



MODULE 1



FUNDRAISING AND NETWORKING, FINANCE, MOBILIZING RESOURCES	
Duration:	5 hours
Learning objectives:	<ol style="list-style-type: none"> 1. Understand Fundamentals of Financial Management <ul style="list-style-type: none"> • Develop a foundational understanding of budgeting, financial planning, and resource allocation for effective resource mobilization. 2. Master Fundraising Techniques <ul style="list-style-type: none"> • Explore various fundraising methods and strategies to identify and secure diverse funding sources. 3. Enhance Networking and Relationship-Building Skills <ul style="list-style-type: none"> • Learn how to build, maintain, and leverage professional networks for organizational growth and resource mobilization. 4. Develop Strategic Thinking for Resource Mobilization <ul style="list-style-type: none"> • Apply entrepreneurial and strategic planning approaches to create sustainable funding models. 5. Strengthen Communication for Advocacy and Partnerships <ul style="list-style-type: none"> • Practice effective communication techniques to engage stakeholders and partners in mobilizing resources.
Sub-Modules:	<ol style="list-style-type: none"> a) Financial Management: Basics of finance, budgeting, and resource allocation. b) Networking Skills: Building and leveraging professional networks. c) Mobilizing Resources d) Fundraising Techniques: Exploring various fundraising strategies and methods
Resources and devices:	<ol style="list-style-type: none"> 1. Books and Articles: <ul style="list-style-type: none"> • <i>“The Art of Fundraising: The Science of Giving”</i> by William P. Barrett. • <i>“Nonprofit Management 101”</i> by Darian Rodriguez Heyman. • <i>“Networking for People Who Hate Networking”</i> by Devora Zack.



	<ul style="list-style-type: none"> • Relevant articles from the Stanford Social Innovation Review on resource mobilization and networking. <p>2. Online Resources:</p> <ul style="list-style-type: none"> • Webinars and workshops on resource mobilization and finance management (e.g., UN and NGO-based resources). • LinkedIn Learning courses on networking and fundraising. <p>3. Reports:</p> <ul style="list-style-type: none"> • Case studies on successful fundraising strategies and resource mobilization from international development agencies.
<p>Assessment:</p>	<p>Assessment Methods:</p> <p>1. Practical Exercises:</p> <ul style="list-style-type: none"> • Develop a basic budget for a hypothetical project. • Create a resource mobilization plan for a small non-profit. <p>2. Role-Playing and Simulations:</p> <ul style="list-style-type: none"> • Networking exercises to practice relationship-building in professional scenarios. • Mock fundraising pitches to assess communication and persuasion skills. <p>3. Written Assignments:</p> <ul style="list-style-type: none"> • Essays or reports analysing successful resource mobilization case studies. <p>4. Presentations:</p> <ul style="list-style-type: none"> • Trainees present a strategic plan for sustainable fundraising to peers or instructors.
<p>Skills/abilities developed:</p>	<p>a) Financial Literacy: Proficiency in budgeting, financial analysis, and strategic allocation of resources.</p> <p>b) Networking Competence: Ability to form meaningful connections and engage stakeholders effectively.</p> <p>c) Fundraising Acumen: Mastery of diverse fundraising methods and donor engagement strategies.</p> <p>d) Strategic Thinking: Developing innovative solutions for resource challenges and creating long-term sustainability plans.</p> <p>e) Communication Skills: Enhanced persuasive, written, and oral communication tailored to diverse audiences.</p>

Submodule 1.1

Financial Management: Basics of Finance, Budgeting, and Resource Allocation

→ **Skills:**

1. Financial literacy.
2. Analytical thinking in resource allocation.

FINANCIAL MANAGEMENT: BASICS OF FINANCE, BUDGETING, AND RESOURCE ALLOCATION
Activity 1: Financial management, budgeting and resource allocation
Duration: 2 hours
Specific Learning Objectives <ol style="list-style-type: none">1. Understand key financial concepts and terminology.2. Develop skills in creating and managing budgets.3. Analyse resource allocation strategies to optimize financial resources
Methodology, Resources and Devices Methodology: Interactive lectures, case studies, and group discussions. Learning Devices: Financial management software simulations, budgeting templates. Resources: Textbooks on finance basics, online finance courses
Description of the activity and Key Concepts Activity: Create a mock budget for a hypothetical project Key Concepts: Financial Statements, budgeting principles, resource allocation
Assessment Quizzes on financial terminology and concepts. Evaluation of the mock budget project.
Skills/Abilities developed Financial literacy. Analytical thinking in resource allocation.
Further readings, activities, materials, best practices Suggested readings include "Financial Management for Nonprofit Organizations" by Charles K. Coe. Best practices involve regular budget reviews and stakeholder engagement in financial planning.



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Financial Management: Basics of Finance,
Budgeting and Resource Allocation



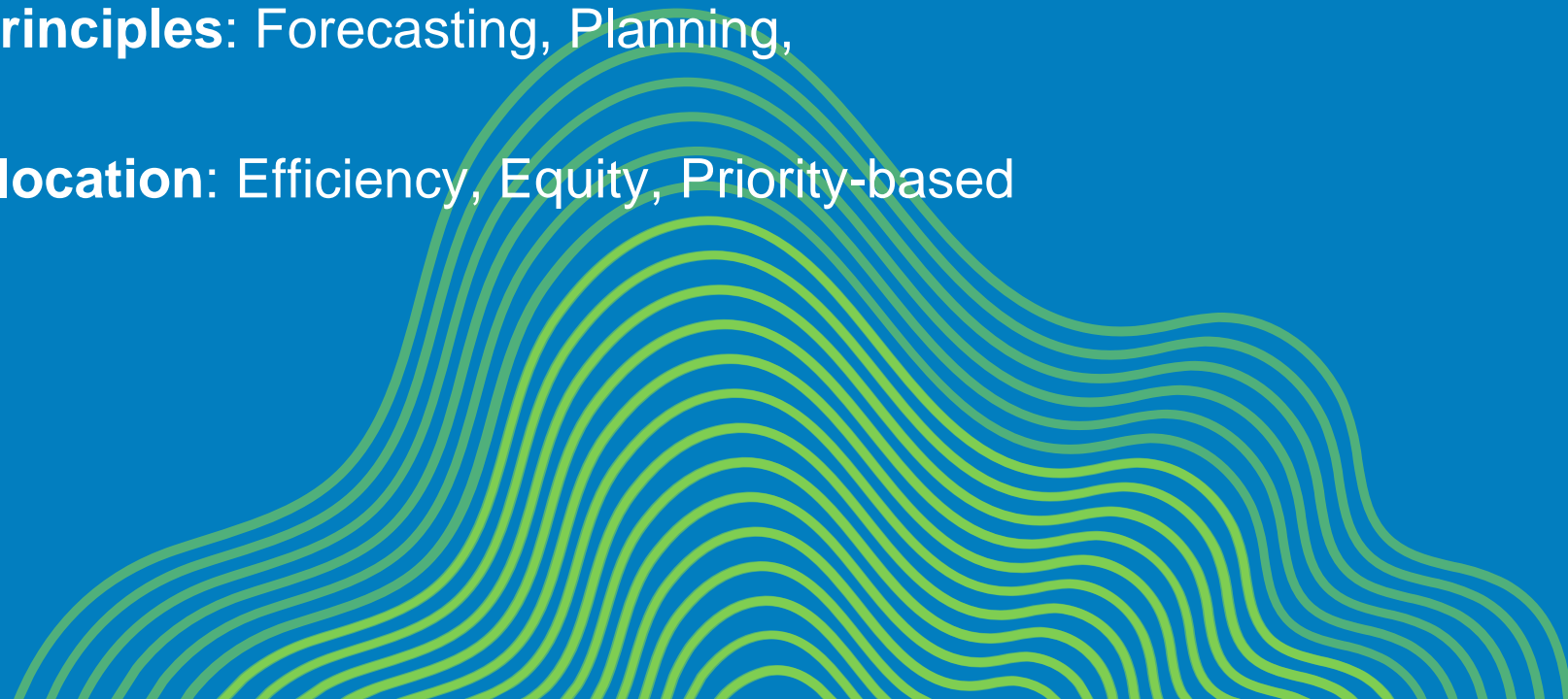
Learning Objectives

By the end of this module, learners will be able to:

- Understand key financial concepts and terminology.
- Develop and manage practical budgets for development projects.
- Analyze and apply resource allocation strategies to optimize financial performance.



Key Concepts

- ❖ **Financial Statements:** Income Statement, Balance Sheet, Cash Flow
 - ❖ **Budgeting Principles:** Forecasting, Planning, Monitoring
 - ❖ **Resource Allocation:** Efficiency, Equity, Priority-based allocation
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So - What is Financial Management

Financial management involves planning, organizing, controlling, and monitoring financial resources to achieve organizational objectives.

Example (from Kenya): GreenBytes Ventures is a small social enterprise founded by four young people aged 25 - 32 in Nakuru. Their business model revolves around collecting organic kitchen and market waste and converting it into compost, which they sell to urban gardeners and peri-urban farmers. They operate with initial support from a Uwezo Fund grant and a youth innovation competition prize.

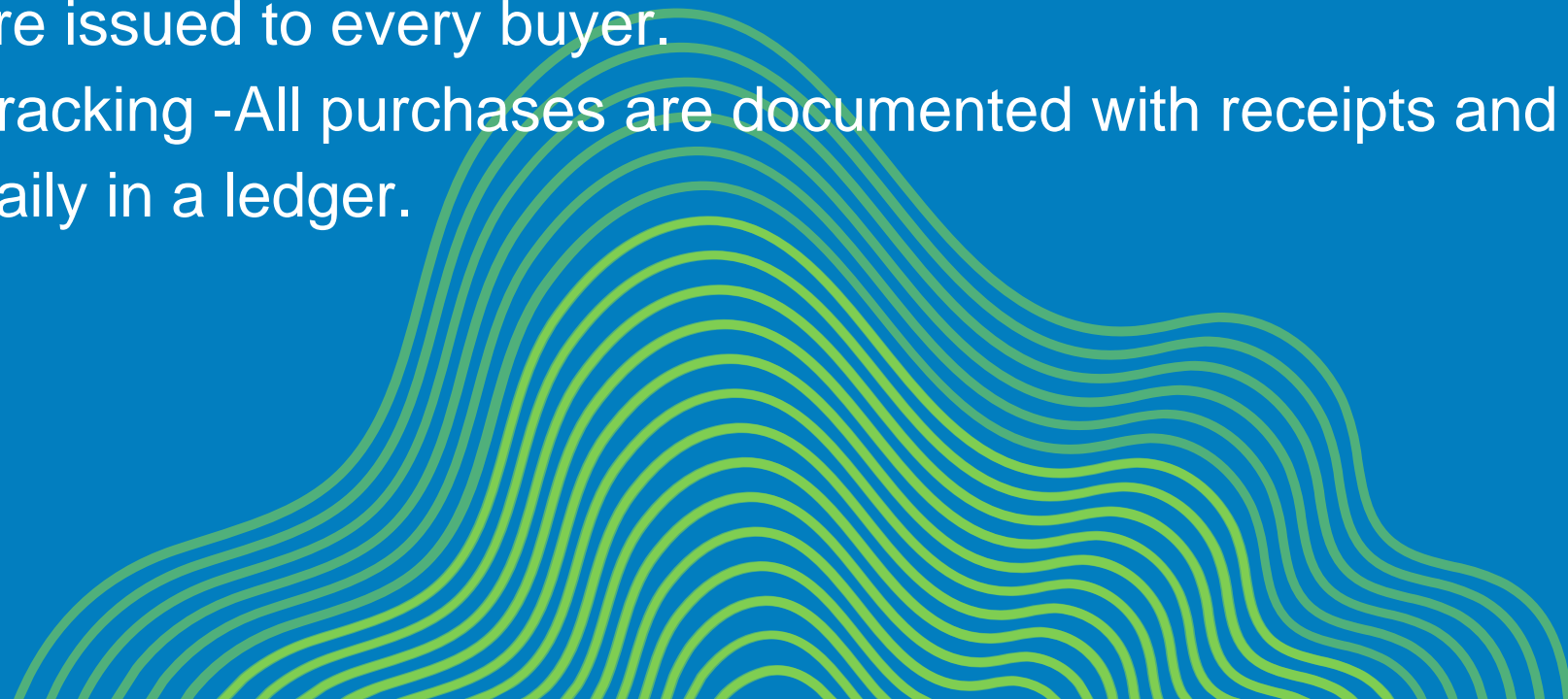
How should Green Bytes apply Financial Management Principles?

Financial Planning and Budgeting

1. Budgeting - Team prepares a monthly budget that covers inputs like protective gear, fuel for waste collection, compost packaging materials, and marketing costs.
2. Income Forecasting - They use an Excel template to plan and track income and expenditure.
3. Use of Budget templates - They use an Excel template (from a similar business or NGO) to plan and track income and expenditure.



Record Keeping and Financial Statements

- 1) Record Keeping - All income from sales is recorded in a sales register. Receipts are issued to every buyer.
 - 2) Expense Tracking -All purchases are documented with receipts and recorded daily in a ledger.
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Resource Allocation

Prioritise essential expenses and balance short-term needs with long term sustainability.

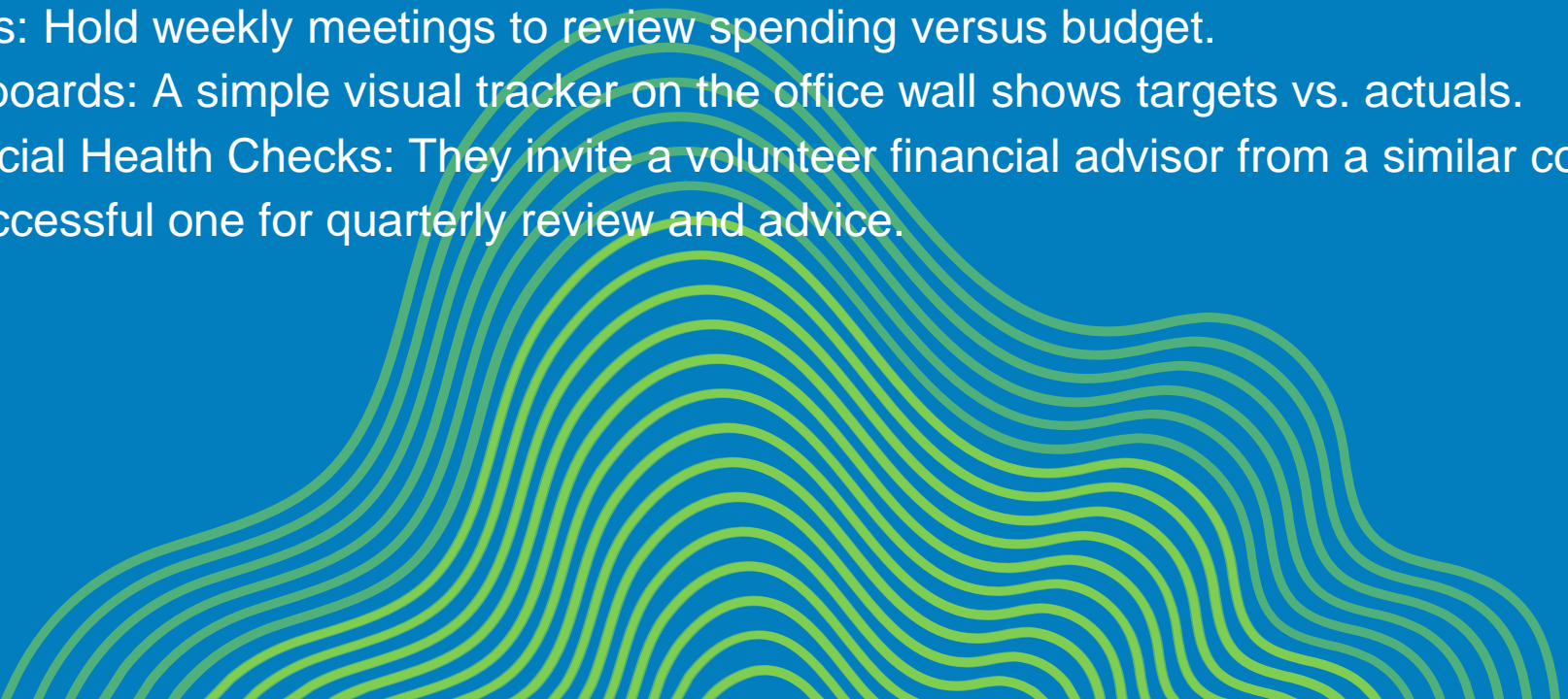
- 1) Priority allocation - 40 -50% of all income is reinvested in operations (buying raw materials, maintenance), 30% goes to salaries for team members, 10% is set aside for expansion (e.g., buying a new shredder), and 10% for savings/emergencies.
- 2) Strategic Investment - When sales increase, instead of increasing salaries, choose to invest in a solar dryer to improve compost quality and reduce drying time.



Monitoring and Review

Regular monitoring enables early detection of issues and facilitates data-driven decision-making.

It should include:

1. **Weekly Reviews:** Hold weekly meetings to review spending versus budget.
 2. **Financial Dashboards:** A simple visual tracker on the office wall shows targets vs. actuals.
 3. **Quarterly Financial Health Checks:** They invite a volunteer financial advisor from a similar company or a larger and successful one for quarterly review and advice.
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Compliance and Stakeholder Engagement

Good financial management includes meeting legal requirements and engaging stakeholders in financial decisions.

- 1. Registration & Tax Compliance:** The organization or enterprise is registered with the Ministry of Social Services, Registrar of Companies or Youth Enterprise Development Fund and Kenya Revenue Authority (KRA) and issue ETR receipts (where applicable especially for bulk sales).
- 2. Donor Reporting:** For grants they received, they submit monthly/ quarterly and annual reports using donor-provided formats and produce regular annual reports which they can share with stakeholders and donors (even on their website)



Why Does Financial Management Matter?

➤ **Empowers Decision-Making**

Well-managed finances enable informed, strategic choices that drive impact and growth.

➤ **Drives Accountability & Transparency**

Accurate budgeting and record-keeping build trust with stakeholders, donors, and communities.

➤ **Ensures Sustainability**

Sound resource allocation helps organizations survive and thrive—even with limited funds.

➤ **Improves Efficiency**

Prioritizing spending and tracking outcomes ensures every shilling counts.

➤ **Supports Growth & Innovation**

Strong financial practices attract funding, partnerships, and scale opportunities.

Financial management is not just a support or back-office function—it's a strategic tool for delivering real, lasting change in any organization.




Why Budget?

Budgeting – Definition and Purpose

What is a budget? A financial plan that estimates income and expenditure over a specified time/ period.

Purpose:

- To plan for future activities
 - To control expenditure
 - To allocate resources efficiently
 - To track financial performance
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Budgeting Process and Tools

The Process

1. **Define Objectives** – What do you want to achieve?
2. **Forecast Income** – Grants, donor funding, revenues
3. **Estimate Expenses** – Staff, operations, logistics
4. **Allocate Resources** – Assign budget lines per activity
5. **Implement and Monitor** – Track budget against actuals
6. **Review and Adjust** – Revise based on performance

Tools

- Excel spreadsheets
- QuickBooks or Sage
- Budgeting templates (e.g., for NGOs or county projects)
- Simulation software (as suggested in the module)



Resource Allocation

What is it? - The process of distributing available financial, human, and material resources to various activities based on priorities and need

Effective Resource Allocation

- **Efficiency:** Maximize output with minimal input
- **Equity:** Fairness in distribution (e.g., gender-responsive budgeting)
- **Priority-based:** Focus on high-impact or urgent interventions
- **Transparency:** Involves stakeholders in decision-making



Practical Exercise

Scenario: GreenBytes has received a loan/ grant for a project worth Kshs 5 million

Allocate:

- 40% to training and capacity building
- 30% to startup grants for MSMEs
- 20% to monitoring and evaluation
- 10% to administrative costs

Discussion: Is this allocation optimal? What trade-offs exist? 30 minutes discussion

Activity: Create a Mock Budget

Task: In groups, create a budget for a youth digital skills training project in Busia, Kenya.

- Consider staff, venue, internet, training materials, and transport.
- Present rationale for each allocation.



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Submodule 1.2

Networking Skills: Building and Leveraging Professional Networks

→ **Skills:**

1. Interpersonal communication.
2. Confidence in professional settings.

NETWORKING SKILLS: BUILDING AND LEVERAGING PROFESSIONAL NETWORKS
Activity 1: Building and Leveraging Professional Networks
Duration: 1 hour
Specific Learning Objectives <ol style="list-style-type: none">a) Identify effective networking strategies.b) Develop communication skills for professional relationship building.c) Leverage networks for career advancement.
Methodology, Resources and Devices Methodology: Workshops, role-playing scenarios, networking events. Learning Devices: Networking checklists, communication skill guides. Resources: Articles on networking strategies, online networking platforms.
Description of the activity and Key Concepts: Activity: Attend a networking event and report on interactions. Key Concepts: Elevator pitches, follow-up techniques, relationship management
Assessment <ol style="list-style-type: none">a) Self-reflection essays on networking experiences.b) Peer evaluations of networking skills demonstrated during activities.c) Skills and Abilities to be Developed
Specific Skills/Abilities developed <ol style="list-style-type: none">a) Interpersonal communication.b) Confidence in professional settings.
Further readings, activities, materials, best practices Recommended reading: "Never Eat Alone" by Keith Ferrazzi. Best practices include maintaining an updated contact list and regularly reaching out to connections.



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Networking Skills: Building and Leveraging
Professional Networks



Learning Objectives

Learning Objectives:

- Understand effective professional networking strategies.
- Develop interpersonal communication skills.
- Leverage professional relationships for career growth.



Key Concepts

1. Elevator Pitch
2. Active Listening
3. Follow-up Techniques
4. Relationship Management





Introduction to Networking

- Definition: Networking is the process of creating and nurturing professional relationships.
 - Purpose: Career growth, partnership opportunities, knowledge sharing, professional support.
 - Example: Meeting a business mentor at a professional workshop who later helps you secure a job, grant, loan or collaboration.
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Essential Networking Skills

- Interpersonal Communication:
 - Clearly express your ideas, interests, and goals.
 - Active listening skills - listen more than you talk
- Confidence:
 - Positive body language, eye contact, approachable demeanor (don't droop shoulders, stand upright, show interest).
- Example: Introduce yourself confidently during an industry event by stating clearly who you are, your role, and your interests in connecting (try a role play as an exercise)



Develop Your Elevator Pitch

- Components of an effective pitch:
 - Introduction: Name and professional identity.
 - Skills & expertise: Briefly state key capabilities.
 - Unique Selling Point (USP): What sets you apart professionally.
 - Call to action: Suggest how you can collaborate or engage further.
- Example Pitch: (try different variations of this practically)

“Hello, I’m Karani, a digital marketing specialist passionate about sustainability. I help companies boost their brand visibility through eco-friendly strategies. I’d love to discuss how we can collaborate on sustainable marketing initiatives.”



Effective Networking Strategies

- Identifying platforms/events:
 - Industry conferences, workshops, LinkedIn, local business meet-ups.
- Approach strategy:
 - Introduce yourself clearly - don't be vague
 - Ask open-ended questions (e.g., "What current projects excite you?")
- Practical Exercise: Approach someone at an event with, "Hello, I found your presentation fascinating, could you tell me more about your recent project?" (Discuss how the response. How can you improve your approach?)



The Art of Active Listening

- Techniques:
 - Maintain eye contact, nodding, verbal acknowledgments.
 - Clarifying questions (e.g., “Could you expand on that point?”)
- Example: When someone mentions their work, respond with, “That sounds interesting. What inspired you to take this approach?” “Tell me more please”



Follow Up Techniques

Send personalized emails/messages thanking the person for their time.

Suggest specific next steps like lunch, coffee or virtual meet-ups.

- Example Email:

“Dear Safari, it was great speaking with you yesterday about digital marketing. I’d appreciate discussing your ideas further. Are you available next week for a quick virtual meeting?”



Common Networking Mistakes and Best Practices

- Common mistakes: Transactional approaches (giving the impression that you want something in return), over-promising, failing to follow-up.
- Best practices checklist:
 - Authenticity, active listening, prompt follow-up, reciprocity.
- Example: Do not immediately ask for favors; instead, provide value first (e.g., share an brochure, article or contact relevant to your conversation).



Assignment

- 1) Create a scenario where you are attending a networking event.
 - 2) Tasks:
 - a) Develop an elevator pitch.
 - b) Engage meaningfully with at least three peers.
 - c) Reflect and submit a brief written report highlighting key learnings.
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Submodule 1.3

Mobilizing Resources

→ **Skills:**

1. Strategic planning and critical thinking in resource mobilization.

MOBILIZING RESOURCES
Activity 1: Resource Mobilization Techniques, Donor Intelligence
Duration: 1 hours
Specific Learning Objectives <ol style="list-style-type: none">1. Understand the principles of resource mobilization.2. Identify potential sources of funding and support.3. Develop strategies for engaging stakeholders in resource mobilization efforts.
Methodology, Learning Devices, and Resources <p>Methodology: Case studies, brainstorming sessions, stakeholder mapping exercises.</p> <p>Learning Devices: Resource mobilization frameworks, stakeholder analysis tools.</p> <p>Resources: Guides on fundraising strategies and resource mobilization techniques.</p>
Description of the activity and Key Concepts <p>Activity: Create a resource mobilization plan for a community project.</p> <p>Key Concepts: Stakeholder engagement, funding sources identification.</p>
Assessment <p>Presentation of the resource mobilization plan to peers for feedback.</p>
Skills/Abilities developed <p>Strategic planning and critical thinking in resource mobilization.</p>
Further Readings, activities, materials and best practices <p>Suggested reading includes "Resource Mobilization" by A. K. Sharma.</p> <p>Best practices involve continuous relationship building with potential funders.</p>




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Mobilizing Resources





Learning Objectives

- Understand the principles of resource mobilization.
- Identify and evaluate potential sources of support.
- Develop effective strategies for engaging stakeholders.



Key Concepts

1. Strategic Planning
2. Stakeholder Engagement
3. Donor Intelligence
4. Funding Source Identification





Introduction to Resource Mobilization (RM)

- What is RM?:

Process of identifying and securing resources (funding, technical support, partnerships) for projects.

- Why is RM important?: Ensures sustainability and scalability of community and organizational projects.

Example: A Not-for-Profit secures funds from a local business or development partner to develop a youth training center.



Strategy and Planning for Resource Mobilization

Steps

- a. Define clear, measurable objectives.
- b. Assess your needs and resources you require.
- c. Align your project goals with potential funders' priorities (very important - if a funder is interested in public health do not pitch a food security intervention).

Example: A nonprofit strategically targets a funder focused specifically on women's empowerment because their project aligns closely with the funder's objectives. (Have a practical exercise on this)



Identifying Funding Sources

Sources can include

- 1) Government (grants, subsidies).
- 2) NGOs and international bodies (UN, EU).
- 3) Corporate sponsorships and partnerships.
- 4) Crowdfunding and individual donors.

Example: A youth startup secures seed funding through a call for proposals due to a strong concept and proposal that showcases an innovative intervention and shows additionality.



Stakeholder Engagement and Mapping

Important to identify who the stakeholders in the ecosystem are and map them out

Process:

- Identify key stakeholders (funders, community leaders, county, government agencies, private sector, beneficiaries).
- Develop a stakeholder influence-interest grid.

Practical Exercise: Create a grid/ matrix categorizing stakeholders like local government as “high influence, high interest,” guiding engagement priority. Include other stakeholders.



Building Donor Intelligence

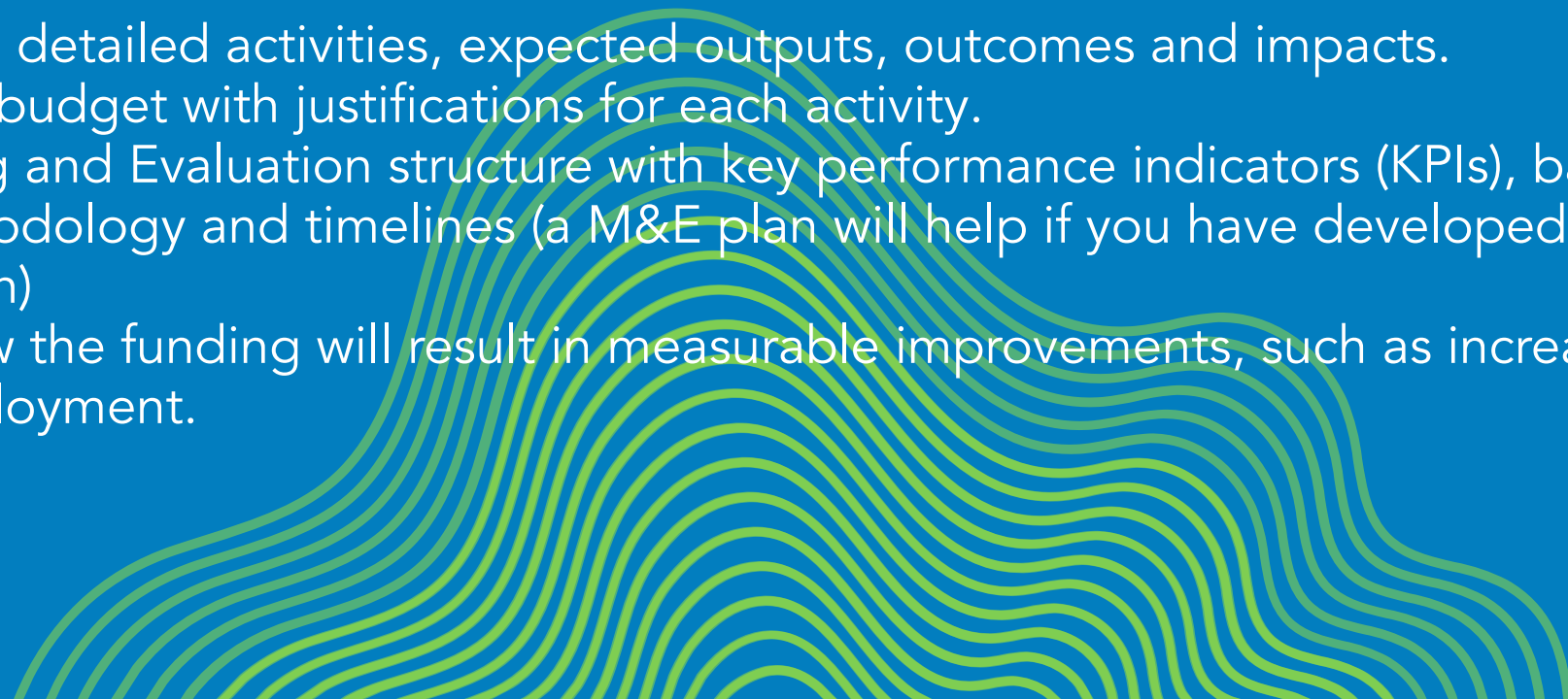
1. Analyze donor websites, past funding projects, annual reports.
2. Understand donor motivations, values, theories of change, geographical interests and priorities and align with them. For example if a donor is not active in a region (e.g. OECD) there is no need to engage with them.
3. Understand the donors approach - are they interested in supporting businesses, partnerships with private sector, humanitarian interventions etc

Exercise: Develop a short concept note for submission to a donor. Make sure to include a justification, theory of change, a brief budget and to tailor it by referencing previous successful projects funded by targeted donors.



Developing Effective Resource Mobilization Proposals

Proposals, Responses to Calls for Proposals or expressions of Interest (EOIs) should include

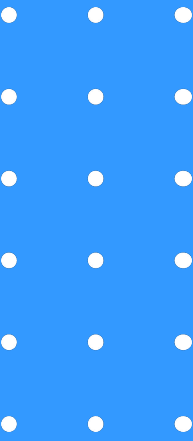
- Clear objectives, detailed activities, expected outputs, outcomes and impacts.
 - Comprehensive budget with justifications for each activity.
 - Clear Monitoring and Evaluation structure with key performance indicators (KPIs), baseline indicators, methodology and timelines (a M&E plan will help if you have developed one at your organization)
 - Clearly state how the funding will result in measurable improvements, such as increased community employment.
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Ethical Considerations in Resource Mobilization

1. Focus on transparency, accountability, clear reporting (meet your reporting targets/ requirements - narrative/ programmatic and financial).
2. Regularly update donors transparently about project progress, financial reports, and impact (normally stated in your project contract. Try not to be late,. Be proactive!)

Maintain Relationships with your Funder

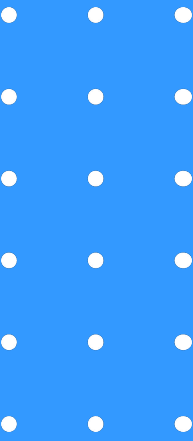


Continuously engage through:

- Regular communication and updates.
- Recognition through public acknowledgment (reports, websites, newsletters).
- Regular PSC, project management and M&E meetings
- Regular reporting

Example: Sending quarterly newsletters highlighting progress made possible through their contributions.

Exercise and Assignment



Task

Develop and present a resource mobilization strategy for a hypothetical or real community-based project (be as practical with your project).

Requirements

- Identify and map stakeholders.
- Create a proposal outline (summary, justification, theory of change, goal, objective, outputs and outcomes)
- Present and discuss for peer feedback.



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Submodule 1.4

Fundraising Techniques

→ **Skills:**

1. Creativity in campaign design
2. Persuasive communication skills.

FUNDRAISING TECHNIQUES
Activity 1: Exploring Fundraising Strategies and Methods
Duration: 1 hour
Specific Learning Objectives: <ol style="list-style-type: none">1. Identify different fundraising methods applicable to various contexts.2. Evaluate the effectiveness of different fundraising strategies.
Methodology, Resources and Devices Methodology: Workshops with guest speakers from successful fundraising campaigns; group projects analysing case studies. Learning Devices: Fundraising strategy templates; online fundraising platforms for simulations.
Description of the activity and Key Concepts Activity: Design a fundraising campaign using selected methods. Key Concepts: Crowdfunding, grant writing, donor engagement strategies.
Assessment Group presentations of fundraising campaign designs with peer reviews.
Skills/Abilities developed Creativity in campaign design Persuasive communication skills.
Further Readings, activities, materials and best practices Recommended readings include: "The Complete Guide to Fundraising Management" by Gail A. Perry. Best practices include setting measurable goals for fundraising efforts and diversifying funding sources.




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Fundraising Techniques





Learning Objectives

- Identify various effective fundraising methods.
- Evaluate fundraising campaign effectiveness.
- Develop persuasive and creative fundraising campaigns.



Key Concepts

- 1) Crowdfunding
- 2) Grant Writing
- 3) Donor Engagement Strategies
- 4) Creative Campaign Design





Fundraising Techniques

What is fundraising: Activities aimed at collecting funds to support organizational or community activities.

Importance: Enables organizational sustainability and supports innovation.





Creativity in Design of Fundraising Campaign

Creative elements: Storytelling, visuals, digital content, interactive content.

Craft a Compelling Story:

Clearly communicate your cause, impact, and how donations help. Use visuals and emotional storytelling.

- Engage supporters with a fun, viral challenges (e.g., “Plant-a-tree challenge”)
- Leverage personal networks: creating personalized and emotionally engaging appeals.
- Select platforms matching your campaign’s focus and audience (e.g., Kickstarter for creative projects, GoFundMe for personal/community causes).

Example: A video showcasing a powerful story of individual impact.



Exploring Fundraising Methods

Key methods

- Crowdfunding: Many small contributions online from an interested community of practitioners or others that are drawn to the project or cause.
- Grants: Structured proposal applications, expressions of interest (EOIs)
- Events: Fundraising dinners, marathons, auctions.

Example: Charity runs that combine health, community, and fundraising.



Communication in Fundraising and Fundraising Essentials

Techniques

- Develop a strong story that connects emotionally with the target audience.
- Have a clear message of urgency and impact.

Example: “Your \$5 donation can provide clean water to a child in (e.g. Kilifi) for a year.”

Fundraising Essentials

Define your goal/s: Goals should be Specific, Measurable, Achievable, Realistic, and Time-Bound (SMART) e.g. “Raise \$20,000 within 6 months to establish a skills training and mentorship program, creating sustainable employment for 100 young people, including at least 60 women and 20 persons with disabilities.”

Assignment: Create 1 SMART goal for the following water, health, green jobs and food security project. Discuss on whether the goals are SMART.



Leveraging Digital tools and Social Media

Tools and Strategies

Live-streaming Fundraisers

- Host live online events (Instagram Live, Facebook Live) to directly engage supporters and motivate real-time donations.

Influencer Collaboration

- Partner with popular influencers to amplify your message, tapping into their large, engaged audiences.

Paid Social Media Ads

- Use targeted ads on platforms like Facebook or Instagram to reach specific audiences likely to donate.

Email Marketing Campaigns

- Regularly update supporters/ donors via personalized emails, highlighting impact stories, upcoming events, and clear calls to action.

Social Proof and Testimonials

- Share brief donor testimonials or success stories publicly to build trust and inspire new donations.

Platforms you can use include: Facebook, Instagram, GoFundMe, Kickstarter.

Example: Engaging posts and videos shared on social media, utilizing hashtags for visibility.





Evaluating Fundraising Effectiveness

Methods:

1. **Donor Retention Rate**
Track how many first-time donors become repeat contributors.
2. **Average Donation Amount**
Measure the average size of donations to evaluate donor generosity trends.
3. **Cost per Dollar Raised**
Calculate total fundraising expenses compared to total funds raised.
4. **Social Media Engagement**
Monitor likes, shares, comments, and hashtag use as indicators of campaign reach.
5. **Feedback Surveys**
Collect direct feedback from donors and stakeholders on campaign perception and motivation.

Important Metrics: Amount raised, donor engagement, repeat donors, campaign reach.

Example: Using Google Analytics, PowerBI and platform data to assess donor origin and campaign performance.



Diversifying Fundraising Sources

To minimize/ spread risk it is good practice to diversify fundraising sources. These include: Grants, crowdfunding, corporate sponsors (private sector, foundations, government - Uwezo Fund, Youth Fund, Hustler Fund). Try not to over-rely on one source.

Example: A nonprofit that combines individual donors, corporate partners, and annual fundraising events for consistent funding.



Exercise and Assignment

1. Task: Design and present a creative fundraising campaign.
2. Criteria: Select cause, campaign design, persuasive message, and methods used.
3. Group presentations, peer evaluate based on creativity, clarity, and practicality.

Assess whether you think it will work (try role play with one another).
What could you have missed, what could be done better?





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