

Resource Mobilization for Civil Society Organizations in a Digital Context

Session #5

Communications Decoded Building a Plan that Connects, Motivates, and Inspires

2025





Resource Mobilization for CSO in a Digital Context

Session #5 Communications Decoded: Building a Plan that Connects, Motivates, and Inspires

1. Introduction

This workshop, "Communications Decoded," is designed for leaders and teams of Civil Society Organizations who need to transform their fundraising outreach from a series of disconnected tactics into a cohesive, goal-driven strategy. This workshop can also be applied to any communications campaign beyond fundraising, such as advocacy or behavior change. Often, organizations feel overwhelmed by the need to constantly communicate, which can lead to reactive decisions or "analysis paralysis," wasting valuable resources on initiatives not fully aligned with their fundraising goals or capacity.

The objective of this session is to equip participants with a visual, collaborative framework to systematically build a strategic communications plan. The guiding principle is to move from discussion to action in a structured way.

During this hands-on session, participants will learn a process to:

- **Analyze** their fundraising landscape by distinguishing between internal assets and external factors.
- **Formulate** a core fundraising message for a specific donor segment by integrating audience values, organizational solutions, and a compelling call to action.
- **Construct** an actionable communications plan by selecting appropriate messengers and tactics that are logically aligned with a defined SMART goal and a specific donor persona.

By the end of the workshop, each participant will not only have a drafted, informed plan for a key fundraising initiative but will also have mastered a replicable method for future strategic communications challenges.

Session Script & Guide #5 Communications Decoded Building a Plan that Connects, Motivates, and Inspires

Minute	Slide #	Activity/Facilitator Action	Key Technical Content	Strategy / Methodology	Facilitation Notes
0-5	1-4	Welcome and Objectives. Project Slide 1 (Title). "Welcome to 'Communications Decoded.'" Use Slide 3 to review the overall session objective. Use Slide 4 to detail the specific learning objectives.	Purpose and benefits of a strategic communications framework for fundraising.	Explanation + visual, purpose-setting.	Reaffirm how the session will move from "idea" to a "concrete action plan." Connect the objectives with a tangible outcome for participants.



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Minute	Slide #	Activity/Facilitator Action	Key Technical Content	Strategy / Methodology	Facilitation Notes
5-10	5-8	Introduce the Strategic Framework. Use Slides 5-8 to explain the logic of the 7-step roadmap, based on the 5-step Spitfire model. "This map will guide us. It's a linear process where each step builds on the last."	Logic of the framework: Goal setting precedes analysis, which precedes audience-centric messaging and tactical planning.	Conceptual exposition + visual.	Use the metaphor of a map or GPS. "Before we plan the route (the How), we have to be certain of our destination (the Why and Who)."
10-15	9	Establish the Foundation: Goals. Explain SMART Goals & Objectives. Launch Activity #1. "Your goal is your North Star. Let's make it concrete."	The SMART framework (Specific, Measurable, Achievable, Relevant, Time-bound) as applied to fundraising goals and objectives.	Individual reflection, practical application.	Frame this as the essential first step. Keep the time strict to build momentum and ensure everyone has a foundation for the rest of the session.
15-20	10	Survey the Landscape: Context. Explain the internal/external scan. "Now, a strategic gut-check. Let's briefly assess our landscape."	Situational analysis: identifying internal strengths/weaknesses and external opportunities/threats.	High-level brainstorming, environmental scanning.	This is a quick mental exercise, not a deep dive. The goal is to get participants thinking realistically about the environment their plan will live in.
20-40	11-13	Identify the Audience + Activity. Explain the critical importance of a specific audience. Launch Activity #2 (Donor Persona). "This is the heart of our work. Let's get specific about WHO we're talking to."	Moving from demographics to psychographics. Understanding audience values, motivations, and barriers to giving.	Divergent thinking, collaborative brainstorming, empathy mapping.	This is the centerpiece activity. Circulate and prompt groups to dig deeper than surface-level answers. "Why do they value that? What's the story behind that belief?"
40-60	14-16	Formulate the Message + Activity. Introduce the Message Box framework. Launch Activity #3 (Core Message). "With a clear WHO, we can now craft the WHAT."	The Message Box framework: Problem, Solution, So What?, Call to Action. Connecting organizational needs to audience values.	Convergent thinking, practical application of insights.	Emphasize that the "So What?" is the bridge to the persona's values. Reinforce that the Call to Action must be a single, clear request.



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Minute	Slide #	Activity/Facilitator Action	Key Technical Content	Strategy / Methodology	Facilitation Notes
60-75	17-20	Select Messengers & Tactics + Activity. Explain the role of messengers and tactics. Launch Activity #4 (Brainstorm Delivery). "Now, let's figure out HOW to deliver this powerful message."	Principles of messenger credibility and effective tactical selection based on audience habits.	Rapid brainstorming, creative problem-solving.	Frame this as a high-energy, rapid-fire activity. The goal is to generate a menu of practical options quickly.
75-85	21	Define Success & Build the Plan. Explain Measures and the Summary Plan. "Let's make this real and actionable." Facilitate the final individual work session.	Distinguishing between outputs and outcomes. The importance of a written plan and specific next steps for accountability.	Synthesis, strategic planning, action orientation.	This is the crucial final step. Help participants convert their strategic thinking into a concrete to-do list to ensure the work continues after the session.
85-90	22-23	Wrap-up & Close. Project Slide 22. Summarize the achievements: "You've created a clear action plan." Explain next steps and thank the participants. Use Slide 23 for evaluation QR code.	N/A	Closing, summary, call to action.	End on a high note, celebrating the collaborative work and reinforcing that the team now has a clear path forward.



Annex 1: Activities

Activity #1: Draft Your Goal & Objectives (Individual Exercise)

- **Objective:** To establish a clear, measurable foundation for each participant's strategic plan.
- **Time:** 5 minutes.
- **Tools:** "My Strategic Fundraising Communications Planner" worksheet (Section 1), pen.
- **Facilitator Instructions:**
 1. Clearly explain the difference between a goal (the ultimate outcome) and objectives (the steps to get there).
 2. Emphasize that both must be SMART.
 3. Set a timer for 5 minutes and ask for quiet, individual work.
- **Participant Instructions:**
 1. Turn to Section 1 of your worksheet, "Define Your Fundraising Goal & Key Objectives."
 2. First, write the single most important fundraising **Goal** you want to achieve in the next 6-18 months. Make sure it is Specific, Measurable, Achievable, Relevant, and Time-bound.
 3. Next, write 1-2 key **Objectives**—the major milestones you must hit to accomplish that goal. These must also be SMART.

Activity #2: Create Your Donor Persona (Group Exercise)

- **Objective:** To generate a deep, empathetic understanding of a key donor audience to guide all subsequent messaging and tactical decisions.
- **Time:** 20 minutes (15 min for group work + 5 min for debrief).
- **Tools:** Worksheet (Section 3), flip chart paper, markers (or digital whiteboard).
- **Facilitator Instructions:**
 1. Divide participants into groups of 3-4.
 2. Explain that the goal is to move beyond demographics (age, income) and into psychographics (values, fears, motivations).
 3. Circulate during the activity, prompting groups with questions like, "What does a good day look like for this person?" or "What media headline would make them stop and read?" to encourage deeper thinking.
 4. During the debrief, ask each sharing group to "introduce" their persona to the room.
- **Participant Instructions:**
 1. As a group, choose ONE specific fundraising campaign and goal from a member of your group to focus on.
 2. Identify the SINGLE most important donor audience you need to engage to achieve that goal.
 3. Turn to Section 3, "Create Your Donor Persona Snapshot." Work together to fill it out.
 4. Give your persona a name (e.g., "Gala Gabriela," "Foundation Frank").
 5. Be specific and creative. Discuss and debate until you have a shared, vivid picture of this person.



Activity #3: Build Your Core Message (Individual Exercise)

- **Objective:** To craft a clear, concise, and compelling core fundraising message tailored to the donor persona.
- **Time:** 15 minutes (10 min for individual work + 5 min for debrief).
- **Tools:** Worksheet (Section 4), pen, insights from Activity #2.
- **Facilitator Instructions:**
 1. Frame this as focused, individual work, allowing participants to synthesize their own thoughts based on the group discussion.
 2. Before they start, re-emphasize the importance of the "So What?" quadrant as the bridge to the persona's values.
 3. For the debrief, ask for 1-2 volunteers to read their entire Message Box aloud to hear how it flows.
- **Participant Instructions:**
 1. Turn to Section 4 of your worksheet, "Build Your Core Message."
 2. Working individually, fill out the four quadrants based on the persona you just discussed (or your own primary audience).
 3. **Problem:** State the issue in a way that creates urgency.
 4. **Solution:** Briefly explain what your organization does that is effective.
 5. **So What?:** This is the most important box. Answer the question, "Why should my persona care?" Connect your solution directly to a value they hold.
 6. **Call to Action:** State the single, specific thing you want them to do.

Activity #4: Brainstorm Your Delivery (Individual Exercise)

- **Objective:** To generate a list of practical, audience-appropriate messengers and tactics.
- **Time:** 10 minutes (7 min for individual work + 3 min for debrief).
- **Tools:** Worksheet (Section 5), pen.
- **Facilitator Instructions:**
 1. Introduce this as a "rapid-fire" brainstorm to generate a menu of options.
 2. Encourage creativity and specificity (e.g., not just "social media," but "a LinkedIn video series featuring board members").
 3. The debrief should be very quick, asking participants to share just one idea each.
- **Participant Instructions:**
 1. Turn to Section 5, "Choose Your Messengers & Tactics."
 2. Working individually, first brainstorm 2-3 **Trusted Messengers**. Who would your persona find most credible and authentic? Think beyond your staff.
 3. Next, brainstorm 3-4 **High-Impact Tactics**. Where does your persona spend their time? How do they get their information? List the specific channels you would use to reach them.



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Annex 2: My Strategic Fundraising Communications Planner

Instructions: Use this planner to capture your thinking and build a powerful, focused communications strategy for your next fundraising initiative. The goal is to move from ideas to a concrete, actionable plan.

Page 1: The Strategic Foundation (The Why & The Who)

1. Define Your Fundraising Goal & Key Objectives

First, state the single, most important fundraising outcome for the next 6-18 months (your SMART Goal). Then, list the key milestones or "baby steps" needed to get there (your SMART Objectives).

SMART Fundraising Goal:

Example: Secure 50 new monthly donors at an average of \$25/month by the end of Q4 to support our youth literacy program.

SMART Objectives (The steps to reach the goal):

Example 1: Secure 10 new corporate partners to promote the monthly giving campaign to their employees by the end of Q2.

Example 2: Recruit 25 current donors to host peer-to-peer fundraising pages for the campaign during Q3.

1. _____
 2. _____
 3. _____
-



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2. Identify Your Primary Fundraising Audience

You can't talk to everyone. Based on your goal, who is the

Primary Audience for This Plan:

Example: Socially-conscious professionals aged 30-45 who live in our city and have previously attended one of our events.

3. Create Your Donor Persona Snapshot

Bring your primary audience to life. This makes it easier to communicate with them authentically.

Persona Name: _____

Who are they? (Role, general demographics)

What do they value most? (e.g., community, efficiency, innovation, family, tradition)

What problem or desire keeps them up at night? (Related to your cause or their personal aspirations)

Who do they trust? (e.g., peers, experts, community leaders, specific publications)

What might stop them from giving? (Barriers) (e.g., don't feel their gift matters, confusion about impact, too many asks)

Why would they give to us? (Your unique connection) (e.g., our proven track record, a personal connection, our innovative approach)

Page 2: The Action Plan (The What, The How & The How Well)



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4. Build Your Core Message

Using your Donor Persona, craft a simple, powerful message that connects your goal to their values. This is your core narrative.

The Problem: (The urgent issue, simply stated)

So What? (Why They Should Care): (Connects directly to the persona's values and worldview)

Our Solution: (What we do that is effective and unique)

The Call to Action: (The single, clear thing you want them to do to help)

5. Choose Your Messengers & Tactics

Based on who your audience is and who they trust, determine the best people and channels to deliver your message.

A. Trusted Messengers

Who is most credible to your Donor Persona?

1. _____
2. _____

B. High-Impact Tactics

Where can you best reach your Donor Persona with your message?

1. _____
 2. _____
-

6. Define Success: Measurement & Impact

How will you know if this plan is working? Focus on the **outcomes** (the results you create), not just the **outputs** (the stuff you do).



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Key Success Metric (The Outcome):

Example: # of new monthly donors acquired through this campaign.

1. _____

Secondary Metrics (Outputs/Leading Indicators):

Example: Email open/click-through rates; # of social media shares; # of attendees at campaign events.

1. _____

2. _____

7. Create Your Action Plan

What are the immediate next steps to put this plan in motion? Be specific.

Action Step	Who is Responsible?	By When? (Date)
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1.

2.

3.
