***SUN Civil Society Alliance / Regional Group***

**Fundraising & Sustainability Strategy *2020 – 2025***

**Introduction**

This is the Fundraising & Sustainability strategy for *CSA Name*. This document will outline the resource mobilisation model to diversify and increase the income streams of the organisation and to build organizational resilience. Following these key principles for the strategy, it will enable *CSA Name* to;

**Maximise Efficiency** – Through an integrated workplan which incorporates fundraising and sustainability in multiple workstreams and utilises the advantages of being a part of the SUN Movement

**Raise Visibility** – With a strong communications plan, underpinning the fundraising work and strengthening the organisations voice

**Build a Compelling Case** – By establishing their unique selling points and showcasing their work in a powerful and effective way

**Establish Strategic Partnerships** – Through a mapped-out list of potential donors, relationships will be built with multiyear strategic partners to ensure the long-term sustainable funding of the organisation

*Top line background of SUN/Organisation/mission statement, etc.*

**Where are we now?**

* *Current funding will last up until X date?*
* *Overview of how much funding is needed*
* *check of the organisations current situation*
* *How many donors do you have?*
* *What’s the mix of income from donors (% corporate, % government?)*
* *What fundraising have you done up to this point and how successful was it?*
* *How many donations did your organization receive this year?*
* *What channels did those donations come through?*
* *What were the donation sizes?*

**Where do we want to get to?**

* *Use this section to outline the ideal situation for your organisation in 5 years.*
* *What is the “dream” scenario, in 5 years’ time?*
* *If you imagine where your organisation will be, what would be the; size, funding, projects; number of CSOs, etc?*
* *With the best-case scenario in 5 years, what will your organisation be able to achieve for tackling hunger and malnutrition*

**Team**

* *Who will be actively involved?*
* *Who is a good champion?*
* *List your team and their roles/responsibilities. Example could be: Fundraising Coordinator – Responsible for keeping the team on track to achieve the Fundraising Strategy*

**Research**

It is important to analyse the current internal and external environments. The following tables contain a SWOT analysis (internal) and STEEPLE analysis (external) for *CSA name* on *date analysis carried out.*

* *When conducting a SWOT and STEEPLE analysis, feel free to draw upon the research you have carried out as part of your CSA strategy (including advocacy strategy)*
* *To help you complete your analysis please see the following links for further guidance:*
	+ *SWOT:* [*https://bloomerang.co/blog/how-nonprofits-can-use-a-swot-analysis*](https://bloomerang.co/blog/how-nonprofits-can-use-a-swot-analysis)
	+ *STEEPLE:* [*https://pestleanalysis.com/steep-and-steeple-analysis/*](https://pestleanalysis.com/steep-and-steeple-analysis/)

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|  **Internal (SWOT) analysis** |
| Strengths:* *What are you good at? Do you have a good/close relationship with any current donors*
* *Civil society able to achieve a transformative and sustainable development, working at the local and grassroots level.*
 | Weaknesses:* *What are you not so good at?*
* *What are your limitations? Lack of capacity?*
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| Opportunities:* *Can current donors make introductions to other donors?*
* *What events/meetings are coming up that you can utilise*
 | Threats:* *Changes to organisational structure, staff turnover?*
* *What could potentially happen that could negatively affect your organisation*
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| **External (STEPLE) analysis** |
| **Social** | *Factors include cultural aspects, health and safety consciousness, population growth rate and various demographics.* |
| **Technological** | *Charities may need to innovate, having considered the compatibility with their own technologies and whether they are transferable internationally* |
| **Economic** | *Factors include economic growth, interest rates, exchange rates, inflation, wage rates, working hours and cost of living. These factors may have major impacts on how charities operate and make decisions.* |
| **Environmental** | *Factors include an awareness of climate change or seasonal or terrain variations which may affect charities’ service delivery methods.* |
| **Political** | *Factors may be altered by the government’s influence on a country’s infrastructure. This may include tax policy, employment laws, environmental regulations, trade restrictions, tariffs, reform and political stability.* |
| **Legal** | *Factors include any law which may impact on the charities’ operations, including NGO regulation and criminal and terrorist legislation which will differ from country to country.* |
| **Ethical** | *Factors include, reputation, business practices, donor practices, confidentiality, how might these effect your organisation* |

**Fundraising Goals & Objectives**

To further the mission of the organisation the *CSA name* the has established a set of fundraising Goals & Objectives, these are:

*Points to think about when completing this section:*

* *You can have a short/medium- and long-term goals, or you can do just short and long term, or just long-term goals and monitor how you are getting on.* ***This is flexible, create what works for you and set goals that are achievable, don’t be overly ambitious!***
* *Use SMART (Specific,* *Measurable, Attainable, Relevant and* *Time-Based) method when establishing goals/objectives*
* *Think about what services you want to deliver and how this might change over the next few years.*
* *Consider what you may need to put in place to make sure your charity can respond to changing circumstances and new opportunities*
* *Consider the feasibility of achieving the targets/goals you set*
* *How much you want to raise and ensure that the financial target is enough to cover the costs of your organisation*
* *Try to link the goals and objectives to your wider organisational strategy*
* *From which sources*
* *Over what timeframe*
* *Where has our income come from in the past?*
* *How much will it cost to do it all?*
* *Ensure you can deliver on your project with the donor’s funds and timelines*

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| **Goal Short Term:** *By 2020* … |
| **Objective 1** | *Build a pipeline (list of donors*, see *Appendix 4) of 50-100 potential donors with 20 being high priority/good prospects* |
| **Objective 2** | *Engage with/reach out to 10 potential donors/prospects* |
| **Objective 3** | *Secure 2x new donors* |

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| **Goal Medium Term:** *By 2023…* |
| **Objective 1** | *Develop engagement plan for current donors, 2x project visits, 2x events* |
| **Objective 2** | *Have developed a strong partnership with other SUN Movement Networks in country – quarterly/monthly calls/meetings* |
| **Objective 3** | *Secured 4x new donors that exceed $100,000 per financial year in grants* |

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| **Goal Long Term:** *By 2025 CSA Name plans to …* |
| **Objective 1** | *Have a diversified portfolio of donors that include 4 multi-year grants that exceed $100,000* |
| **Objective 2** | *Have raised £500,000 per year from donors* |
| **Objective 3** | *Have 2x long term donors invested in the organisation* |

**Action Plan**

The following action plan has been developed by *CSA Name* to achieve the goals and objectives of the fundraising and sustainbilty strategy and to get where *CSA Name* wants to be by *2025*.

*Ensure that your actions will lead you to help achieve your goals/targets/objectives, the following is some examples, however you can brainstorm your own to suit your requirements. The format for your actions can be designed how you prefer.*

* *Set up a brainstorm session to help the CSA finalise the fundraising strategy*
* *Secure 2-3 high level champions for fundraising efforts within your organisation or wider network and utilise these contacts to access senior leadership within donors*
* *Person allocated to be the fundraising lead to sign up to the Fundraising Training offer by the SUN CSN*
* *Contact Donor Network country focal point and organise meeting, set up regular calls/meetings to build the relationships with the Donor Network, Government Network and Business network in country*
* *Prepare pitch, case for support and grant application template tools from the SUN CSN Fundraising Toolkit*
* *Ensure sure strong internal financial systems are in place*
* *Tap into wider SUN Movement to develop and identify/gather strong case studies and materials to document the impact of the civil society on nutrition, with communications and fundraising expertise*
* *Commit to writing a fundraising and sustainbilty budget line to every proposal/gran application to ensure you have resources/capacity allocated to use to raise funds, this can be used to attending events, hosting events, human capacity, resources and materials etc.*
* *Convene a senior level INGO discussion to examine potential strategic partnerships with 2-3 donors, and secure fundraising support*
* *Set up a stewardship programme for your current or prospective donors (how often will you engage, opportunities for project visits, events to host)*
* *Hire a fundraising/grant manager role, who will then be able to manage the current grants and find new grants/funding, freeing up capacity to deliver on your workplans*
* *Access technical assistance to increase human capacity*
* *Input the strategic engagement events into your calendar*

**Appendices**

The following sections are all supporting documents and templates that *CSN Name* is using for their fundraising and sustainability strategy.

*These are not mandatory, and you can use/not use/ design/ amend the documents to what works best for you and your organisation.*

**Costing Up**

The *CSA Name* has the following budget costs and predicted future costs which need to be covered by funds from donors

Appendix 1: *(budget/ organisation strategy/ costings/ overheads/ staff etc. Or you can use the example budget sheet in appendix 1.*

**Current Situation**

The following table contains the top line information on the current donors for *CSA Name*.

Appendix 2: *(you can use your own donor list, or you can use the template table in appendix 2.*

**Case for Support/ USP**

The *CSA Name* has identified the following Unique Selling Points (USP) and developed the Case for Support that will be used to mobilise interest from potential donors.

Appendix 3: *Case for support document/ link to case for support,*

* *List below the top line case for support/ USPs - What is your USP?*
* *You will need to convince funders why they should support you.*
* *Demonstrate the need, prove how effective you are at reaching your target group, and show them how proactive you are. E.g. only civil society working on BMS code in country,*
* *this USP/ Case for Support list/document will provide you with a collection of information you can add to all your proposals and applications.*

**Sources of Funding**

To achieve the organisations’ goals the *CSA Name* has identified the following sources of funding and developed a pipeline to priorities the prospective donors.

Appendix 4: *(feel free to use the template in the appendix or use a pipeline that you currently have)*

*When populating the table in Appendix 4 with your pipeline of prospective donors do think about some of the suggested tips and advice I have listed below:*

* *Brainstorm potential funders, name as main as possible then you can refine the list*
* *What funding do you have already in place?*
* *Research Plan – how much do you know about the donors, do they fund your work, what are their interests*
* *Could your current donors potentially extend their funding? If yes how do you plan to ask*
* *Who are your historic donors? Can you reengage them.*
* *Think about diversifying funds from Governments, Trusts & Foundations, Corporates, etc.*
* *Who are the key donors working in your country/location (who is in the SUN Donor Network)?*
* *Who have neighbouring CSA’s/ Regional groups been funded by?*
* *Ethically check who you will receive grants from, does the private sector company work in a sector that goes against the SUN principles? Always be vigilant with your sources of funding, one bad funder can negatively affect your relationships with other donors and your wider reputation*
* *Innovation, how can you use tech, new ways of working, opportunities to be more innovative to raise funds*
* *What’s your media and visibility strategy/plan?*
* *Who are the high net worth individuals/diaspora populations that you could reach out to, to secure funding?*
* *Explore funding opportunities in related sectors such as agriculture and health*
* *I have listed some suggested donors who could potentially be included in your pipeline (not all of these will be appropriate for your specific location*
* *Governments: DfID, Irish Aid, Swiss Cooperation, USAID, Canada, UN, SIDA, GIZ, NORAD, DANIDA, JICA, KOICA World Bank, Asian Development Banks*
* *Trusts & Foundations: Gates, CIFF, Rockefeller, Wellcome Trust*
* *Corporate: Packard, HSBC, Standard Charter, UBS,* *Unilever, Kelloggs,* *Newman's Own Foundation*

**Challenges**

Successful fundraising efforts will need to understand the challenges to funding nutrition advocacy and implementation through civil society organisations and be ready to unpick these with good responses. *CSA Name* has identified the following challenges and potential responses.

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| **Challenge** | **Response** | **Who** |
| *Human capacity within organisation to actively fundraise*  | *Incorporate more budget from current/future grants into sustainbilty for the organisation, speak with current donors to establish a sustainbilty objective to fund a role/time to target new donors* |  |
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**Fundraising Calendar & Timeline**

The *CSA Name* Fundraising Calendar is detailed Appendix 5:

* *The calendar in appendix 5 can have key dates for fundraising opportunities that you have identified and can be used to monitor your progress, this can be incorporated into your outlook calendars or other calendars you are using.*
* *When adding in dates think about the following; every 6 months a fundraising strategy review (are you on track, what’s working/what’s not); meetings, events, networking opportunities; donor financial end of year (sometimes they have left over funds you can apply for); dates to use SUN fundraising toolkit etc.*

Appendix 1: Template Budget Sheet

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| **Area of Expenditure/Income** | Planned Expenditure *2020/21* | Planned Expenditure *2021/22* | Planned Expenditure *2022/23* | Planned Expenditure *2023/24* | Planned Expenditure *2024/25* |
| **Income** |
| *Grants* |  |  |  |  |  |
| *Bank Interest*  |  |  |  |  |  |
| *Donations* |  |  |  |  |  |
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| **Total Income** |  |  |  |  |  |
| **Expenditure** |
| *Wages* |  |  |  |  |  |
| *Rent* |  |  |  |  |  |
| *Travel* |  |  |  |  |  |
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| **Total Expenditure** |  |  |  |  |  |
| **Annual Surplus/Deficit** |  |  |  |  |  |

Appendix 2: Donor Database

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| **Donor Name** | **Donor Type** | **Overall Funding Amount** | **Funding Start Date** | **Funding End Date** |
| *DFID, Gates Foundation,* *Vodacom* | *Government, Foundation, Corporate*  | *USD$500,000,* | *01/01/2018* | *01/01/2020* |
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Appendix 3: Case for Support

*(link to case for support document or just use the USP list in the main document)*

Appendix 4: Donor Pipeline

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| **Donor Name** | **Donor Type** | **HQ Location** | **Key Individuals/ Contacts** | **Net Annual Profit/ Aid Budget** | **Past Partnership** | **Rationale** |
| *NORAD* | *Government* | *Norway* | *John Smith* | *USD$ 5m* |  | *NORAD’s key thematic areas cover nutrition* |
| *UBS* | *Private Sector* | *Switzerland* | *Sarah Brown* | *USD$ 400m* |  | *Founding member of the Power of Nutrition, have key interest in tackling hunger* |
| *Wellcome Trust* | *Trust* | *UK* | *Thomas Wilson* | *USD$ 5m* |  | *Interested in developing and strengthening civil society* |
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Appendix 5: Fundraising Calendar

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|  | **Jan** | **Feb** | **Mar** | **Apr** | **May** | **Jun** | **Jul** | **Aug** | **Sep** | **Oct** | **Nov** | **Dec** |
| *Strategy Review* | *Review date* |  |  |  |  | *Review date* |  |  |  |  |  | *Review date* |
| *Events* |  |  |  |  |  |  |  |  | *SUN Global Gathering* |  |  |  |
| *Grant Report Due* |  |  |  | *DFID report due* |  |  |  |  |  |  |  |  |
| *F&S Toolkit* |  | *Use toolkit to create, case for support* |  |  | *Use toolkit to create pitch slides* |  |  |  |  | *Sign up to fundraising training course*  |  | *Review tools in toolkit to check fit or purpose* |
| *Donor Financial End of Year* |  |  |  |  |  |  |  | *USAID end of financial year* |  |  |  |  |
| *New Donor Engagement* |  |  | *Engage EU*  |  |  |  |  |  | *Engage Gates Foundation* |  |  |  |