



# Climate and health public engagement Leadership program

Topic area: Public engagement

Session title: Planning PE for fundraising

Funded by

**Dalberg**



# PE for fundraising: overview of sessions



## Understanding the climate x health funding landscape

Discussing trends in the climate x health landscape and understanding what funders look for



## Planning PE for fundraising

Introducing the fundraising cycle to strengthen your toolkit for how best to engage funders



*Focus of this session*

# Agenda

- 01 How can the fundraising cycle help you navigate the CxH funding landscape? (20 mins)
- 02 Identify funders (20 mins)
- 03 Solicit funds: define your impact story (20 mins)  
(break) (10mins)
- Solicit funds: tailor your messaging and outreach (20 mins)
- 04 Cultivate and steward relationships (20 mins)
- 05 Wrap-up (10 mins)
- 06 Additional resources n/a



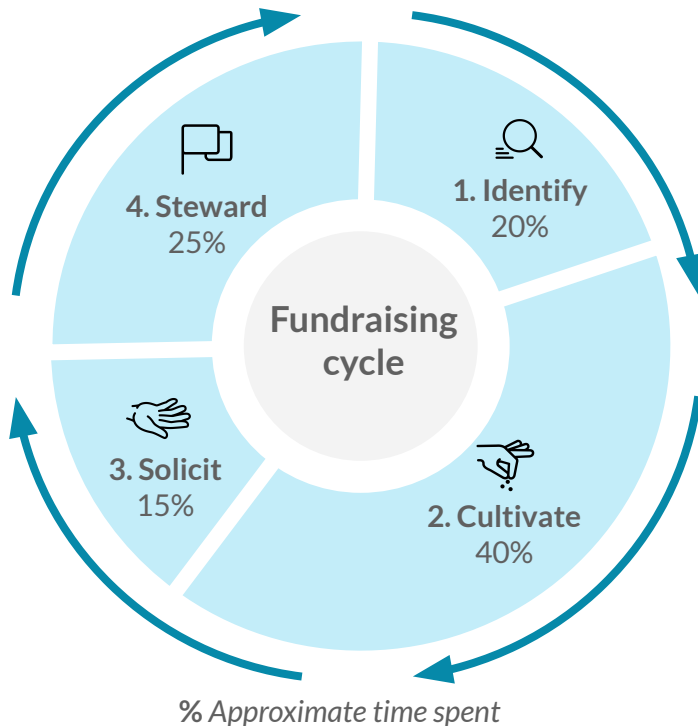
# 1 How can the fundraising cycle help you navigate the CxH funding landscape?

## Introducing the fundraising cycle

### Steward funder relationships

by inviting funders to events, thanking them privately over email or letters, and publicly

**Solicit funds** through the most appropriate channel depending on your target funders



### Identify potential funders

, develop comprehensive criteria, build a database, use existing databases and warm connections

### Cultivate funder relationships

by meeting them, sharing regular updates, and seeking media coverage

An assumed 'pre-step' of the fundraising cycle is **defining your fundraising target and needs**

## 1

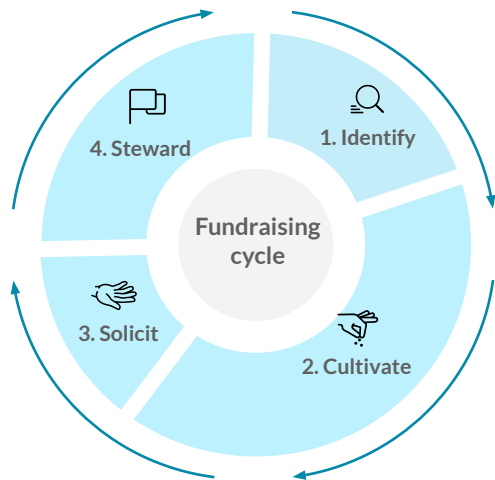
How can the fundraising cycle help you navigate the CxH funding landscape?

# Which areas of the fundraising cycle do you find challenging?

INTERACTIVE ACTIVITY: Menti poll + Plenary discussion



10 mins



## Menti Poll

*In which areas of the fundraising cycle do you spend most time on today?*

*Which areas do you find most challenging?*

*To enter your response, go to Menti.com using the link shared in chat, or scan the QR code*



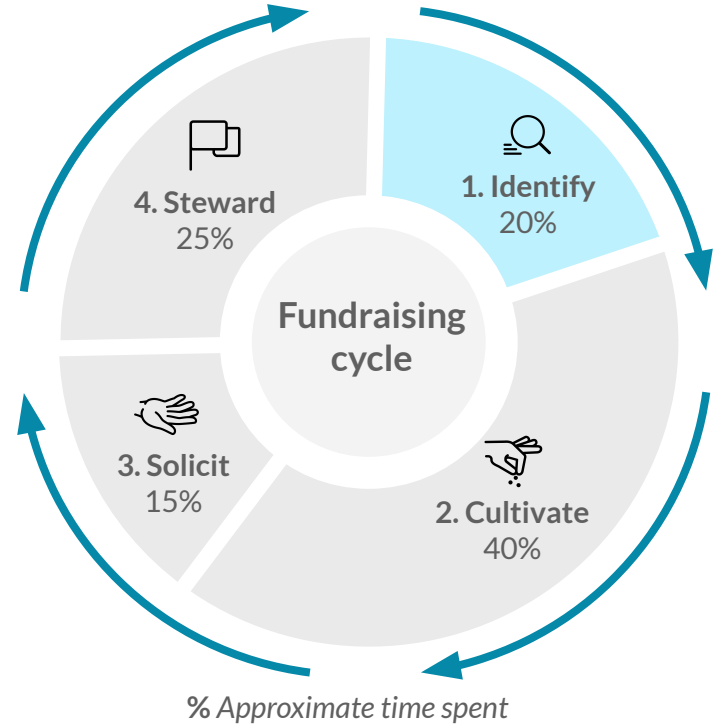
## Plenary Discussion

*What are the challenges you face?*

*Unmute, or type your response in chat*

02

## Deep dive on how to identify funders



## 02 IDENTIFY FUNDERS

# Identify potential funders – channels, tools and best practices

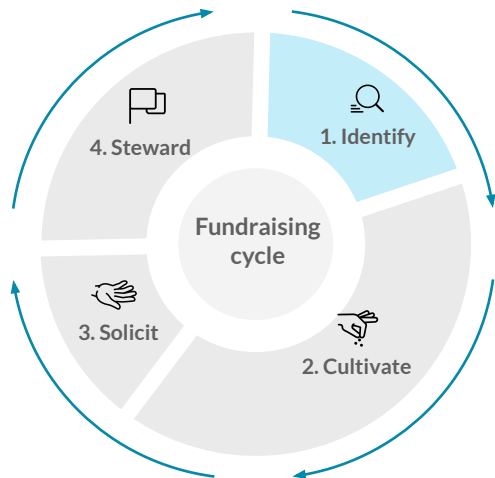
**Identify potential funders** by developing comprehensive criteria, building a database, using existing databases and warming connections

### Channels and tools you can use to IDENTIFY funders:

- **Build a database** of funders that you engage or will engage with, and regularly update it
- **Leverage existing tools** available to research funders. Examples include DonorSearch, Double the Donation, Intellect space and Matching Gift Widget
- **Create visibility** to ensure funders can find you as well, by positioning your organization well on different platforms (e.g., Facebook, LinkedIn etc.)

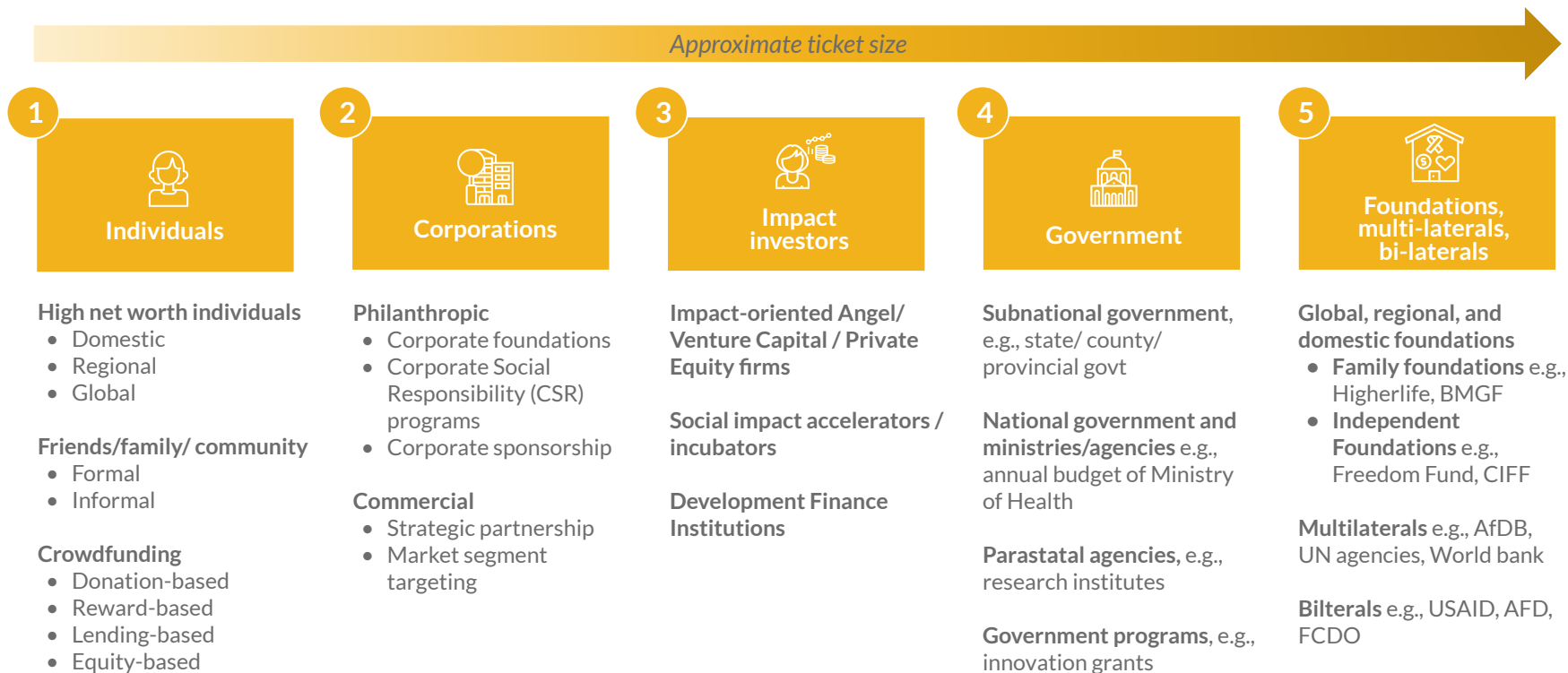
### Best practices for IDENTIFYING funders:

- **Develop comprehensive criteria** to assess potential funders, e.g., alignment with your vision, philanthropic habits, and legal requirements
- **Consider community members** as potential donors, e.g., via crowdfunding campaigns
- **Create a separate workstream** with a designated person to identify (and own, if feasible) the prospect research process (consider specialized consultants, if necessary)





# Funders are not a monolith

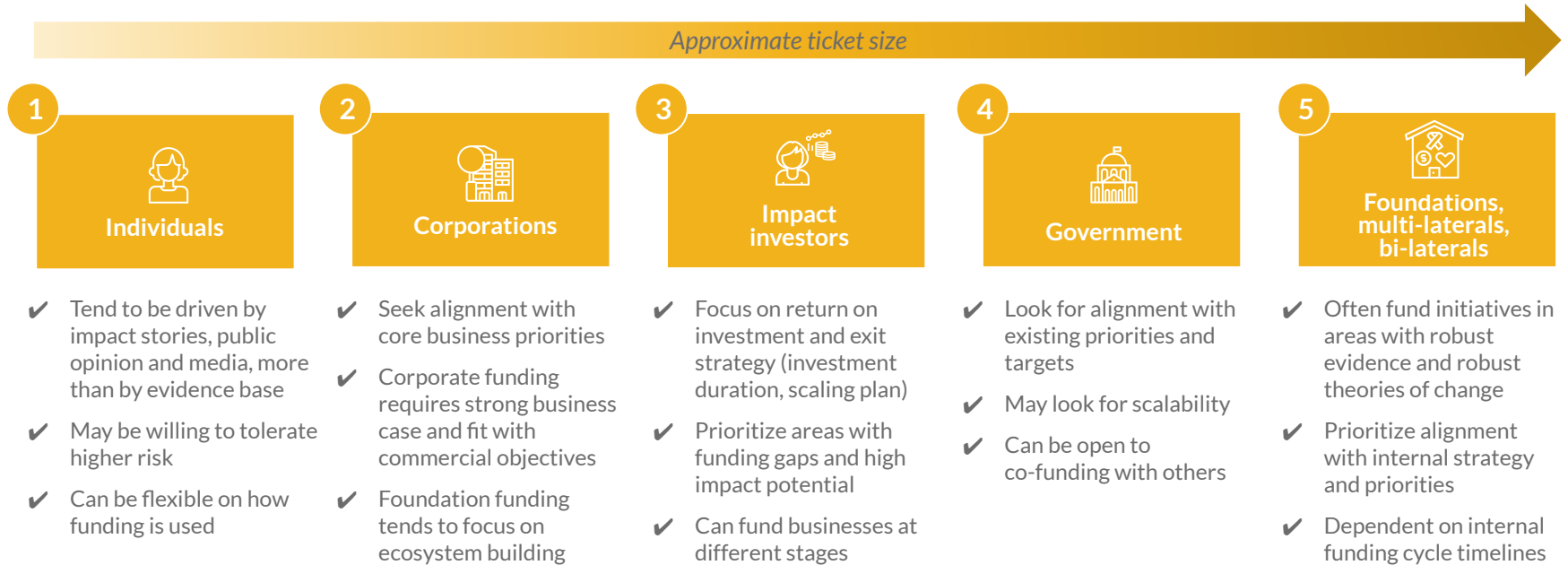


*Note: This list does not include alternative revenue sources; e.g., internally generated revenues, reserve funds, social enterprise models, etc.*

**Acronyms:** **BMGF** Bill and Melinda Gates Foundation, **CIFF** Children's Investment Fund Foundation, **AfDB** African Development Bank, **USAID** United States Agency for International Development, **AFD** Agence Française de Développement **FCDO** Foreign, Commonwealth & Development Office (UK)

## IDENTIFY FUNDERS

# What drives funding decisions for each funder type?



## Determining funder fit



### Is the funder a good fit?

#### Questions to consider:

- **Internal preference.** Which funding option do you resonate with most?
- **Funder alignment.** Which funders are aligned with your values?
- **Funder capacity.** What's their capacity to give? Are gifts unrestricted or fungible (earmarked)?
- **Funder motivation.** What are their interests and motivations for giving?
- **Funder recognition.** Which funders recognize your value proposition?

## IDENTIFY FUNDERS

# 2 Tips for identifying funders to meet your goals



**Determine your fundraising goal.** Be clear about the intended outcomes and how to achieve them. If a detailed budget is needed, include core support and programmatic activities



**Consider multiple funders to meet your fundraising goal.** Estimate how many of each type of funder you need to approach, based on average donation size. Reach out to at least 4x the number of donors needed to meet the goal



**Make sure your goal is reasonable.** Determine if the overall goal is too ambitious or not ambitious enough, given your capacity for outreach



**Prioritize resources.** Consider spending extra time and effort on outreach to fewer funders that can give generously. Expect 80% of goal to be given by 20% of funders



**Define your targets.** Identify specific prospective funders for each level of giving and be clear about the amount you request from each one

# What has worked for you in identifying funders?

INTERACTIVE ACTIVITY: Round robin in plenary



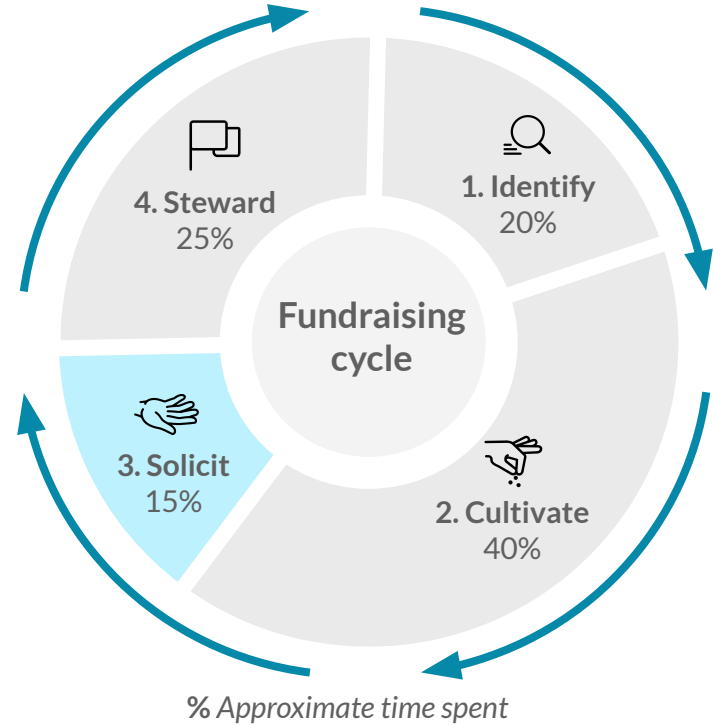
5 mins

*Thinking back to a time when you have  
identified potential funders, what worked/  
didn't work?*

*Put your hand up, or type your response in chat*

03

## Deep dive on soliciting funds



## Soliciting funds – channels, tools and best practices

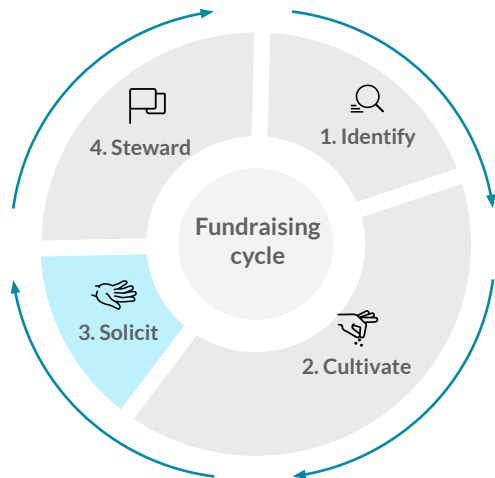
**Solicit funds** by selecting the most appropriate channel for your target funder

### Channels and tools you can use to SOLICIT funds:

- **Crowdfunding** Keep your page alive by sharing photo and video content; post regular updates and show how much you have already raised
- **Letters** Be concise and formal; while soliciting through letters, keep them professional, accessible, and get to the point
- **In person** Know your funders in person; do your research and identify the needs of the potential funder before in-person meetings
- **Email** Customizing the ask is critical; directly address the recipient and include any reference to previous encounters
- **Phone** Prepare a script to ensure you clearly communicate your ask, and be ready to address the funder's questions

### Best practices for SOLICITING funds:

- **Be responsive** even when funders are unsure or postpone
- **Follow up** with clear next steps, such as through a follow-up email to thank the funder and recap major decision points and action items immediately after in-person meetings
- **Be genuine and authentic** when making the ask to help build trust with the funder
- **Choose the right time** to ask for donations, such as at end of year, specific "cause months" (e.g., breast cancer prevention month), and during/around specific events



# *SOLICIT FUNDS:*

## *How to make the ask*



**Define your impact story**



**Tailor your messaging and  
outreach**



# Clearly define and communicate your intended impact



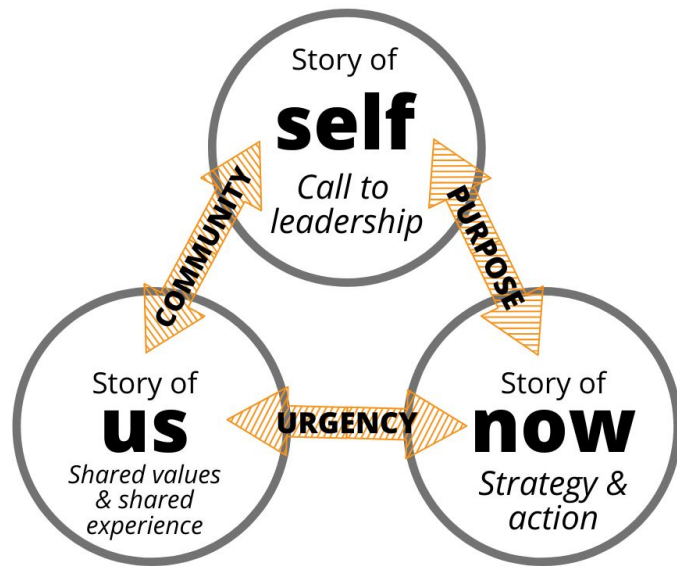
## Define your impact story

### Questions to consider:

- **Clarify mission and vision.** What is your mission, and how do your program activities support it?
- **Define unique value proposition.** What is your organization's unique value proposition?
- **Prove impact.** How do you prove your impact? What metrics can you use to validate your claims?

## Build on your story of self, us and now

Recall your story of self-us-now:



[Link to Session 3.1](#)

Bring your story of self-us-now into your storytelling for funders:

- **What is the urgent 'challenge' you call on us to face?** What vision could we achieve by acting on your proposal?
- **What are the motivating values that we share?** What unites us in this shared purpose?
- **What are the sources of your calling?** What has led you/your organization to have this motivation to act?



Shift your mindset away from the 'sales pitch', towards calling on others to join you in action

# Discuss: integrating community engagement into fundraising

## INTERACTIVE ACTIVITY: Plenary discussion



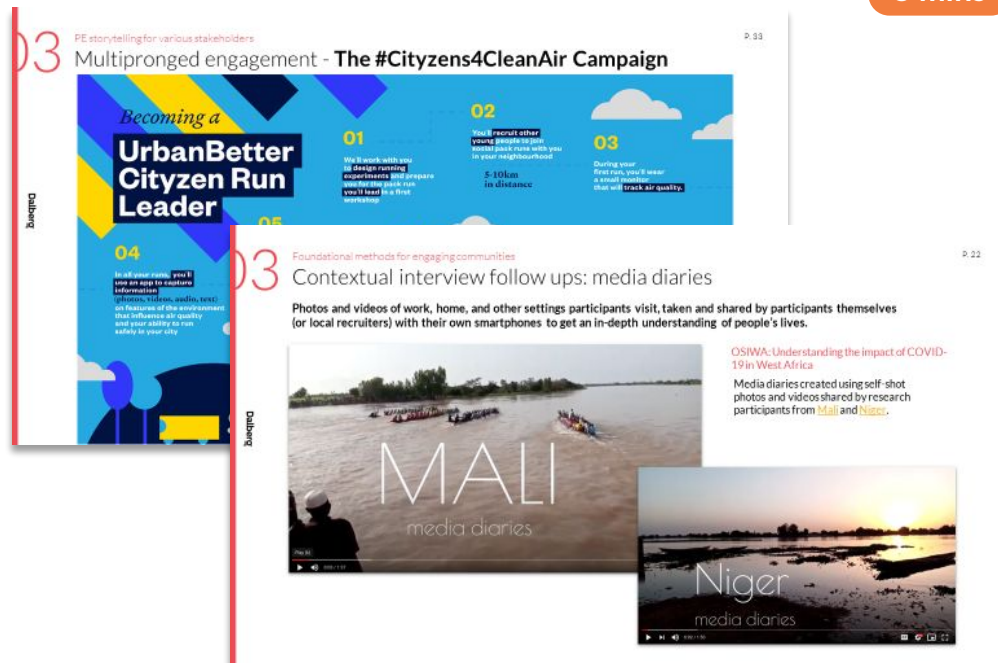
5 mins

*Link to session 3.0 and 3.1*

*How might the #Cityzens4CleanAir Campaign further integrate community engagement into a fundraising approach?*

*How might OSIWA further build on media diaries into an impact story for funders?*

**Unmute, or type your response in chat**



## Discuss: integrating community engagement into fundraising

INTERACTIVE ACTIVITY: Plenary discussion



7 mins

*Your turn:*

*How might community engagement strengthen **your** impact story or fundraising approach?*

*Unmute, or type your response in chat*

**BREAK**

# SOLICIT FUNDS:

## *How to make the ask*



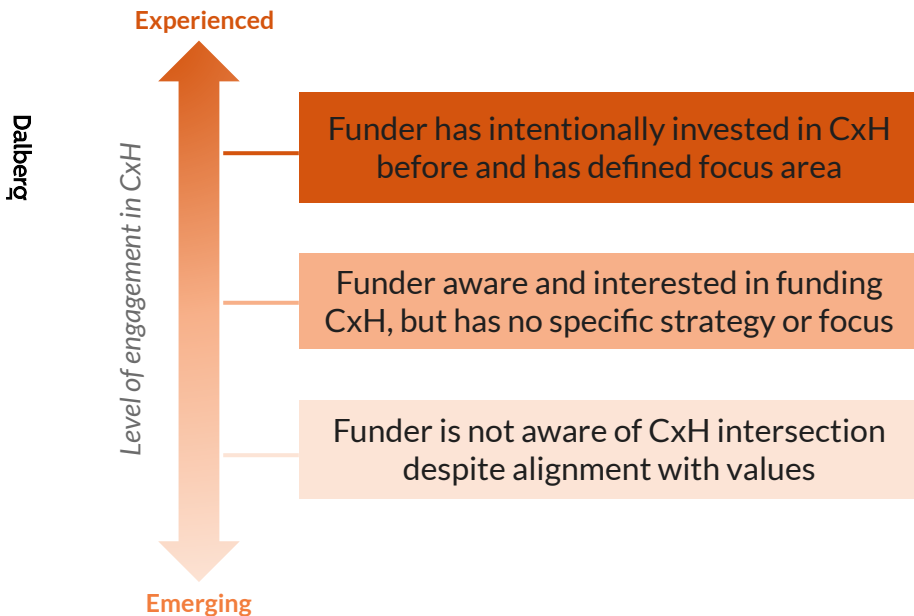
Define your impact story



Tailor your messaging and  
outreach

## Funders have different levels of engagement in climate x health, and different funding priorities

### Funders have varied levels of engagement in CxH...



### ...and different interests and priorities

#### Example CxH funder priorities<sup>1</sup>:



[1] Source: Dalberg interviews conducted at a recent convening of climate x health funders

## Tell your story in a way that resonates with the audience



### Tailor your messaging and outreach

#### Questions to consider:

- **Decision makers.** Which decision-makers should you target for outreach?
- **Align communication.** How might you clearly communicate your impact story in a way that aligns with the funder's interests, capacity, and motivations for giving?
- **Communicate financials.** How do you explain your business plan and budget to funders?



## Discuss: what works to engage different funders

INTERACTIVE ACTIVITY: Plenary discussion



15 mins

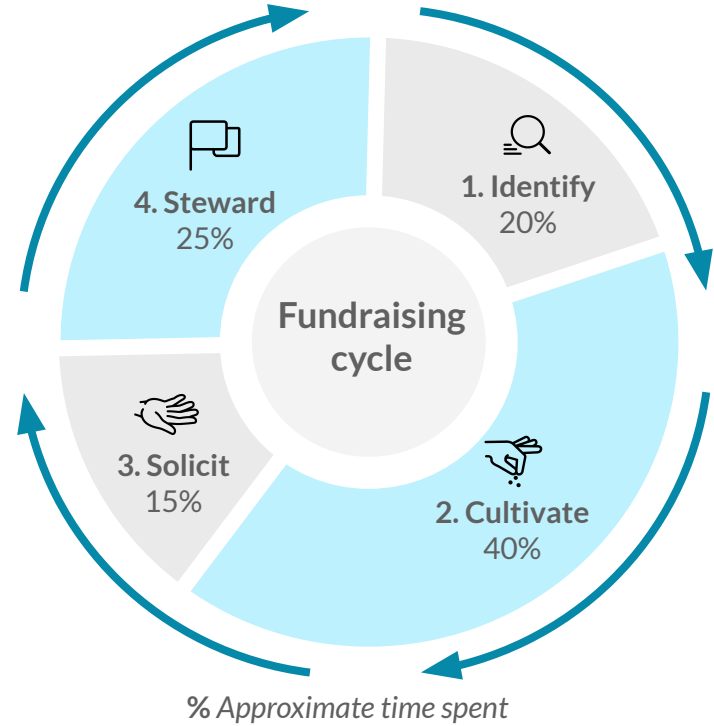
*What sources have you used to identify a funder's interest and priorities?*

*How have you tailored your messaging to the funder's level of engagement in climate x health?*

*Unmute, or type your response in chat*

04

## Deep dive on how to cultivate and steward funder relationships



# Cultivating relationships – channels, tools and best practices

**Cultivate funder relationships** by meeting potential funders, sharing regular updates, and seeking media coverage

## Channels and tools you can use to CULTIVATE funder relationships:

- **Meet in person** with potential funders, join events hosted by others to grow your network and interact in person
- **Share newsletter** with articles and photos on major donations, personal stories of participants etc.
- **Make phone calls** to check in with potential funders, especially after first meetings, for follow-ups or to share positive developments
- **Get (social) media exposure** by seeking opportunities for engagement and building substantial presence on major social media platforms

## Best practices to CULTIVATE funder relationships:

- **Develop the story of “Why”** people should give you money, and learn how to communicate it using an elevator pitch. Train your staff and board members as well.
- **Prepare FAQs** with common questions, including details on how to learn about upcoming events and who to call to be involved
- **Create a system** for funder cultivation. Do not try multiple approaches randomly but identify a few effective strategies and invest time and resources in them



# Stewarding relationships – channels, tools and best practices

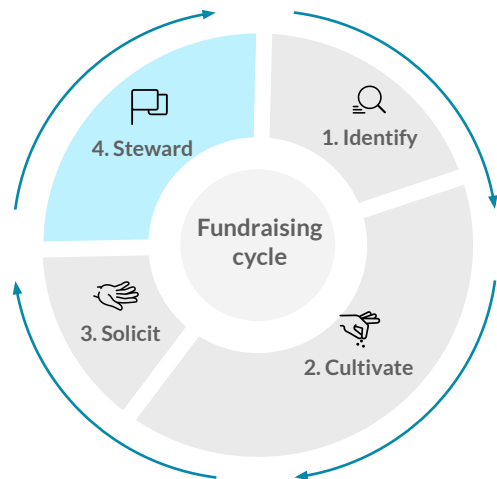
**Steward funder relationships** by inviting funders to events, thanking them privately over email or letters, and publicly

## Channels and tools you can use to STEWARD relationships:

- **Invite funders to events**, either as guests, or to assist delivery
- **Use social media** to thank funders publicly, and share gratitude with your community
- **Send cards or letters** where appropriate within a week after receiving the donation - many funders appreciate old-fashioned thank you cards
- **Write emails** to thank the funder individually

## Best practices for STEWARDING relationships:

- **Acknowledge your gratitude** with a letter (and gift, if possible and/or appropriate)
- **Solicit feedback** continuously from funders on upcoming plans and initiatives
- **Keep funders updated** on your progress, and how their money is contributing to achieving results
- **Deepen funder involvement** over time to prepare the ground for future, possibly larger, donations
- **Ask for referrals** when you have built a strong relationship, by explicitly asking current funders to connect you to potential funders in their networks



# Tips for building long-term trust and engagement with funders

## Targeted communication

Use a communication matrix to have **regular and calendarized touch-points** with your funders

## Mutual learning

**Organize learning events** with funders and peer organizations; **attend learning events** where funders are present

## Leveraging your larger team

**Involve your larger team** – your Board, executive directors, and program leads, as touchpoints with your funders

## Engagement/advice seeking

Use your **funders as thought partners** and engage with them regularly to seek programmatic and strategic advice

## Honesty and transparency

**Be transparent** about your wins and missed targets

## Reflecting on your relationship

Set up **regular debriefs** with your funders and have an honest discussion on your relationship

## Discuss: how to build relationships with funders (1/2)

INTERACTIVE ACTIVITY: Breakout discussion



10 mins

*What has worked for you in building relationships  
with funders?*

*In your breakout group, come up with a set of tips and tricks to  
share back in plenary*

## Discuss: how to build relationships with funders (2/2)

Share back in plenary



5 mins

*What has worked for you in cultivating relationships with funders?*

<Fill in sticky notes>

...

...

...

...

...

...

...

## 05 **Wrap up**



# How do you feel about fundraising?

INTERACTIVE ACTIVITY: Share in chat



5 mins

*At the beginning of Session 3.6, we asked “Does fundraising fill you with joy or fear?” Has anything changed since then?*

*Type your thoughts in the chat  
Unmute or raise your hand to speak*

## 06 Additional Resources

# Where can I learn more?

## 1. Giving Chart tool (free, downloadable)

- This spreadsheet will allow you to (a) plan a campaign gift strategy to meet a specific goal and (2) enter gifts as they are received to track progress - [LINK TO GOOGLE SHEET](#)

## 2. Resources to help identify funders

- Online foundation directory to find grants to fund non-profits - <https://candid.org/>
- Resource to identify and segment potential donors (free and paid subscriptions available) <https://www.donorsearch.net/>

## 3. More guidance on fundraising

- Online platform with useful tips on many aspects of fundraising (free) - <https://doublethedonation.com/tips/nonprofit-fundraising/>
- Philanthropy University courses (free, sign-up required)
  - Introduction to fundraising [LINK](#)
  - Connecting with donors - [LINK](#)
  - Fundraising strategies - [LINK](#)