# Raising Funds and Awareness in a Post-COVID-19 World

**Thursday, July 16, 2020**

11:00 – 12:00 noon EST

**WFYC**

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# Today's agenda

- Opening Remarks/Housekeeping

- Introductions

- Presenters:
  - Patricia Carrasco Sanchéz
  - Kelly Crowe

- Moderated Discussion/Q&A

- Close

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# Patricia Carrasco Sánchez

Fundraising Specialist

(Past Director of the B&G Club of Mexico City and State of Mexico)

# Corporations, Individuals and Social Media

## INDEX

- Introduction: Post Covid-19 opportunities

- Fundraising Strategy

- Fundraising Resources:
    1. Grants
    2. Corporations
    3. Individuals
    4. Crowdfunding

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# Introduction: Post Covid-19 opportunities

- <u>Revaluation of traditional values:</u>    family, unity, compassion, and solidarity.

- <u>Opportunity of building bonds:</u>    with other members of the community or individuals/corporations with the same goals and values.

- <u>Contribution to the community:</u>    as an entity of reference, identity and security.

- <u>Preparation for a new beginning:</u>    SWOT and strategic planning.

- <u>Building skills for your personnel:</u>    Online seminars, training sessions

# Fundraising Strategy

1. Identify your strengths and opportunities.

2. Know the needs of your community and how to impact them.

3. Research and choose foundations, corporations and individual groups that match your purpose and are willing to support your community, in order to link their goals and yours.

4. Adequate your projects and proposals to the donor's terms of reference.

5. Highlight the impact on minority groups and the gender perspective.

6. Make current and future grants as flexible and unrestricted as possible, to support the whole organization and not just a specific project.

7. Look for emergency funds to help your community.

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# Fundraising Strategy

Do not focus on what you want to do, <u>focus on what the donor is looking for!</u>

| GENERAL GOAL |
|:---:|

| Specific goal 1 | Specific goal 2 | Specific goal 2 |

| SELECTED STRATEGY |
|:---:|

| Outcome 1 | Outcome 2 | Outcome 3 |

| Strategy 1 | Strategy 2 | Strategy 3 |

Qualitative and quantitave analysis. Consider your strengths, costs, outcomes, time, and resources.

| IDENTIFIED PROBLEM |
|:---:|

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# Fundraising Resources

1. **<u>GRANTS</u>**

- Government
- Multilateral organizations (UN, European Union, Unicef, Asian Development Bank, African Development Bank, Inter-American Development Bank)
- Bilateral organizations (Canada Fund, USAID, AECI)
- National Foundations (Femsa, Grupo México, Río Arronte)
- International Foundations (United Way, Childfund, Save the Children, Bill & Melinda Gates)

**Projects directed toward:** health, nutrition, emergencies, human development and family support. ***How will the Club address this issues?***

**Definition of operation strategy post-Covid:** remote, fewer children, schedules, health prevention rules. ***How will the Club return to regular activities or make the transition towards the new normality?***

# Fundraising Resources

1. **GRANTS (***continued***)**

**Where to find them? (Fundraising resources websites):**

- Foundation Center (fconline.foundationcenter.org) PAID
- GrantStation (grantstation.com) PAID
- Funds for NGOs (www.fundsforngos.org) FREE
- Funding Opportunities (funding-opportunities.org) FREE
- Terra Viva Grants Directory (terravivagrants.org) FREE
- Innpactia (www.innpactia.com) FREE
- Grantsy (grantsy.org) PAID
- Networks and association of civil organizations in your area

**THEY ALSO HAVE NETWORK AND TRAINING EVENTS**

**USE THESE TOOLS, THEY REALLY HELP!**

# Fundraising Resources

## 2. <u>CORPORATIONS</u>

- Mapping and research of companies. Identify the partners that are aligned to your mission to match THEIR needs and requests.

- Designing of proposal with excellent language, incorporating impact, specific target, and sense of urgency.

- Presentation of proposal, meetings through platforms, close communication.

- Establishment of relationships for the future.

- Exploring other forms of cooperation: corporate volunteering, donations from employees, ATM donations (banks), and in-kind donations.

# Fundraising Resources

## 3. <u>Individuals and Social Media</u>

IDEAS FOR FUNDRAISING INICIATIVES:

- Online events and campaigns: raffles, concerts, classes, fundraising, bazaars, auctions, etc.
- Collections: with the help of banks, stores and public institutions to place money boxes.

- Design an eficcient database
- Choose a moving and urgent cause
- Evaluate the effort dedicated and a realistic income
- Promote the campaign within your community

**ACTIVE COMMUNICATION THROUGH:**

**Facebook**         **Twitter**         **Instagram**

**NEWSLETTER:**

**Mailchimp**

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# Fundraising Resources

## 4. **Crowdfunding**

**PREPARE YOUR CASE**

- Choose a clear, moving and urgent cause
- Show your commitment
- Use storytelling of individual cases
- Impact in your community

**CROWDFUNDING PLATFORMS:**

| | | |
|---|---|---|
| Global Giving | Fundly | Razoo |
| Bonfire | Handbid | Youcaring |
| Donadora | Fondify | Donately |
| Hipgive | Generosity | |

**ACTIVE COMMUNICATION THROUGH:**

Facebook          Twitter          Instagram

**NEWSLETTER:**

**Mailchimp**

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# Kelly Crowe

Project Director

# How to Develop & Write a Grant Proposal

Objectives:

- Identify key steps for writing a grant proposal
    - Review recommended components of a grant proposal
    - Discuss strategies related to writing a successful grant proposal
- Understand how to approach U.S. federal funders

# Ensuring it is the correct opportunity

- Can you implement the program for the amount available?

- Does the program fit within your orgs long term goals? – not going after funding for funding sake

- Can you manage the grant requirements including reporting, evaluation, etc.?

- Is it a cost reimbursable grant? If so, do you have the cash on hand to spend the money and wait for reimbursement?

- Do you have a relationship with the funding organization?

# Internal capacity for writing a grant

Working with a contract grant writer vs. writing it in-house
- Pros: experience, does not take time away from your staff, objective perspective
- Cons: cost, may not fully understand your org or programs

Building out a template grant to have as a starting point
- Have a standard Letter of Interest prepared and on hand
- Have standard data for various needs statements
- Have standard language for organizational history, capabilities and competencies
- Have resumes updated regularly

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# Letter of Interest vs. Request for Funding

## Letter of Interest

- Often required as a first step for larger foundations that do not accept unsolicited proposals
- Can be useful for outreach to individual donors as well as foundations
- One page, clear & compelling reason that they should fund you over other orgs and programs

## Request for Proposal

- Solicitation for a full proposal
- Often involves detailed proposal requirements including page length, formatting, topics to be covered, etc
- Proposals are often rejected for not following minor details within the RFP

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# First Steps Towards Developing a Grant Proposal

1. Thoroughly review the grant solicitation or Letter of Interest request
2. Pinpoint deadlines, application format, and the criteria of the grant
3. If possible, contact that granting organization and see if they will give you any additional insight into what they are looking to fund.

# Generating Support for your Proposal

Meeting with Officers at funding organization

• Public Affairs officer at U.S. Embassy

• Foundation Staff or Board members

Gather letters of support

• Community Leaders

• Political Leaders

• Academic

• Professional

# Collect Local Data to Clearly Describe Your Community

- Local Demographic population data
    - Education
    - Poverty level
    - Employment
- Description of location
- Needs of community that reflect grant focus
- Use the funding agency's own research were available

# Grant Writer's skills include:

- Strong analytical and writing skills
- Able to follow the instructions in the solicitation.
- Identifying what must be included in the program abstract and program narrative by reading the solicitation.
- Determining measurable goals and objectives.
- Communicating in a clear and concise writing style.
- Establishing accurate dollar amounts for the various budget items and totals for the cost categories.

# Proposal components

- Project Narrative
  - Needs Statement
    - Using local data and current research
  - Project Goals and Objectives
    - Goals are the overarching framework
    - Objectives are the specific framework of what will be accomplished
    - Be careful to not include activities as objectives
  - Program Activities
    - Specific activities that will be conducted during the project period
  - Program Design
    - How the program is expected to work to solve the stated problem and achieve the goal.
  - Program Timeline

# Proposal Components (cont.)

- Organization Capabilities
  - Key Personnel
  - Program Partners
  - Monitoring & Evaluation Plan
  - Marketing Plan (if applicable)
  - Sustainability
- Budget & Budget Narrative
- Attachments
  - CV or resumes
  - Letters of Support
  - Other

# Project/Program Timeline

**Sample Program Timeline**

| Month | Project Goal | Related Objective | Activity | Expected Completion Date | Person Responsible |
|---|---|---|---|---|---|
| 1 | Off-track student A begins garden/computer courses; students B and C begin homework/ tutoring. | Off-track students receive educational input when out of school, become reinvested in learning, and develop new skills in project areas.<br><br>On-track students notice improvement in grades, attendance and mathematics and literacy skills. | Students designate and complete a certain project in these fields and learn about biology, math, art, design, and literacy through hands-on activities and active participation in a creative educational endeavor.<br><br>On-track students receive individualized homework help and tailored "game-plan" for improved grades and attendance. | End of month 2. | Project Director, Alice Smith |
| 2 | Identify and provide counseling for at-risk students. | Provide individual and group counseling for up to 200 identified at-risk students. Referrals are ongoing throughout the school year. | Begin student referral process. Form 15 student peer groups consisting of 10 students and facilitated by coordinators who meet weekly throughout the year. | Ongoing. | Project Director, Alice Smith |
| 3 | Evaluation | Track student progress. | Administer quizzes and portfolio assessments, project progress assessment.<br><br>Begin teacher check-ins, grade assessment, progress reports. | End of month 6. | Program Coordinator, John Smith |

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# Budget Worksheet & Budget Narrative

- Tie the budget to the project strategy and design.

- Justify the need for each expenditure, itemize, and provide detail.

- Outline travel plans—itemize carefully.

- List equipment—develop a clear relationship between equipment and the project objectives.

- Be sure that all items in your budget are allowable and reasonable and that all your calculations are provided and are correct.

- Use the required budget templates for each funding organization & include correct number of years as per the solicitation

# Organize your submission

- Use appropriately descriptive file names (e.g., "Program Narrative," "Budget and Budget Narrative," "Timelines," "Memoranda of Understanding," "Rèsumès") for all required attachments.

- Limit the number of attachments. For example, if resumes are required, include them in a single file.

- Save and submit files in .doc and .xls or .pdf formats.

- Enlist a neutral third party to review your work for errors, and ask for constructive criticism regarding narrative, clarity and reasoning.

# Check your application against the solicitation's requirements

- Must be responsive to the scope of the solicitation.
- Must include all items designated as "critical elements."
- If the solicitation includes multiple categories for which applicants can apply, make sure you submit your application under the appropriate category.
- Make sure that your grant proposal includes **all** requested documentation.
- For U.S. federal grants, ensure that you have applied for all necessary registrations including DUNS number and grants.gov login

# Funding opportunity sources

- U.S. Embassy website

    - Embassies often have small grant programs that they will list in the Education & Culture section of their websites. You can also reach out to embassy staff to request information.

- The Philanthropy News Digest by Candid posts current Requests for Proposals and has an option to subscribe for alerts. http://philanthropynewsdigest.org/rfps

- Nonprofit Expert website - https://www.nonprofitexpert.com/international-grants/

- Fundsnet Services.com - http://www.fundsnetservices.com/searchresult/30/International-Grants-&-Funders/1.html

- Candid – GuideStar and Foundation Center

    - RFPs – https://philanthropynewsdigest.org/rfps

    - Training - https://grantspace.org/training/search

# Moderated Q&A

Jose Cruz

World Federation of Youth Clubs

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# We want to know what you think?

## Thank you!

Mark Shamley

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