

**INTELLECTUAL OUTPUT 3**

**Training toolbox material & guidelines for SNGO operators**

**IO3.1: Tool suggestions**

**Unit 3**: Implementing a fundraising action toward donors

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INTRODUCTION

The goal of IO3 is to:

* make the training materials for the learners as interactive and useful as possible
* develop tools and templates fit for purpose, ready to use and easily adaptable to the needs of an SNGO
* provide step-by-step guidance through the different aspects of fundraising, always encouraging the learner to think of their own organisation in parallel for each step of the way described within the materials

Toolbox for Unit 3 includes;

* list of tools for digital fundraising with the pros and cons of each tool, so that the SNGO operators have a good overview and can easily decide which tools suit their organisations needs
* example texts for a good communication with donors (e.g. thank you e-mails, social media posts, etc.)
* template of a fundraising plan featuring the main elements of a fundraising campaign

TOols for digital fundraısıng

1. **Civi CRM**

An open source constituent relationship management (CRM), event management, donations/payments, volunteer management platform and more, designed for charities and non-profits

**Uses:**

\*Contact management — contact data can be stored in one place; you can tag and group contacts according to their level of engagement with the organization

\*Membership management — allows members to sign up, pay online, and receive membership renewal reminders

\*Accounting integration — enter gifts into the CRM, export data, then import them into your accounting system

\*Event management — create generation forms, sign up volunteers, and generate registration confirmations and receipts

\*Email marketing — you can send emails using personalized templates and measure the effectiveness of campaigns by monitoring email statistics

\*Advocacy campaigns — allows nonprofits to create online petitions and encourages supporters to take action

\*P2P fundraising — Constituents can create personal campaigns to raise funds on your behalf

\*Reports — CiviReport has over 40 standard reports to help your organization evaluate its impact

**Pros:**

\*CiviCRM is complex and flexible, and can be tailored to fit your nonprofit’s needs

\*Save your contacts with unlimited number of custom fields, which allows you to track supporters and each interaction with them

\*It’s to link donations with contact records, so you can easily thank donors for their generosity

\*Send automatic reminders to your supporters to make sure your events are well-attended

\*Encourage donors to help you achieve your fundraising goals by setting up a tracking page with a thermometer widget

**Cons:**

\*You need to have good technical/programming knowledge to install and use the CRM

\*Some organizations pay for experts to manage and customize the system, which can be more expensive than using other paid CRMs or free ones

\*It’s hard to master all of the features due to its broadness and complexity

\*According to some users, the font and some formatting are not user-friendly

\*You have to rely on networks and forums (or your paid expert) for support

**Pricing**:

Free\* — CiviCRM is an open-source system, so you don’t have to pay to use it; however, you need hosting to take advantage of its features

Organizations with limited in-house technical capacity will likely have to pay for hosting and a Civi “partner” expert to get set up and maintain the system

1. **Donor Perfect**

A fundraising and CRM system that provides the tools for communicating, tracking, and managing campaigns so you can raise more funds for your mission.

**Uses:**

* Donor management – save donor contacts with custom fields and screens to reduce data cluter and increase efficiency
* Membership management – send renewal messages, track upgrades and lapsed memberships
* Volunteer management – track volunteer assignments, skills, availability, certifications, and more
* Targeted mailings and emails – use filters and targeting features to send personalized communication
* Contact management – manage future tasks, meetings, calls, or donor appointments
* Fundraising event management – manage event details, track expenses, arrange tables and team assignments
* Donation processing – keep record of gifts and pledges; recognize donors who influence others to give

**Pros:**

* Easy integration with Microsoft Word and Excel lets you export reports exactly formatted the way you want them
* SmartGive feature allows donors to give with just a few clicks — SmartGive takes donors to a secure online payment page that’s pre-filled with their information, so they can donate quickly and easily
* Effortlessly produce receipts and documentation for donor taxes
* Constituents can raise funds for your cause with P2P fundraising feature
* Easy to integrate with Quickbooks or other 3rd party solutions

**Cons:**

* Breadth of features make the system hard to master
* Some essential features are not in the basic package; add-ons can become quite expensive
* Contacts can be duplicated which can cause confusion

**Pricing:**

* Lite: $89/month
* Express: $159/month
* Essentials: $269/month
* Premier: $459/month
* Enterprise: $799/month

1. **GiveGab**

GiveGab is an agile platform specifically tailored for nonprofit donor and relationship management.

**Uses:**

* Engage both volunteers and donors in one platform
* Volunteer management — track volunteer hours, post your volunteering opportunities and recruit more supporters
* Donor CRM — manage supporters and donor data

**Pros:**

* Create crowdfunding campaigns involving your best volunteers, donors or other supporters, who can create mini-campaigns centered around your larger campaigns
* Online fundraising capability
* Advertises Giving Days as new fundraising opportunities
* Built-in messaging and social medial for supporter and donor engagement
* Full range of event fundraising capabilities, such as registration and checkout features
* Volunteer management system including hours tracking and opportunity postings

**Cons:**

* Some users say that the number of features makes it difficult to master
* The higher platform fee rate for the free plan means your nonprofits pays more if your fundraising performs better

**Pricing:**

* Basic — Free + 7% platform fee + credit card fees (2.9%)
* Fundraising—$49/month (annual subscription required) + 4% platform fee + credit card fees (2.9%)
* Fundraising & Donor management (CRM) — $199/month (annual subscription required) + 2% platform fee + credit card fees
* Enterprise — “Pricing That Fits Your Nonprofit” (custom pricing)
* #GivingTuesday — 0% + credit card fees — GiveGab waves its fees on #GivingTuesday

1. **Hubspot CRM**

A customer relations management tool that allows you to organize and track your current and potential donors. Designed for for-profit businesses, its power, flexibility and price (free)

**Uses:**

* Store up to 1,000,000 contacts with no expiration date
* Manage your pipeline and entire contacts database
* Track donor interactions automatically— whether they’re in an email, across social media, or on a call
* Place phone calls from within the CRM

**Pros:**

* If you’ve been using a spreadsheet for tracking, this tool is much more robust
* Easy to learn and the menu is easy to navigate
* Your whole team can share the system, so one team member can easily pick up with a donor where another team member left off
* Sort capability allows easy view of people who have donated and those who have not
* Syncs with Gmail or Outlook to capture every communication
* Organizes everything about a particular donor in one place
* You have the option to record and store conversations
* Calendar and meeting scheduling tools

**Cons:**

* The tool does not have the capability to create or export custom reports
* Some advanced features require integration to other products which may or may not be free
* Can take a lot of time to set up all of the functionality for you and your team
* The number of features makes it difficult to master

**Pricing:**

* Hubspot CRM is “free forever.” As long as you don’t need additional features, there is no charge to use the service
* Integrations with Hubspot Sales and Hubspot Marketing—which add a lot more power—require a subscription fee

5) **Insightly**

Insightly is a customer relations management (CRM) tool that allows you to organize and track your current and potential donors, plan and implement projects, and stay on task.

**Uses:**

* Keep track of client relationships through the unique relationship graph engine to automatically capture the links between contacts, organizations and the business relationships they share
* Allows you to send messages from directly within the CRM
* Convert a lead into an opportunity with a single click
* Create recurring tasks, schedule calendar appointments with leads or contacts, and link them to projects
* **Pros:**
* Automated lead capture of potential donors
* Includes workflow automation tools for project management
* Pipeline view to see timeline of interactions with a particular donor
* Automatically send emails and track analytics
* Easily syncs with MailChimp
* Customized reports at every package level
* Connects to tools and apps you already use
* Contains a file management service for document storage
* Calendar sync
* Encryption available to safeguard sensitive data
* System allows you to set role- and profile-based permissions within your team
* Easily integrates with Google and Microsoft
* Easily integrates with accounting systems like Quickbooks
* **Cons:**
* Free version only allows 2,500 contacts, 2 customizable database fields and 10 mass emails per day
* Some users report that to find contacts, you have to search for them exactly how they were entered in the system
* **Pricing:**
* Free — Up to 2 users
* Basic — $12 user/mo usd (billed annually); $15 user/mo usd (billed monthly)
* Plus — $29 user/mo usd (billed annually); $35 user/mo usd (billed monthly)
* Professional — $49 user/mo usd (billed annually); $59 user/mo usd (billed monthly)
* Enterprise — $99 user/mo usd (billed annually); $129 user/mo usd (billed monthly)
* **Nonprofit Discount:** Registered 501(c)(3) and NGO organizations can get a 50% discount on allpaid plans(after verification from Insightly support)

example texts for a good communication with donors

There are several ways that your nonprofit can focus on improving your marketing strategies through more effective communication with your donors.

THANK YOU LETTERS

Gratitude is strong, and a mail of thanks remains one of the most helpful ways to express this to donors.A thank you letter expresses appreciation, serves as a receipt and helps build a stronger relationship with the donor. Sending an effective thank-you letter can give your organization an edge in a world full of charity contests.

What should you care about while writing thank you letters?

1) It Must Be Timely: Fundraising experts recommend mailing a thank-you letter—regardless if they're first-time or longtime donors—within 48-72 hours after receiving the donation. Timing may vary, but the donor should still remember giving that donation when they receive the thank you. A thank you three months later will do little good.

2) It Must Be Accurate: Are the donor's name and address correct? Have you used the right honorific, such as Ms, Mrs, or Mr? Are the spelling and grammar correct? Does the formatting make the letter easy to read? When appropriate, use the donor's first name in the salutation for more personalization.

3) It Must Allow the Donor to Visualize the Effect of the Donation: Have you included a story about someone or some animal that will benefit from the gift? Or have you used a testimonial from that person? People feel more generous when they can visualize particular people or an animal that they have helped.

4) It Must Show How Well Your Programs Work: Include a paragraph about your mission and some statistics about your results. Keep it short, though. The letter should attempt to reach the heart of the donor more than just the head. Include just enough numerical data to prove that you follow through and do what you promise.

5) It Must Use "You" More Often Than "We" or "I.": Make the donor the hero. Use the phrase "because of you" frequently. Make the letter about the donor and the people they help rather than about the organization. This is no time to boast about the money you raise or the awards you've won. It's about the donor and what they have made possible.

6) Include the Gift Amount and Information About Taxes: Is the entire amount tax-deductible or only a portion? The IRS stipulates what legal statements need to be included. This information can be at the end of the letter, although, in the body, the amount should be mentioned. For instance, "Thank you for your donation of €200." Mentioning the amount initially serves as a confirmation of the amount and a reminder for the donor.

7) It should be signed by a Noteworthy Person: That person might be a board member, the executive director, a volunteer, or a beneficiary of the donation. A high-status person is logical for most thank you letters. But some thank-you letters could be from someone who uses your organization's services, such as a student who receives a scholarship or the mother of a child who benefits.

8) It Includes a Postscript: When people scan a letter, they do read the PS. So make that last message count. Repeat a vital piece of information and reiterate your gratitude. When appropriate, have the person signing the letter add a hand-written PS saying thank you again or referencing something personal.

9) It Should Not Be a Generic Form Letter: Ideally, thank-you letters should not be generic letters, set up, and then forgotten. Don't let your thank-yous become routine and dull. Unless you have a huge number of donors, your charity should try to make each thank-you letter unique so that the donor knows that letter was meant specifically for her.

Here is a template for you:

|  |
| --- |
| Name of the organization, SNGO  Adress • Phone Number • Mail Adress  Date …../…../……….  Name of the donor  Address of the donor  Dear xxxxx (Donor Name),  Thanks to you, xxxxxxx(whats have been done with the donation, who has benefited of the donation, which conditions has been changed for beneficiary,)  Thank you for your recent generous gift of €xxx (amount) to xxxx (Organisation or SNGO name). Your willingness to help xxxxx.(The usage area of donation)  Thanks to you, we have provided xxxxx (How many people and how they are helped in total)  Your donation will help purchase xxxxx (if you purchased sth with the donation, what did you purchase and how many)  Some information about the campaign and its goals. How far have the goals been achieved?  We would love to give you a xxxx (A gift offer concerning the donated campaign)  xxxxx, our development director, is always available to set up a visit for you or to answer any questions you may have. Don't hesitate to call him or her at xxx(contact number), or email him/her at xxxx (e-mail adress)  We would love to keep you in the loop with our emails and newsletter. You can sign up for those at our site, xxxx(organisations or SNGO’s web site)  Again, thank you for all you do for xxx(Donation Subject). Y  Sincerely,  xxxxxxxxx  Executive Director  P.S. xxxx (Any additional comments) |

THANK YOU E-MAILS

Today, more and more donations are being made online, and sending a thank you email is perfectly okay. However, this email thank-you letter needs to stand out more than a mailed thank you letter because it comes down to a torrent of email for most of us.

Thanks are not just for donation. You should thank your supporters for everything they do, such as attending an event, participating in a survey or volunteering.

**Make the donor the star:** Use the word ‘YOU’ as much as you can.

**Tell the donor the results and be specific:** The specificity even extends to sharing the number of individuals who fundraised and the number of people who donated as a result. This creates a feeling of belonging to a very special group of people and emphasizes the multiplication factor of every person's effort

**Show a heart-warming photo:** There is no excuse for not including an image in an emailed thank-you. Images are super easy to add. Make sure the image is a person (or animal if that is your focus), is tightly framed, and is large. You could also include a video, as long as it focuses on someone who benefits from the donor's generosity and is simple. Make the video accessible from within the thank you message. No clicking off to another place.The Imagery of one person is stronger than a group of people, and a person or group is stronger than charts, graphs, or info graphics.

**Include a link to more information:** Focus on keeping the thank-you as straightforward and heartfelt as possible, but do provide a way for the donor to get back to your homepage or some other landing page that will pull him or her into more action.

Here is a template for you:

|  |
| --- |
| The email's subject line read: "Thank you for your recent donation!"  Dear [First Name],  Thank you for your gift of €\_\_\_. xxxxx (How did you spend the donation,what did you buy?) Thank you!  Your financial gift helped xxxxx (Who did you help with the donation,which facilities did you provide?)  A message from beneficiary  Thank you again for your rapid response that enabled xxxx (The activities have been done by organization or SNGO)  Thank you for your gift of €\_\_\_\_ to xxxx (Organisation or SNGO name). It is the donations, such as yours, that equip us to help in xxxxx (ongoing activities of SNGO)  With your help, we will reach even more xxxxxxx around the world this year.  Below is a summary of your gift. You can also access a receipt online by clicking on this link: xxxxxx  Amount: € xxxx  Payment Method: Mastercard Credit Card, \*\*\*\*\*\*\*\*\*\*\*\*  Date: ..…/…./……  Designation: xxxx  Thank you for your compassion  Sincerely,  xxxxxxxx, President |

TEMPLATE FOR A FUNDRAISING PLAN

Please see Unit 1 for a fundraising plan template

Link: [https://drive.google.com/drive/folders/1Kn6mzPRHMIFRZSfoshv0w5eSINvm4jt3?usp=sharing](about:blank)

a GDPR example text to be changed + cookies + privacy

What are the principles at the heart of data protection?

There are six principles that NGOs and charities must follow when processing personal data. These principles are set out in the DPA 2018, and summarized below:

1. Processing must be done fairly, lawfully and in a transparent manner. This means two things:

» being transparent with the people who have shared their personal data with you. NGOs

and charities should be upfront as to how personal data will be processed, for what

purpose and whether it will be shared with anyone else.

» having a lawful basis on which to process the personal data of data subjects. There is a

number of lawful bases that could be relied upon. For example, the NGO or charity has

a legitimate interest in processing the personal data, or the NGO or charity has obtained

the consent of the data subject.

2. Personal data must be acquired for a clear and specified purpose. For example, it cannot be

collected for one purpose only to be used for another purpose. NGOs and charities must use

personal data in the way they told data subjects it would be used.

3. Personal data collected shall be adequate, relevant and not excessive. NGOs and charities are

collecting personal data for a specific purpose(s) – they should collect the minimum amount of

data necessary to achieve that purpose(s).

4. Personal data must be accurate and kept up to date.

5. Personal data should not be kept longer than is necessary. NGOs and charities should be

deleting personal data when it is no longer required.

6. Personal data must be kept secure. NGOs and charities should ensure that they have robust

physical and technical security measures to protect the personal data.

You can find templates for privacy and cookie policies down.

|  |
| --- |
| **PRIVACY POLICY TEMPLATE**  **Privacy Policy**  Last updated: (add date)  My Company (change this) ("us", "we", or "our") operates http://www.mysite.com (change this) (the  "Site"). This page informs you of our policies regarding the collection, use and disclosure of  Personal Information we receive from users of the Site.  We use your Personal Information only for providing and improving the Site. By using the Site, you  agree to the collection and use of information in accordance with this policy.  **Information Collection And Use**  While using our Site, we may ask you to provide us with certain personally identifiable information  that can be used to contact or identify you. Personally identifiable information may include, but is not  limited to your name ("Personal Information").  **Log Data**  Like many site operators, we collect information that your browser sends whenever you visit our Site  ("Log Data").  This Log Data may include information such as your computer's Internet Protocol ("IP") address,  browser type, browser version, the pages of our Site that you visit, the time and date of your visit,  the time spent on those pages and other statistics.  In addition, we may use third party services such as Google Analytics that collect, monitor and  analyze this …  The Log Data section is for businesses that use analytics or tracking services in websites or  apps, like Google Analytics.  **Communications**  We may use your Personal Information to contact you with newsletters, marketing or promotional  materials and other information that ...  The Communications section is for businesses that may contact users via email (email  newsletters) or other methods.  **Cookies**  Cookies are files with small amount of data, which may include an anonymous unique identifier.  Cookies are sent to your browser from a web site and stored on your computer's hard drive.  Like many sites, we use "cookies" to collect information. You can instruct your browser to refuse all  cookies or to indicate when a cookie is being sent. However, if you do not accept cookies, you may  not be able to use some portions of our Site.  **Security**  The security of your Personal Information is important to us, but remember that no method of  transmission over the Internet, or method of electronic storage, is 100% secure. While we strive to  use commercially acceptable means to protect your Personal Information, we cannot guarantee its  absolute security.  **Changes To This Privacy Policy**  This Privacy Policy is effective as of (add date) and will remain in effect except with respect to any  changes in its provisions in the future, which will be in effect immediately after being posted on this  page.  We reserve the right to update or change our Privacy Policy at any time and you should check this  Privacy Policy periodically. Your continued use of the Service after we post any modifications to the  Privacy Policy on this page will constitute your acknowledgment of the modifications and your  consent to abide and be bound by the modified Privacy Policy.  If we make any material changes to this Privacy Policy, we will notify you either through the email  address you have provided us, or by placing a prominent notice on our website.  **Contact Us**  If you have any questions about this Privacy Policy, please contact us. |

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| --- |
| **COOKIE POLICY TEMPLATE**  Last updated [month day, year]  INTRODUCTION  [Business Entity Name] (“we” or “us” or “our”) may use cookies, web beacons, tracking pixels, and other tracking technologies when you visit our website [Name of Website.com], including any other media form, media channel, mobile website, or mobile application related or connected thereto (collectively, the “Site”) to help customize the Site and improve your experience.  We reserve the right to make changes to this Cookie Policy at any time and for any reason. We will alert you about any changes by updating the “Last Updated” date of this Cookie Policy. Any changes or modifications will be effective immediately upon posting the updated Cookie Policy on the Site, and you waive the right to receive specific notice of each such change or modification.  You are encouraged to periodically review this Cookie Policy to stay informed of updates. You will be deemed to have been made aware of, will be subject to, and will be deemed to have accepted the changes in any revised Cookie Policy by your continued use of the Site after the date such revised Cookie Policy is posted.  USE OF COOKIES  A “cookie” is a string of information which assigns you a unique identifier that we store on your computer. Your browser then provides that unique identifier to use each time you submit a query to the Site. We use cookies on the Site to, among other things, keep track of services you have used, record registration information, record your user preferences, keep you logged into the Site, facilitate purchase procedures, and track the pages you visit. Cookies help us understand how the Site is being used and improve your user experience.  TYPES OF COOKIES  The following types of cookies may be used when you visit the Site:  Advertising Cookies  Advertising cookies are placed on your computer by advertisers and ad servers in order to display advertisements that are most likely to be of interest to you. These cookies allow advertisers and ad servers to gather information about your visits to the Site and other websites, alternate the ads sent to a specific computer, and track how often an ad has been viewed and by whom. These cookies are linked to a computer and do not gather any personal information about you.  Analytics Cookies  Analytics cookies monitor how users reached the Site, and how they interact with and move around once on the Site. These cookies let us know what features on the Site are working the best and what features on the Site can be improved.  Our Cookies  Our cookies are “first-party cookies”, and can be either permanent or temporary. These are necessary cookies, without which the Site won't work properly or be able to provide certain features and functionalities. Some of these may be manually disabled in your browser, but may affect the functionality of the Site.  Personalization Cookies  Personalization cookies are used to recognize repeat visitors to the Site. We use these cookies to record your browsing history, the pages you have visited, and your settings and preferences each time you visit the Site.  Security Cookies  Security cookies help identify and prevent security risks. We use these cookies to authenticate users and protect user data from unauthorized parties.  Site Management Cookies  Site management cookies are used to maintain your identity or session on the Site so that you are not logged off unexpectedly, and any information you enter is retained from page to page. These cookies cannot be turned off individually, but you can disable all cookies in your browser.  Third-Party Cookies  Third-party cookies may be place on your computer when you visit the Site by companies that run certain services we offer. These cookies allow the third parties to gather and track certain information about you. These cookies can be manually disabled in your browser.  [Other]  [Other]  CONTROL OF COOKIES  Most browsers are set to accept cookies by default. However, you can remove or reject cookies in your browser’s settings. Please be aware that such action could affect the availability and functionality of the Site.  For more information on how to control cookies, check your browser or device’s settings for how you can control or reject cookies, or visit your browsers web site.  OTHER TRACKING TECHNOLOGIES  In addition to cookies, we may use web beacons, pixel tags, and other tracking technologies on the Site to help customize the Site and improve your experience. A “web beacon” or “pixel tag” is tiny object or image embedded in a web page or email. They are used to track the number of users who have visited particular pages and viewed emails, and acquire other statistical data. They collect only a limited set of data, such as a cookie number, time and date of page or email view, and a description of the page or email on which they reside. Web beacons and pixel tags cannot be declined. However, you can limit their use by controlling the cookies that interact with them.  PRIVACY POLICY  For more information about how we use information collected by cookies and other tracking technologies, please refer to our Privacy Policy [CLICK HERE]/posted on the Site. This Cookie Policy is part of and is incorporated into our Privacy Policy. By using the Site, you agree to be bound by this Cookie Policy and our Privacy Policy.  CONTACT US  If you have questions or comments about this Cookie Policy, please contact us at:  [Company Name]  [Street Address]  [City, State Zip]  [Phone Number]  [Fax Number]  [Email] |

social media netiquette and social media posts for fundraising

With millions of people active on social media platforms every day around the world, users must adhere to protocol standards when interacting. As with interacting face-to-face with people, it's important to maintain the same etiquette on social media.

While social media interaction is viewed as a much less personal form of communication, it is no less important to respect and value other online users. There are certain behaviors you should avoid and others that you should always keep in mind when interacting on social media. Since NGOs also communicate with their donors on social media, these values are also important to them.



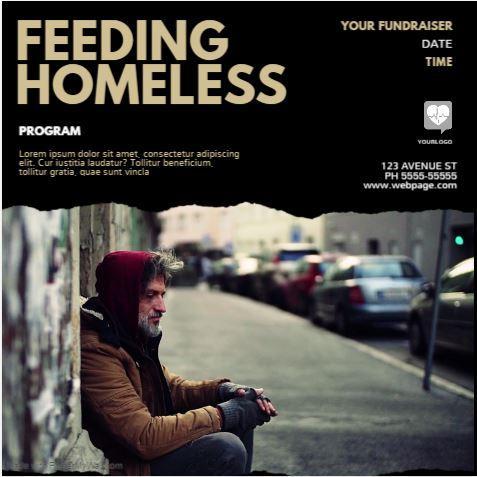
Source: [https://digitalschoolofmarketing.co.za/blog/what-is-social-media-etiquette/](about:blank)

Social Media Fundraising Posts Templates Here are a few social media post templates for you to use to help with your fundraising!

TEMPLATE 1)



TEMPLATE 2)



TEMPLATE 3 )



Source: [https://www.postermywall.com/index.php](about:blank)

This web site has free membership option ; you can download templates for free and edit them using online editor.