Resource Mobilization for Civil Society Organizations in a Digital Context

Resource Mobilization

of resources for

Civil Society Organizations

in a Digital Context

Session #2

Connecting to Make an Impact Keys to Success with Donors

2025

1. Introduction

This workshop, "Connecting to Make an Impact: Keys to Success with Donors," is designed for CSO staff responsible for resource mobilization and partnership building. This session is the first of two interconnected parts, focusing exclusively on the "before" of the proposal: the art and science of building relationships. The guiding principle is that a strong, well-cultivated relationship is the indispensable foundation for any successful proposal. We understand that approaching donors and writing proposals are two sides of the same coin; therefore, this session and the next are mutually reinforcing and should be viewed as a complete cycle for effective resource mobilization.

During this workshop, we will focus on demystifying the outreach process, transforming it from an intimidating task into a relational strategy. By the end of this session, participants will be able to:

- **Design** a strategic outreach plan for a potential donor organization, justifying the selection and structure of the request ("The Ask") to maximize alignment.
- **Apply** research and planning techniques to prepare effective meetings, anticipating the donor's interests and possible objections.
- **Evaluate** the coherence of an outreach plan, judging how relationship-building strategies underpin a future funding decision.

Session 2 Script: Connecting for Impact - Donors

Minute	Slide number	Facilitator activity/action	Key Technical Content	Strategy/Methodology	Notes for facilitation
0-10	1-4	**Welcome and Objectives.** Project Slide 1 (Title). Welcome participants. Use Slides 3-4 to review the session objectives.	Purpose and objectives of the session. Emphasis on relationship building as the basis for financing.	Explanation + Visual framing.	Be very direct and energetic to set the pace. Clarify that this session focuses on the "relationship" and the next one on the "proposal."
10-25	5-6	**Explain the basis: Trust and Contact.** Use Slide 6. "We will move from 'hard selling' to a natural relationship." Discuss contact strategies: direct, "warm bridges," role of the CEO.	Trust vs. "hard sell." The value of prior research. Strategies for timely and professional initial contact.	Conceptual presentation + Dialogue.	Key phrase: "Trust is the currency of our industry." Use the slide content to elaborate on each point and ask the group about their experiences.

25-50	7-8	**Planning and Preparation.** Use Slide 7 to explain the importance of preparation. Launch Activity #1: "Donor Organization Research."	Strategic timing. Clear purpose of the meeting. Research the donor's history, interests, and possible objections. Eligibility.	Conceptual presentation + practical group activity.	This is the central activity. Ensure that the groups understand the research task. Circulate to answer questions and maintain focus.
50-65	9	**Expectation Management and Commitment.** Use Slide 9. Discuss what happens after the meeting. "Courtesy is not a promise." Explain how to demonstrate impact and transparency.	Post-meeting expectation management. Long-term engagement strategies: ongoing communication, demonstration of impact, financial transparency.	Conceptual overview.	Keep this section concise but impactful. Key phrase: "The relationship does not end with the donation; that is where the real work of trust begins."
65-85	10, 14	**The Moment of Truth: "The Ask."** Use Slide 10. Explain the importance of rehearsing and being specific. Launch Activity #2: "Shark Tank."	The request as a value investment offer. The importance of practice, clarity, and the value of asking for feedback.	Exposure + Modeling + Hands-on activity in groups.	Model a 1-minute pitch before sending groups off. The goal is quick practice and constructive peer feedback.
85-90	15	**Closing and Next Steps.** Project Slide 15. Summarize the key points: Confidence, Preparation, Clarity. Thank participants and announce the transition to Session #3 on proposals.	Recap the key points of the session.	Closing and transition.	End on time, reinforcing that they now have the tools to build the relationship, which is the prerequisite for the next session.

Appendix 1: Worksheet: Donor Contact Strategy

Name of Potential Donor: ___________________________________

Date Prepared: __________________

I. Research and Preliminary Contact:

- Are there any personal/professional connections with this donor organization?
  - Yes: Who? _________________ How can they help? _________________
  - No: Executive Management will lead the contact.
- People in my network with experience with this donor organization:
  - _________________ (Key advice: _________________)
- Key information about the donor organization (interests, history, other causes):

II. Approach Planning:

- Is my project concept sufficiently mature? YES / NO
- Main purpose of the meeting (clear and concise message):
- Professionalism: Points to remember (dress code, language, punctuality):

III. Preparation for the Meeting:

- Specific research on the person I will be meeting with:
- Possible concerns, fears, or objections of the donor organization:
  - _________________ (Answer: _________________)
  - _________________ (Answer: _________________)
- Meeting structure:
  - Small talk (topics): _________________
  - Transition to the cause: _________________
  - The Request ("The Ask"): _________________
- Key eligibility question (if applicable):

IV. The Request ("The Ask"):

- Key points of my presentation (memorize):
- The specific request (amount, project, etc.):
- Don't beg for money: I am offering a valuable investment opportunity.

V. Post-Meeting and Follow-up:

- Questions to solicit feedback:
  - "What are your impressions of our proposal?"
  - "Do you have any advice for us in this process?"
- Manage expectations: Politeness is not a yes.
- Follow-up plan:

Session 2 Activities

Activity #1: Donor Organization Research (Group Exercise)

- **Objective:** Practice quick, collaborative research skills to identify alignment and points of contact with a potential donor.
- **Estimated time:** 25 minutes (5 min explanation, 15 min group work, 5 min sharing).
- **Instructions for the facilitator:**
    1. **Explanation (5 min):** "Now we are going to simulate the first step before any contact: research. In groups, you will choose a donor organization that is new to you and conduct quick online research."
    2. **Group work (15 min):** Divide people into groups of 3-4. "Your task is to find the following information about the donor you chose: 1) Their mission and how it aligns with yours. 2) At least one similar project they have funded in the past. 3) A key contact person, if possible. 4) Any past or present calls for proposals."
    3. **Sharing (5 min):** "When you return, each group will share in 1 minute the name of the donor they researched and the most important or surprising finding they discovered."

Activity #2: "Shark Tank: Preparing the Approach" (Group Exercise)

- **Objective:** To synthesize the research into a clear and persuasive verbal pitch to justify approaching a donor.
- **Estimated time:** 20 minutes (5 min explanation/preparation, 10 min group practice, 5 min sharing).
- **Instructions for the facilitator:**
    1. **Explanation (5 min):** "We are going to practice how to present the rationale for an outreach. Imagine that you have ONE MINUTE to convince your Executive Director why you should contact the donor you researched and what the clear purpose of that first meeting would be."
    2. **Group practice (10 min):** Keep the same groups. "Each person will take turns presenting their 1-minute pitch. The other people will offer feedback focused on two things: Was the alignment clear? And was the purpose of the meeting convincing?"
    3. **Sharing (5 min):** "Upon returning, one volunteer per group will share the most useful advice or the greatest learning they received from their colleagues."
