

# So You ~~Want~~ Have to Fundraise

Jay Monteverde



# Be Present!



→ Get comfortable!



→ Remove distractions



→ Get a beverage



→ Get note-taking stuff



→ Center yourself

# Agenda Overview

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- The fundraising process
- How to pitch your work
- How to find donors that might fund your organization
- How a funder analyzes your work
- Key parts of a proposal
- Planning your time

# The Fundraising Process

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→ Types of donors:

- ◆ Individual donors
  - Small donations
  - Large donations
- ◆ Foundations

→ Fundraising routes:

- ◆ Individual contributions
- ◆ “Solicited” proposal grants
- ◆ “Competitive” grants

# Types of funding

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- Unrestricted, aka “general operations” or “core funding”
- “Restricted”
  - ◆ Project specific (“project funding”)
- (Re-grants / sub-grants / contract funding)

# The Fundraising Process (Generally)

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## Solicited Proposals

- Email/phone introduction (ideally, thru a “validator”, i.e. a connection)
- Initial conversation with donor
- Offer to send a “concept note” (usually a “one-pager” or “two-pager”)

## Competitive Proposals

- Search for competitive proposals and application deadlines
- Reach out to the donor’s program officer unless it specifically says “please don’t contact us”



→ Draft and submit “Letter of Intent” (LOI)  
(if needed)

→ Draft and submit full proposal

# How to pitch your work

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- ~One-sentence summary (not necessarily mission statement)
- “Elevator pitch” (30-60 seconds)
- 5-7 min pitch
- LISTEN

# How to find donors that might fund you

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- Look up the IRS Form 990s of organizations similar to yours (501(c)(3) organizations are required to report their major donors)
  - ◆ See <https://www.grantmakers.io/>
- Go to foundation's website:
  - ◆ Look at "our strategy"
  - ◆ Look at recent grantees (not perfect)
  - ◆ Also note \$\$ range of grants
- Word of mouth, or talk to the donor



# Sample donor's "Our Strategy" page:

Our strategy is shaped by these key trends:

## RISE OF GLOBAL CORPORATIST STATE

Henry A. Wallace was deeply concerned by what he saw as the rise of a corporatist state that concentrates power in the hands of the few and wields unchecked authority at the expense of the common good. Corporatocracy, now a global phenomenon, poses a fundamental threat to our political and natural systems.

## THREATS TO DEMOCRACY AND RIGHTS

Our systems of government must put people before profits. From unfettered campaign contributions and insidious surveillance in the US to coercion and the suppression of dissent in Zimbabwe, democracy is under assault by those who wish to maintain the privileges enjoyed by the few.

## ECOLOGICAL COLLAPSE

Climate change caused by unprecedented consumption of fossil fuels and the poisoning of the planet by harmful chemicals have pushed the Earth's natural systems to the point of collapse, with profound consequences for human health and existence. Rather than reverse the disastrous practices at the root of these problems, corrupt governments seek ineffective technological fixes in order to maintain and maximize corporate profits.

## POWER DIFFERENTIAL AND WEAKENED NGOS

Many nongovernmental organizations struggle to achieve impact because of limited resources and dysfunctional governments weakened by powerful economic interests. Real change comes from the power generated by authentic movements of people dedicated to fundamental transformation and represented in decisions that affect their lives. The best NGOs are those that tap into and galvanize such movements, working collaboratively to achieve bold goals.

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## Competitive Proposals

- Search for competitive proposals and application deadlines
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take a  
moment!

# How donors think about your work

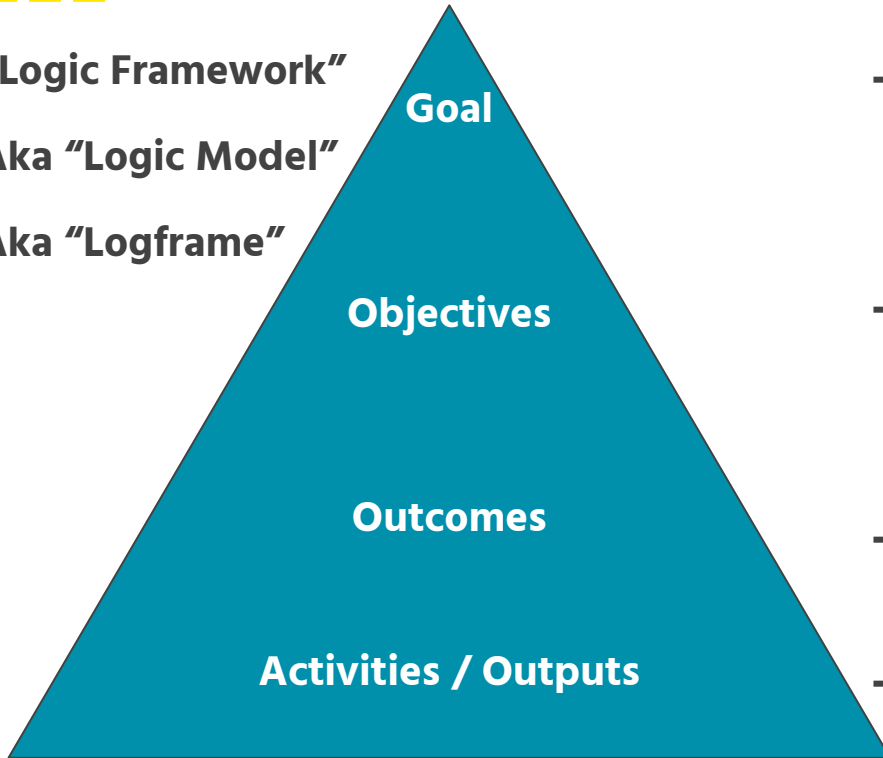
- Justice donors fund social change
- “Theory of change” or “Pathways to change”
- Cause and effect
- Why are you the right org for this work?

# How will funders analyze your work?

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"Logic Framework"

Aka "Logic Model"

Aka "Logframe"



**Goal**

**Objectives**

**Outcomes**

**Activities / Outputs**

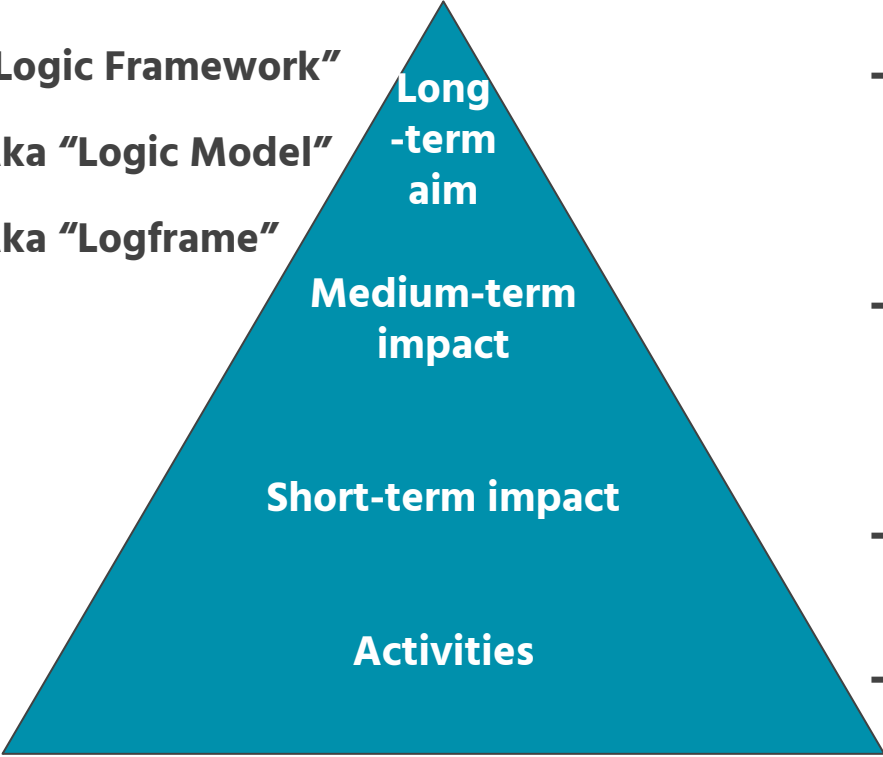
- What's the ultimate goal of your work? (more specific than "stop climate change")
- What will be accomplished at the end of the project? (usually 1-3 objs)
- What is accomplished at the end of the activity? (often 1-3 per obj)
- What are the activities you engage in, and what things do you create?

# How will funders analyze your work?

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"Logic Framework"

Aka "Logic Model"

Aka "Logframe"



Long  
-term  
aim

Medium-term  
impact

Short-term impact

Activities

→ What's the ultimate goal of your work?  
(more specific than "stop climate change")

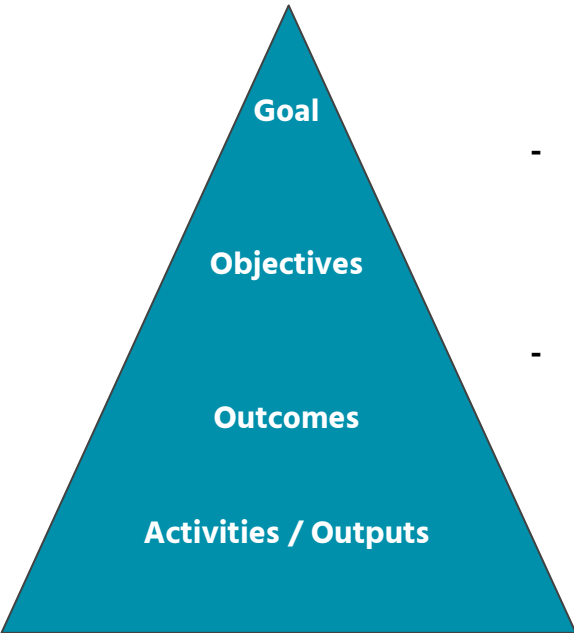
→ What will be accomplished at the end of the  
project? (usually 1-3 objs)

→ What is accomplished at the end of the  
activity? (often 1-3 per obj)

→ What are the activities you engage in, and  
what things do you create?

# Example Logic Model

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- **Goal:** force the closure of the Alpha oil terminal through applying direct action and media advocacy pressure.
- **Objectives:**
  - 1. Strengthen participation in and support for direct actions
  - 2. Support local residents to voice their opposition to the oil terminal in local and national media
- **Outcomes:**
  - 1. A. Increase knowledge and safety related to direct actions.
  - 1. B. Build support networks between out-of-town activists and residents.
  - 2. A. Increase residents' ability to give interviews where they can deliver advocacy key messages opposed to the terminal
- **Activities:**
  - Train people who want to participate in direct actions on what to expect and what their rights are if they are arrested.
  - Organize social events for local residents and out-of-town activists to get to know each other.
  - Organize housing for out-of-town activists who come to participate in direct actions.
  - Provide media trainings for local residents on how to interact with reporters and how to handle interviews while trying to deliver advocacy messages

# Exercise: Build a Logic Model



- Let's build a logic model for a specific project focused around a huge climate strike like the one in NYC in fall 2019.
- So let's say it's June or July 2019, and Greta Thunberg has already started making global headlines for her school strikes for climate. There's buzz that people want to organize school strikes in the fall, once school resumes. There's talk that there will be big marches and rallies in major cities.
- You and your youth climate organization want to not just attend the strike, but really go all-out and make your mark. You also live far outside New York City, so if you joined a strike and march in NYC, you would need to stay overnight there. You need funding.
- You've found a foundation whose website says they want to fund the youth climate movement. You know \*everyone\* is asking them for funding.
- **How do you make your idea stand out?**



# Exercise: Build a Logic Model

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→ Increase pressure for aggressive climate action through amplifying the youth climate movement.

→ HINT: “attend the climate strike” is not the only activity you should propose

# Sample Logic Model for a Climate Strike

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- Increase pressure for aggressive climate action through amplifying the youth climate movement.
- 1. Organize diverse, non-city youth to participate in strike; 2. Promote compelling youth climate messages on social and traditional media.
- 1.A: Increase number of students who can attend the strike. 2.A: Increase students' ability and opportunities to deliver key messages when giving interviews.
- Rent a bus; buy supplies for posters; buy a large banner; hold a media training; rent a megaphone; reserve an AirB&B; order swag with key msgs; post-strike activities.

# Bonus Pro-tip

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→ Magic sentence structure:

◆ “My organization/project [aims for what goal] through/by [strategies]”

OR

◆ “My organization/project [uses what strategies] to [aim for what goal]”

# Bonus Pro-tip

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→ E.g.:

- ◆ This project will increase pressure for aggressive climate action through amplifying the youth climate movement.
- ◆ Breach Collective advances climate justice through locally-driven campaigns rooted in grassroots organizing, legal advocacy, and human stories.
- ◆ Namati advances social and environmental justice by building a movement of people who know, use, and shape the law.
- ◆ The Power Shift Network mobilizes the collective power of young people to mitigate climate change and create a just, clean energy future and resilient, thriving communities for all.



take a  
moment!

# Key Parts of a Concept, LOI, or Proposal

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- What specific problem are you trying to address? (“Problem Statement” or “Issue Statement”)
- What are you proposing to do about the problem? (“Proposal narrative” but sometimes that means the whole document that includes all of these components)
- What impact will the project have, and how do you plan to measure it? (“Monitoring and Evaluation” or “M&E”)
- Why are you the right organization to do this project? (“Capacity Statement” or “Organizational Capacity”)

# What is “Monitoring and Evaluation”

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- How will you decide if your project was a success?
- How are you promising the donor they can hold you accountable?
- What scale are you proposing? (e.g., how many rallies? How many trainings? How many schools?)

# Example “M&E” Metrics or Indicators

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- 3 trainings provided for activists who will engage in direct actions
- 5 social and educational events organized for residents and out-of-town activists
- 6 media trainings for residents who will give interviews for the media
- 1 media messages toolkit created for residents and activists for social media posts
- 100 phone calls to local officials before a key city council hearing demanding they publicly oppose the oil terminal



# Use “SMART goals”

S

**Specific**

Make your goals specific and narrow for more effective planning.



M

**Measureable**

Define what evidence will prove you're making progress and reevaluate when necessary.



A

**Attainable**

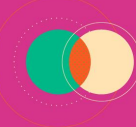
Make sure you can reasonably accomplish your goal within a certain timeframe.



R

**Relevant**

Your goals should align with your values and long-term objectives.



T

**Time-based**

Set a realistic, ambitious end-date for task prioritization and motivation.

# Planning Your Time

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- Think through your logic model for what you want to pitch or propose, so you can talk about strategy. If you can brainstorm with people (and write the proposal with them), even better.
- Pay close attention to any proposal instructions and the funder's priorities.
- Make drafts and ensure you have time to rewrite and revise, if at all possible.
- Good writing is communication, so it's a social effort. Build in time for feedback, including from someone who wasn't directly involved in writing the proposal. Brief them on the proposal instructions and funder priorities so they know the reason for your framing.

**Thank you!**

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