

NGO Executives, Managers, and Fundraisers

**Find out how to get  
the money you need  
to accomplish your goals  
by organizing business relationships with philanthropists  
and promoting stable and long term partnerships**

**Raise skills**

**How to develop donors' commitment to your case  
How to develop local community by participation in your case  
How to get long term sources of funding and support  
How to easier conduct local fundraising events  
And how to maintain social responsibility and ethics**

**Everything at:**

**THE INTERNATIONAL FUNDRAISING WORKSHOP**

**Fifth Annual Workshop**

*“Fundraising: A Step towards Potential Donor”*

**You will get the opportunity to learn**

- Strategic and organizational fundraising
- Seeking New Donors and Maintaining Relationships with Donors
- Legitimacy and business relationships
- Local fundraising techniques
- Overcoming Communication Barriers
- Management and monitoring of fundraising

**With the help of fundraising professionals, qualified trainers and philanthropists**

to be held in

**Ukraine, Crimea, Sudak  
May 28-31, 2005**

**CO-Organizers**

*Center for Philanthropy, Ukraine*

*the Resource Alliance, UK*

*Organization Futures LLC, Strategic Fundraising and Capacity Building, USA  
“For Professional Assistance” Association, Ukraine  
International Center for Non-profit Law, USA*

## WORKSHOP PROGRAMME (tentative)

### 1 Day. Saturday May 28

10.00-16.00 – Participants Arrival and Registration  
14.00 – 15.30 – OPENING AND INTRODUCTORY SESSION  
Welcome and Introduction to the Workshop – Michael Norton  
15.30 – 16.00 – Coffee/Tea  
16.30 – 18.00 – Plenary 1. Civil Society Sustainability Discussion  
19.00 – Welcome Reception and Dinner. Countries Presentation.

### 2 Day. Sunday May 29

8.00-9.00 Breakfast  
9.00-10.30 INTERACTIVE PRESENTATION «Strategic Thinking about Local Resources», Ken Phillips  
10.30 – 11.00 Coffee/Tea  
11:00 – 12:30 INTERACTIVE DISCUSSION “Juridical Aspects of Fundraising”, Melanie Lyons  
12.30 – 13.30 Lunch  
13:30 - 15:30 Plenary 2. «Establishing Lasting Relationships with Donors», John Baguley  
15:30 – 16:00 Coffee/Tea  
16:00 – 17:30 FR Clinic, Institute of FR Presentation  
19:00 - 21:00 Dinner and Social Event «Charitable Auction»

### 3 Day. Monday May 30

8.00-9.00 Breakfast  
9.00- 11.00 Workshops. Round 1  
11:00–11:30 Coffee/Tea  
11.30-13.30 Workshops. Round 2  
13:30-14:30 Lunch  
14:30-16:30 Workshops. Round 3  
16:30-17:00 Coffee/Tea  
17:00–18:30 Best Fundraising Cases Presentation  
19:00 – 21:00 Gala and Dinner

### 4 Day. Tuesday May 31

8.00-9.00 Breakfast  
9.00 – 10.00 INTERACTIVE PRESENTATION «30 Great Fundraising Ideas in 30 Minutes»  
10.00 – 10.30 Coffee/Tea  
10.30- 11.30 Monitoring and Evaluation  
11.30 -12.30 SUMMING UP, WORKSHOP EVALUATION, FUTURE PLANS AND CLOSING  
12.30 Lunch, Participants Departure

## ***SESSIONS DESCRIPTION***

### *Opening and Introductory Plenary*

Presentation of speakers, trainers and facilitators and meeting the participants. Introduction to the topic of the Workshop: how to outreach for new donors, cultivate relationships, make donors feedback effective, overcome the barriers of communication with donors – everything that helps to make a first step towards a potential donor.

### ***Interactive presentations***

#### *- Strategic Thinking About Local Resources*

This session leads participants in the world of strategic approaches to local funding base. By interplay and communications the participants come to see that fundraising success is inside of your organization rather than in money available. The amount of funds depends on your organizational development and professional skills to measure the social impact of your programs.

#### *- Establishing Lasting Relationships with Donors*

When it is difficult to raise funds for the long term development projects from the community, which is engulfed with acute social problems, you need to develop long-term relationships with the major donors. They can also be committed to your organization when you manage this difficult task. This panel will open up the world of big donors, their understanding of giving, their system of governance and management of philanthropic programs. Participants will learn why the donors' world is sometimes not similar to that of NGOs and why it is important to put yourself in the donor's place to efficiently raise funds.

#### *- Juridical Aspects of Fundraising*

Universal approaches to juridical aspects of financial management, contracting, etc., exist despite different countries have different legislative bases for fundraising. This session will focus on technical issues on using legislation and comparative analysis of donor countries rather than on issues of taxation of donations or specifics of fundraising types, which is really varies from country to country.

#### *- 30 Great Fundraising Ideas In 30 Minutes*

Participants will be asked to record the ideas heard either during the workshop or brought from their organizations.

#### *- Monitoring and Evaluation in Fundraising*

Effective system of monitoring and evaluation serves for getting reliable data for reporting, which in its turn maintains open and transparent relationships with community and donors. At the session the monitoring and evaluation system of the workshop will be discussed as an example of follow up and important tips for making your evaluation system feasible will be provided.

### ***Workshops***

- *Presentation skills*

Participants will acquire necessary skills to present their organizations and to make presentation materials feasible and understandable to encourage donors' commitment and willingness to give. The session provides knowledge how to make the organization's brand competitive in the resources market.

- *Total Organizational Fundraising*

This session will guide each participant through their application to their own specific NGO. Key issues to be explored will be concepts beyond traditional strategic planning -- leadership vision, assessment of donor needs and satisfactions, value of long term results, benchmarking of competitors, differentiation and competitive advantage, strategic positioning, the imperative of market development, and management through Critical Success Indicators. The key document of this session will be the Strategic Planning Worksheet. The expected outcome will be an understanding of how to apply the tools for successful development of local sustainability.

- *Events*

At the session participants learn in detail how to organize, run and monitor different fundraising events, like charitable sponsored events, concerts, auctions, etc/

- *Communication*

The session will analyse the specifics of interpersonal communication with different donors, including their psychological characteristics. Participants will develop patterns of communication with different donors.

- *Proposals Writing*

Necessary session for learning the proposal writing techniques, including language and writing skills. The structures of proposals that submitted to different donors is studied.

- *Direct Mail*

Direct mail is quite unknown phenomenon in the region while it is an important tool for maintaining the relationship with donors, getting them involved on regular basis. Letters writing skills, letters format and design will be studied. The technical aspects of impersonal donations collection will be studied as applied to the local money transfer system.

- *Relationships*

The failure in fundraising often is associated with bad planning, management, etc, while the problem was in psychological readiness to hold relationships with donors. This training will focus on how to overcome the problem of proper asking, developing relations with the potential and actual donors, ensuring trust between parties, reporting and thanking.

- *Legislation/Ethics*

Self-regulation, codes of ethics, appliance to the national legislation standards are the most important tools for ensuring credibility and trust. The session will explore the ethics codes drafting, enforcing and self-regulation for separate organizations and the NGO sector. The session will be important for organizations that build sustainability of NGOs in the region as well as for organizations seeking to establish professional standards in fundraising.

### **INFORMATION ABOUT SPEAKERS AND TRAINERS:**

**Michael Norton** is the founder and former Director (until 1995) of Directory of Social Change, the UK's leading provider of information and training on fundraising and NGO management. Since 1995 he has founded and co-founded a number of organisations promoting community involvement amongst young people and social entrepreneurship and he also runs a number of development projects in India. He is the author of "The WorldWide Fundraisers Handbook", "Getting Started in Fundraising", "How to be a Fundraising Champion" and other books on fundraising and communication published in the UK and India.

**John Baguley** MBA MICFM is a fundraising expert who has worked in the profession for over 15 years, he has written the comprehensive guide to fundraising "Successful Fundraising". John is the founder of the series of International Fundraising Workshops in Ukraine, he also has organised fundraising workshops in many countries including India, Nepal, South Korea, the Philippines, the Czech Republic, the Netherlands and the UK. He is a member of the Institute of Fundraising in the UK, initiator and founder of the NIS Institute of Fundraising.

**Ken Phillips**, Director, Organization Futures LLC, Strategic Fundraising and Capacity Building, Mr. Phillips has worked 40 years with NGOs as project development specialist, proposal writer and major donor fundraiser; vice president for development at Save the Children US; executive director of PLAN International US; chairman of the board of InterAction and West Broadway Neighborhood Association; and consultant, trainer and facilitator for NGOs around the world. His consulting is based on his successful fundraising and management experience fine tuned by work with hundreds of organizations (HelpAge International, CARE International, World Wildlife Fund, Red Cross/Red Crescent, Civil Society Development Foundation Romania, Caritas Croatia, NGO Centre Riga, Ukrainian Newspaper Publishers Association and many small NGOs. Since 1992, 30% of his consulting has been in Eastern Europe and the CIS.

**Svitlana Kuts** director of the Center for Philanthropy in Kiev and author of training on fundraising. With 10 years practical work in the NGO sector she has a number of research publications on fundraising, philanthropy, legal issues of public-private partnership. She is a founding member of the International Institute of Fundraising and member of the East European Board of the Resource Alliance (UK).

**Volochaj Olena** is professional business/NGO consultant and trainer. She has graduated from Saint Petersburg University (Applied Psychology) and Graduate School of the Institute of Psychology of the National Academy of Science of Ukraine. Major field of specialization is organizational development, interpersonal communication, public relations, advocacy.

**Volochaj Sergey** is professional business/NGO consultant and trainer. He has graduated from Kharkiv University, Saint Petersburg University (Graduate School in Applied Social Psychology). His work record is connected with HR in big business companies. Major field of consultancy and training specialization is HR motivation, team-building, leadership development, marketing for NGOs and business companies.

*Organizing Committee Contact*

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