How to Research and Identify New Donors for your NGO
About the Author

Dr. Saumya Arora is a development professional with cross-disciplinary experience in project management and execution at the grassroots level, resource mobilization and fundraising, donor relationship management, capacity building of non-government organizations and community based organizations. Saumya has been successful in raising funds from a wide range of national and international donors, and possesses in-depth knowledge of the fundraising and resource context for developing countries.
Table of Contents

Need for Researching Donors for your NGOs: ................................................................. 3

Section 1: Donor Mapping and Identification ................................................................. 4
  1.1. Overall Fund Seeking Strategy: ........................................................................ 4
  1.2. Starting Donor Mapping: .................................................................................. 6

Section 2: Donor Research: Tools and Techniques .................................................. 8
  2.1. Role of research: .............................................................................................. 8
  2.2. Key Considerations: The 4 Cs: ....................................................................... 9
  2.3. Tools and Techniques: ..................................................................................... 11
    2.3.1. Donor Profiles: ........................................................................................ 12
    2.3.2. Prospect Table: ....................................................................................... 12
    2.3.3. Prospect ranking index: .......................................................................... 13

Section 3: Application Process and Considerations: ........................................... 15
  3.1. Understanding the Application Requirements: .............................................. 15
  3.2. Checking Document Requirements: ............................................................... 15
  3.3. Checklist: ....................................................................................................... 16


Ethics and Principles: A Short Note: ...................................................................... 18

List of Figures

Figure 1: Grant Cycle ................................................................................................. 4
Figure 2: SSOR Process ............................................................................................ 18

List of Tables

Table 1: Donor Mapping Matrix Template ................................................................. 7
Table 2: Prospect Table template with Donor Profile Rows .................................... 13
Table 3: An example of Prospect Ranking Index .................................................. 14
Table 4: Sample Checklist for Grant Application ................................................ 16

www.fundsforngos.org
How to Research and Identify New Donors for your NGO

Simple, Practical and Effective Ways to Find Donors for your Good Cause

This book offers your NGO a plethora of much needed resources in a simplified manner and shows you how to take the first steps towards effective fundraising - right from researching new donors to making sure you win the bet. This book contains strategies, tips, tools and resources that combine both the bird eye view and operational aspects of the efforts to help you do it all yourself.

Need for Researching Donors for your NGOs:

It is a widely accepted fact that funding is the key requirement of a non-profit organization or non-government organization (NGO). We are sure you understand the reasons why your organization both needs and merits funding - to further the mission and values of your NGO, to run and implement the programs and projects, to plan for future programs, to ensure you hire and retain your amazing staff, and to spread the word about your work.

But as the core competency of an NGO like yours lies in doing what it does best- social good; fundraising takes a backseat until there is a drop in funding or number of funders. Because of this reactive approach, many NGOs squander numerous potential fundraising opportunities. It is important to understand that no matter how impactful your work is or how many funders and donors believe in the cause of your work, your NGO can not get the funding for the programs until and unless you set yourself up for much needed efforts towards fundraising! Mastering the techniques and strategies of raising funds is something your NGO must strive for. This book is filled with practical and highly effective collection of recommendations to help you find support for your cause.

While this book is intended to make your efforts easier around fundraising techniques pertaining to researching and identifying donors, you will have to work with this book to make it work for you. Before you start, let us give you a caveat, it is neither something that can be done overnight nor something that can be solved with a cookie-cutter approach. What works for another organization might or might not work for yours. There is no one-size-fits-all in the development sector and fundraising is no different. We hope the resources and tools in this book help you devise your own strategies and plans so that you get impactful results in fundraising as good as your NGO does in its programs.

Note: While there can be hundreds of ways to find support for your NGO, this book is primarily focused on institutional giving (foundations and funding agencies).
Section 1: Donor Mapping and Identification

As an NGO which is doing great work at the grassroots, but is struggling to find and retain donors, where should you start your donor research and identification? The answer is just a little brainwork away. You need to start mapping your donors - let us call them prospects at this stage. There can be various prospects for you like foundations, funding agencies, Government agencies and grants, etc. The first step is to finalize your NGO’s overall fund-seeking strategy. Once that is in place and agreed, steps like prospecting, mapping and research on donors follow. Let’s get started!

1.1. Overall Fund Seeking Strategy:

At the outset, it is a prerequisite for you to know your requirements. You would agree that this can be done by identifying your NGO’s immediate/short-term or long term funding needs. For that, you need to ascertain which project or program you seek funds for. As the grant cycle below shows it in a pictorial manner, begin with identifying the need and estimating the requirement:

Figure 1: Grant Cycle
This is a cycle for your NGO and thus, various projects will require these steps at various stages. At the stage of identifying your need, you have to ask yourself what your strategy is going to look like. There are two major ways to begin:

1. Looking for RFPs (Request for Proposals related to grants) focusing on your thematic area or geography where you work; or
2. Looking for funds and expanding or diversifying your work and strategy accordingly.

For example, you might be an NGO working for women empowerment in Uganda and you come across a grant proposal prospect which is having the same focus as yours- a USAID grant for women empowerment. This scenario is as in point 1, and is the most common way of starting the search. This allows the NGO to stay focused on its core competency whether it is theme-wise or geography-wise. The downside though is you have a limited prospect bracket to explore.

In scenario 2, you could be an NGO working in India in an administrative state but as you see opportunities for funds, you consider expanding and diversifying from your current focus areas and geographies. This would mean you can have access to a wider range of donors but the limitation is that you will not have the thematic expertise or geographical experience which might put you on the lower preference on the list of donors. But both these strategies can work for different NGOs. You can pick either of them, and there is no right or wrong choice. Not having prior experience in a particular domain can also put you on the radar of the donor. You must keep trying till you succeed! This is the mantra for eventual success.

Another way of strategizing your fund-seeking is looking for government grants or foundation grants. In many countries, government grants come with their own sets of terms and conditions. You have to see that for your NGO. Ask yourself whether a government grant success will come with caveats that could affect your NGO’s autonomy or effectiveness of current programs. Therefore, you need to weigh the pros and cons of every opportunity associated with the funding agency and type of funding. You can even go for a composite strategy for various programs of your NGO- depending on the rationale and understanding of the pros and cons of each.

One important thing to remember is that your NGO must not depend on only one source of funding. In these times, where NGOs are multiplying in numbers and so is your competition for that share of the
pie, you should have a long-term diversification strategy in place for seeking and raising funds. Bear this in mind when you proceed to the next steps.

1.2. Starting Donor Mapping:

Once you have an overall idea of your fund seeking strategy, the next step is to look for grants and opportunities with that perspective. Mapping of prospects- agencies/ government grants/ foundation etc. will be very helpful at this stage. Why Donor Mapping? Simply because for NGOs, time is money! Mapping your donors will help you strategize and focus your time and energy by understanding the aspects which make some opportunities/ funding organizations better fit for your requirements as compared to others.

Please bear in mind here that donor mapping and donor research are different as defined in this resource book. Donor mapping simply gives you the breadth of your prospect pool, while donor research will enable you to understand your prospects in depth. Mapping is the starting step that helps you put on paper and visualize the number of potential prospects you can explore. It sheds light on the categories of donors based on their areas of interest, geographical preference or presence, typical budgets, etc.

Once you start aggregating this information, you will clearly have an idea of the following:

- Which prospects can be explored further for detailed profiling by research
- Which prospects are high/ medium/ low priority as per parameters set by you
- Which opportunities are low hanging fruits and need immediate attention
- What your short term/ long term timelines should be, and so on.

Donor mapping is also a way of control. Based on aspects like eligibility criteria, theme, geographical focus, etc., this process can help you refine donor research that will follow this step.

How you want to do this- is up to you. Typically, an excel sheet or a google sheet dashboard can be maintained with brief information about the prospects. first sheet can have this summarized version, and you can add sheets in the same file with more detailed information as you proceed with your research.
Here is a template for your reference to maintain this record - called the Donor Mapping Matrix:

Table 1: Donor Mapping Matrix Template

<table>
<thead>
<tr>
<th>S.No.</th>
<th>Donor Prospect Name and Category</th>
<th>Key Focus Areas/Themes</th>
<th>Geographical Presence/Focus</th>
<th>Funding Mechanisms</th>
<th>Current Partners or Projects Funded</th>
<th>Typical Budget/Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>USAID, UNESCO, etc. <em>(Bilateral Agency/ Multilateral/ Alliance/ Foundation...)</em></td>
<td>Human Development, Health, Education...</td>
<td>Donor emphasis on which geography/ current funding focus...</td>
<td>Any open opportunities for seeking funding, timelines notes..</td>
<td>Understanding of current partners/ typical projects funded</td>
<td>If information available</td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Hence, donor mapping is like a dashboard that would have a summary of your prospects/ donors, while donor research will be more in detail but guided and informed by your donor mapping sheet as described above.

**Quick Tip: Color coding and comments in excel/ google sheets:**

Color coding of your donor mapping table will help you in quickly eliminating/ selecting prospects for further research, while will also help your staff/ colleagues in identifying green/ amber/ red ones. (E.g. Green can be high priority ones, red could be delayed for next year and so on). This may also help you in maintaining a log of all your decisions related to further fundraising with the rationale you can make comments about.
Section 2: Donor Research: Tools and Techniques

Donor research involves great amount of strategy and thought-through approach. No ready-made tool or technique can do this for you, as it requires strategic thinking in the context of your NGO. But in this section, we will understand the ways you can customize these strategies, approaches and techniques for your NGO.

2.1. Role of research:

Detailed research about your prospects is crucial for your fundraising efforts. It enables you to understand the priorities of the donors to set yourself up for the application process. Remember that it would not be an easy task to get funding and it would take great amount of effort on your part. But it will all be easy if you channelize your efforts. It is also important to start thinking about how well the different pieces of the jigsaw puzzle of development sector fit in! Building and maintaining relationships with donors and prospects can help in putting the jigsaw pieces together in the right order. You can reach your goal faster if you make sure you build good relationships along the way. This is possible only if you conduct good research with the end goal in mind.

Once you have a broad idea of your donor prospects in the form of your donor mapping matrix as per the exercise in the previous section, you can explore the prospects (green ones!) in depth and detail. There are many online donor databases which you can explore for detailed information. If you do not know where to research- Google! Start by bookmarking the grant/ funder aggregator sites and funding agency sites. Set up calendar reminders to look them up regularly. Many of the online search databases offer filtering and sorting features that come handy to make the process quicker and easier for you.

A smart trick is to check out other NGOs working in the same sector/ geography to find out who their donors are. Like in the context of business organizations, it is important for non-profits also to understand and study the competitors. When we use the word competitor, we do not mean it in the literal sense. We all agree that every non-profit is working for social good and there is only congruence and coherence and no competition. But when it comes to funding, surely you have competition out there. Most organizations might overlook this aspect, but it is important to analyze this aspect. With so
many NGOs clamoring for funds, it is important to understand the competition to pitch your organization project in front of the funder. So seeking information about where other NGOs in the same sector as yours are getting funds from, is actually a good strategy. There are many online directories and search databases to help you search this information. For example, in the context of India, NGO Darpan is one such portal, which has a central repository of NGOs in India. Registered NGOs can get access to government grants under the schemes of various Ministries and Departments. In Kenya, one such portal is NGO Coordination Board that regulates the NGO sector in Kenya. Most of the countries have such portals in some format- government regulated or NGO sector operated, directory format or regulatory requirements, etc. For a wider coverage, WANGO (World Association of Non-Government Organizations) is a directory of NGOs world-wide.

Third way of conducting this research is to look at common platforms for NGOs and donor agencies. Some examples are GiveIndia in the context of India or Guidestar, an online search engine with information about US based donors interested in some other specific countries. It also has information about other NGOs which post requests online. We also recommend visiting websites of individual organizations once you shortlist those organizations as most important ones.

To summarize this section, you have 3 main ways to conduct your research:

1. To look up your prospects/ donor agencies/ foundations
2. To begin your research by seeking information about other NGOs and their sources of funds
3. To explore the NGO-donor organization common portals or search engines.

Quick Tip: Check out FundsforNGOs:
Go no further! At Funds for NGOs, we offer these services to our premium members which makes us your one stop solution. Check out our online database of donors, sort and filter the results as you require, and you are good to go.

2.2. Key Considerations: The 4 Cs:

Researching for grants needs to be conducted in a strategic manner. There is no shortcut approach to guide you through this, but there are some key aspects you need to consider to make it strategic. Here are the key considerations to look for to help you with this process- let us call them the 4 Cs:
1. Coherence:

It is important to search the like-minded organizations to seek support for your NGO to increase your chances of building the relationship with them. This coherence can be in the form of same thematic areas or the cause they support, geography or type and magnitude of support you seek and they offer. Your donor research must focus at understanding the mission, vision and values of the donor organization so that you can figure out which ones definitely check all or most of the boxes towards this coherence and convergence you seek.

2. Capacities:

It would be helpful to look at the projects and organizations these donors have funded in the past and the ones they are funding currently to get an idea of the magnitude of the support. This will help you in understanding their capacities and to judge whether it is worthwhile to approach them and to judge the size of the project you can pitch to them.

3. Calendar:

Look at their calendar and start preparing as per the timeline. In your donor map and research sheet, the calendarised view of donor agency timelines will help you in prioritizing your approach. For example, if the timeline for this year’s grant of a particular donor agency A has gone last month, put it on lower priority for now (color coding will come handy for this- or put comments) and you can re-look at this prospect next year as per the calendar.

4. Checkboxes of Eligibility:

Lastly and most importantly, check the eligibility criteria for applying for all your prospective opportunities to seek funds. If you do not fulfil the eligibility criteria for a particular grant funding, it makes sense to make a note in your prospect sheet. It could be a red-marked column or box. We advise against taking it out completely from your sheet and suggest flagging it instead. You have to consider both scenarios- current and future. To elaborate, let us assume the donor agency requires you to have a particular certification you do not have as of now, but you have applied for it. So even if you do not fulfil the eligibility criteria now, you can check this box eventually. You might want to revisit the opportunity in that case. In addition, pursuing the opportunity helps you in going ahead and start building a relationship with an agency you strive to partner with, but do not fulfil the criteria as of now. It is
advisable to pursue and nurture the relationship as first steps on the ladder till you are prepared to take the further steps.

We have to reiterate here that there cannot be a ‘one-size-fits-all’ approach in this process and you have to work the strategy and approaches as per your NGO, your requirements and priorities and your context. Therefore, it is important for you to work with your team and/or your board to make decisions about these steps.

Box 1: Case Study

Consider an NGO working in Kenya towards ending tuberculosis (TB) in children. Let us call the NGO ‘End TB’. This NGO is seeking funds for its TB prevention and treatment projects. End TB has an idea of its project requirements in all the aspects before it starts looking for funds- project theme and expected outcome, geographical focus, overall project budgetary requirement, other resource requirement, etc.

With this context background, End TB should search for donor agencies which support health programs and preferably in infectious diseases or TB context. It should also look for donor agencies active in the geographical area End TB is operating in. Once it finds such organizations, End TB must also look at the typical grant size the donor agency can provide- as per their historical donations.

With all these checkboxes ticked, End TB can find out the ideal choices for donor agency prospects, and can actively start pursuing them- which would mean searching for opportunities, filling applications, building relationships and submitting grant proposals to round up the fundraising cycle.

The bottom line is Research, Research and more Research! As you must have understood by now, the process will be time consuming but it is of paramount importance, and it will pay off.

2.3. Tools and Techniques:

Once you have your prospect list as per your donor map and have agreed on the key considerations, you’ll need to organize all relevant information at one place. You can use tools like Microsoft Excel or Google Drive/ Google Sheets or Google Docs to record all this information. While technology can help
you better understand the giving potential of these donors, it can’t help you create this list. You need to take time out to do this, and also to revisit and update this information from time to time. There are two ways to do it: either maintains separate sheets in the file you made your donor mapping matrix sheet; or create separate files. You can also make one composite ‘Prospect Table’ with all this information or you can maintain individual tables for each prospect. It is up to you. Let us call these individual detailed sheets as ‘Donor Profiles’.

2.3.1. Donor Profiles:

A typical profile for your potential donor will be a snapshot of key information, including their contact, giving information, as well as their financial capacity. Most of this information can be found on the websites of these organizations, their annual reports or other public records like tax documents, organizational information sections on databases or portals, etc. Depending on how big your prospect list is and how much human resource or capacity you have, individual in-depth research can be done for these organizations. The deeper you dig, the better and more useful information you can get. The more information you have, the more understanding you can develop for the 4Cs as explained above. All this eventually boils down to better chances at securing that funding you strive for.

2.3.2. Prospect Table:

A typical prospect table will have summarized or detailed donor profiles of all your prospects. It is a sound practice to maintain this table as a living document, which means revisiting this regularly and updating it as and when required. This will also help you in setting clear tasks and timelines for yourself and your team. In long run, this document can serve as very important artefact of institutional memory and as a testimony of building a culture of continuous research.

You can allocate prospects to your team members for contacting or starting the process as per action items required. Remember to be strategic while doing this. For example, someone in your board will be ideal to touch base and build a relationship with a very big donor agency to ensure credibility. Make sure you involve your team in planning this. Networking will also be very helpful in getting more detailed and reliable information and also to triangulate your findings from other sources like internet. To help you
with this process, here is a sample of a typical Prospect Table (This is a compiled table sample where you can put donor profiles in this template in separate rows):

<table>
<thead>
<tr>
<th>Donor Prospect Name</th>
<th>Key Focus Areas/Themes</th>
<th>Geographical Presence/Focus</th>
<th>Financial Information</th>
<th>Contact Information</th>
<th>Action Items</th>
<th>Responsible Person</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile 1: USAID, UNESCO, etc.</td>
<td>Human Development, Health, Education...</td>
<td>Donor emphasis on which geography/current funding focus...</td>
<td>Information about typical budgets or funding provisions in the past/current year</td>
<td>Contact information like email/contact number with the name of contact person</td>
<td>Steps in the form of action items</td>
<td>The person in your team the prospect is allocated to</td>
<td>Deadline or timeline to apply/to start steps as per action items</td>
</tr>
<tr>
<td>Profile 2:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 2.3.3. Prospect ranking index:

While the above system of profiling your prospects is very effective and efficient, taking time and resources available to you and your staff into consideration, the term ‘profiling’ actually has a deeper meaning to it. If you wish to profile your prospects in a way that helps you record the information in a comprehensive yet complied manner, you can consider using a ‘Prospect Ranking Index’. This is not a mandatory step, but if you have a bigger staff team and/or have dedicated team members undertaking donor research dedicatedly, it is worthwhile to make this step an integral part of your donor research process to help you maintain a very systematic and comprehensive donor research database of your own. The way this index would work is explained in detail:
It would entail allocating a numerical value to each aspect—focus area, geographical presence or focus, budget, and so on. The numerical value would be in a range—e.g. on a scale of 1 to 3, an organization with singular and same focus area can have 3, the highest value assigned to it, while an organization with your focus area as one of multiple areas can have 1 as the value. Similarly, an organization with more budget will be assigned a higher numerical value. The weighted average of these values can give you a composite score value—your prospect rank!

Let us take an example to understand this: (You can develop your own scale and score as per your context). There is an NGO working in the state of Maharashtra in India towards public health domain, seeking INR 25 lakhs for their programs. In their prospect table, they come across one donor agency called GiveFunds. GiveFunds is operating in Maharashtra in public health domain and have been supporting multiple NGOs in the locality. Their funding budget is INR 3 crores this year. Taking this particular example, we are using this scale:

Table 3: An example of Prospect Ranking Index

<table>
<thead>
<tr>
<th>Aspect and numerical values assigned</th>
<th>3</th>
<th>2</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thematic Area</td>
<td>Same thematic area supported</td>
<td>Public health as one of thematic areas supported</td>
<td>Different thematic areas supported so far</td>
</tr>
<tr>
<td>Geographical focus</td>
<td>Same geographical focus</td>
<td>Not the current focus but in previous years</td>
<td>Not the focus</td>
</tr>
<tr>
<td>Budget</td>
<td>&gt; INR 2.5 crore</td>
<td>INR 1-2.5 crores</td>
<td>INR &lt; 1 crore</td>
</tr>
</tbody>
</table>

Assigning a number to each of these aspects as per the table, GiveFunds is getting a composite score of 9 (3+3+3). It would rank higher in the donor prospect table as compared to others as this is the highest score as per this example of scale and score. As you can see, this gives a quick picture of the likelihood of securing funding from this prospect.

If this works for you, devise your own score as per your priority aspects when researching a donor prospect. You can adopt this process if you are sure that you have the bandwidth to do this in terms of

www.fundsforngos.org
Section 3: Application Process and Considerations:

We now arrive at the most critical operational aspect of your grant seeking cycle—application process. Once you have shortlisted the prospective donors/ funders, you might want to understand their application process and requirements in detail. Consider the timeline for the application while planning this process. It can be helpful to keep an internal deadline well before the actual deadline to make sure you do not land up in nervous nineties and complete the process with the best of your capabilities.

3.1. Understanding the Application Requirements:

The first step is to go through their website or web-page where the application is listed. Creating a working document with the application fields helps start writing the application. See what documents are required for the application, so that you can start putting them together. You might also require coordination with multiple departments within your organization to compile all the required information, so it is always best practice to understand the complete application process and to send specific requirements to respective teams within the organization. This will prove to be very efficient for you as meanwhile you can work on the application while you receive the required information and documents.

3.2. Checking Document Requirements:

Certain grant applications might require your NGO to have particular documents in order. For example, if you are an NGO working in India, most of the donor agencies look for documents like 80G certificate (which grants the donors making gifts to a particular NGO with 80G the ability to avail of a tax deduction on the donations) or a 12A certificate (which is a one-time exemption from paying income tax). As per the new laws in India under the Foreign Contribution Regulation Act (FCRA) 2010, an NGO must have an FCRA certificate to be eligible to secure foreign funding. Make sure you have checked all the document requirements, and then you can check with your legal team about them. If you do not have certain documents in place, which are mandatory for the application, it makes sense to put that prospective
application on hold till you secure the required set of documents. You can observe that at each stage, your prospect table sheet will be in use. Make sure you keep it updated.

Some grant applications might require recommendations and testimonials from your previous or current donors. This is more common in case of corporate foundations or donors. You might have to write to your current/previous donors seeking these testimonials in time to complete your application as per the deadline.

3.3. Checklist:

Despite trying our best to keep everything in order, making sure we complete the application as per the timeline, we might miss out on some important information simply due to high pressures, tight timelines and time-bound targets. To avoid any oversight that could cost us dear, it is important to keep a checklist of every step required to complete our grant application. This process will be an additional tell you whether you should apply or not apply now, or should you do it later, based on the documents required/specifications as per application requirements. So remember to make a checklist to ensure you are ticking all the boxes when applying. A sample checklist is ready for your reference:

Table 4: Sample Checklist for Grant Application

<table>
<thead>
<tr>
<th>S. No.</th>
<th>Application Steps and Document Required</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Application document on google drive shared with key team members involved</td>
<td>✓</td>
</tr>
<tr>
<td>2.</td>
<td>Detailed Logframe and activity plan</td>
<td>✓</td>
</tr>
<tr>
<td>3.</td>
<td>Team structure for proposed project</td>
<td>X</td>
</tr>
<tr>
<td>4.</td>
<td>Timeline and Evaluation Framework</td>
<td>X</td>
</tr>
<tr>
<td>5.</td>
<td>Project Budget</td>
<td>X</td>
</tr>
<tr>
<td>6.</td>
<td>Recommendation Letters</td>
<td>X</td>
</tr>
<tr>
<td>7.</td>
<td>Audited Financial Statements for previous 3 years</td>
<td>X</td>
</tr>
<tr>
<td>8.</td>
<td>Registration/ Incorporation Certificate</td>
<td>✓</td>
</tr>
</tbody>
</table>
Section 4: Systems and Processes: A Quick Guide (SSOR):

If you have reached this section and you have followed all advice as per your context so far, you are almost there at the finalizing stage of your fund-seeking and securing process! You have a clear idea of your roadmap to secure funding for your cause and now you are just a few steps away. At this stage, you have to ensure you forge ahead systematically and as per your big plan by building a system to engage the identified and shortlisted prospects. Going forward from planning stage to implementing stage, there are a few steps to help you as a quick guide for putting your systems and processes in place. We are only touching upon this topic here to ensure you have the complete view of the full circle you will have to undergo in this journey. Remember it is a cycle! So there is no stopping at failures- reflect and strategize again! Let us call this guide the SSOR Guide. SSOR stands for Strategize, Systematize, Operationalize and Reflect.
Figure 2: SSOR Process

At the strategizing stage, you have made your donor maps, prospect table with key donor/prospect profiles. At systematizing stage, you have made sure you have a system in place for starting the process—you have allocated the prospects to your team, you have clear timelines and deadlines in place, and you are sure of the next steps as per the process.

It is now time to operationalize your plan. An operational plan must have an answer to both scenarios—the Yes’s and No’s. Visualize this in the form of a flowchart. If you get green signal at the first touch point with a prospect, you go to the next step—perhaps fixing a face-to-face meeting. If you do not, make sure you have a plan B! As the cycle suggests, reflect and strategize again. Even if you complete a grant cycle journey by securing the funds or you do not, make sure you follow up and seek feedback. A continuous feedback cycle and learning loop is the key to success. Try and try till you succeed.

Ethics and Principles: A Short Note:

While it is in the best interest of your NGO to do everything you can to seek and secure the funding it deserves, there is one aspect mostly forgotten in the quest of winning that much coveted grant. This aspect of ethical fundraising is important for every NGO to understand. It is required of a fundraiser/grant-seeker to get all the insider and reliable information to increase the chances to crack the grant application. But it is also important and ethical to remember to seek information which the donor is willing to share and not to be intrusive while trying to find out contacts and more information about the organization.

In this process, we need to remember not to succumb to the pressures leading to sub-par fundraising practices and standards. This is why it is important to build and maintain good relationships with your current, previous and also prospective donors. Do not underestimate the power of good relationship with an organization which might not be funding your NGO currently. Make that phone call, write that email to them, invite them to your annual fundraising gala, offer them a visit to your program areas to meet your beneficiaries or to give them more information about what you do.
When you have set sights on your prospects, the process begins, which is not limited to securing funding within the given timeline in that google sheet of yours. Let this be the beginning of a long-term mutually beneficial relationship by putting yourself on the radar of every relevant donor out there. This is where your journey towards a long-term sustainable fundraising plan begins. Happy fundraising!