Objectives Of Sessions

Session 2 Wednesday 20 May 11.00-12.30

- How to apply to and approach donors
- What systems/processes need to be in place in order to apply/respond quickly to donors

Session 1 Tuesday 19 May, 16.10-17.45

- How to go about successful fundraising
- How to identify different sources of funding.
SUPER fundraising

Strategic – fundraising to deliver your mission
Understanding - the donor’s priorities, and matching your work to them
Presenting - your case and your organisation effectively
Effective - having good processes and teamwork to be effective in accessing and managing funding
Relationships – cultivate and develop strong relationships with donors
Wider benefits of donor relationships

- Negotiation of areas of additional flexibility, e.g. extensions, carry-over of underspends etc.

- Opportunities to influence donor programmes and policies

- Opportunities for scaling up, for joint action, replication

- Advance warning of new funding opportunities or other changes or shifts in the donor's policy

- Opportunities for “cross-selling”
Four Stages in Making Approaches

Stage 1  Identification and Evaluation
Stage 2  Raising Awareness
Stage 3  Exploring the Opportunities
Stage 4  Making the Agreement
Identification and evaluation

- previous / current relationship?
- what they fund – does it match your work?
- who they fund – are you eligible?
- process – funding cycles, application forms?
- how much they give?
- whether they fund core costs?
- do they require match funds?
- are there any unusual compliance conditions?
- contacts – can you open a dialogue with them?
Raising Awareness

• if there is a personal contact, use it
• make it clear you understand their priorities
• make it clear how you fit
• give them a clear statement of your Vision and Mission; your status and capacity – your core pitch
• provide endorsement and “success story”
• make it clear how you propose to follow up – a meeting; a concept note, more information
Exploring the Opportunities

• Be prepared – bring several projects to the discussions

• Be flexible - if they can’t support you this funding cycle, how about next year? be open to changing your ideas – so long as you are still achieving your priority goals

• Expect the donor to want co-ownership of the project

• Ask – are there aspects of your work they are particularly interested in; but beware of donor “cherry-picking”
GIFTED - A formula for managing informal meetings

Greetings - lead the meeting
Interest Creator – initiate by talking about the donor
Fact Finding - ask questions and listen to the answers
Turn Them On – what can you do for the donor
Evidence – why your project deserves funding
Decision - ask for a commitment – at least to continue the discussion.
Making the Agreement

- Make sure that you understand the donor’s terms and conditions, especially for “visibility”, reporting and accountability

- Ensure partners can deliver on compliance too

- If the proposal is rejected, find out why - is there a realistic possibility to put in a new – and stronger – proposal?
Key Components of a Funding Proposal

- Justification and relevance
- Project structure (the logframe)
- Added value and impact
Components - Justification and Relevance

- Situation analysis
- Beneficiaries – direct and indirect
- Partners and other actors
- “Fit” to donor priorities
- “Niche” – other actors
- Your expertise
- Process & participation
Components – Project Structure (logframe)

- Objectives
- Results or Outcomes
- Activities
- Project Management
- M & E – Indicators, verification
- Risks and assumptions (“Plan B”)
- Budget
- Equipment, logistics, security
- Visibility for donor
Components – Added value and impact

- Methodology and approach
- Expertise – You and Partners
- Impact
  - scaling up,
  - replication
  - capacity building
  - lesson learning
  - policy change
- Value for Money
Ten tips on effective proposal writing (1-5)

1. **Follow the format**: exactly; respect space limits and provide all the information required.

2. **Use a good precedent**: use an example of a good proposal to guide you.

3. **Style**: avoid jargon; use clear headings and numbering; include an executive summary; use annexes for detail and supporting information.

4. **Donor priorities**: Understand and reference the donor’s priorities and viewpoint. Be explicit about how your proposal meets them.

5. **Link problem and solution**: Include clear situation analysis. Make it clear how your proposal tackles the main problems identified.
Ten tips on effective proposal writing (6-10)

6. **Project design**: Use a logframe or similar tool to ensure the proposal logic is strong – even if the donor does not require it.

7. **Budget as part of the fundraising proposal**: make budget persuasive, not just a list of numbers. Use budget notes to justify costs & show VFM.

8. **Involve partners and beneficiaries**: do this at an early stage; Partners should present a strong core case too.

9. **Teamwork**: Involve your colleagues at an early stage and at all review stages. Ensure enough time for review and final proofreading.

10. **Connect**: connect at a human level: include direct testimony, use success stories, case studies, powerful images.
“Hard to write” sections of a proposal

Rationale/ problem analysis

Sustainability

Monitoring and Evaluation

Scaling-up and replication

Value for money
Key stages for proposal development

1. Opportunity assessment
   - Opportunity review and approval

2. Defined timeline, roles and responsibilities
   - Proposal writing and budget preparation
     - Risk assessment
       - Proposal review
         - Approval
         - Submission to donor
           - Yes decision

3. Concept paper drafting and risk assessment
   - Concept review and approval
     - Submission to donor
     - External Partner assessment
       - Yes decision

4. Optional stage

Lessons learnt loop (to next proposals)

Donor requires changes

Proceed to grant agreement

Mandatory stage
Mandatory approval stage
Optional stage

OR
Due diligence - defined

Due diligence is the process by which a funder assesses an organisation before deciding to invest.

- Grant Managers Network

Due diligence is part of ‘Developing a knowledge base’ to identify the organisation(s) that fit best with a funder’s strategy.

– Helen Chadwick, SVA Consulting (Australia)
Due diligence – what to put in place (1)

**Governance:** legal status; registrations, constitutional documents, tax status, trustees, CVs of senior management, Board and Senior Management minutes

**Financial:** controls, management accounts, audited accounts, fundraising strategy, donor contracts, overhead recovery, internal audit, finance manual

**Programmatic:** strategic / operational plans; technical capacity, grant management systems; evaluations; partner assessments
Due diligence – what to put in place (2)

**Systems, Processes and Procedures:** policies e.g. on equal opportunities, child protection, health and safety; staff handbook; risk management, recruitment; website

**Environmental risk management:** policy; audit; preparedness

**Value for Money:** procurement policy; supplier management

**Results and impact:** M&E system at organisational, division and project levels; KPIs; annual and donor reports
Resources for more information on due diligence

*Due Diligence: making philanthropy work for you.* (Helen Chadwick article in SVA Quarterly). This sets out a framework for due diligence


Grantmakers for Effective Organisations (coalition of <300 funders) has developed an online tool for Due Diligence; (available to members only): [http://www.geofunders.org/](http://www.geofunders.org/)
The components of a Core Case for Support (1)

- Mission, Vision, Values;
- Problem analysis
- Beneficiaries / constituency
- Your approach, programmes and key services
- What makes you special
- Theory of Change - make use of the GnB theory of change
The components of a Core Case for Support (2)

- Case studies/ success stories
- Future plans – where you are going
- Leadership / expertise - bios
- Capacity Statements (technical capacity), etc
- What you need/ how to get involved
- Cost examples – what $$ will achieve
What is a Theory of Change?

- An on-going process of reflection to explore change and how it happens – and what that means for the part we play in a particular context, sector and/or group of people:
  - It considers a programme or project within a wider analysis of how change comes about.
  - It makes us explain our understanding of change – but also challenges us to explore it further.
  - It is often presented in diagrammatic form with an accompanying narrative summary

- The focus is on what we think will change, not on what we plan to do.
A simple Theory of Change – Save the Children

We will...

... be the voice
advocate and campaign for better practices and policies to fulfillment children’s rights and to ensure that children’s voices are heard (particularly those of children most marginalized or living in poverty)

... build partnerships
convene with partners, organizations, communities, governments, and the private sector to share knowledge, influence others, and build capacity to ensure children’s rights are met

... be the innovator
develop and prove evidence-based, replicable breakthrough solutions to problems facing children

... achieve results at scale
support effective implementation of best practices, programmes, and policies for children, leveraging our knowledge to ensure sustainable impact at scale
More resources on Theory of Change

- Girls not Brides: View our new 'Interactive Theory of Change on Child Marriage' an online resource that takes you through the interconnected steps and strategies needed to end child marriage [http://bit.ly/1wY9w9q](http://bit.ly/1wY9w9q)

- INTRAC newsletter #51, Theory of Change: What’s it all about? [www.intrac.org](http://www.intrac.org)
**VISION:**
A world without child marriage where girls and women enjoy equal status with boys and men and are able to achieve their full potential in all aspects of life.

**IMPACT**
Girls can decide if, when, and whom to marry
Married girls lead healthier lives

**RESULTS**
Girls at risk of child marriage participate more in decisions that affect them, including regarding marriage
Girls are better able to avoid early pregnancy and to refuse unwanted sex
Married girls are better protected from violence, exploitation or abuse
Married girls increasingly access and use services and supports of all kinds
Married girls increasingly access divorce, annulment and child custody
Community, traditional and religious leaders take greater action to end child marriage and realise the rights of girls
Community, traditional and religious leaders increasingly support alternative roles for girls beyond marriage
Men and boys increasingly take action to end child marriage
Families engage less in exchange of dowry and bride price

**GIRLS**
- Girls are increasingly aware of their rights
- Girls have the opportunity to develop solidarity with one another through peer groups and collective action
- Alternative economic, social roles for girls and women exist and are valued
- Increased access of married and unmarried girls to health, education, economic, and legal support

**FAMILIES AND COMMUNITIES**
- Families, communities and young people are increasingly aware of the harmful impact of child marriage and alternatives available
- Families, communities and young people value alternative options to child marriage
- Families and communities prefer not to marry girls as children
- Men prefer not to marry girls who are still children
- Increased use of media to inform and support norm change to end child marriage

**SERVICES**
- Increased access to safe, quality formal and non-formal education for girls
- Increased access to health services for adolescent girls, married and unmarried
- Health and education services establish protocols on identifying the warning signs and addressing the risks of child marriage
- Improved economic security for girls
- Increased commitment of programmes to prevent and mitigate risk of child marriage

**EMPOWER GIRLS**
A wide range of programmes invest in girls, their participation and their well-being

**MOBILISE FAMILIES & COMMUNITIES**
Families, communities and young people are engaged to change attitudes and behaviours related to child marriage

**PROVIDE SERVICES**
Services across sectors reinforce one another and are tailored to the specific needs of girls at risk of child marriage and married girls

**ESTABLISH STRATEGIES**
A robust marriage effective

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Ending child marriage will require long-term, sustainable efforts. Change will ultimately take place within communities, but has to be supported at national, regional, and international levels. Adequate resources must be made available to support effective implementation.
Other useful resources

Girls not Brides Webinars (Globalgiving)

- “Good Fundraising – Practical Skills”:
  http://www.instantpresenter.com/globalgivinguk/EB53DA808149

- “Core Case for Support to Boost Your Fundraising”:
  https://attendee.gotowebinar.com/recording/4391370638898774529

Girls not Brides – sources of funding for child marriage work; a brief guide
Evaluation forms please!
Thank you