partly because there is an assumption that you just wrote to hundreds of people without any special care and attention (however lower costs are an advantage).
- Be clever about the title of your message, it needs to be intriguing and eye catching so that they open it. It is important that your title stands out and that you personalize how you address the person at the start of the email.
- You can take advantage of being online and include links to your webpage or to videos that showcase your work. If you use images and graphics, test that the email looks OK on mobile as well as computers on arrival.

DONTs

- Go over a page in length.
- Be too general in your ask, or let it get lost in amongst the rest of the text.
- Be impersonal in how you address people.
- Exaggerate or make people feel overly guilty if they can't help. Yes you want to make them feel they ought to help, but be reasonable and ethical about it.
- Have an ask that is very high with no alternative. If your ask is very ambitious, unless you know from research that the target donor will be able to respond to it, give an option for something more modest.
- Neglect your thank you-s and follow up letters, they are essential and also be a subtle, effective way to ask.

What to be aware of when writing to a business?

Of course you need to be polite, clear and open in any such letter asking for donations, but be especially mindful of:

- Not wasting the reader's time: be concise.
- Not making them feel that you are hiding something or pretending: be very clear and upfront about your asks. Sometimes your ask might be just for a meeting, but it is advisable to provide some idea of the sort of collaboration you will suggest. They don't have time to waste and they don't want to feel committed to something they aren't sure they are able or willing to provide.
- Don't write generic letters or emails that show you have not done any research on the SMEs you are targeting. The more you can show you understand their company and how there might be a synergy with your NGO, the better. If possible, go as far as describing potential benefits for them in getting involved. Try your best to relate the ask or the charity's cause to their business or their known interests.

Resources

See the examples of letters on the following pages.
There are a lot of websites advising nonprofits on letter writing, here are just a couple of blogs you could check:

https://anngreennonprofit.com/
letter/https://www.qgiv.com/blog/
https://www.causevox.com/blog/

Example 1 – Letter asking for food supplies for an event from a local supermarket

Use official letter headed paper

Charity Name
Address

Dear *XX Local Food Store Manager*,

We are a youth charity based around the corner on Dominick St.

On Saturday 24th June 2017, we are hosting the **"PRIDE Breakfast"** for 300 LGBT young people from all over Ireland coming to march in the PRIDE Parade. For most of them, it is their first time. As part of our on-going LGBT support program, we give them a group to march with, confidence in who they are, and a sense of togetherness. This is what it looked like last year!

We are looking for help with the breakfast itself please. We would be very grateful for anything you can help us with, such as: pastries, bread rolls, eggs, breakfast bars, yogurt, fruit, water bottles, smoothies/juice, tea/ coffee… We will credit your donation (unless you ask us not to) at the event and on our event communications, social media, website etc.

I hope you will be able to help us. Please don't hesitate if you have any questions before you decide.

Thank you,

XX
Fundraising Officer
Office – XX Mobile - XX
Email - XX

Example 2 – general template for a request for support from a local SME

Use headed paper with logo and charity registration number

Charity Name
Address Line 1
Address Line 2

December 18th, 2018

Dear XX (use the person's name – writing it by hand is best)

I am writing from *XX (insert the specific charity name – mention the most local office/project if there is one).* You are probably already aware of us, **we have been supporting young people in the local community since *XX*** *(insert year of creation).*

In 2018 we supported XX young people *(insert number, either for the whole charity or for the local project, or both)* **aged XX-XX**.

Many young people do not have a safe place to go where they feel they belong, where they can have a positive relationship with adults, and where people believe in them. We offer young people from all backgrounds a place to go, a listening ear, and support if it's needed. **The services are run by local people, including XX volunteers *(insert number of your volunteers)*** and the programs are run based on the needs of the local community. We are known both locally and nationally for our high standards in child protection, volunteering, youth work practice and program delivery.
(adapt this paragraph so as to describe you own charity's work – describe both the need your address, and the solution you provide)

To continue delivering this level of service in 2019, we need help: *if you are looking for goods/equipment/free services, state clearly what you need and why you need it. If you need cash, state your ideal donation amount, which again needs to be linked to why it is needed: say how many young people this will help, to do what, for how long – always quantify and justify your ask!)*

We would be extremely grateful for any support you can give us and it would **make a real and lasting difference to the more vulnerable young people in our community.**

To make a donation, or if you would like to know more about what we do, please contact me any time on XX *(insert your own direct tel number, ideally mobile, and email address).*

Yours sincerely,

XX (sign by hand)
Job title if staff, or role if volunteer

Example 3 – Thank you to company that donated cash after nomination by staff member

Use official letter headed paper

Director's name
Business name
Address

December 21st, 2016

Dear Mr XX,

On behalf of Youth Work Ireland, I would like to express our sincere gratitude and appreciation to you and to all in *XX (business name)* for your recent donation of €500, following nomination by one of your staff, Mrs XX.

The support you provided this past week will help us continue to provide a range of vital supports, programs and activities to young people all over Ireland. We provide weekly services to 116,060 young people and their families across 22 regions, with the support of 6721 volunteers.

We would be delighted to work with you again in the future and I would very much welcome the opportunity to meet you to thank you in person. If you would like any additional information on our work with young people, please contact me at any stage on *email add* or *mobile number*

Again, on behalf of everyone in Youth Work Ireland, thank you, and our best wishes for Christmas and the New Year.

Yours sincerely,

Name
Development Manager
XX Organization

Example 4 – Thank you letter for hosting a pilot fundraising event

Use letter headed paper

Contact name
Address

February 14th, 2017

Dear XX,

On behalf of Youth Work Ireland, I would like to thank you very much for hosting one of our pilot fundraising parties a couple of weeks ago.

It was very kind of you to not only facilitate raising funds for the charity's work, but also to support us in our research for this innovative type of fundraising event.

I enclose a receipt for your donation of €285, as well as the Revenue Tax-efficient Giving Certificate we talked about. By filling this certificate and returning it to us, you enable us to increase your donation by 45% at no added cost to you.

Again, on behalf of everyone in Youth Work Ireland, especially the 116,000 young people who benefit from our services and supports nationwide, thank you.

Yours sincerely,

XX

Fundraising & Marketing Officer
Office -
Mobile –
Email -

14. The Story Map

The tool

You could use this tool to plan the stories or case studies you want to include in the fundraising process, such as fundraising online campaigns, emailing or mailing appeals, face-to-face solicitations, writing proposals, etc. The stories can be about your organization, your projects, your clients, your success cases, your struggles, etc.

The Story Map process

Before going into developing the story and collecting your information, answer first to the following questions:

1. Why are you telling the story?

2. Who is your audience?

3. What do you want people to remember? What do you want your audience to do after hearing/watching/reading the story?

4. What is the format of your final story? A video, a text for your website, a post on Facebook, a poster, a case study in a brochure, a success story for your grant proposal, etc.?

Story Map

Main character / the hero	Setting / places / tone & other characters
Problem / challenge	**Solution / resolution**

Beginning setting, characters, introduce the main conflict / problem (explain the problem you want to solve)	**Middle** tension increases, it ends with the most tensioned moment of the story, the biggest challenge of the hero (the major crisis)	**End** the main conflict is solved and success is celebrated

Why using the story map?

Once, you clarified the aspects from above, you are ready now to develop your story using the Story Map. The story map includes the main parts of any story: characters (these could be your clients, or even your donors, depending on the story you want to tell), the problem or the challenge the hero has to face, which generates the main conflict in the story, the settings and other characters, and finally, the solution or resolution to your story. Usually, your organization or your project should be the one that provides the solution or the happy ending to the story or you can ask for help from your donors or supporters in finding the solution and make the happy ending happen.

Also, the map helps you in structuring the story:

Develop the **beginning**, setting the context;

Set the tension and the main problem or challenge **in the middle**;

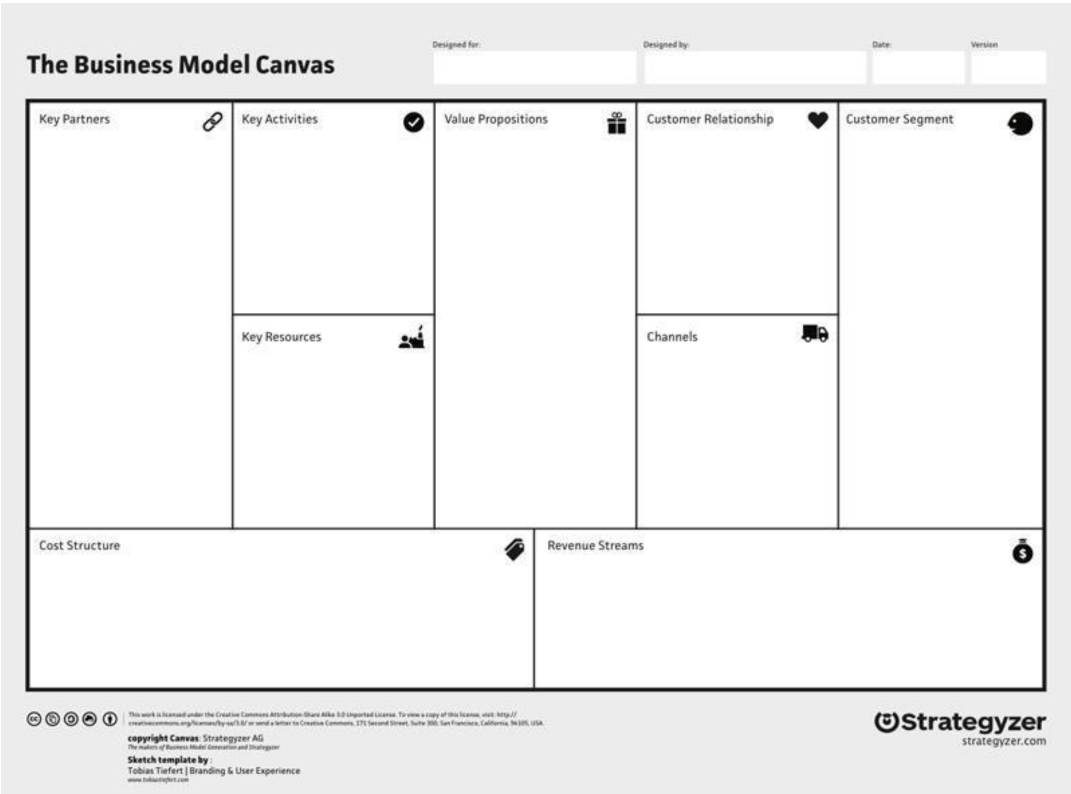
Show how problem can be solved or was solved, **in the end**.

15. Business Model Canvas - explain your projects using the business language

The tool and why it is important in fundraising from SMEs

The Business Model Canvas, developed by Strategyzer, is a strategic management and entrepreneurial tool for developing new or improving existing business models. It is a visual chart consisting of nine building blocks that allow to express an idea in just one page - the canvas. The Business Model Canvas can also be used in planning projects, activities and events.

We chose to include this tool among the fundraising tools, because we consider it useful in planning your projects for which you want to get the SMEs' support. At the same time, planning your projects for young people using the business model canvas helps you in developing and presenting these projects using the business mind and language.



The Business Model Canvas explained

Step 1: Customer/client segments

The first step is to identify what type of clients/beneficiaries your project is targeting. Try to identify all the groups (segments) that your project could reach. Consider also the key resources and partnerships you may need and the key activities you want to develop.

Questions to ask:

For whom are we creating value?

Who are our most important clients?

Step 2: Value propositions

Once you know your clients, then you can appeal to them with a value proposition. This part goes further than just stating your products/services provided through the project, by expressing *why* your product/service is valuable for them.

Questions to ask:

What value do we deliver to the clients/beneficiaries?
Which one of our clients' problems are we helping to solve?
What bundles of products and services are we offering to each client segment?
Which client needs are we satisfying through our project?

Step 3: Channels

Decide the communication and the distribution channels you are going to use to reach your beneficiaries, within the project, with the products or services you develop for them. Describe how your organization communicates with and reaches your client segments to deliver your value proposition.

Questions to ask:

Through which channels do our client segments want to be reached?
Which channels work best? How much do they cost? How can they be integrated into your and your clients' routines?

Step 4: Client relationships

Your client relationships describe the types of relationships your organization establishes with specific client segments (personal assistance, self-Service, automated services, communities, co-creation, etc) within the framework of the project. Connecting with your client base is important in keeping your reputation as a caring organization.

Questions to ask:

What type of relationship does each of our client segments expect us to establish and maintain with them?
Which ones have we established?
How costly are they?
How are they integrated with the rest of our project business model?

Step 5: Revenue streams

The revenue streams represent the ways your project generates income. Being a nonprofit, most of your client segments most probably not be able to pay for the services/products you provide. Here is where the SMEs can be involved, in supporting the income of your project so that key activities will happen. Describe how exactly your sponsors will "buy"/support your product/service, in the end the project.

Questions to ask:

For what value are our supporters/donors really willing to pay?
What and how do they recently pay? How would they prefer to pay?
How much does each revenue stream/sponsor should contribute to overall revenues?

Step 6: Key resources

This section describes the most important assets required to make your project business model work. There are four main types of resources: physical, intellectual, human and financial. For each one, think about what your organization uses/what your project needs.

Questions to ask:

What key resources do our value propositions require, to be able to deliver the services/products to our clients?
What resources are most important the most in distribution channels, client relationships, but also in maintaining the relationship with the sponsors that ensure the revenue stream?

Step 7: Key activities
The key activities building block describes the most important things you must do to make the project happen and to deliver the products/services to your clients. Think the most important actions you must undertake to operate successfully.
Questions to ask:

What key activities do our value propositions require?
What activities are the most important in distribution channels, client relationships, but also for maintaining the relationships with the sponsors that ensure your revenue stream?

Step 8: Key partnerships
Describe the network of suppliers and partners that are needed in the implementation of your project. Decide what partnerships your organization should forge.
Questions to ask:

Who are our key partners and suppliers?
Which key resources are we acquiring from partners?
Which key activities do partners perform?

Step 9: Cost structure
In this final step, you need to describe the most important costs incurred while operating your project. Creating and delivering value, maintaining client relationships and generating revenue by maintaining the relationships with the sponsors... all incur costs. Such costs can be calculated relatively easily after defining key resources, key activities, and key partnerships.
Questions to ask:

What are the most important costs inherent in our project?
Which key resources are most expensive?
Which key activities are most expensive?

Finally, you have your project in one-page and ready to be presented to SMEs' owners or decision-makers. Using this canvas your project will be clearer, easier to understand by others, especially business people, and you will be able to answer to any business questions in a professional way!

The tool was described and adapted using the available resources from:
https://www.strategyzer.com/.

16. Report to your sponsor!

What is a sponsorship report?

A sponsorship report is completed by the sponsored party and provided to the sponsor at the conclusion of the event/activity (for single events) or periodically (for on-going sponsorships), as commonly agreed.

Why reporting to your sponsors is important?

- Provides another opportunity to say thank you;
- Increase credibility with sponsor;
- Consist a written documentation of what was delivered;
- Sponsors see them as very valuable;
- Consist the starting point of discussions for renewal of the sponsorship;
- Has been suggested to increase renewal rates.

What steps your need for completing a successful sponsor report?

- Know who your audience is;
- Know what information you want them to know after reading it;
- Have all needed information ready;
- Use accurate and precise information on all sections.

Sponsorship report content

The sponsorship report must outline four main parts:
a. Objective;
b. Budget;
c. Workflow & process
d. Summary & results

Here is an example of the structure of a sponsorship report you could use while reporting for an SME partner:

Organizations' info	Names and addresses of the parties to the sponsorship
Main project info	Title of the project, Location, Target group
Objective	Brief description of the organization/ event/ activity being sponsored
Budget	A summary of how sponsorship funds are being allocated (i.e. direct community benefit, administration, promotion and marketing, etc.)
Workflow & process	Performance relating to the organization/ event/ activity being sponsored; Management of any identified constraints, risk, liability and/or conflict of interest
Summary & Results	Summary of the main cooperation results including: Beneficiaries, Impact; Remaining sponsorship obligations where applicable

17. A good first meeting with an SME

General suggestions for the meeting

Meeting with a SME decision-maker/owner is maybe the best way to establish a good first contact and explore possibilities for cooperation. We prepare some tips for you for arranging the perfect meeting with a business. The tips are designed having in mind the scenario of a first meeting with a company, and you can adapt it to your own organizations and needs. Our experience proved these tips worked, all of them - so try not to skip too much from these steps!

In the below scenario, we use the words owner and decision-maker interchangeably. Keep in mind that the owner might not be always available and you will have to talk with other decision-makers from the company, or it may also be a family business with several owners. But remember that the first meeting should be with a person who has real power in the company and is properly authorized to make decisions, such as those for supporting your projects. Also, it would be useful to check in your own network if somebody could recommend or introduced you to the SME owner/decision-maker. Having this recommendation gives you the chance to mention the common friend/acquaintance and have a better start in the conversation.

Building a good rapport in the meeting with the SME's representatives is very important! For that reason, it would be extremely helpful to know the person's communication style and personality. People are roughly divided into the following four personality types: analytical (blue), relational (green), directive (red) and expressive (yellow). If you are able to recognize the style of your interlocutor, try to "tune in" like with a musical instrument. For example, when talking with 'blue' personality people, speak slowly and have a very well-ordered and logical presentation. When speaking to 'green', build a good and friendly atmosphere and emphasize the relationship with people you help or work with. Talk with 'red' personality people about benefits for their organization or for themselves. When speaking to 'yellow', stress the uniqueness of your organization and your activities and how interesting and attractive your cooperation can prove to be.

Tips for a successful meeting with an SME

Before the meeting

1. Familiarize yourself with the company's website and identify key information:

Profile of the owner/decision-maker;
Company values;
Social actions taken so far (if any);
Main customers (recipients);
Number of employees,

2. Prepare for the meeting and prepare information about your organization:

Determine what your minimum/maximum objective is. How do you want to achieve it?;
Prepare a presentation personalized for this particular SME, as a cooperation proposal and have your story ready;

Prepare printed key slides and a brochure/leaflet (if available);
Have you business cards with you;
Prepare a small gadget as a gift - if you have one that can be easily associated with your organization,

3. Allow 30 minutes (not less) for the meeting and confirm by email.

4. Check if there will be more people present at the meeting apart from the owner/decision-maker. If so, take with you a selected employee of your organization (a senior employee that you can prepare as a contact person for the business, it would be the best). The meeting will then have symmetry and at the same time you can teach your co-worker how to conduct effective meetings.

5. Check the address and travel directions - you should be at the SME office 10 minutes before the scheduled time of the meeting.

6. Consider what type of clothes will be adequate for the organization in question (perhaps it will be OK to wear the clothes you wear usually, but it depends on what style you have and on the company dress code).

During the meeting

1. Introduce yourself and praise the SME for something specific that you discovered from the website or from information known locally.

2. Thank you for the opportunity to meet.

3. Suggest a meeting agenda and confirm whether it is convenient for the decision-maker. Be flexible and pay attention to the signals coming from the other party in the conversation. Confirm the time of the meeting (it is of great importance as it gives you space for conducting the meeting in a natural way).

4. Ask what form of presentation will be most convenient for the decision-maker (speaking or showing slides - printed or from an overhead projector/laptop). Remember that different people have different preferences (visual/auditory).

5. Make a short story - a 'business card' of your organization. Speak about yourself - why you are involved in this form of support, who you are, show your emotions. It is important that you establish a personal relationship with the decision-maker and present yourself not only as an NGO employee, but as an individual as well.

6. Present your project/organization story and the cooperation model you propose, encouraging the decision-maker to ask questions so that you can have meaningful conversation, and not a one-way presentation. Remember to show the benefits of cooperation for both your beneficiaries and the SME.

7. At the end, ask which proposals/cooperation opportunities were the most interesting for the decision-maker. For those ideas that the decision-maker seems more interested, invite him/her to work together to further develop the concept of the cooperation.
Useful tip: it is a good idea to draw on a piece of paper or flipchart and encourage the decision-maker to visualize and draw their insights. This method works especially well with more visual thinkers.

8. Summarize the arrangements you agreed upon for cooperation, and ask for confirmation of the next steps to take together to put into practice the things discussed.

9. Thank for the meeting and find out whom you should contact/talk to for the next steps of cooperation.

10. If none of your proposals/ideas turned out to be interesting for the decision-maker, encourage him/her to think or mention **what their cooperation interests would be**, for working with your organization.

11. Remember to leave the business card and the materials that you have prepared. Ask for permission to follow-up, by phone or email, as agreed.

12. Say goodbye and thank for the meeting and praise the decision-maker for a particular aspect of his or her activity during the meeting.

After the meeting

1. Write a memo from the meeting and send it as a .pdf to the decision-maker, thanking them for the meeting. Make sure you include in the email also key people in your organization that will be more involved in the further cooperation process.

2. Agree with the key people in your organization what further steps you will take and who will be responsible for them, for the cooperation with the SME.

3. Make sure that the actions included in the memo are implemented, paying special attention to the deadlines included in the memo.

4. Make sure that all the materials/documents concerning this new potential partnership are recorded electronically, in one dedicated folder.

18. Online resources on fundraising and on how a fundraiser/youth worker/NGO staff should prepare for the first meeting with a potential sponsor/donor from a SME

Fundraising and development specialization
https://www.coursera.org/learn/fundraising-development
The University of California offers this course on Fundraising and Development Foundations, which can be followed for free. It allows staff from youth organizations to follow an extensive course of five months, to learn how to build and cultivate relationships with various donors, including from the business sector.

The right way to prepare for a donor conversation
https://capitalcampaignmasters.com/right-way-prepare-donor-conversation/
Capital Campaign Masters provides some ready to implement tips on how to prepare for a first meeting with a donor, on what to do and what to avoid.

Five tips for your first meeting with a major donor
https://www.themuse.com/advice/5-tips-for-your-first-meeting-with-a-major-donor
The article provides five good tips on what to do when starting to work with a new prospect donor. The tips focus on what to do before the meeting, during and after.

Free fundraising training - script for meeting with your donor prospect
https://www.youtube.com/watch?v=nlcF4cNt9UM
A fundraising expert provides some practical insights on what to say and how to prepare for meeting with a donor: “ It’s all about being specific!”.

Fundraising - connecting with donors
https://www.class-central.com/course/independent-fundraising-connecting-with-donors-3910
The course “Fundraising-Connecting to Donors” is a four-week class that allows helps learners to practice communication skills with donors, prepare for specific questions to be asked, and to deal with the disappointment of rejection got from donors.

Fundraising: ask and raise contributions for your charity
https://www.class-central.com/course/independent-fundraising-connecting-with-donors-3910
This specific course introduces the learners to a process, which can be put in place every time they want to approach a new prospect donor, for a face-to-face meeting or over the phone.

Taking the fear out of corporate fundraising
https://www.udemy.com/corporate-fundraising/
The course is dealing specifically with how to approach donors from the business sector. It introduces the learner to the four-step corporate fundraising cycle, provides practical insights for holding a meeting, and on how to raise more money.

Beyond sponsorship - a better approach to corporate funding for nonprofits
https://www.donordrive.com/resources/blog/beyond-sponsorship-a-better-approach-to-corporate-funding-for-nonprofits/
“ Companies aren’t looking to sponsor events, they’re looking for marketing opportunities.” This article provides good insights into the mindset of companies and how to prepare as a nonprofit organization for the meeting with a company representative, what to ask and what not to ask.

How to make your nonprofit attractive to corporate sponsors
https://www.thebalancesmb.com/nonprofit-corporate-sponsors-2502063
The article talks about how sponsorship can be communicated to a company in an attractive way. The provided information can help nonprofits to prepare for a meeting and also provides points to check before approaching a company.

Asking Styles: Harness Your Personal Fundraising Power, Andrea Kihlstedt
https://www.amazon.com/Asking-Styles-Harness-Personal-Fundraising/dp/1938077059/ref=as_li_ss_tl?ie=UTF8&linkCode=sl1&tag=topnonp-20&linkId=6fe137417cbe81532e6a1ac85043d265
The book aims to show that everyone can engage in fundraising, that you can “Harness Your Personal Fundraising Power” by using your personality traits. Find your own best style on how to approach companies and getting ready for meetings!

The Fundraiser's Guide to Irresistible Communications, Jeff Brooks
https://www.amazon.com/The-Fundraisers-Guide-Irresistible-Communications/dp/1889102024/ref=as_li_ss_tl?ie=UTF8&linkCode=sl1&tag=topnonp-20&linkId=7e7839df6c53a82d423f3dfa4ab1db5d
The book is written by a fundraising practitioner who provides tips and tricks based on his own experience. Reading the book will provide a very good base to think about what to prepare for a meeting with a potential donor.

How to Win Friends & Influence People, Dale Carnegie
https://www.amazon.com/How-Win-Friends-Influence-People/dp/0671027034/ref=as_li_ss_tl?ie=UTF8&linkCode=sl1&tag=topnonp-20&linkId=ae0dff78722041666cd557d8d9326fbb
The book is not specifically meant for fundraising or for nonprofits. It rather discusses techniques in handling people and how to have people like you. Moreover, instructions are provided about how to win people to our own thinking and how to be a leader by changing people without offending them or causing resentment. All those points are important when having a meeting with a potential donor or in fundraising, therefore we recommend to read it for preparation.

The Charity CEO Guide To Creating A Business Focused Team, Richard Parkes Cordock
https://www.e-booksdirectory.com/details.php?ebook=10057
“How to grow your charity by getting your employees to think like business people” - having this goal in mind, the book is a good preparation read before approaching business donors. Moreover, the E-book is available free of charge.

Fundraising with Businesses: 40 Strategies for Nonprofits, Joe Waters
https://www.amazon.com/gp/product/1118615468/ref=as_li_tl?ie=UTF8&camp=1789&creative=390957&creativeASIN=1118615468&linkCode=as2&tag=doubthedona-20&linkId=DDVUHKG2JWXSOHM5
The book provides insights on how to work with businesses. It includes even powerpoint tips to be used for meetings and other practical ready to use materials for fundraising.

The clues to a great story
https://www.ted.com/talks/andrew_stanton_the_clues_to_a_great_story?language=en
Andrew Stanton, the writer behind "Toy Story", delivers a speech on the importance of messages that allow to "make me care". By learning to use storytelling, we can build powerful messages that make the listeners to care, and in a fundraiser-donor relationship, to receive the needed support for a project that the organization wants to organize.

Meeting with a corporate partner for a sponsorship? be prepared.
http://groundfloormedia.com/blog/2017/07/be-prepared-when-meeting-with-a-corporate-partner/
The article provides tips on "what to research, prepare and bring to the meeting" with an existing or new donor.

Meeting with a potential sponsor for the first time
https://cuttingedgepr.com/free-articles/sponsorship/meeting-potential-sponsor-first-time/
The article is written by a fundraising professional and provides therefore good practical tips on how to prepare and follow up on a meeting with a possible sponsor.

23 questions to ask donors and prospects
https://bloomerang.co/blog/23-questions-to-ask-donors-and-prospects/
This article helps to prepare questions and topics to be discussed during the meeting with a company, potential donor.

Seth Godin on successful fundraising - ask the fundraising expert
https://www.youtube.com/watch?v=Qsnap5Oh8S8
Seth Godin is a well-known public speaker and in this speech he talks about what one nonprofit organization should promise to a company, which it can accomplish through a social project.

How to confidently ask for money for your nonprofit
https://www.youtube.com/watch?v=w5av0rwbiec
It is not only important what you ask for and how you do it, but also how you feel in this role of being a fundraiser. The video shines some light on why many people do not feel comfortable in a fundraising role. It helps in reflecting about how the fundraiser wants to be perceived in the meeting and how he/she needs to behave, in order to get the wanted perception.

19. Online resources on how to build relationships with your donors

Best bits: how to build sustainable donor relationships
https://www.theguardian.com/voluntary-sector-network/2012/mar/08/building-sustainable-donor-relationships-advice
"People forgive mistakes, they understand changes, but if you lie to them or keep them in the dark they'll be off like a shot." Check out all the advices given by development directors, fundraisers, social media and direct marketing experts on how NGOs should build sustainable relationships with donors - individuals, companies or SMEs.

Build long-term relationships with your donors
https://www.youtube.com/watch?v=Cv-QtiQgIgI
"The donation processing is really only sort of half the story and in many ways that's the easy part. The much more important part is how you build those relationships with people they want to be regular supporters to your cause (…)", watch the full webinar of Charities Aid Foundation on "building long-term relationships with your donors", by acclaimed fundraiser Ken Burnett.

Building relationships with donors, Kevin Strickland, president of Not for Profit Group, a consultancy dedicated to helping not-for-profit organizations build effective development strategies.
https://trust.guidestar.org/blog/building-relationships-with-donors
"After you receive a donation, reach out to the donor. (…) Make it clear how much you appreciate his/her/their generosity and support. Sometimes a simple "thank you" goes a long way toward securing another gift.", Kevin Strickland, president of Not for Profit Group.

How to build relationships with donors, Asia Catalyst (an independent organization with main target to build strong civil society and advance the right to health of marginalized groups in Asia)
http://asiacatalyst.org/wp-content/uploads/2017/06/5.2-How-to-Build-Relationship-with-Donors.pdf
The article is a coherent and simple nonprofit survival guide on building relationships with donors, presenting all the basic and very necessary steps.

The steps in order to maintain relationships with donors using the internet
https://wiredimpact.com/blog/maintain-relationships-with-donors-using-the-internet/
"It can be mutually beneficial to both your nonprofit and your donors to establish a meaningful, long-term relationship." - the article gives specific advice on how to develop these meaningful relationships using online tools.

Build loyal donor relationships in 3 easy steps
https://www.networkforgood.com/nonprofitblog/build-loyal-donor-relationships/
Online post by Linda Lombardi, Content Manager, who uses data from a research conducted by the Association of Fundraising Professionals and the Center on Nonprofits and Philanthropy at the Urban Institute, the U.S.A., to present three easy steps for building donor loyalty: satisfaction, relationship, trust.

One thing most nonprofits stink at (donor retention) and how you can change it in 2017
https://npengage.com/nonprofit-fundraising/12-donor-retention-tips-from-nonprofit-fundraising-experts/
"(…) nearly 3 out of 4 new donors leave and never come back": the article includes tips and tricks on donor retention coming from 12 fundraising experts.

Nine interesting ways to maintain relationships with your donors
https://www.fundsforngos.org/featured-articles/9-interesting-ways-maintain-relationships-donors/
Online post by expert Dr. Saumya Arora, at fundsforNGOs, a social enterprise and online initiative with the goal to increase the sustainability of NGOs across the world:
"A sense of appreciation, feeling of contributing towards a social cause, and regular and meaningful communication would result in maintenance of lasting relationships with your donors."

Three ways to build authentic donor relationships
https://www.causevox.com/blog/donor-relationships/
Expert Haley Bodine at CauseVox: "authentically connect with your donor (…) by establishing donor-focused relationships." Check the three tips she gives to nonprofits!

Donor management software for nonprofits
https://www.youtube.com/watch?v=L5NKhlGcYCQ
"Fundraising is about building relationships" - watch the interview with the fundraising expert Kim Klein, who provides tips & tricks on building better donor relationship (6:36'+).

Mastering the art of donor relationships
https://www.youtube.com/watch?v=dcfS3mVvEkI
"Your "Thank You" letter to a donor for a donation should not include another ask for more money. Using storytelling and infographics are key ways to highlight the mission of your organization, but it shouldn't always be about you: you have to focus on the donor, too." - a full webinar on how to keep meaningful relationships with donors.

Weinstein Stanley, Barden Pamela (2017). *The Complete Guide to Fundraising Management*, Fourth Edition. Hoboken, New Jersey: John Wiley & Sons, Inc.
We recommend to read at least the chapter 7 on Nurturing Relationships. The book can be purchased from: https://www.amazon.com/Complete-Guide-Fundraising-Management-Development/dp/1119289327
It provides comprehensive information on relationship building and maintaining, including templates and scenarios for these activities.

For more resources on **CSR and Fundraising for youth organizations**, please visit our website:

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www.coop.norsensus.no

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