

# Ageways

Practical issues in ageing and development  
Issue 81 / August 2013



## Fundraising

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**HelpAge  
International**

*age helps*

**30** years as a  
global network

In association with

 **the  
resource  
alliance**

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### Future issues

Issue 82 (February 2014): Emergencies  
We welcome articles for consideration.  
Please send them three months  
before the month of publication.

### Front cover

Natrajan lives in an older people's village supported by HelpAge India and earns some money from sewing clothes. A photo such as this shows a donor what a difference their money makes.  
Photo: Mayur Paul/HelpAge International

# Comment

## Reaching your potential

Welcome to *Ageways* 81. A fair and just world which recognises the potential of older people requires a strong, sustainable and productive non-profit sector to support their cause. For this to be achieved, staff and volunteers need appropriate skills, knowledge and financial resources. Funding can be hard to come by, however, and in recognition of this, this issue has a special focus on fundraising tools and techniques.

It has been produced in association with the Resource Alliance, which has more than thirty years' experience helping strengthen the fundraising capacity of non-profits around the world. We hope the articles and case studies will help you to reach your potential and achieve greater impact.

**Alison Gordon, Director of Fundraising, HelpAge International**  
**Neelam Makhijani, Chief Executive, The Resource Alliance**

*We would like to thank our colleagues and enthusiastic practitioners in the HelpAge and Resource Alliance networks for their great help in producing this issue.*

# Letters

## Lifting up ourselves

Twenty older people (11 men and nine women) of Bwanjai ward, Kiziba Division, Kagera Region, Tanzania are determined to lift up not only themselves but all older people of the ward. Those older people formed an association in 2004 and called it WAZEE TUINUANE, meaning "Older people, let us lift up ourselves".

The association has no discrimination regarding sex, religion or ideology. It aims to understand and demand the rights of older people. Members pay Tsh 1,000 (US\$0.62) as an entry fee and Tsh 5,000 (US\$3.10) as a starting share which rises up to Tsh 100,000 (US\$62).

Members can join the Bwanjai Saving and Credit Cooperative Society (SACCOS) where WAZEE TUINUANE has a deposit of Tsh 150,000 (US\$93). The association lends money to members which they repay within eight months or one year with 10 or 15 per cent interest. The members are considering better ways of farming and keeping domestic animals. They are seeking advice from agricultural or veterinary officers. We also grow vanilla as our cash crop.

*Paulo Mugizi, c/o J Mushumbusi, WAZEE TUINUANE, Bwanjai, PO Box 711, Tanzania*

## Making a dream a reality

A few years ago I had a dream of finding a way to care for older patients. The district medical officer, Dr Gasper Masemba, asked me to put my idea in writing. My proposal was considered by the high authorities. By July 2003, funds for establishing a geriatric clinic in Mpanda District were released. The clinic was allocated three rooms, essential equipment, a television, a sofa and one nursing officer to work with me.

However, by 2004, I found that there was still a poor response by older patients coming for medical care. There was also inadequate cooperation between the health workers working with older people and the other health workers, and the system for providing exemption letters was not clear.

It was then that I thought of conducting a research. My idea was accepted by the district health management committee. I submitted the document to the Ministry of Health headquarters where it was channelled to the National Institute for Medical Research. Luckily enough, the proposal was accepted and we were given a grant from the Health Research Users Trust Fund.

The findings of the research have been used to improve the service tremendously. Health care workers at all levels have

become knowledgeable about how to handle older patients. The number of older people attending treatment has increased from 10-15 in 2003 and 2004 to 30-40 daily. Through daily exposure we have expanded our skills in managing the common diseases affecting older people. The system of issuing exemptions has been improved by providing permanent identification cards. We are closely working with HelpAge International Tanzania office.

A word to my fellow health workers: We are all offspring of older people. We ought to help them in all aspects. Think of yourself when you get older and how you would like to be handled when you go to a health facility!

*Patrick J Mwita, Coordinator of Older People Health Services, Katavi Region, Tanzania. Email: patrickmwital@yahoo.com*

## Spreading the word

The Siddhi Memorial Foundation runs a hospital in Bhaktapur, Nepal, which provides high-quality, low-cost or free treatment. Many of the patients are poor people who have moved from rural areas to work in the nearby brick factories, earning only around 300 rupees (US\$2.30) a day.

The foundation also runs a care home for up to 35 older people, which charges people according to what they can afford. Priority is given to the poor. The home

runs daily social events for all the older people who live nearby. People enjoy free food, music and religious sessions.

The foundation was created by Shyam and Ranjana Dhaubhadel after their son Siddhi was killed in a traffic accident in 1993.

I am helping spread the message about the work it does, as it relies on grant funding and donations for a significant part of its income. The foundation has received many generous grants from governments through institutions such as the Japanese and Australian embassies, and through local NGOs. However, fundraising is an ongoing challenge.

Stephen Bailey (by email). [www.smf.org.np](http://www.smf.org.np)

## Guiding young people

The Cebu City Government recently awarded eight centenarians with a plaque of recognition and a cash gift of 100,000 pesos (US\$2,300) each for their contribution to society during their prime time. Cebu City will give us 500,000 pesos (US\$11,510) for our new project for youth. Thirty senior citizens will mentor 10 minors for one year to prevent them from quitting from their studies.

Martiniana D Mercado, President, Central Visayas Association for Volunteer Effort (CVAVE), Cebu City, Philippines.  
Email: [cvave7\\_ph@yahoo.com](mailto:cvave7_ph@yahoo.com)

## We welcome letters

Please write to: The Editor, *Ageways*, HelpAge International, PO Box 70156, London WC1A 9GB, UK  
Email: [ctill@helpage.org](mailto:ctill@helpage.org)

*Include your name, organisation (if any) and postal address. Letters may be edited.*

# New resources

## Nutrition interventions for older people in emergencies

These guidelines advise humanitarian workers on how to address the nutritional needs of older people in emergencies, recommending five key action points. Also available in French.

[www.helpage.org/resources/publications](http://www.helpage.org/resources/publications)

## This is Age Demands Action

This booklet describes the progress of the Age Demands Action campaign, profiling some of its leaders, and explains why a UN convention on the rights of older people is necessary.

[www.helpage.org/resources/publications](http://www.helpage.org/resources/publications)

## Spanish website

HelpAge has a Spanish-language website and Facebook page for Latin America.

[www.helpagela.org](http://www.helpagela.org)

## Russian website

HelpAge International now has a Russian-language website and Facebook page. The new website highlights the issues facing older people in Eastern Europe and Central Asia, gives voice to older people through films and stories, and offers Russian-language publications to download.

[www.helpageeeca.org](http://www.helpageeeca.org)

[www.facebook.com/helpage.eeca](http://www.facebook.com/helpage.eeca)

## More languages on the web

If you want to read HelpAge's English-language website in another language, use the "Select language" button in the top right corner of the home page and select a language from more than seventy available.

[www.helpage.org](http://www.helpage.org)

# Campaigns

## Human rights

The UN Open-Ended Working Group on Ageing will meet in August to consider what should go into a new human rights instrument for older people, such as a convention. On 15 June, World Elder Abuse Awareness Day, Age Demands Action campaigners in 30 countries lobbied their governments to attend the meeting.

"Having a convention on older people's rights would be a step in the right direction. It would make people more aware of their rights throughout the entire world," says Kenneth Hemley, Age Demands Action leader, Jamaica.

**You can sign the convention petition at:**  
[www.helpage.org/campaigns](http://www.helpage.org/campaigns)



Ranath Fraser/HelpAge International

# Research

## Tackling transport problems

Many older people struggle to obtain healthcare because of transport problems. A study in rural Tanzania shows that most villages have *boda-bodas* (motor-cycle taxis), but these are often too expensive for older people and they are not suitable for those who are very sick.

The Tanzania Government has a policy of providing free healthcare for older people. However, the study shows that it is often not available because they are referred to higher-level, more distant health centres, or prescribed drugs that are not available locally, and they cannot travel there.

Transport difficulties affect other aspects of older people's lives too. For example, older farmers may have to sell their produce at farm gate prices, which are usually much lower than local market prices, because they do not have the means to travel to the markets.

HelpAge International and partners in Tanzania have made a number of recommendations to the Tanzanian Government and local authorities, based on the findings. These include adapting *boda-bodas* to carry people who are sick, developing emergency contact systems, improving roads, and providing start-up grants and cooperative marketing schemes for older people. A pilot project to provide mobile phones to home carers and village older people's associations has also been proposed.

The study was carried out by HelpAge International, University of Durham and Policy Research for Development (REPOA) with funding from the Africa Community Access Programme (AFCAP) and UK government (DFID). *Rural transport services for older people in Kibaha district, Tanzania: report on projects findings* can be downloaded from: [www.helpage.org/resources/publications](http://www.helpage.org/resources/publications)

# Successful fundraising starts here

**It all begins with a well thought-through strategy – no matter where in the world an organisation is based, says Jill Nadolski.**

Every NGO or CBO needs to raise money and all can be successful in fundraising. Yet many find it a challenge. The key to effective fundraising is being strategic and selecting the best options in terms of time, money and resources.

The first step for those writing a fundraising strategy is to have a full understanding of their organisation and the need that is being addressed (see page 8 for more on this). This should then be followed by a review of internal resources, such as who is available to fundraise, their skills and the support available. This will provide useful insight into the organisation's capacity and the type of fundraising it may be capable of.

Then comes research into the potential sources of fundraised income: national and local government, trusts and foundations, companies and individuals. Understanding the drivers and motivations of each is crucial.

**Individuals** This type of fundraising – be it by writing an appeal letter, inviting someone to a dinner dance or selling entries to a prize draw – can raise funds but is often the most difficult to do. It includes appealing to the public (for example, through letters, phone calls, emails, face-to-face, websites and social media), organising events (such as dinner dances, prize draws and sponsored runs) and approaching major donors (rich individuals).

Donations tend to be a personal response based on individual interests and beliefs, and no matter how emotive or effective a cause, not everyone will connect with it. It is also important to take into account your strengths and weaknesses. For example, if you aren't able to mobilise volunteers, running a big event may be too demanding on your staff.

**Corporate fundraising** While more companies are beginning to recognise that success is linked to responsible business practice, the economic climate is taking its toll. Sectors that are growing,

**Representatives of the Ethiopian Bureau of Social and Labour Affairs, Ethiopian Elders and Pensioners National Association and HelpAge International Ethiopia with staff of HelpAge India.**



declining or in recovery should be identified, and smaller enterprises should not be discounted, especially those that operate in your community. Equally, it is important to understand that not all businesses make appropriate partners, such as those that manufacture weapons or that use exploitative labour practices.

**Government** In some countries, government funding accounts for a significant proportion of NGO income. These sources usually have strict criteria, and eligibility varies enormously. On the positive side, funding is often offered over several years. Again, this type of funding is not right for everyone. Those NGOs that conduct lobbying activities, for example, will frequently exclude government funding so they can remain independent. Governments also make intensive demands on managing grants – from proposal preparation to final reporting – since they are using taxpayers' money and must therefore demonstrate the highest levels of accountability and effectiveness.

**Trusts and foundations** On the whole, trusts and foundations – legal institutions set up to support charitable causes – can offer a good starting point, particularly for smaller organisations. While it can be tempting to focus on major international foundations such as Rockefeller, more success is likely to be found within those

located locally. Again, strict criteria are applied and fundraisers who do not follow the application process to the letter do so at their peril.

**Commercial activities** One area of fundraising that is gaining popularity, probably in response to the changing funding environment, is generating income through commercial activities. Many charities have profit-generating arms such as charity shops (where members of the public donate unwanted items for sale), restaurants or partnerships with commercial companies to sell products or services.

## Understanding donors

Understanding donor motivations was one of the areas explored during a recent skillshare trip to HelpAge India. A group of representatives from HelpAge International Ethiopia, the Ethiopian Elders and Pensioners Association (EEPNA), the Ministry of Social and Labour Affairs (MoLSA) and the Addis Ababa Bureau of Labour and Social Affairs participated in the study tour to discover more about fundraising.

The participants learnt how HelpAge India uses a diverse range of innovative techniques to mobilise domestic resources. For example, in addition to asking for financial gifts, it also sells greetings cards, asks supporters if they



HelpAge India

## Example of a SWOT analysis

### Strengths

- Track record for delivering projects
- Good reputation with local communities
- Good relationship with government and international agencies
- Executive director and programme staff fully engaged in the fundraising process

### Weaknesses

- Too reliant on funding from government and international agencies
- Low awareness by general public
- Lack of investment in fundraising
- Board not willing to make personal solicitations to potential donors

### Opportunities

- Increasing amounts of funds generated
- Recent decrease in income tax
- Finding new partners

### Threats

- Recent natural disaster diverting government funds and public attention
- Political instability
- Poor economic outlook

are willing to share relevant knowledge that may be of use to the organisation, and uses social media (see page 16).

## Building the team

Once a list of potential income sources has been researched, a team should be established that includes representatives from both the board and staff. This is so that everyone understands why fundraising is important and the role they have to play. For example, the finance staff will oversee the budget while programme colleagues are valuable sources of information on projects. A popular tool to use when developing a fundraising strategy is the SWOT analysis. This helps identify strengths and weaknesses, opportunities and threats (see box).

A review of internal processes is also important. For example, does your NGO have an annual plan and budget that's regularly monitored? Can the fundraising staff differentiate between restricted funds (funds that have to be spent on particular projects) and unrestricted funds (funds that can be spent on anything)? Are there programmes that are running at a surplus or loss, and if so why? Are results measured and demonstrated? (See page 7 for more on this.)

It is then time for strategic planning: thinking through all the options and planning activities. The best strategy

does not rely on one source of income so approaching a variety of different donors is encouraged.

The strategy doesn't need to follow a strict format, but should include:

- A summary of SWOT and readiness to fundraising assessments
- Analysis of current fundraising tools, successes and failures
- Top-level aims
- SMART objectives – specific, measurable, achievable, realistic, time-bound
- Financial and operational targets for each source
- Staff and other resources required
- Performance standards, such as the ratio of funds raised against funds spent
- Reports and other donor communications.

This latter point is important. As the HelpAge skillshare participants learned, supporters are more willing to make donations when organisations are transparent about their activities and when they communicate aims and results. HelpAge India understands this and has developed a number of printed and online documents that highlight the work of the

organisation. This goes a long way in building trust with donors. Your strategy also should contain ways for reporting back to donors on the impact that their funding has had.

Finally, a strategy is useless unless it's implemented. Draw up a timetable to carry out your plan and include a list of objectives that can be regularly monitored. This helps identify and prevent any unpleasant surprises early on rather than waiting until the main evaluation at the end. This is precisely what HelpAge International Ethiopia has done since returning from India.

Whether you want to introduce a culture of giving or simply raise enough money for one programme, be realistic about what you can achieve. If you're just starting out in fundraising, small incremental successes are more useful than overly ambitious plans that fail to deliver.

Jill Nadolski is Operations Manager at EEIBA, the UK's national charity for the electrical and electronics industry.

For additional resources, visit:

[www.resource-alliance.org/pages/en/resources.html](http://www.resource-alliance.org/pages/en/resources.html)  
[www.fundsforngos.org](http://www.fundsforngos.org)  
[www.knowhownonprofit.org](http://www.knowhownonprofit.org)  
[www.demille.co.uk/how\\_subs/glossary\\_terms.php](http://www.demille.co.uk/how_subs/glossary_terms.php)

# Image counts

**You are a brand, whether you like it or not, says *Maria Ros Jernberg*.**

There is much talk of “brand” and how important it is. But what is a brand and what does it mean for fundraising?

A brand is what people perceive an organisation, product, service or individual to be. Or as Scott Bedbury, famous branding guru, expressed it: “Brands become psychological concepts held in the minds of the public.” This means a brand cannot be entirely controlled but efforts can be made to guide and influence it in the right direction. The question is, do you do this?

A brand is what differentiates any NGO or CBO from all the other great organisations which are asking for people’s support. Without a distinctive brand, an NGO will drown in the flood of voices. It should help a donor remember why they should trust an organisation and should create the feeling of connection, quality and loyalty.

Someone once said: “Everything communicates.” I couldn’t agree more. Everything an organisation does communicates its brand. But are you consistent? Consistency is one of the key factors behind a successful brand. Are you in control of all your brand touch points?

A touch point is everywhere you have some sort of interaction with your stakeholders. It’s a website, volunteers and staff, a shop window, offices, the answer machine message outside office hours, an email signature... All of these must communicate a consistent message and positive experience that donors, current and potential, recognise wherever they meet you.

A great example of consistency in practice is from the fruit juice maker, Innocent Drinks. They are always true to their values and understand how every brand touch point counts. Customers are invited to call their “banana phone” or visit their offices called Fruit Towers, and their delivery trucks have even been renamed as “dancing grass vans” – a technique that emphasises their fun and healthy brand.

The aim to be consistent must not stand in the way of another key success factor – passion. Linked to this is the importance of the “elevator pitch”. This is a description of an organisation which takes less time than a journey in an elevator or lift, normally up to 30 seconds. It explains why an organisation exists, generates interest and starts conversation.

The idea is that all staff know the elevator pitch by heart and that it’s clear and consistent. However, it should not sound exactly the same all the time. The core of it should be consistent, but it has to be personal. Everyone has to be able to add their own passion for the cause. That’s when you have a great elevator pitch.

The third key success factor is integration. Some years ago it was as if NGO branding was a subject for communications and fundraising staff only. This is changing and today branding is recognised as playing a more strategic role in an organisation’s core performance.

Several years ago I worked for Amnesty International in Sweden. We had great brand recognition but when we asked people what it is Amnesty does they had no clue. We learned the hard way that high recognition doesn’t equal a strong brand. We hadn’t filled the brand with content. From a fundraising perspective that’s not good. People don’t support organisations. They give to fulfil needs. For example, people donate to emergencies because they want to help people affected by disasters.

Marketing expert and Danish author, Martin Lindstrom writes about passion in his book, *Brand Sense*, where he refers to “tattoo brands”. The idea is that customers feel so strongly about a brand they are willing to tattoo the brand logo on their body. And guess what? There are a lot of brand tattoos out there, including Google. If a search engine can ignite such passion you must be able to do the same thing. You should build a consistent, well integrated and passion-filled brand that makes your donors ask only one thing: “Where can I get my HelpAge tattoo?”

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**Maria Ros Jernberg is Chief Executive of the Swedish Fundraising Council.**

**For further reading, the following offer useful insight:**

*The Role of Brand in the Nonprofit Sector* by Nathalie Kylander and Christopher Stone of the Hauser Center for Nonprofit Organisations at Harvard University

*Emotional Branding: The New Paradigm for Connecting Brands to People* by Marc Gobé

*The Purple Cow* by Seth Godin



**Your brand is the impression you create in the minds of others.**

# The fundraising journey

**As organisations develop, their fundraising priorities change. Sarah Barzel and Neelam Makhijani explain.**

The founders of many NGOs and CBOs would be surprised to see how the organisations they founded have developed since they were first established. As the world has changed, so too have the roles of the organisations working to serve individuals and local communities.

Most NGOs and CBOs will evolve over time – this is how they stay fresh and relevant. There are many stages through which an organisation will progress, which will require different strategies.

Of course, at the heart of everything an organisation does, passion and understanding for the cause are crucial.

## What stage is your organisation at?

Do you know where your organisation is along its fundraising journey? How ready are you to bring in major donations or deal with large numbers of supporters? Can you deliver everything you have promised to funders?

The Resource Alliance has developed a special online tool to help organisations assess where they are on the fundraising journey. The assessment tool asks questions focused on four key areas:

**Mission and vision** such as: “Are the organisational objectives and activities in line with the mission, vision and values?”

**Fundraising** such as: “Do you have a multi-year fundraising strategy that is aligned with the case for support?”

**Communications** such as: “Is the organisational communications strategy aligned with fundraising strategy and targets?”

**Governance** such as: “Is the board involved in the strategic planning and budgeting of the organisation?”

The responses provided are then analysed by the tool and an assessment of the fundraising capabilities and capacity of the organisation provided.

You can find the tool here: [www.resource-alliance.org/fundraisingassessment](http://www.resource-alliance.org/fundraisingassessment)

Without these, the route along the fundraising journey will be difficult. As Hank Rosso, in his book *Achieving Excellence in Fundraising*, said: “The need or opportunity for service provides the organisation with a reason for being... This becomes the cause that is central to the concern of the organisation. The cause provides justification for more intervention and this provides justification for fundraising.”

One way to explain the fundraising journey is to use the analogy of human life (see “Different stages” box).

For example, as when we are born, the world for recently founded organisations is new and exciting. It will be experimenting with different ways of working, including fundraising. Some of the tools and techniques at your disposal will work, some will not – but all of your experiences will contribute to your level of knowledge.

During the start-up stage, it is particularly important to understand what your organisation is capable of when it comes to fundraising. For example, some NGOs have access to skills, resources, and a big pool of supporters from which to seek donations, while others do not.

The growth stage shares similar characteristics to the human life stage of youth. Just as a primary focus for young people is education, so too should learning and development feature within the activities of NGOs that are growing. Attending courses, workshops and conferences – along with on-the-job experience – will help ensure opportunities can be maximised and impact achieved, both now and in the weeks, months and years to come. It is only by investing in the “today” that organisations can learn how to be sustainable in the future.

The strength of the governing body will be vital if growing pains are to be avoided and effective decision-making achieved.

As an organisation ages, it becomes more experienced. It should have an evidenced strategy for achieving its goals. It may have found a partner to help it along the way or possibly formed new subsidiary organisations – just as we marry and have children – both of which will create additional demands, challenges and opportunities for fundraising.

**Organisations are just like people, gaining experience as they age.**



Antonio Olmos/HelpAge International

## Different stages

### Start-up

**Works to make sure the organisation knows what it is doing and how to achieve this**

### Growth

**Works to make sure there is an impact from its activities**

### Focus

**Works to focus that everything is going to strategic plans**

### Robust

**Works to make sure the organisation is sustainable**

### Reflective

**Works to ensure continuity and a long-lasting legacy to benefit the community it serves**

For example, how much support will an organisation need to offer its partners or subsidiaries, are there skills to be shared and if so, how, when and which?

As with life, success in fundraising is not accidental. It requires careful planning but also a flexibility and openness to change when detours or obstacles arise. Just as we invest in making our own lives exciting and fulfilling, we must do the same with our organisations.

Sarah Barzel is Director of Community Relations and Training with the boutique fundraising consultancy Possibility International.

Neelam Makhijani is Chief Executive of the Resource Alliance.

# Meaningful manifestos

Potential donors need to be aware of your organisation's mission, says *David Zerman*.



Marcus Skinner/HelpAge International

A graphic yet dignified portrayal of need, such as this photo of a woman whose house was destroyed by floods, could accompany a case for support.

Do you know why your organisation was established and why it still exists today? If you don't, you should.

If you are to engage in meaningful conversations with donors they need to know the role and value of your organisation. This is what is commonly known as making a "case for support".

The case for support is essential to fundraising, especially when writing proposals to donors. Succinctly and effectively articulating the need for your organisation and why it deserves support is the best tool an organisation can have for ensuring fundraising success. It explains the benefits an organisation will bring and is used as the foundation for funding applications and other proposals and presentations.

Bernard Ross and Clare Segal, authors of *The Influential Fundraiser*, believe a case for support is the core document of a fundraising strategy as it explains to potential donors why their money is needed. It is not a glossy brochure but a written document that captures the essence of an organisation or project and explains to a potential donor what they can achieve with the money they give you.

For example, according to New York-based Foundation Center's 2012 report on international philanthropic giving trends, the top 15 US foundations disbursed US\$2.86 billion worth of grants to 3,187 organisations in 2010. Each of those recipients would have had to prepare a case for support as part of their application.

The most important thing about a case for support is that this comprehensive document can be boiled down into one simple argument – or with a really strong case, into a few choice words or mission statement. It makes sense of the need and the way in which this need should be addressed.

So exactly what information should a case for support contain? First, it should answer the key questions: what is the need and why is the project so important? Then it must explain what makes your organisation or project uniquely placed to meet this need.

Remember, the donor will have limited funds and may also be considering funding other organisations instead of yours. So you have to say why your organisation is the best one to do this work and what makes it different from other organisations.

It is also important to explain the role of the donor – why should the donor give now and what impact will their funding have on the beneficiary group?

A discussion with other staff, the board and older people you work with can be a great way to generate the information you need:

**Mission:** Why is your organisation needed, why does it exist?

**Aims and objectives:** What does your organisation want to achieve and why?

**Programmes and services:** How will your organisation address the need?

**Governance:** How does the board operate and what role does it play in the community?

**Staff:** What are the staff and volunteers required to do and how do they do it?

**Finances:** What is the overall financial situation and how do you report on this?

**Organisational planning, development and evaluation:** How does your organisation plan its work and how often and how do you monitor how effective its work is?



**History:** What is the history of the organisation from its origins until today?

**Unique selling point:** What makes your organisation stand out from others, what does your organisation do better than others – where do your expertise and key skills lie?

While these questions should form the basis of any case for support, the document itself can take different formats. For example, when planning a major campaign for the Royal Flying Doctor Service, the team spent 18 months developing the case for support until all stakeholders were satisfied. The generic document comprised more than 40 pages. This was then used to produce different materials tailored to different audiences.

Meanwhile, at a charity for older people where I used to work, our case for support was a simple document of a few pages. Alternatively, others use just a paragraph or two that can easily be incorporated into a website or fundraising appeals.

The case support should also be flexible and adapt as circumstances change over time. A good example of this comes from the private sector company Intel, which has changed its mission statement to reflect the contemporary view of what it does.

In 1995 the company's mission statement was: "Do a great job for our customers, employees and stockholders by being the preeminent building block supplier to the computing industry." By 2000 this had changed to: "Intel's mission is to be the preeminent building block supplier to the worldwide Internet economy", and last year it changed again to: "This decade we will create and extend computing technology to connect and enrich the lives of every person on earth."

Every case for support is different and should be tailored to the individual donor, using a format and language they will understand. Ultimately this is about storytelling and painting a picture about the value an organisation can and does bring to the world.

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David Zerman is Chief Executive of Possibility Australia and Possibility International.

# Win!

Fancy putting your creative flair to the test? Want to tell the world how great your organisation is?

Write your case for support and you could win a copy of *The Influential Fundraiser*, by Bernard Ross and Clare Segal, and 50 per cent off your entry ticket to the International Workshop for Resource Mobilisation (IWRM), hosted by the Resource Alliance.

Your words will also be shared with both the HelpAge global network and Resource Alliance network, reaching 20,000 people worldwide.

Maybe you want to tell us how your organisation aims to improve healthcare for older people. Perhaps your focus is on raising awareness of the discrimination faced by older people? Or maybe your goal is to eradicate isolation and neglect of older people?

Whatever the aims and objectives of your organisation we want to hear about them.

Using the article on this page as a guide, write your case for support and send it to the email address below, before 30 September 2013. If you need more inspiration, examples of case studies can also be found on the Resource Alliance website at: [www.resource-alliance.org/pages/en/resources.html](http://www.resource-alliance.org/pages/en/resources.html)

All entries will be reviewed by the HelpAge and Resource Alliance teams and a winner selected. The winning case for support will be published in the next issue of *Ageways* and in the Resource Alliance e-newsletter, which has an audience of 10,000 fundraisers worldwide.

## About the prizes

*The Influential Fundraiser: Using the Psychology of Persuasion to Achieve Outstanding Results* offers an alternative yet effective model for asking and influencing potential donors and peers using the latest techniques developed in the neural and psychological sciences. It is written by Bernard Ross and Clare Segal, directors of the Management Centre, a UK-based management consultancy and training organisation.

The IWRM, hosted by the Resource Alliance, is widely recognised as the leading training for building the fundraising capacity of non-profit organisations in the emerging economies. Taking place in India and Africa, this three to four day workshop focuses on all aspects of resource mobilisation and sustainable fundraising techniques. The four-day residential course costs GBP £448 (US\$683). The competition winner will receive a 50 per cent discount worth £224 (US\$341), which can be applied to either event.



Participants at the last International Workshop for Resource Mobilisation, organised by the Resource Alliance.

# Improving your prospects

**Joseph Michael reveals the best way to find donors and assess their propensity to give.**

Prospect research involves gathering, analysing and interpreting information that leads towards a donation. At the outset, it is vital to have a case for support (see page 8) that clearly states an organisation's specific programmes and the outcomes the funding aims to achieve. This will ensure that donor priorities align with a project. For instance, it would be difficult to get funding from an animal welfare trust to support the wellbeing of older people.

The internet, trade magazines and other directories are useful sources of information about trusts, foundations and other funders (see box for examples). For example, when I was carrying out prospect research for Emerge, a Resource Alliance initiative that aims to help NGOs raise funds, I ensured that we had access to the Directory of Social Change's UK grant-making trusts and foundations database. This helped us study the donor priorities of selected trusts and foundations to establish relationships, resulting in more positive outcomes.

The websites or annual reports of NGOs doing similar work can also be a useful resource, as they will often publicise who is funding them as a way of saying thank you to donors.

Prospect research should not only be carried out for institutional funders, corporate foundations and governments, but also for individual donors. In this instance, an organisation's own list of suppliers, staff, volunteers and board members can be useful.

## Three key steps

1. When looking to identify new donors, the first step is to investigate each potential funder. In particular, look for information on the type of work they support, previous grantees and funded projects, geographical reach, and the value of each grant, as well as how and when proposals should be submitted. This information should then be matched against the objectives and activities of the organisation seeking funding to assess where mutual interests and objectives may lie.

The background of trustees of a charitable organisation can also offer useful clues. Common interests and previous links between an individual and an organisation could suggest that a trustee may be willing to offer support on a personal basis, even if the mission or cause differs from that of their trust.

2. Once prospects have been identified the next stage is to confirm if they have potential as funding partners. Vitally, this means ensuring that the donor criteria fits the case for support for your project or the programme. All the organisational requirements of the funder must be met, from the type of beneficiary group to be supported to the amount of money needed to the specified deadline for applications.

3. Once all of this has been researched it is time to move towards building a relationship with the donor with a view to asking them for funding. This can begin with an introductory phone call, meetings, presentations and/or the submission of (often lengthy) application forms (see page 11 for more on relationships). Above all, it is important to listen to the needs of the donor and to demonstrate how their support for your project can enable them to meet their own aims and objectives.

The trick to this is to be patient – it can take many months or even years to develop a relationship to the stage where the donor trusts you enough to make a considerable gift. So don't expect immediate results – but equally don't give up too soon.

**Joseph Michael is Fundraising Manager at the Resource Alliance.**

## Useful resources

Fundsformgos.org

[www.fundsformgos.org](http://www.fundsformgos.org)

The Foundation Centre (America)

<http://foundationcenter.org>

Directory of Social Change (UK)

[www.dsc.org.uk](http://www.dsc.org.uk)

Africa Grant Makers (Africa)

[www.africagrantmakers.org](http://www.africagrantmakers.org)

GrantsLink (Australia)

<http://grants.myregion.gov.au>

Funding Directory (India)

[www.fundingdirectory.info](http://www.fundingdirectory.info)

The Association of Professional Researchers for Advancement (APRA)

[www.aprahome.org](http://www.aprahome.org)

Wealth Monitor

[www.wealthmonitor.com](http://www.wealthmonitor.com)

GuideStar

[www.guidestar.org](http://www.guidestar.org)

**Home visits to older people in Vietnam are supported by government funding, part of a regional programme coordinated by HelpAge Korea and HelpAge International.**



Center for Ageing Support and Community Development (CASCD)

# Lasting donor relationships

**Simone Joyaux explains how to build profitable relationships with donors and ensure they stay with you.**

Fundraising is like any other business: customer loyalty is the Holy Grail. The local butcher needs loyal customers to flourish. The baker requires repeat customers to stay open. And non-profit organisations need loyal donors – of all shapes and sizes – to survive.

That is the job of fundraising: finding and retaining customers (see page 10 for information on finding donors). We call them donors, but they are customers, just the same. And loyalty is what matters.

Everyone understands the concept of “customer-centred”. Non-profit organisations need to get up to speed and embrace “donor-centrism”. Donor-centric is another way of saying “building trust”. A donor’s relationship with an organisation deepens or frays mostly based on how much trust can be created.

Donors need to trust that they play an essential, central role in an organisation’s success; that an organisation does worthwhile things with donations; and that an organisation conducts its operations efficiently. Sadly, most organisations focus on their own needs and why their good work requires funding. That’s not good!

The donor-centred organisation puts the donor at the centre. It doesn’t matter if this is an individual or a trust or corporate who has given you funding, they should be treated the same.

Your choice of words is what puts a donor at the centre. For example, “Because of your support, HelpAge can do this vital work.” “Your donation created a comfortable home for our elders.” “With your gift older people can live dignified, secure, and healthy lives.” “Because of you, the donor, HelpAge challenges age discrimination in Sudan.” And so on. However, be careful not to overdo it as too much repetition and words can lose their meaning.

To understand what donor-centred means, read Adrian Sargeant’s research about what donors want. Sargeant found that the following matter in the fundraising relationship:

- thanking donors for their support
- informing donors how their money is spent
- responding quickly when donors contact the organisation
- being polite in communications.

Once an organisation is behaving in a donor-centred manner, then it can build relationships between the donor and the organisation, and the cause of care, support and rights for older people. Donors should be engaged in “a fight they can win” and made to feel part of the team. In order to do so, a fundraising programme must include a comprehensive relationship-building programme. Simply asking for a donation alone is not enough, nor is it appropriate.

Donor-centred communications include some form of regular donor newsletter, such as a monthly update on the organisation’s work. The donor is the hero in this newsletter. Of course, include an opportunity for them to give again. For example, you could ask them to support a different project or to sign up to a regular monthly donation. If a newsletter is truly donor-centred and really good, sometimes it can generate more money than a direct mail letter.

But relationship building is more than the donor newsletter. Relationship building includes offering donors some extraordinary experiences. These are experiences that makes the donor feel special (see box).

Ask yourself – as a donor to some cherished cause – when did you feel like you mattered the most? When did you feel like a hero?

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Simone Joyaux is a consultant at Joyaux Associates.



## The giving pyramid

The donor pyramid shows how donors’ relationships with NGOs develop. Starting at the base, supporters are cultivated over time to give larger amounts through successive engagement strategies.

### Consider experiences like these for donors:

- A thank-you call from a board member
- A special event where donors meet staff and learn about the impact of their donations
- A gathering to talk with some of the older people that their donation has helped
- An invitation to share their philanthropic story as a donor. Maybe this is published in the donor newsletter, annual report or website.

### Additional resources

*Relationship Fundraising*, Ken Burnett

*Building Donor Loyalty*, Adrian Sargeant and Elaine Jay

*Keep Your Donors: The Guide to Better Communications and Stronger Relationships*, Simone Joyaux and Tom Ahern

Showcase of Fundraising Innovation and Inspiration: [www.sofii.org](http://www.sofii.org)

Free e-news about how to produce donor-centred communications: [www.aherncomm.com](http://www.aherncomm.com)

Weekly blog and monthly e-news about fundraising, boards, planning and more: [www.simonejoyaux.com](http://www.simonejoyaux.com)

# Seven steps to success

## Top tips for effective proposal writing from Jill Nadolski.

Writing an effective proposal – also known as a funding application – is not difficult but it does require skills that every fundraiser can and should develop. For many smaller NGOs this will be the first impression a funder will have of your organisation and their decision will largely depend on how well a project or programme of activity is presented.

### 1. Have a project plan

Before starting to write your proposal, it is vital to have a project plan. This spells out in detail why a project is needed, what you are seeking to achieve, how and when you will deliver the work, staff requirements, the results expected, and monitoring and evaluation tools.

Your plan must include a detailed budget which will demonstrate financial planning. Identify capital or other one-off costs, salaries, project-related overheads and any other major operational costs, such as building materials, IT equipment or transportation needs.

It is good practice to conduct an analysis of the risks involved and how you will react if things do not go to plan. Equally, thought should be given to the sustainability of the project and also the “exit strategy”. What will you do on completion of the project and when the funding ends?

### 2. Plan your approach

Carefully consider who you plan to approach. You need to consider the funder’s priorities and interests, application process and eligibility criteria. (see page 10 for more on this process). It might help to telephone the donor or meet them to present your organisation’s work before you write a proposal.

A proposal that is targeted to a particular funder is more likely to succeed than a proposal sent out to a large number of untargeted funders. Start by identifying the most appropriate funder for your project and spend time producing a well structured proposal that is in line with their priorities. Be sure to check what they will not fund and to read the guidelines thoroughly.



**Elim Hlanganani Society for the Care of the Aged has raised funds from local financial institutions in South Africa to train and support carers of older people.**

### 3. Make your points quickly

You might be tempted to put everything in your proposal, but grantmakers receive hundreds, if not thousands, of applications. Your job is to get their attention in the shortest possible time. This starts with the “title”, which must be attractive and exciting while at the same time conveying the goals of the project. It’s not easy to do, but can be very effective. For example HOPE: Helping Older People in Emergencies, or Forget Me Not: Improving Dementia Care in Andean Countries.

For substantial projects and for certain funders, a long application might be appropriate. However, for most projects a good rule is a two-page proposal plus budget. You can add appended information such as case studies, assessment reports, photographs or technical information, but only if these will strengthen your case.

An executive summary of no longer than two or three paragraphs can then be used in the cover letter, which will help highlight your case for support (see page 8) in a format that is quick and easy to understand.

### 4. Establish your credibility

If your NGO is new to the prospective funder, they will question why they should trust you. List well connected patrons or committee members, any major supporters and funders, and include clippings of press coverage of your work. Evaluations of your work and feedback from service users, community leaders or others can add credibility. Direct quotes from respected experts will help establish your track record, especially if the problem itself is not widely recognised.

### 5. Language and jargon

The best writing brings a project to life. While the need to be factual is important, writing that is boring to read is not a winning formula. Use words that denote action, focus on what matters, use short words and sentences, and use headings and bold text to highlight key features.

The use of technical language is the biggest mistake in a proposal. Unless you know that the person assessing your proposal is an expert, jargon will mean nothing to them. Abbreviations should be written out in full in the first instance

## Mutual support

Elim Hlanganani Society for the Care of the Aged successfully applied for funding from the Old Mutual Foundation, the charitable arm of the financial services provider, Old Mutual.

The opportunity had been identified by the fundraising team using prospect research techniques, like those described in the article on page 10.

Molly Languta Baloyi who works at the charity said that the application process was easy to follow. “It took a day to fill in”, she says, describing how they were required to provide information about the organisation’s background; goals, mission and vision; and involvement in the local community.

“They also requested our Constitution; PBO Section 18 A letter [which confirms the charity has been approved as a public benefit organisation]; audited financial statements; a recent bank statement and a budget for the programme,” she adds.

Some six months and several conversations later, the partnership was approved. This was in 2006 and since then funding of 96,000 rands (US\$9,700) has been provided, money which has contributed to material assistance and the accredited training of caregivers.

The charity takes care to ensure that the Foundation knows how much the funding is appreciated. A thank you

letter is always sent out after donations are received, and regular reports, including the annual report, are provided that highlight how the money has been used.

“Whenever funds are received from any source it should be used for the intentions as stipulated in the application,” says Molly, who emphasises how this is necessary to encourage repeat donations.

“Organisations should also inform and update the donors on the developments and achievements. For example, donors should be invited to the centre where they can see first-hand the important role their funding will and does have.”

and used sparingly. For example, “older people’s self-help group” is clearer than “OPSHG”.

The most overused words in proposals are “desperate”, “urgent”, “unique” and “innovative”. Be prepared to back up these words with facts and figures, not generalities.

## 6. Ask someone else to read it

Before you send off your proposal, the best person to read it is someone who knows little about your work. If they don’t understand it, it’s likely the funder won’t either. They can also challenge your assumptions and ask for explanations.

## 7. Be truthful

Proposal writing shouldn’t be seen as winning the prize. While there is enormous satisfaction in writing a successful application, it will backfire if you promise what the NGO cannot deliver.

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Jill Nadolski is Operations Manager at EEIBA, the UK’s national charity for the electrical and electronics industry.

## Checklist for a proposal

**How a proposal is presented can make all the difference. If the funder has not already stipulated their preferred format, the following checklist will help to ensure nothing is forgotten:**

1. Details of your mission and project
2. A description of the problem and why it’s important, referencing internal and external data that can evidence the problem
3. Particular geographic or socio-economic factors
4. The project’s aims and objectives, including beneficiary numbers, length of project, and evidence of experience in the geographical area and sector of work
5. A detailed budget. If no budget format is given, then costs should be presented plainly and grouped by sub-categories, using notes to explain anything that is unclear. Information on co-funding secured or any in-kind support should be included, as this additional support can be attractive to a donor
6. The results expected – quantifiable targets (outputs) and qualitative impact (outcomes)
7. Working methods, and short and long-term operational plans
8. How progress will be measured and monitored
9. How beneficiaries are involved in the project
10. Partner organisations and relations with them
11. Staff requirements, including skills and key people involved
12. Details of your track record
13. Exit strategy
14. Risk assessment and contingency plans
15. Dates by which you hope to secure the money (shown in a project timeline)



Runners in the 2012 Berlin Marathon raised thousands of euros for HelpAge Deutschland from their families, friends and colleagues.

# Adding more donors

**Lutz Hethey reveals the challenges that HelpAge Deutschland faced in expanding its donor base.**

HelpAge Deutschland is a relatively young and small member of the HelpAge family. Founded in 2005 by three people with vast experience of development aid, it is packed full of ideas, but does not have the funds to match its creativity.

From the outset HelpAge Deutschland has concentrated on raising funds for two main projects: KwaWazee in Tanzania and Waman Wasi in Peru. The former provides a basic pension and psycho-social care to grandmothers who care for their grandchildren who have been orphaned by AIDS. The latter helps older people to share their knowledge and life experience with younger generations.

HelpAge Deutschland has greatly benefited from the endorsement and support of well known and worthy patrons. The politician Henning Scherf and actress Hannelore Hoger hold an enormous public appreciation in Germany, and have therefore played a vital role in increasing our public profile.

The assistance and guidance from many other individuals has also been greatly appreciated. They have volunteered time to help create a brand identity, inputted ideas for direct marketing campaigns, given key advice on building a supporter database and offered technical support to improve our website.

Transferring ideas into actions that will come to fruition is a real challenge, but

a worthwhile one. Our photo exhibition *Stille Heldinnen* (Silent Heroes) contributed greatly towards our increased public exposure and to finding supporters. Through this initiative we have found partners such as Soroptimist International and raised public awareness of our cause.

The most successful campaign so far has been *Jede Oma Zählt* (Every Granny Counts). It demonstrates both active ageing and the solidarity between different generations. During this campaign, we have been working with schools under the slogan “pupils assisting older people”, which has generated a lot of public attention, including that of new and inquisitive supporters.

Another success has been our peer-to-peer marathon fundraising. Over 70 runners ran the Berlin Marathon in 2012 on behalf of HelpAge Deutschland. They were wonderful, frontline ambassadors and raised more than €70,000 (US\$91,300) from over 900 donors by encouraging family, friends and colleagues to sponsor their efforts and support the cause.

This type of fundraising does not require big investment, but needs a lot of input to keep the volunteers motivated. For example, frequent event management support was necessary to attract public attention to their activities, with special events such as concerts and celebrity book readings proving vital.

## Taking the next step

Through these activities, HelpAge Deutschland raised €400,000 (US\$533,000) in private donations over the course of the year from 5,000 donors. However, this was still not enough to make us a major player in the German NGO world. To do this we needed to enter into the realm of public fundraising, using the skills of professional fundraising agencies.

After comprehensive research, we decided that face-to-face fundraising (on the street) was the best route to explore. With much appreciated financial support and guidance from colleagues at HelpAge International in London, we have conducted two tests with different agencies. By the end of 2013 we predict we will have found approximately 1,500 new regular donors, who will each donate €120 (US\$160) on average per year.

Finding ways to recruit new and committed donors will always be a challenge for any NGO, but keeping those donors engaged is the real challenge and HelpAge Deutschland is lucky to have a great fundraising and communications team within its ranks. In the long term our target is to become established as a well-known brand in Germany and a truly inspirational NGO that can attract and retain many donors who are keen to support our vital work.

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Lutz Hethey is Executive Director of HelpAge Deutschland.

# Fundraising surgery

**The Resource Alliance's global network of fundraising associates offer solutions to some common fundraising challenges.**

## How can I fundraise for items such as travel, meetings and administrative tasks?

It can be more difficult to fundraise for items such as these, but it is not impossible. The key is to demonstrate their added value within a project proposal and how they are directly linked to a project. For example, donors like to see that the project they are funding is well managed and many would expect to see some monitoring and evaluation costs included within this, which could include travel to the project.

Equally, publishing project results is a good way to ensure donor visibility and share the learnings of the outcome and activities. Therefore, if a publication is directly linked to a project, and helps highlight the achievements to a wider audience, then donors could be open to funding this type of item. However, it would be advisable to include these costs within the budget, labelled as direct project costs, if at all possible. The added value they provide can be detailed within the proposal or budget narrative if extra justification is required.

*Sophia Ioannou, Greece*

## Our trustees are currently not very engaged with our fundraising activities.

### How can we encourage them to be more supportive?

It all comes down to the composition of your board. Typically, if your trustees are passionate about the cause and organisation, they will be happy to support you. However, perhaps they haven't realised quite how useful they could and should be. Sometimes a little encouragement can highlight to them the value they can bring either through the use of their own skills, or by opening doors to others who might be happy to support the organisation.

If the trustees do not understand the need to develop and strengthen your fundraising, then one should stress the parallels with business development. As much as businesses need to invest in generating revenues to become successful, so too do NGOs and CBOs. Otherwise it is very difficult for organisations to become sustainable and to achieve their mission.

*Eduard Marcek, Slovakia*

## What qualities make a successful fundraiser?

One would think that the success of a fundraiser would be measured by the amount of money raised. I do not believe so. We achieve success when we manage to transform our circumstances. To do that, we need more than money.

You can pick a fundraiser out of a crowd because of his or her passion. Passion is what you need to connect people to one another, to worthy causes and to good solutions. You need passion to inspire others to invest in something that will provide them and their communities with lasting returns.

Fundraisers are good listeners. They need to perceive what an organisation needs and also what donors need; to be good at making these connections, and developing trust that will lead to long-term relationships capable of change and transformation.

*Annette Candanedo, USA and Latin America*

## It has been suggested that we use volunteers to support our fundraising activities.

### What value can they add and what should their role be?

The passion that volunteers have for an organisation can make them great fundraisers. Volunteers come with many talents to enhance the fundraising process. They can promote the messages of the organisation to their friends, family and work colleagues and ask these contacts to give money. They can also volunteer their time to help implement fundraising activities, such as the organising of events, writing of appeals and mailing of letters. However, for this type of fundraising to be successful, volunteers need to feel appreciated and receive appropriate guidance. Therefore, it's imperative to have a strong manager who can provide the appropriate support.

*Jolan van Herwaarden, UK*



Dalton Bennett/HelpAge International

**Some donors will fund projects for older people if they also include children, as in Kyrgyzstan, where labour migration has led to many "skipped-generation" households.**

# Embracing social media

**Howard Lake explains why social media is important for fundraising.**

Social media enables people to communicate with each other through the internet. In particular, it is those websites that allow people to share or contribute content and connect with friends, family and colleagues, whether at a desktop computer or on the go using a smartphone.

Social media is the norm for many people now. Facebook alone has more than 1 billion regular users worldwide, while Twitter has more than 500 million users who generate 340 million tweets a day.

The digital realm is not and has never been the exclusive preserve of the young. In the UK, for example, a survey by the website myvouchercode.co.uk found that 22 per cent of people aged over 60 have a social media presence. Of those

polled, 71 per cent said they were on Facebook, 34 per cent used Twitter and 9 per cent have profiles on the business network, LinkedIn.

For non-profit organisations, social media offers a valuable if challenging array of opportunities. You can use it to source and share information, highlight your work and build your credibility. Services such as Facebook, Twitter and YouTube offer important, even essential channels to new and current supporters, volunteers, journalists, legislators, clients and beneficiaries. They are free or low cost, although staff time spent learning and applying the finer methods of using them is certainly not.

They are essential because these sites are where so many people spend their

time. For example, Railway Children raised over £97,000 (US\$152,000) in just 24 hours via a Twitter campaign that saw the insurance company Aviva UK donate £1 (US\$1.5) for every tweet sent that used the hashtag #1every5.

Social media campaigns can have a near-instant response. A single tweet from the band Coldplay created a sudden surge of would-be donors that tested the ability of the British Red Cross website to respond.

Used effectively, the right social media tools will help your organisation extend its reach, enhance its reputation and engage with new audiences. Ignore it and the likelihood is you will be ignored too.

**Howard Lake is publisher of UK Fundraising and an adviser to charities on digital media.**

## A true conversation

Until 2010, HelpAge India did not use online media other than a website and emails to staff. Our social networking began with the launch of online communities on Facebook, Twitter and LinkedIn, writes *Mathew Cherian*.

We realised we cannot be top-down but must be part of a true conversation.

We began with younger people in our fundraising team in Delhi, asking them to get active on Facebook, Twitter and LinkedIn in order to build an online community with relevant audiences.

An important means of driving traffic and engagement are our annual research reports on elder abuse in India. We promote these on our website, Facebook and Twitter accounts.

We also use online banners on websites such as [www.yahoo.com](http://www.yahoo.com), and receive free ads through Google. These banners were created by our in-house team and put on leading news sites and business newspapers, such as [www.indiatimes.com](http://www.indiatimes.com) and the *Economic Times*.

These banners are key to the success of our online fundraising.

In order to improve our online presence we revamped [our website](#), which included an online donation page that was promoted on the home page and via the toolbar along the top of the website, which provided easy access.

We also improved our in-house analytics in order to see patterns of access. For example, analysis shows

that emails after 3pm and sent on Friday and Saturday have a better reading and response rate.

An important lesson has been the need to decentralise our efforts when it comes to social media. HelpAge India works in many states and so, for example, a decentralised hub such as HelpAge Kerala has a separate Facebook page.

**Mathew Cherian is Chief Executive of HelpAge India.**





# Raising money from new enterprises

**HelpAge Sri Lanka's innovative mobile phone scheme is both raising funds and meeting the communication needs of hundreds of older people.**

A little creative thinking combined with business intellect and lots of hard work can reap wonders for an organisation's bottom line. Indeed, it was this exact combination of qualities that led HelpAge Sri Lanka to take up a novel mobile phone initiative offered by Sri Lanka's premier mobile services provider Dialog Axiata PLC. The initiative has already generated 150,000 Sri Lankan rupees (US\$1,170), with more income set to follow.

A survey in *Ageing in the Twenty-First Century: A Celebration and A Challenge*, published last year by HelpAge International and the UN (summarised in *Ageways* 80), showed that 61 per cent of older people around the world use mobile phones. However, because this technology is designed with younger generations in mind, mobile phones tend to feature complex functionality and small buttons or touch screens, which many older people struggle to use – particularly those with poor eyesight. Consequently, they are unable to keep in touch with loved ones as easily as they would like.

## Existing relationship

The team at HelpAge Sri Lanka already enjoyed a relationship with Dialog, whereby its customers could donate their loyalty points to HelpAge Sri Lanka, and this is where the conversations started. Numerous meetings between us and Dialog took place to discuss the idea, and after much discussion and consideration of how the initiative would work, the partnership was inked.

The innovative features offered on the Big Dialog Phone from Dialog include buttons with large letters and numbers, an SOS button that will alert family members in the event of an emergency, a torch and an FM radio.

What's more, as part of HelpAge's work around social enterprises, Dialog Axiata will donate a proportion of the sales income to HelpAge Sri Lanka, so the scheme will raise funds for HelpAge Sri Lanka's charitable work with disadvantaged senior citizens.

**This phone makes money for older people's projects as well as helping them keep in touch.**



Russell Juriansz/HelpAge Sri Lanka

A phone costs 3,990 rupees (US\$31) to purchase, of which 300 rupees (US\$2.30) will be donated to HelpAge Sri Lanka. One thousand phones are available for customers, meaning funding of 300,000 rupees (US\$2,340) has been committed to the organisation – half of which has already been raised in the two months since the phone was launched.

## Peace of mind

HelpAge Sri Lanka Chairman Deshabandu Tilak De Zoysa, notes: "This phone's unique SOS functionality provides peace of mind to older people and their families for a small price. The money raised from our partnership with Dialog Axiata PLC will go a long way in supporting our mission to address the social and medical needs of senior citizens in Sri Lanka."

"This new phone from Dialog Axiata PLC shows Sri Lanka taking a lead on

this issue and is a first step in ensuring equal access to technology for older people. In the next ten years, there will be over one billion consumers aged over 60 worldwide, representing a huge shift," says Mayur Paul, Head of Communications and Brand at HelpAge International. "We hope to replicate this social enterprise across the globe and are now looking for other companies to partner with us in providing products and financial services tailor-made for older people."

**To find out more about HelpAge International's social enterprises work, get in touch at Mayur Paul, Head of Communications and Brand at HelpAge International. Email: [mpaul@helpage.org](mailto:mpaul@helpage.org)**

**If you are in Sri Lanka, visit a Dialog store to purchase the phone. [www.dialog.lk/personal/mobile/phones-and-accessories/big-dial-phone](http://www.dialog.lk/personal/mobile/phones-and-accessories/big-dial-phone)**

# Maintaining momentum

## Older people's self-help groups in Vietnam are developing a variety of fundraising strategies.

One of the main problems facing small organisations is the ability to achieve long-term financial sustainability. HelpAge International and the Vietnam Women's Union helped to form 67 self-help groups, which are still active today. To encourage the groups to develop sustainable ways of fundraising, they offered them grants to establish a revolving loan fund. This fund provides micro-credit for members to invest in income-generating activities.

The groups, or clubs, are also required to generate their own funds. Each club sets its own borrowing terms and members usually pay back the capital in monthly instalments. The interest on each loan forms the largest part of the club's self-generated fund. Borrowers must also pay into a savings scheme.

A popular way to generate funds is through group activities. Most of the income goes to the participating members, with a cut going to the club. For example, groups sing at events, care for bonsais at a school, produce embroidery, do balloon twisting, wash bicycles at events, repair village roads and clean village irrigation systems.

### Value to the community

One example is Thanh Xuan Trung club in Hanoi, which attracts donations by proving its value to the community. HelpAge loaned the club 55 million dong (US\$2,590). By early 2011, the club had raised another 25 million dong (US\$1,177). Of this, about 1.2 million dong (US\$56) came from interest from the club's micro-credit scheme, which offers members small loans at an interest rate of 1 per cent per month.

Most of the club's money is spent on six activities: the micro-credit scheme, club meeting expenses, community HIV and AIDS awareness-raising activities,

### Thu's top tips

- Make and preserve contacts
- Have a committed management board
- Develop a good volunteer base
- Publicise your club's activities



**Thanh Xuan Trung co-chair  
Nguyen Thi Thu (left) with Nguyen Thu Huong,  
vice-chair in charge of micro-credit.**

annual health check-ups for members, photocopying interesting or educational articles for members, and providing funds for members' emergencies, such as illness or death.

The club keeps 5 million dong (US\$235) cash in hand at all times. When the cash in hand reaches 8 million dong (US\$376), 3 million dong (US\$141) can be loaned to a member.

The club also provides services for the wider community, including an annual 1.2 million dong (US\$56) scholarship for a child orphaned by AIDS.

Membership has grown from an initial 50 to 60. The club has thrived mainly due to its success securing donations from the local community.

Club co-chair Nguyen Thi Thu usually meets prospective donors personally to show that the club holds them in high regard. The club asks the head of the local Vietnamese Women's Union branch to write a letter of introduction to present to local shops and businesses. The club takes this letter and a copy of their aims

and objectives to community shops and small businesses when shops are busy and turning over good profits, or at the end of the year when they are rounding up their accounts. When a business or individual makes a donation, the club sends a thank you letter, which makes the process more accountable and reassures the donor that the money will be spent for official club purposes.

The management board has also understood the importance of benefiting the wider community. The club uses public holidays such as Family Day, Children's Day and the New Year to raise awareness of its activities and to fundraise.

The club sets a great example whereby its contributions to the community inspire donations, which in turn allow it to continue to support its members, their families and other vulnerable people.

With thanks to Chattip Soralump, Communications Officer, HelpAge International East Asia and Pacific Regional Centre, 6 Soi 17, Nimmanhaemin Road, Suthep Muang, Chiang Mai 50200, Thailand. Email: [chattip@helpageasia.org](mailto:chattip@helpageasia.org)

## Affiliates

More than 100 organisations in over 60 countries are affiliated to HelpAge International, forming a global network standing up for the rights of older people.

We extend a warm welcome to two new Affiliates: **KwaWazee, Switzerland, and Palestinian Center for Communication & Development Strategies (PCCDS), occupied Palestinian territories.**

### Caribbean

Action Ageing Jamaica  
 Dominica Council on Ageing  
 Extended Care through Hope and Optimism (ECHO), Grenada  
 HelpAge Barbados  
 HelpAge Belize\*  
 HelpAge St Lucia  
 National Foundation for Blind Care, Suriname  
 Old People's Welfare Association (OPWA), Montserrat  
 REACH Dominica  
 Society of St Vincent de Paul, Antigua  
 St Catherine Community Development Agency (SACDA), Jamaica

### East, West and Central Africa

Current Evangelism Ministries, Sierra Leone  
 District Pastoralist Association, Kenya  
 Ethiopia Elderly and Pensioners National Association (EEPNA)  
 Fantsuam Foundation, Nigeria  
 HelpAge Ghana  
 HelpAge Kenya\*  
 Kenya Society for People with AIDS (KESPA)  
 Mauritius Family Planning Association  
 RECEWAPEC, Cameroon  
 Rift Valley Children and Women Development Organisation (RCWDO), Ethiopia  
 SAWAKA, Tanzania  
 Senior Citizens' Council, Mauritius  
 Sierra Leone Society for the Welfare of the Aged  
 South Sudan Older People's Organisation (SSOPO)

Tanzania Mission to the Poor and Disabled (PADI)  
 Uganda Reach the Aged Association (URAA)

### Southern Africa

Age-in-Action, South Africa  
 APOSEMO, Mozambique  
 Elim Hlanganani Society for the Care of the Aged, South Africa  
 HelpAge Zimbabwe  
 Maseru Senior Women's Association, Lesotho  
 Muthande Society for the Aged (MUSA), South Africa  
 Senior Citizens' Association of Zambia  
 VUKOXA, Mozambique

### East Asia and Pacific

CASCD (formerly RECAS), Vietnam  
 China National Committee on Aging (CNCA)  
 Coalition of Services of the Elderly (COSE), Philippines  
 Council on the Ageing (COTA), Australia  
 Fiji Council of Social Services (FCOSS)  
 Foundation for Older Persons Development (FOPDEV), Thailand  
 HelpAge Korea\*

Helping Hand Hong Kong  
 Instituto de Acção Social, Macau  
 Mongolian Association of Elderly People  
 National Council of Senior Citizens Organisations Malaysia (NACSCOM)  
 Office of Seniors' Interests, Australia  
 Senior Citizens' Association of Thailand  
 Senior Citizens' Council of Thailand  
 Singapore Action Group of Elders (SAGE)  
 Society for WINGS, Singapore  
 Tsao Foundation, Singapore  
 USIAMAS, Malaysia  
 Vietnam Association of the Elderly (VAE)  
 Yayasan Emong Lansia (YEL), Indonesia

### South Asia

Bangladesh Women's Health Coalition (BWHC)  
 Dhaka Ahsania Mission, Bangladesh  
 Gramin Vikas Vigyan Samiti (GRAVIS), India  
 HelpAge India  
 HelpAge Sri Lanka\*

Pakistan Medico International  
 Resource Integration Centre (RIC), Bangladesh

### Eastern Europe and Central Asia

Dobroe Delo, Russia  
 Lastavica, Serbia  
 Mission Armenia  
 Resource Centre for Elderly People (RCE), Kyrgyzstan  
 Second Breath (Gerontological Association of Moldova)  
 Turbota pro Litnix v Ukraini

### Western Europe

Age Action Ireland  
 Age International, UK\*  
 Caritas Malta  
 Centre for Policy on Ageing, UK  
 Cordaid, Netherlands  
 DaneAge Association  
 HelpAge Deutschland\*  
 Helpage International España\*  
 Kwa Wazee, Switzerland  
 Slovene Philanthropy  
 WorldGranny, Netherlands\*  
 Zivot 90, Czech Republic

### Latin America

AGECO, Costa Rica  
 Asociación Red Tiempos de Colombia  
 CAPIs, Peru  
 Caritas Chile  
 Centro Proceso Social, Peru  
 CESTRA, Colombia  
 CooperAcción, Peru  
 Fundación Horizontes, Bolivia  
 Haitian Society for the Blind (SHAA)  
 IPEMIN, Peru  
 ISALUD, Argentina  
 Peru Coordinating Group for Older People (Mesa de Trabajo)  
 Pro Vida Bolivia  
 Pro Vida Colombia  
 Pro Vida Perú  
 Red de Programas para el Adulto Mayor, Chile

### North America

AARP, USA  
 HelpAge Canada\*  
 HelpAge USA\*  
 West Virginia University Center on Aging, USA

### Middle East and Northern Africa

El-Wedad Society for Community Rehabilitation (WSCR), oPt  
 Palestinian Center for Communication & Development Strategies (PCCDS), oPt  
 Sudanese Society for the Care of Older People (SSCOP)

\*HelpAge sister Affiliates

## HelpAge regional centres

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## Find out more

If you are an Affiliate, you can use the HelpAge intranet to find out more about the HelpAge global network, regional networks and other Affiliates. You can also download a wide range of resources and take part in discussion forums.  
<http://hai-intra.jamkit.com>

To enquire about affiliation, please contact your nearest HelpAge regional centre or the London office. Full contact details can be found at: [www.helpage.org/where-we-work](http://www.helpage.org/where-we-work) (click on the name of the region)

Any questions? Please contact Anders Hylander, Network Communications Assistant, HelpAge International, PO Box 70156, London WC1A 9GB, UK.  
 Email: [ahylander@helpage.org](mailto:ahylander@helpage.org)

**HelpAge International helps older people claim their rights, challenge discrimination and overcome poverty, so that they can lead dignified, secure, active and healthy lives.**

*Ageways* exchanges practical information on ageing and development, particularly good practice developed in the HelpAge network.

*Ageways* is published twice a year.

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 Alternatively, email: [info@helpage.org](mailto:info@helpage.org) or write to the editor. You can also download *Ageways* as a PDF.

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Registered charity number: 288180  
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ISSN 1469-6223

Design: TRUE. Print: Park Lane Press  
*Ageways* is printed using vegetable-based inks, with power from renewable resources and waterless printing technology.  
 Paper: Revive 100 Offset, 100% recycled



With funding from



Member of the HelpAge global network



We aim to be the global network for fundraising, resource mobilisation and philanthropy

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