

# Wpf-Unesco Indonesia

Input on fundraising

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# Overview

0 Overview of people involved

1 Fundraising



## 0 A wide range of people / organizations have been involved

Type of organization	Name of person / organization
<b>Fundraising</b>	<ul style="list-style-type: none"><li>• Depaul UK (Kate Wareham)</li><li>• Words that Count / Southern Africa Institute of Fundraising (Melanie Brink Jackson)</li></ul>
<b>Homeless people</b>	<ul style="list-style-type: none"><li>• Stichting De Ontmoeting (Meinke Balfoort)</li><li>• Stichting Wielewaal (Laura van de Ven)</li><li>• De Hoop ggz (Melvin Uittenbogaard)</li><li>• Stichting Dak- en Thuislozenzorg Menorah (Ben Bloem)</li><li>• Stichting De Tussenvoorziening (Peter ten Cate)</li><li>• Juvans (Dorieke Wewerinke)</li><li>• Kessler Stichting (Taïs Van Vijnckt)</li></ul>
<b>(Disadvantaged) children</b>	<ul style="list-style-type: none"><li>• Teach for America (George Dong)</li><li>• Mercy Centre (Jason Yeo)</li><li>• Stichting Het Vergeten Kind (Jolijn van Spaendonck)</li><li>• Stichting Jarige Job (Amber Merkus)</li></ul>
<b>Disabled people</b>	<ul style="list-style-type: none"><li>• Samarthanam Trust for the Disabled</li></ul>
<b>Healthcare</b>	<ul style="list-style-type: none"><li>• Cliniclowns / Clown Care Netherlands (Dominique Knaepen)</li></ul>



# Overview

0 Overview of people involved

1 Fundraising



# 1 *Fundraising: overview* – Rules of thumb

NGOs should preferably diversify type of donors

- As different types of donors are impacted by different external factors, e.g. economic vs political vs other factors
  - Behavior of same type of donors is often correlated

Too high donation tickets should be avoided

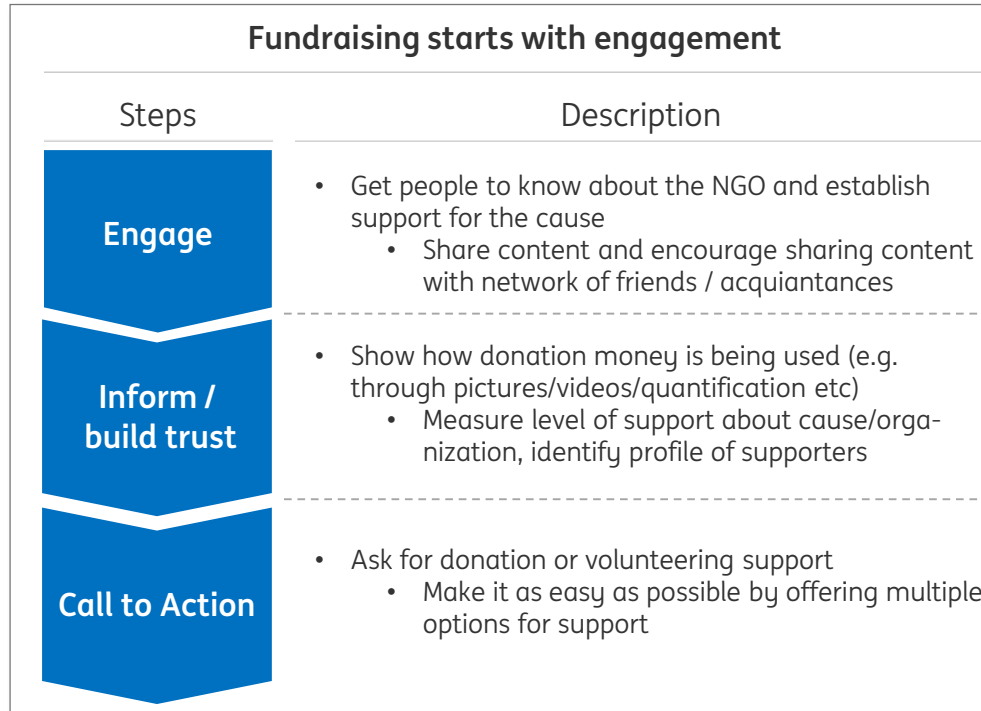
- Given dependency on donation and potential funding gap if donation is terminated
  - Cut-down of operations is painful for beneficiaries









Social enterprise funding should be preferred over donation funding

- Social enterprise funding has proven more sticky given tangible service/product in return for money provided



# 1 Fundraising: overview – Framework



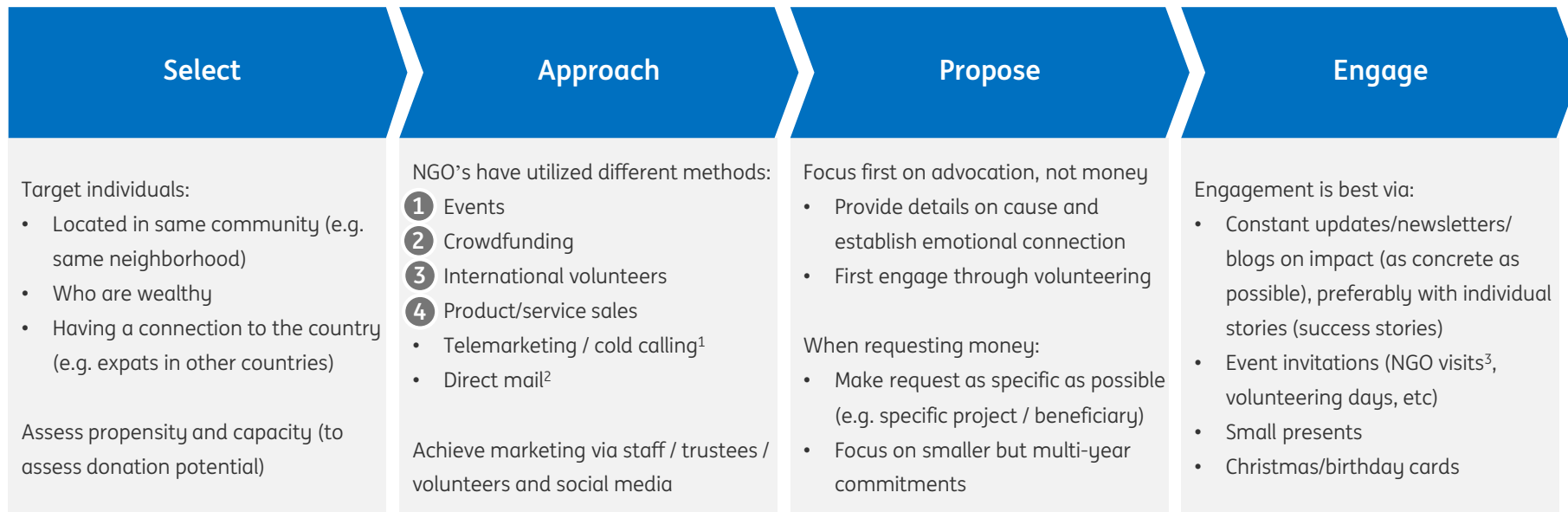
Preferred donors differ for small vs large NGOs		
Likelihood of donating	Large NGO	Small NGO
a Individuals		
b Companies		
c Foundations/embassies		
d Government		

e/f/g/h/i/j

For fundraising also the following elements are important: other income generating activities, CRM, strategic partners, fundraising professionals, and unrestricted funding, and KPIs



## 1a Fundraising: individuals - Overview



Fundraising campaign can be strengthened by endorsement from celebrity or extensive exposure in the media

1) Are mostly successful for famous NGOs or NGOs with emotional cause (e.g. child cancer). Typically telemarketing is most successful with older potential donors;  
2) Was successful in the past, but effectiveness dropped due to overexposure; 3) Have beneficiaries tell their life stories and how the NGO helped them;



# 1a Fundraising: individuals - Events

● implies limited resources,  
◐ implies significant resources

Context	Event	Detailing	Resources required	Financial impact
<b>Main reason for events is community visibility</b> <ul style="list-style-type: none"> <li>Most events typically require too many resources</li> </ul> <b>Preferred type of events depend on type of NGO</b> <ul style="list-style-type: none"> <li>Grassroot: open house, auction/raffle, speaker, sports, etc</li> <li>Other: fancy, networking, presentation project results</li> </ul>	Open House / speaker event	People are welcome to visit NGO <ul style="list-style-type: none"> <li>Potentially with external or NGO speaker</li> </ul>	◐	◐
	Fancy event	E.g. dinner, comedy show, musical, orchestra etc	◐	●
	Auction / raffle	Auctions / raffles for goods, for example produced by beneficiaries of NGO	◐	◐
	Sport event	Walk / run / swim / etc for a social cause	◐	◐
	Other	E.g. networking, organization of party, skills workshop, etc	TBD	TBD

- The best events are events organized by a different organization (with NGO as beneficiary)
- It is optimal to organize different types of events to attract a varied audience (e.g. 3-4 per year)





# 1a<sup>2</sup> Fundraising: individuals – Crowdfunding: overview

## Best practices on crowdfunding per topic

Platform / website	Preferably (a) local <sup>1</sup> , (b) with significant traffic, (c) where donations can be kept even if goal is not achieved, and (d) with high functionality <sup>2</sup>
Messaging / visuals	Campaign should outline benefits, uniqueness, past results and large amount of visual evidence: videos, pictures, mock-ups, etc
Marketing	Campaign should be launched with a buzz through social networks, retweets, potential coverage on related professional networks or (local or national) media through press releases
Target amount	Is a balance of how much is required for a medium-size investment vs what likely amount of donations <sup>1</sup> <ul style="list-style-type: none"><li>• Rule of thumb: in the US, USD 10,000 often seems a suitable amount<sup>4</sup></li></ul>

A crowdfunding campaign can potentially be supported by agencies, providing end-to-end content, creatives and publishing

## It is optimal to...

**...launch one campaign per year on days of giving**

- E.g. Thanksgiving, Christmas, etc

**...have a specific donation goal**

- E.g. specific purchase / project

**...not have zero donations for too long**

- Own money can be invested
- Friends and family can be asked for pre-campaign funding

1) To avoid transfer costs to donate money from other country; 2) E.g. for payments, visualization/presentation, tailoring, etc; 3) # of people reached x % of people that donate x average donation (determine giving tiers for this, based on giving ability); 4) Assuming most to come from friends, family, closest followers












# 1a<sup>2</sup> Fundraising: individuals – Crowdfunding platforms: decision funnel

Fundraising methodology	Features	Level of customization	Pricing	Other aspects
Donation-based: most platforms	Software integration (e.g. CRM and payments)	Add logo and change color scheme	Platform fees (% of funds raised)	Customer support (fundraising and/or technical support)
Rewards for donations <sup>1</sup>	Shareability (on social media)	Placement of videos, photos and text	Processing fees	Trust (Incl. level of PCI compliance <sup>6</sup> and BBB rating <sup>7</sup> )
Item sales (e.g. t-shirts, hats, etc) <sup>2</sup>	Mobile responsiveness (for mobile phones)	Giving levels <sup>4</sup>	Upfront fees	Speed of pay-out (ranging from 2 to 14 days)
Peer-to-peer lending / investing <sup>3</sup>	Management (automatic sending receipts and goal tracking)	Incentives	Donor's tips <sup>5</sup>	
	Acceptance of payment methods	Post updates on page (to boost giving)		

1) E.g. Kickstarter; 2) E.g. Bonfire; 3) E.g. PeerFinance101; 4) To show how certain amount of money is being used; 5) E.g. with YouCaring and GoFundMe; 6) For example Facebook and GoFundMe have the highest level, but Fundly does not; 7) Better Business Bureau rating on responsiveness to customer's complaints



# 1a<sup>2</sup> Fundraising: individuals – Crowdfunding platforms: overview

Suitability	Platform	Keep what is raised? <sup>1</sup>	Monthly traffic	Ease of use <sup>2</sup>	Only social?	Pricing		Strengths / USPs
						Platform	Processing	
		✓/✗ <sup>4</sup>	~2.3mln	9.5	✗	5%	2.9%+30c	Very easy to use platform
		✓	~750k	8.6	✓	4.9%	2.9%/3%+30c	Largest social platform, fully customizable, top-notch integrations and mgmt tools
		✓	~320k	N/A	✓	5-7% <sup>5</sup>	3%	Globally large social platform
		✓	~20k	N/A	✓	5%	2.1-3.9% <sup>6</sup> +27c	Asia's largest social impact platform, 14 local currencies
		✓/✗ <sup>4</sup>	~1.6mln	7.8	✗	5%	3%+30c	One of the earliest platforms
		✓	~160k	8.3	✓	4.9%	2%+30c	N/A
		✗	~3.1mln	8.6	✗	5%	3-5%	Largest global platform
		✗	~13k	8.2	✓	5%	3%+30c	Min tipping point <sup>8</sup> vs funding goal
		✗	~400k	8.9	✗	5%	3%+30c	Large platform in Asia-Pacific

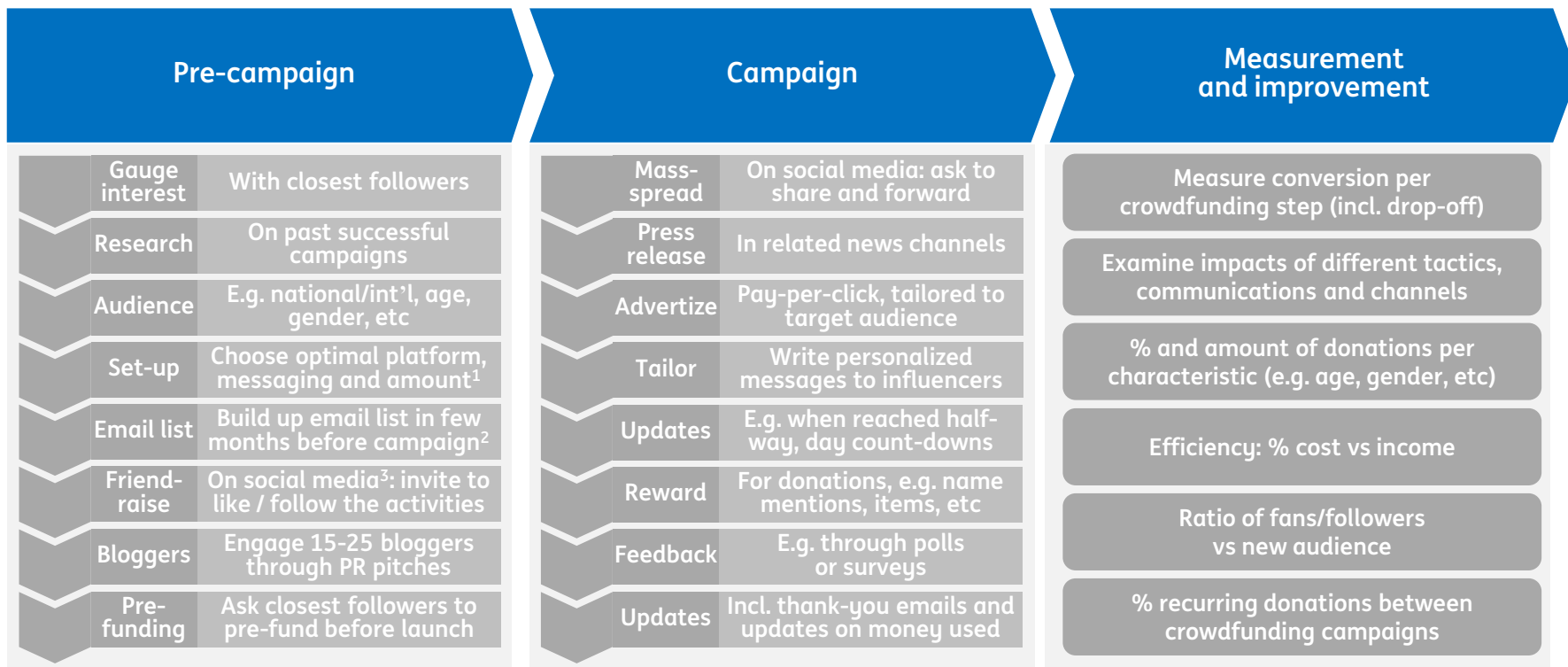
Scope: international platforms | However, it is optimal to use a local page to avoid significant money transfer fees

Note: includes pages mentioned as most suitable for social organizations and that are not exclusively for 503 (c) NGOs.

1) Vs all-or-nothing; 2) Rated by CrowdsUnite; 3) Other than credit card, Paypal, or Visa/Mastercard debit; 4) Creator can choose; 5) 5% if US/UK-registered, 7% otherwise; 6) 2.1% for domestic credit card vs 3.9% for international c.c.; 7) 8% if goal is not reached; 8) Amount at which project can proceed;



# 1a<sup>2</sup> Fundraising: individuals – Crowdfunding: suggested activities



1) See crowdfunding overview page; 2) Rule of thumb: at least 2,000 e-mail contacts before campaign; 3) At least on Facebook, Instagram, Twitter, Pinterest and Youtube



# 1a<sup>3</sup> Fundraising: individuals – International volunteers

● implies limited effort,  
◐ implies significant effort

Suitability	Channel	Description	Suggested marketing strategy		Financial results	Effort
	Own distribution	Use social media (FB/IG/etc) for marketing of program	<b>For all:</b> <ul style="list-style-type: none"> <li>Highlight program benefits (incl. differentiation)</li> <li>Justify pricing (what value is delivered)</li> <li>Use many visuals (photos and videos)</li> <li>Show stories of beneficiaries</li> <li>Display past volunteer stories</li> </ul>	Post in groups and invite for direct contact (e.g. Whatsapp or Skype)	◐	◐
	Word of mouth	E.g. request past volunteers to source new volunteers		Potentially financially reward for successful placement	◐	◐
	Volunteer websites <sup>1</sup>	Allows to market program directly to potential volunteers		Choose website/agency with: <ul style="list-style-type: none"> <li>Significant traffic</li> <li>Attractive pricing</li> <li>Match with candidate preferences</li> <li>Options to display much of NGO characteristics</li> </ul>	○	◐
	Volunteer agencies <sup>2</sup>	Matches volunteers to program based on preferred geography and sector <sup>3</sup>			○	◐

1) E.g. [www.volunteerhq.org](http://www.volunteerhq.org), [www.workingabroad.com](http://www.workingabroad.com), [www.volunteerinternational.org](http://www.volunteerinternational.org), [www.goabroad.com](http://www.goabroad.com), [www.gooverseas.com](http://www.gooverseas.com), [www.globalvolunteers.org](http://www.globalvolunteers.org), [www.projects-abroad.org](http://www.projects-abroad.org); 2) E.g. <http://www.govoluntouring.com>, [www.geovisions.org](http://www.geovisions.org); 3) Does not mention name of NGO



# 1a<sup>3</sup> Fundraising: individuals – International volunteers

● implies limited effort,  
◐ implies significant effort

Suita- bility	Offering	Description	Financial results	Effort
	Accom- modation	Accommodation in local hostel or at home of person related to organization (e.g. with Airbnb)	◐	◐
	Food	Offering breakfast, lunch, dinner and snacks (easy if organization provides food to beneficiaries)	◐	◐
	Language courses	Offering beginner course: course material and somewhat experienced teacher is required	◐	◐
	Dance classes	Offering beginner course on local dance	◐	◐
	Touristic tours	Offering guided tours with guide who can tell stories of the location	◐	◐

**Pricing of program is often all-in...**

- Allows for easier mark-up on price components

**...on weekly basis...**

- As volunteers join in multiples of weeks

**...and commercial**

- Can be justified given social cause

Some elements can best be offered with partner provider (e.g. for language, dance or tours)

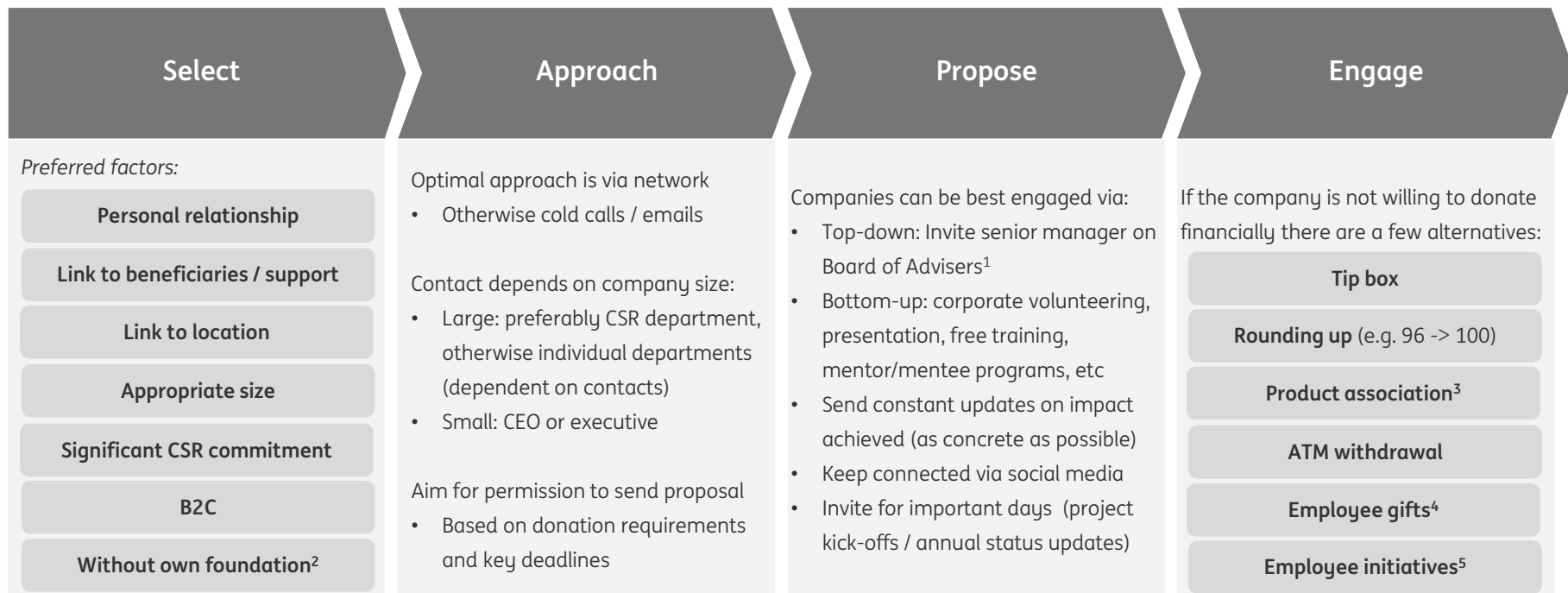


## 1a<sup>4</sup> Fundraising: individuals – Product/service sales

Rules of thumb	Description
Optimal type of product/service depends on type of NGO	<ul style="list-style-type: none"><li>• Large/famous: e.g. logo on any small household product</li><li>• Small/grassroots: e.g. artesanal products (e.g. wristband, ring, etc) or services performed by beneficiaries</li><li>• Advocacy/litigation: e.g. tickets for speaker events</li></ul>
Events are the easiest distribution channel	<ul style="list-style-type: none"><li>• Given possibility to establish an emotional connection with the donor</li><li>• A physical or digital shop is often less successful<ul style="list-style-type: none"><li>• People do not actively look to buy for NGO products</li></ul></li></ul>
It is preferred to hold catalogue for goods offered	<ul style="list-style-type: none"><li>• NGO would act as sales intermediary and not hold inventory<ul style="list-style-type: none"><li>• Is more cost efficient, creates less uncertainty and does not require to have storage space</li></ul></li></ul>



## 1b Fundraising: companies - Overview



Large companies typically work with 5-10 NGOs, often for 3-5 years per NGO

1) Potentially in combination with give-or-get (requiring to either donate or to collect donations); 2) In case the foundation has own social impact operations on ground and does not look for technical partner; 3) Monetary donation per product sold; 4) Employee can choose to receive gift or to donate monetary equivalent; 5) Employees to undertake initiatives to raise money for NGO (e.g. with marathons etc)

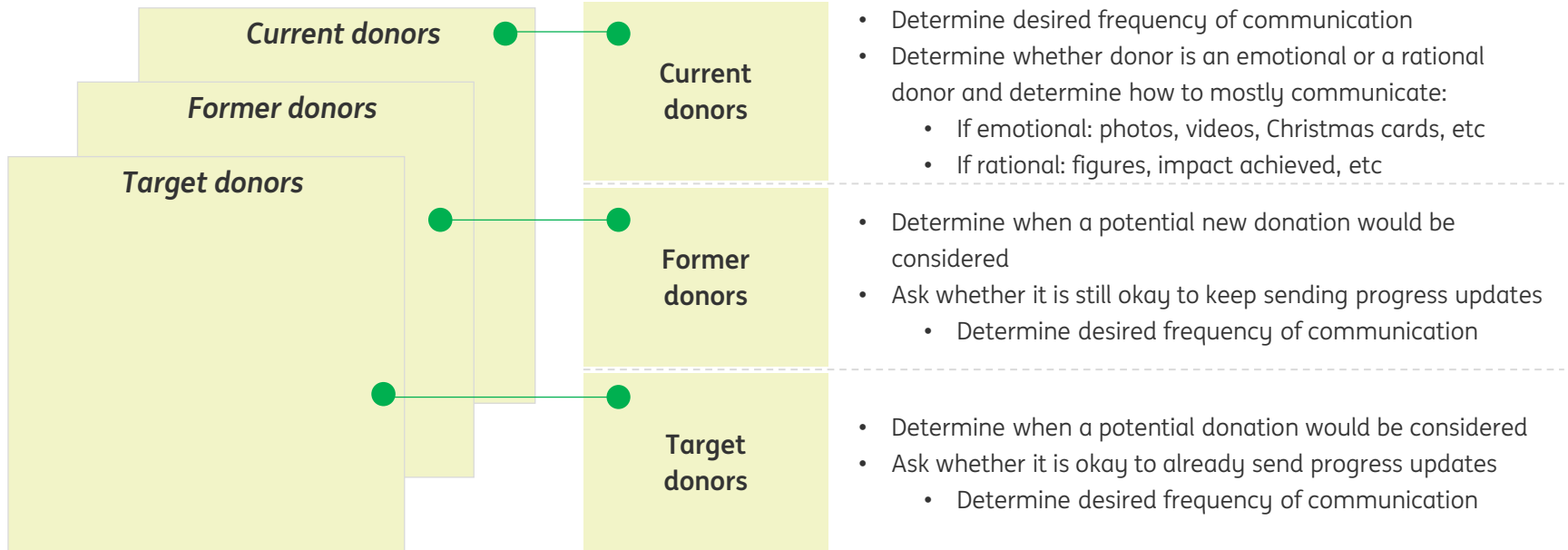




## 1b Fundraising: companies – Differentiated communication strategy

3 Excel tabs...

...with a differentiated communication strategy



## 1b Fundraising: companies – Pitch

Suggested elements	
Vision / mission	<ul style="list-style-type: none"><li>Incl key objectives<ul style="list-style-type: none"><li>E.g. measurable impacts in 3-5 years</li></ul></li></ul>
Organization's capacity	<ul style="list-style-type: none"><li>Incl. resources and assets (people, financial, etc) and summary of key personnel</li></ul>
Beneficiaries	<ul style="list-style-type: none"><li>Identify prioritized groups to be reached</li></ul>
Activities / logic model	<ul style="list-style-type: none"><li>Include a picture / visual representation of framework or model for project</li></ul>
KPIs	<ul style="list-style-type: none"><li>Describe expected results of the program and key criteria to evaluate</li></ul>
Business plan	<ul style="list-style-type: none"><li>Identify link between resources required and social service delivered</li></ul>
Budget	<ul style="list-style-type: none"><li>Include all projected income (monetary but also in kind) and projected expenses<sup>1</sup></li></ul>
Communication plan	<ul style="list-style-type: none"><li>Plan to engage stakeholders, e.g. community and donors</li></ul>

Highlight...
...community / social media visibility (e.g. FB/IG/etc)
...good governance (no fraud)
...organizational track record (past results / impact / awards)
...beneficiary satisfaction
...cost efficiency (efficient provision of services)
...other past or current donors

1) Salaries, office, rent, utilities, phone, computer, equipment, travel



## 1c *Fundraising: foundations/embassies* – Rules of thumb

Rules of thumb	Description
Foundations often prefer to support larger NGOs	It is more cost efficient to provide larger tickets (less NGOs have to be selected) and with larger NGOs there is less perceived chance of fraud
There is significant reporting required	<ul style="list-style-type: none"><li>• On past impact achieved, good governance and project budgeting, especially with UN-based/affiliated organizations (given significant scrutiny by donors)</li><li>• Application process can be very lengthy and can require large amount of work</li></ul>
Donation commitments from foundations can be more consistent than from embassies	Donation commitments from embassies can often change with a new government policy or in case of a natural disaster in the country of the embassy

**It is crucial to subscribe to grant posting websites<sup>1</sup>  
(scoping based on criteria related to your NGO)**

1) Grant posting websites often communicate new funding opportunities by email (given scope of NGO)



## 1c *Fundraising: foundations/embassies* – Elements of proposal (I/II)

Elements		Description
Overview	Cover letter	<ul style="list-style-type: none"> <li>• Include important info: e.g. RFA/grant name, proposal name, agency name</li> </ul>
	Abstract / executive summary	<ul style="list-style-type: none"> <li>• Summarize proposal in 1 page: devote at least one sentence to every sub-section</li> </ul>
Context	Statement of problem/goal	<ul style="list-style-type: none"> <li>• E.g. by including public records/indicators to stress importance</li> <li>• Stress that problem/goal is important for community (e.g. surveys, assessments)</li> </ul>
	Description of community	<ul style="list-style-type: none"> <li>• Describe geographic area, population and other relevant characteristics</li> <li>• Describe intended beneficiaries, including relevant characteristics</li> </ul>
Intention	Mission and objectives	<ul style="list-style-type: none"> <li>• State vision to deal with problem / goal</li> <li>• State key behavioral objectives for project (e.g. measurable impacts in 3-5 years)</li> </ul>
	Organization's capacity	<ul style="list-style-type: none"> <li>• Incl. resources and assets (people, financial, etc) and summary key personnel</li> <li>• Show organizational development (how long around, how grown, etc)</li> </ul>
	Community's capacity	<ul style="list-style-type: none"> <li>• Community's assets and resources and level of readiness</li> <li>• Describe support from other organizations and achievements so far</li> </ul>
	Beneficiaries	<ul style="list-style-type: none"> <li>• Identify prioritized groups to be reached</li> <li>• Describe the approaches to be used to reach the prioritized groups</li> </ul>

Recommended to submit a proposal of 10-20 pages



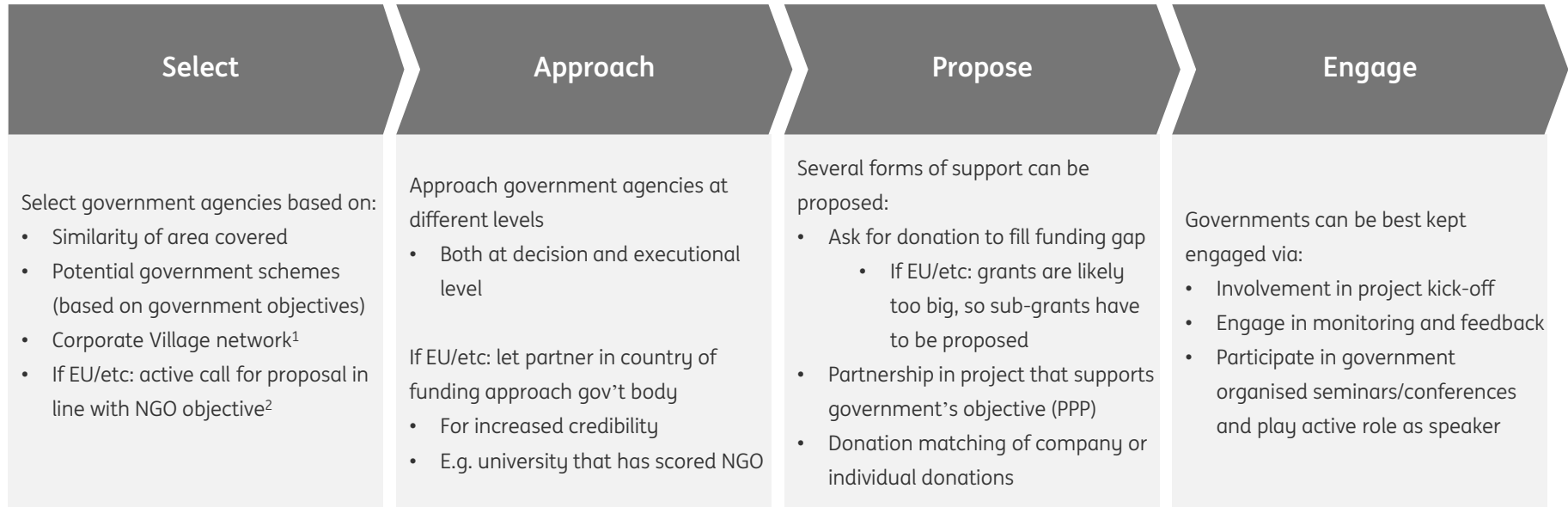
## 1c *Fundraising: foundations/embassies* – Elements of proposal (II/II)

Elements		Description
Methods	Resources / barriers	<ul style="list-style-type: none"> <li>Describe key stakeholders who could potentially support</li> <li>Describe potential sources of resistance, and how it could be reduced</li> </ul>
	Project activities	<ul style="list-style-type: none"> <li>Describe the activities to be carried out, in detail</li> </ul>
	Logic model	<ul style="list-style-type: none"> <li>Include a picture / visual representation of framework or model for project <ul style="list-style-type: none"> <li>Incl. context, inputs, activities, intended effects, outputs</li> </ul> </li> </ul>
	Intervention and action plan	<ul style="list-style-type: none"> <li>Include implementation timeline, with how resources are intended to be used over time (potentially in Appendix)</li> </ul>
Evaluation	KPIs	<ul style="list-style-type: none"> <li>Describe the expected results of the program by the end of the funding period <ul style="list-style-type: none"> <li>What is success for project? What are key criteria used to evaluate?</li> </ul> </li> </ul>
	Measurement	<ul style="list-style-type: none"> <li>Indicate data to be gathered to evaluate on performance</li> <li>Indicate how performance results will be used for decision making on project</li> </ul>
Financials	Business plan	<ul style="list-style-type: none"> <li>Identify link between resources required and specific activities / services / products to be offered</li> </ul>
	Annual budget	<ul style="list-style-type: none"> <li>Include all projected income (monetary but also in kind) and projected expenses (salaries, office, rent, utilities, phone, computer, equipment, travel)</li> </ul>

Potentially include Appendix, e.g. with Letters of Support and other evidence for proposal elements










## 1d Fundraising: government - Overview



1) E.g., Utrecht (4th largest city in the Netherlands) has ~20 partner cities that it supports with donations; 2) NGOs can be notified by alerts



## 1e Fundraising: other income generating activities

Initiative	Offer	Feasibility	Impact
Charge for offered services	Install co-pay model <ul style="list-style-type: none"><li>Beneficiaries pay a small proportion of the cost</li></ul>		
Sell IT best practice	Sell IT model developed for operations		
Sell model	Sell model to other NGOs or government, given 25 years of track record <ul style="list-style-type: none"><li>E.g. when NGOs or governments want to launch similar model</li></ul>		
FISA	Achieve Future Income Sharing Agreement with beneficiaries <ul style="list-style-type: none"><li>Beneficiaries donate back the moment they start working in the future</li></ul>		
Consultancy	Give advice to related organizations on treatment insights		
Selling of data	Sell 25 years of data on relative effectiveness of social practices <ul style="list-style-type: none"><li>E.g. to new similar NGOs, government, etc</li></ul>		



## 1f Fundraising: CRM – Overview

### There are several advantages of a CRM system

Advantages	Description
<b>Tailored fundraising</b>	<ul style="list-style-type: none"><li>Given info on donor preferences (sector, geography, ticket size) and availability (when money is available)</li></ul>
<b>More tailored event planning</b>	<ul style="list-style-type: none"><li>Event invites can be tailored to specific benefactors to avoid spamming</li></ul>
<b>Find volunteers based on skills</b>	<ul style="list-style-type: none"><li>Given possibility to communicate to interested based on people's professional profiles</li></ul>
<b>Knowledge/data retention</b>	<ul style="list-style-type: none"><li>For a smoother transition in case of FTE changes</li></ul>

### ...And there are several considerations to choose a system

Advantages	Description
<b>Price</b>	<ul style="list-style-type: none"><li>Price is typically \$20<sup>1</sup> - ~100's / month</li><li>However, many CRM vendors have free options for limited number of users</li></ul>
<b>Features</b>	<ul style="list-style-type: none"><li>Many CRM packages have specializations for specific functions, e.g. fundraising, advocacy or volunteer recruitment</li></ul>
<b>Level of tailoring/integration</b>	<ul style="list-style-type: none"><li>To improve efficiency and consistent look &amp; feel of external communication</li></ul>

1) For example NonProfitEasy and Batchbook





## 19 *Fundraising: strategic partners* - Overview

Strategic partner	Examples
Fund request partners	<p>E.g. universities in geography of grant that can endorse impact of NGO</p> <ul style="list-style-type: none"><li>• Especially relevant in case fund request is done in different (e.g. with EU grant)</li><li>• The partner typically receives a mgmt fee for being fund request partner</li></ul>
Value chain partners	<p>E.g. with companies or other NGOs in next step in value chain, as this enhances the impact the NGO makes</p>
Facilitation agencies	<p>E.g. agencies that help with crowdfunding campaign (such as United Way / CAF), etc</p>



## 1h *Fundraising: professional fundraisers*

Typically only larger NGOs hire professional fundraising experts

- As professional fundraising salaries should maximally be ~3% of NGO budget and as fundraising professionals are expensive

Smaller NGOs typically hire fundraising consultants, larger NGOs full-time staff

- Smaller NGOs typically do not have the resources to finance full-time staff
- Larger NGOs typically prefer full-time staff, given more dedication to specific NGO, culture alignment, and learning benefits

Professional fundraisers are often highest paid in the NGO and have highest turn-over

- In many developing countries professional fundraisers often:
  - Earn more than CEO of the NGO
  - Stay only for 1 - 2 years with an NGO

Professional fundraisers typically get base salary + flexible pay-for-performance

- As NGOs can often not finance expensive professional fundraisers and can keep the cost lower by proposing variable pay
- Salary is hardly ever completely flexible and is often against profession codes



## 1i Fundraising: unrestricted funding

### Unrestricted funding is important, but hard to obtain

Categories	Description
<b>What is unrestricted funding?</b>	<ul style="list-style-type: none"> <li>Funding that can be spent on any NGO purpose: projects or admin/overhead<sup>1</sup></li> <li>Funding from foundations and companies is often restricted</li> </ul>
<b>Why is it important?</b>	<ul style="list-style-type: none"> <li>Allows to invest in organization<sup>2</sup> or to respond more quickly to changes<sup>3</sup></li> </ul>
<b>Why do donors prefer restricted?</b>	<ul style="list-style-type: none"> <li>Preference for more control over spending (in line with ext' communication)</li> <li>Easier to measure results of donation</li> </ul>



### Hence, NGOs can choose several strategies


Strategies	Description
<b>More unrestr. beneficiaries</b>	<ul style="list-style-type: none"> <li>E.g. more money from individuals, small/medium-sized companies, etc</li> </ul>
<b>More social business</b>	<ul style="list-style-type: none"> <li>Higher reliance on selling products or services (e.g. consulting, microfinance, etc)</li> </ul>
<b>Unr. funds for performance</b>	<ul style="list-style-type: none"> <li>Unrestricted funding in case pre-defined KPIs are met</li> </ul>
<b>Providing optionality</b>	<ul style="list-style-type: none"> <li>Donor can choose whether prefers to donate restricted or unrestricted<sup>4</sup></li> </ul>
<b>Reallocate costs</b>	<ul style="list-style-type: none"> <li>Allocate more overhead/admin costs into project costs</li> </ul>

Suggested suitability

1) Staff salaries, rent, furniture, computers, fundraising costs, utilities, insurance, etc; 2) E.g. in fundraising and other overhead, giving pay raise to high-performing individuals; 3) Without having to first check with donors; 4) E.g. American Red Cross gives options to give unrestricted, or for "Disaster Relief," "Where it is needed most," or "Your Local Red Cross."



# 1j Fundraising: KPIs / impact measurement - Overview

Type of data		Type of sub-data	Applicable?
Aggregate metrics	a Financial	Statistics on money raised, costs, and efficiency	✓
	b Non-financial	Statistics on support provided, staff, and donors	
	c Social media	Number of visitors, likes, shares, comments, etc	
	d Fundraising	Conversion rates, donor retention, recurring gifts, etc	
Beneficiary metrics	e Beneficiary satisfaction	Measures on how happy beneficiary is with support, on several dimensions	 <p>Only in case of:</p> <ul style="list-style-type: none"> <li>• A clear beneficiary</li> <li>• Significant solo impact</li> </ul>
	f External evaluation	Measures observed improvement of beneficiaries across selected dimensions	
	g Before/after	Measures statistics on selected dimensions before vs after support was provided <sup>1</sup>	

1) For example income of beneficiary,



# Fundraising: KPIs / impact measurement – Financial/non-financial

Frequency	Monthly / quarterly
Goal	Analyze trends through over months / quarters
Financial	Non-financial
<ul style="list-style-type: none"> <li>• Money raised               <ul style="list-style-type: none"> <li>• Breakdown in type of donations / income and channel (online vs offline)</li> <li>• Average gift size</li> <li>• Recurring gift %</li> <li>• Pledge fulfillment %</li> <li>• % donation vs giving capacity</li> </ul> </li> <li>• Costs:               <ul style="list-style-type: none"> <li>• Breakdown in type of costs: operational vs overhead</li> <li>• Program expense growth</li> </ul> </li> <li>• Efficiency               <ul style="list-style-type: none"> <li>• % spent on beneficiaries (vs admin)<sup>1</sup></li> <li>• Cost efficiency of fund-raising per activity (ROI)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Support provided:               <ul style="list-style-type: none"> <li>• Number of beneficiaries + successes</li> <li>• Number of hours of service provided</li> <li>• % attendance children</li> </ul> </li> <li>• Staff: employees vs volunteers               <ul style="list-style-type: none"> <li>• Number of staff</li> <li>• Staff / beneficiary ratio</li> <li>• % sick leave</li> </ul> </li> <li>• Donors               <ul style="list-style-type: none"> <li>• Donor growth</li> <li>• Retention rate</li> <li>• Conversion rate in donation funnel</li> </ul> </li> </ul>

<sup>1</sup>) Preferably higher than 80%



# Fundraising: KPIs / impact measurement - Fundraising

Metrics		Description
Donation metrics	Gifts secured	<ul style="list-style-type: none"> <li>Broken down in donor type (individual / company / foundation / government), channel (offline vs online) and monetary/in-kind</li> </ul>
	% donation vs giving capacity	<ul style="list-style-type: none"> <li>Based on an estimation of the giving capacity of donors</li> </ul>
Retention metrics	Donor retention rate	<ul style="list-style-type: none"> <li>% donors that have given more than 1 time</li> </ul>
	Recurring gift %	<ul style="list-style-type: none"> <li>% of gifts from recurring donors</li> </ul>
	Average gift size growth	<ul style="list-style-type: none"> <li>To track traction with donors</li> </ul>
	Donation / donor growth	<ul style="list-style-type: none"> <li>Both in euros and # of donors, measured monthly and annual</li> </ul>
Communication metrics	Conversion rate	<ul style="list-style-type: none"> <li>Rates on opening, click-through, acts on call-to-action, opt-out</li> </ul>
	Outreach rate	<ul style="list-style-type: none"> <li>Frequency of getting in touch with donors</li> </ul>



## Fundraising: KPIs / impact measurement - Beneficiary satisfaction

Frequency	Every ~2 months
Question structure	Scoring on 1-10
Metrics	<ul style="list-style-type: none"><li>• Extent that services provided match preferences of beneficiary</li><li>• Happiness with amount of services provided</li><li>• Impact of services on ability to do things beneficiaries deems important</li><li>• Impact of services on ability to make better decisions about one's life</li><li>• Extent comments / complaints are incorporated</li><li>• Politeness of employees / volunteers</li><li>• Extent employees / volunteers listen to beneficiary</li><li>• Time employees / volunteers take for beneficiary</li><li>• Extent employees / volunteers take beneficiary serious</li><li>• Extent employees / volunteers explain something in understandable manner</li><li>• Extent beneficiary can reach employees / volunteers when support is needed</li></ul>



# Fundraising: KPIs / impact measurement - External evaluation

## Examples of metrics

- Physical health
- Mental health
- Societal participation
- Social network
- Activities in daily life
- Performance in school
- Frequency of contact with police
- ...

## Scoring overview for selected metrics

Metrics	1 – Acute issue	2 – Not self-reliant	3 – Limited self-reliance	4 – Sufficient self-reliance	5 – Fully self-reliant
<b>Societal participation</b>	No participation at all, survival modus	Isolated / no social skills / no motivation	Barely participating / lack of social skills to participate	Some participation (e.g. support group), but hindrances	Active participation
<b>Social network</b>	Absence of support from family/friends, only wrong friends	Some family/friends, but cannot support client	Some support from family / friends, however limited	Sufficient support from family / friends, few wrong friends	Healthy social network, no wrong friends
<b>Activities in daily life</b>	Serious limitations on self care and complex activities	Important problem on self care (food, hygiene, dressing)	Basic self care on all aspects, but not more complex (e.g. work)	All basic and complex activities, but small issues (disorganised)	No problems, functions well on all levels

Overview is meant as example

