



Mobilization resources for civil society organizations in a digital context

Session 2: Connecting to make an impact Keys to Success with Donors

2025

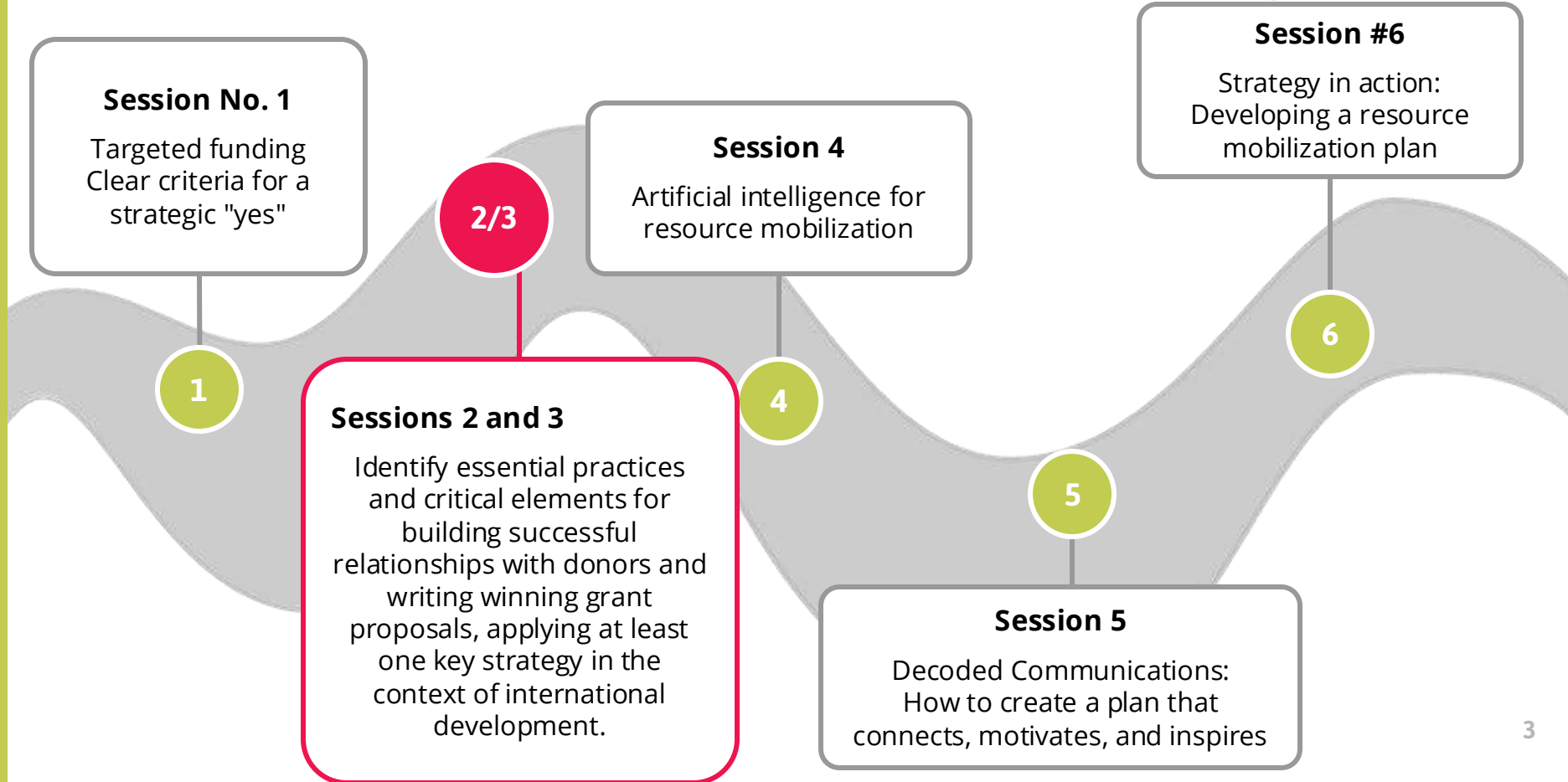


To know how to approach a donor organization and then send it a winning proposal, we need a toolkit and identical skills.



That is why Sessions 2 and 3 reinforce each other and share the same learning objectives.

Slide Show of Sessions and Where We Are Going



Session 2: Objectives

Objectives of these sessions

- ✓ **Develop a strategic approach plan for a potential donor organization, justifying the choice of donor and the structure of the request ("The Ask") in order to maximize alignment and chances of success.**
- ✓ Build the central argument of a grant proposal, convincingly linking the problem, the solution, the SMART objectives, and the sustainability strategy.
- ✓ Evaluate the consistency and potential for success of a donor approach plan, judging how donor relationship strategies and proposal structure reinforce each other to support a decision.

The key resource and inspiration for the day

YOU'RE ALREADY MAKING
A DIFFERENCE. MAKE EVEN
MORE WITH WINNING GRANTS.

JAMES RUELL NONPROFITS



Foundations: trust and first contact

- Objective: to move from "aggressive selling" to a natural transition.
- Trust is the foundation.
- Opportunistic preliminary contact:
 - Take advantage of direct contact if it exists.
 - Use "warm bridges" (existing connections).
 - Role of senior management (CEO) if there are no contacts.
 - Seek out other people's previous experiences.

Beyond the request:
trust is key



Meeting planning and preparation

- Plan ahead:
 - Timing is crucial: not too early (concept immature), not too late.
 - Clearly communicate the purpose of the visit (discuss the cause, explore opportunities for engagement).
- Prepare thoroughly:
 - Find out about the donor: background, interests (countries, sectors), possible objections.
 - Structure the meeting: informal discussion -> transition -> request.
 - Clarify eligibility (e.g., do they fund in their countries of operation?).

Success lies in preparation.



Group exercise: research on a donor organization



- In groups, you will choose a new donor and conduct an in-depth analysis. When you return, you will tell us about the organization you selected, providing us with at least the following information:
 - A contact person within the organization
 - Its mission and how it corresponds to yours
 - Other projects funded
 - Existing or past calls for projects

Managing expectations and long-term commitment

- Managing expectations after the meeting:
 - Courtesy is not a promise.
- Encourage long-term commitment:
 - Maintain a high level of commitment.
 - Demonstrate the impact of donations (field reports, data).
 - Ensure funds are used correctly (transparency and accountability are ESSENTIAL).
- Remind donors that they want to SEE the impact and KNOW that funds are being used properly.

After the meeting: realism and maintaining the relationship



Meeting planning and preparation

- Practice, practice, practice:
 - Rehearse each element.
 - We offer an attractive investment opportunity.
 - Be specific and unequivocal in your request.
- Ask for feedback:
 - People like to feel listened to.
 - Asking for advice makes the donor feel important.

The moment of truth: the request and the value of feedback



Worksheet: Donor Contact Strategy



Name of potential donor: _____

Date prepared: _____

I. Research and preliminary contact:

- Are there any personal/professional ties to this donor?
Yes: Who? _____ How can they help? _____
No: Executive management will be responsible for making contact.
- People in my network with experience with this donor:
_____ (Key advice: _____)
- Key information about the donor (interests, donation history, other causes):

II. Planning the approach:

- Is my project concept sufficiently developed for this contact? YES / NO
- Main objective of the meeting (clear and concise message):
- Professionalism: points to remember (dress code, language, punctuality):

Worksheet: Donor Contact Strategy



III. Preparing for the meeting:

- Specific research on the person I am going to meet:
- Possible concerns, fears, or objections of the donor:
 - _____ (Answer: _____)
 - _____ (Answer: _____)
- Meeting structure:
 - Small talk (topics): _____
 - Transition to the cause: _____
 - The ask: _____
- Key question about eligibility (if applicable):

IV. The ask:

- Key points of my presentation (to memorize):
- The specific request (amount, project, etc.):
- Reminder (Rockefeller): I am offering an attractive investment opportunity.

Worksheet: Donor Contact Strategy



V. After the meeting and follow-up:

- Questions to solicit feedback:
 - "What is your impression of our proposal?"
 - "Do you have any advice for us regarding this process?"
- Managing expectations: politeness is not a yes.
- Follow-up plan:
 - Date: _____ Action: _____

Group exercise: Shark Tank

What will we do?

We will simulate a one-minute pitch to justify the reasons for contacting a specific donor and the purpose of the meeting.

Small group tasks:

- Individual: Using the worksheet, note down the key points about a donor and the clear purpose of the meeting.
- In groups: Each person presents their one-minute *pitch*. The others give their opinion on the clarity and persuasiveness of the presentation.

Pooling:

One volunteer per group will share the most useful advice or key lesson learned from the feedback received.

Preparing the approach



Thank you!



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