

The Methodology of

# NIOK's Social Base Building Support Program

FOR CAPACITY BUILDING  
ORGANIZATIONS, CSO EXPERTS  
AND DONORS

2021

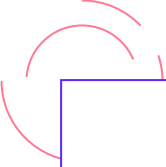


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STRONGER  
ROOTS

NADÁCIA  
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# Preface

Free and active civil society is an attribute of a healthy participatory democracy and fulfills a variety of crucial roles, such as creating solidarity and ties among people, protecting the environment, providing support to vulnerable groups, and enhancing transparency and good governance. Civil society organizations (CSOs) derive from a wide range of joint aspirations and stimulate public participation in public life. At the same time, they need public support to maintain their legitimacy, effectiveness and financial stability. Applying different strategies of how to reach out to existing and new audiences, build a network of active supporters, and increase the number of volunteers and individual donors help CSOs to get stronger, more professional, publicly acclaimed and sustainable.

Moreover, the importance of strengthened ties of the CSOs to the people around them has been particularly seen over the last decade, when civil society and democratic institutions in the post-communist Central Europe have been challenged by attempts to delegitimize CSOs and limit the space in which they operate.

CSOs cannot fend off these attempts without the support of the broader public and without some self-reflection of their organizational functioning. Increasing its social capital is a vital aim for any organization to become more resilient in times of shrinking space for civil society.

Reflecting these trends, Open Society Fund Prague (CZ), Open Society Foundation Bratislava (SK), Glopolis (CZ) and NIOK Foundation (HU) have created a consortium to jointly implement the “Stronger Roots for Civil Society” project. The project strives to increase the organizational and sectoral resilience of CSOs in the Czech Republic, Slovakia and Hungary, and embed them in the societies in which they operate. As part of this project, the consortium provides dual support to CSOs: a grant for building their social base and an expert support program that is based on the methodology of NIOK Foundation, which is the focus of this publication.

# 1. Introduction

This publication is written for organizations that work to strengthen the capacity of other civil society organizations (CSOs) in building their social bases. NIOK Foundation's goal with this paper is to transfer four years of direct, and more than ten years of indirect, experience to CSO experts and other capacity-building organizations. Our hope is that learning about our experience and applying the Social Base Building Consultancy and Peer Support Program we have developed will provide valuable help to others in supporting their capacity-building efforts with other organizations. This publication may also be useful to private foundations and other supporting organizations that seek effective models to strengthen and revitalize civil society organizations (CSOs), and increase their social embeddedness.

This publication aims to explain the details of NIOK Foundation's Social Base Building Consultancy and Peer Support Program: how we define social base building, on what principles we work with CSOs, how we categorize the different stages that an organization goes through while building its social base, and the methods and processes we use in supporting CSOs in implementing their social base building projects.

The support program has been developed by NIOK Foundation within its partnership with OSIFE in providing support for CSOs that implement social base building projects as grantees of OSIFE's Social Base Building program.

The OSIFE Social Base Building program started as a result of the realization that civil society organizations have to work in

a continuously shrinking space. Narrowing grant opportunities, as well as a changing legal and regulatory environment, are limiting space for organizations to operate; and narratives criticizing or even attacking them are undermining their legitimacy. As many organizations started their work as a few individuals with a vision, but without a community of supporters, they are struggling not only with the lack of social embeddedness but also with dependence on large donors as well as with the difficulties coming from the combination of these two.

Partnering with OSIFE to support its grantees in the implementation of their social base building projects has been a major step for us to help CSOs more effectively. In the past four years, we have developed, and continue to develop a complex support program.

The program reflects our experiences in supporting 30 Hungarian organizations in their social base building endeavors since 2016. Our statements are also built upon a survey that we conducted with the engagement of 40 organizations from the V4 countries and Bulgaria that took part in a workshop that we organized in 2019. The aim of the workshop was to gather together CSOs that implement social base building projects in the region with an aim to share their challenges and successes.

Apart from these direct experiences, NIOK as a leading civil society development organization in Hungary has been providing services for hundreds of organizations through training courses, consultancy, and services mainly in fundraising and communications. This paper relies on our ex-

perience with these organizations and the several transformations that we have seen and supported to make these organizations more connected to their communities and society as a whole.

The methodology has been introduced and tested in 3 countries in the framework of the Stronger Roots and the OSIFE Social Base Building programs from 2020.

We have compiled the learnings of newly launching the program and the related detailed instructions in the Support Program Manual. We have also created case studies of social base building projects implemented in the Stronger Roots program in a separate publication.

## 2. What Does Social Base Building Mean?

We use the terms social base building (SBB) or constituency building (CB) as synonyms both in this publication and in practice. Both terms describe an approach, an active process and series of actions during which an organization consciously reaches out to and engages its beneficiaries, supporters and diverse groups of society into fulfilling its mission. The organization strives to build an ongoing and mutual relationship with these groups. This relationship allows the organization to learn about and understand the community's needs, challenges, expectations, thinking, and build its activities, actions and communications based on them. As the organization becomes more reflective of social trends, it also becomes more able to react to societal challenges and address people's needs or create a need for change. At the same time it becomes able to engage more individuals and various groups of society as active or passive supporters of its work.

*“Since our participation in the program our organization has gone through huge changes. We have formulated a need to make our organization more open and accessible, easier to understand, and to put an emphasis on getting to know and engaging those around us. To achieve this we not only started new activities but also changed our operation and world*

*view. Our participation meant a learning and development opportunity, and we received great help from our mentors and experts in embracing this new approach, conscious building and keeping our focuses.” (Gábor Takács, Káva Drama / Theatre in Education Association, Hungary)*

Social base building thus has an impact on the overall operation of the organization, and it requires and results in a new approach to identifying and engaging audiences. The strong and mutual social connections will increase the organization's embeddedness in society, and the organization will gradually embrace the following characteristics (the focus and relevance of these may vary based on the strategy of the organizations):

- It forms its strategy, activities and communications taking into account the characteristics of the environment (social, political, economic, psychological, digital etc. features);
- It understands its audiences at high levels;
- The organization is widely known, its voice and opinions are heard and understood by various groups, and it has supporters based on its principles and values;

- It has strong relationships with the beneficiaries and other constituents, whose opinions are reflected in its strategy and programs, and the organization's leadership has beneficiary representation;
- It has a local (community, regional, national) donor base, including regular donors;
- Volunteers and activists are engaged in its activities, and the activities are actively formed by their input;
- It has strong intersectoral and professional relations, it is a well-known and acknowledged organization among CSOs, independent of state institutions and municipalities;
- It is transparent and accountable towards its community and the wider audience.

Increased social embeddedness allows the organization to grow and increase its ability to mobilize people, raise more funds, reach out

to new audiences, have an impact on social change, and increase its social legitimacy. The organization will be stronger, more resilient, more reactive to the challenges of shrinking space for civil society, more independent of funding by the state or major grant institutions, and social embeddedness will provide a community that has its back.

*“Besides concrete professional help, the program provided ongoing mentoring, a unique flexibility and tailored solutions that was essential for us to shift from a low point and overcome a management change. Thanks to this support we could dedicate adequate time and energy to communication and fundraising activities that built a base for our future operation. Mentoring also helped us not to lose focus and keep our eyes on our long-term goals amidst various challenges.”*  
(Zoltán Hámori, Romaversitas Foundation, Hungary)

## 3. The Model of NIOK's Consultancy and Peer Support Program

NIOK's Social Base Building Consultancy and Peer Support Program currently is an extension to a grant program. The grant supports CSOs' social base building projects, and allows grantees financial stability, capacities and a strong focus to implement their projects and utilize the support program. The support program is a complex and flexible package specific to social base building and tailored to each organization's specific needs, and it gives meaningful additional value and benefits to

grant-making. It offers various learning and development opportunities that provide knowledge, skills and tools that the individual organizations can benefit from in the long run, and it also encourages and builds on regular experience sharing and peer learning. Most importantly, the program creates a unique opportunity for CSOs to dedicate time to and focus on learning and self-development to understand social base building as an overall approach, test and evaluate activities and processes to

foster identifying and engaging constituents; and start integrating the new approach and processes to their work.

The development and learning opportunities in the program allow grantees to continuously modify their original plans based on what they learn and experience, and create new plans to achieve their original social base building goals.

## Program Principles and Values

The essential values of NIOK's Social Base Building Support Program are that it builds on the grantees' needs, encourages and enables peer support, and provides a flexible framework of a complex support system, based on the following general principles:

- The capacity building follows the grantee's learning curve and reflects the current stage of the organization.
- It enhances self-reflection, works with the past experiences of the organization, and builds on their successes and failures.
- It is an iterative process, based on an initial assessment of the organization's current stage, and creates a development plan, which is revisited and fine-tuned quarterly.
- Responsibility remains within the organization to learn and develop.
- All support elements are provided in an engaging and consultative way; nothing is compulsory, leaders of the organization and leaders of the project have the right and the responsibility to implement changes at their own pace.

- It creates space for peer learning and peer support as the organizations and their staff undergo very similar development processes and thus can learn from each other and support one another.

## The Key Actors of the Program

The support program is unique also in the way it involves many actors and individuals, all of whom have a specific and significant role.

- The donor organization that provides grants for CSOs to implement social base building projects.
- The support organization that provides a complex support program for the grantees to help them implement their social base building project. The support program is delivered by the support program staff and a carefully selected pool of mentors and experts.
- The grantees who propose and implement social base building projects, and take part in peer learning and self-developing activities. On the grantees' side it is not only the leader of the project who takes part in the program, but at best the leader of the organization to ensure organizational level change, and the program staff who have connections to constituents: fundraisers, communication managers, advocacy managers or volunteer managers.



# Program Elements

The program is built from existing capacity-building methods, but in the past years, we have created a mix of tools that we believe works best to support organizations building their social base and reflects our development principles. The program is very flexible and enables grantees to utilize its elements, specifically consultancy support, in a quantity, thematic range and pace tailored to their needs. The networking and training opportunities are also designed based on continuous needs assessment of the cohort, as well as their challenges, successes and development paths.

*“It meant great help in finding and testing new forms that the social base building project specifically encouraged experimenting. Besides implementing our own ideas we also had opportunities in the framework of the program to have discussions and share experiences with other organizations in a similar situation, and we also received consultancy support tailored to our needs.”* (Katalin Szitás, Political Capital)

**Mentoring:** The goal of mentoring is to provide an expert in social base building and change management available for the grantees. The mentor creates a partnership, not a vertical relation, with the leader of the organization and/or with the person responsible for the social base building project at the organization. This personal connection and continuous support assists organizations in regular reflection and development to make a change and reach their goals.

**Networking workshops:** Throughout the program grantees participate in various networking events. These events provide opportunities for the grantees to share experience and discuss best practices, successes and challenges throughout the program so they can learn and be inspired by each other’s experience, and reflect on their own development. These occasions are the primary spaces for peer learning, allowing organizations going through similar development processes to learn from each other, identify common challenges and start discussions that could lead to solutions.

**Training courses:** The training courses are led by experts in topics relevant to most of the organizations, and provide high-quality learning opportunities. A set of basic training courses in online communications and fundraising is often useful in the first phase of the program, while latter ones can be tailored to the grantees’ specific interests and needs.

**Expert consultancy:** We provide consultancies in fields of expertise relevant to social base building by experts in those fields. As opposed to the training courses, the consultancy provides more specific and deeper support in the implementation of a task, campaign or development. The experts do not participate in the implementation itself, but only provide their expertise during planning, implementing or evaluating a specific task. The support program is unique also in the way it involves many actors and individuals, all of whom have a specific and significant role.

# 4. Stages in Building Social Base

*“For us participating in the program was like a safety net underneath while we were walking on a tightrope. An essential condition of social base building is that the organization has to direct a spotlight to itself, even if only for a brief time, and dedicate resources to activities they might have not had enough capacities before beyond its core activities. The organization needs to develop skills to talk about itself, present its results, celebrate its supporters and followers, and think of them as a base they can build on. The program and NIOK’s support created space and opportunities for us to improve these skills with the help of experts whose experience or services are rarely accessible to a CSO.” (Zoltán Bognár, TASZ / Hungarian Civil Liberties Union, Hungary)*

Below we have described the typical stages in a CSO’s life based on our experience having supported 30 Hungarian organizations in their social base building endeavors between 2016-2020. Our statements are also built on a survey that we conducted with the engagement of 40 of the OSIFE Social Base Building program from the V4 countries and Bulgaria, who took part in a workshop on social base building we organized in 2019. Our conclusions of these stages have also been reinforced by the social base building projects run within the Stronger Roots program in Hungary, the Czech Republic and Slovakia.

In the following chapter we describe how organizations generally move forward until they reach a point when they manage social base building and the related dimensions on a strategic level.

## These dimensions include:

**Dimension 1 (D1)** Awareness, attitudes, capacities of leadership and staff

**Dimension 2 (D2)** Plans, strategies, transparency, and accountability

**Dimension 3 (D3)** Understanding and engaging current social base

**Dimension 4 (D4)** Identifying and reaching out to new audiences

We have defined three stages, but of course there might be overlaps in case an organization is more experienced and developed in one dimension than in others.

In all 3 stages we examined the 4 dimensions and provided a short explanation on how an organization performs in each of these dimensions at the different stages.

In Stage 1 (S1) the organization is in a pre-phase for building a social base. We call this stage Questioning, as most of the organizations are skeptical about making progress in building a social base at this stage, they often lack the capacities and skills, and the approach is quite new to the organization. In Stage 2 (S2) the organizations have already made steps and have had experience in social base building. As the organizations usually go through a transformative change, we call this stage Transforming. This means that the organization gradually adapts the new approach and starts to feel and acknowledge the benefits of building a social base. In Stage 3 (S3) constituency building is at a strategic level, its concept and related activities are being built into the strategies and processes of the organizations thus we call this stage Integrating. Throughout the support program, the support organization’s goal is to help the grantees move to higher and higher stages within the different dimensions. The support program provides a framework for grantees to work on themselves and get more and more conscientious in their relations to their constituencies.

## Stages in social base building (SBB)

	S1 Questioning	S2 Transforming	S3 Integrating
<b>D1 Awareness, attitudes, capacities of leadership and staff</b>	SBB is not considered important, there is skepticism towards fundraising and communication. There are no/not enough capacities allocated to communication, fundraising or mobilizing.	Some of the staff members are getting acquainted or even committed to SBB processes; successes in communication, fundraising or mobilization; some capacities allocated.	The leaders and the staff understand and support SBB; the key barriers are eliminated; adequate capacities are allocated.
<b>D2 Plans, strategies, transparency &amp; accountability</b>	SBB is not integrated into the operation of the organization; there are no strategies or plans for fundraising, communication or mobilizing.	The organization starts to create strategies for fundraising, communication or mobilizing, in which SBB starts to appear, but it is not an integrated part of the overall strategy of the organization.	SBB becomes an integrated part of plans and activities, and the overall strategy of the organization, and is seen as an area that overarches all operations.
<b>D3 Understanding and engaging current social base</b>	The organization has constituencies but does not know and understand them, does not reflect on their needs and motivations.	The organization starts to understand its constituencies, groups and profiles them, and starts to work on the quality of its relations with them.	The organization and its board have a profound understanding of its current constituencies and their needs or interests, and involve specific members of them in planning, implementation and evaluation.
<b>D4 Identifying and reaching out to new audiences</b>	There is no conscious planning and the organization is not aware of the techniques to reach out to new audiences.	The organization realizes that it needs to define and learn about new methods in order to reach out to new audiences, and starts to work on it.	The organization reaches out to new target groups with diversified methods and messages; it has an outreach strategy or outreach plan as part of its SBB strategy in place.

In the following section, we give a detailed description of all stages and all dimensions.

# Stage 1

## Questioning

### Stage 1 - Awareness, attitudes, capacities of leadership and staff

- The leader of the organization is not committed to social base building, there are conflicts within the organization between staff implementing the SBB project and other staff members, and/or the management. The staff could also be indifferent, there are no conflicts, the SBB process is not considered important.
- There is skepticism towards fundraising and effective communication, there is no belief in success: 'No one would donate to such a complicated cause', 'People do not understand our activities, we do not work with dogs or cute babies', 'It is so embarrassing to ask for money from people, we will not beg', 'People would never understand our cause, it is too complex, and difficult to talk about'.
- There is no or not enough staff capacity allocated to communication, fundraising or mobilization.

## Stage 1: Plans, strategies, transparency, and accountability

- Social base building is not an integral part of the operation of the organization. The SBB project is just one project of the organization, and it is not integrated.
- The organization may have an overall strategy, but at this stage, it may not have strategies or plans for fundraising, communication or mobilizing. SBB does not appear in any of these plans.
- There are no policies or procedures in place to measure impact or results and to be accountable and transparent towards the different groups of their constituencies.

## Stage 1: Understanding and engaging current social base

- The organization has relationships with different groups of the society, and it may even have donors, volunteers or supporters, but there are no procedures in place to get to know them better, to engage them, or to communicate with them systematically.
- The organization does not know or understand its current audiences and their motivations to support the organization.
- The data of the people in these groups are stored in different spreadsheets and systems, there are no procedures to track changes and interactions with these people.
- The organization does not reflect on the

needs of their constituencies and motivations in its communication and campaigns or in its activities.

- Accountability and transparency are not considered important in their relations with their constituencies, or there are no procedures in place.

## Stage 1: Identifying and reaching out to new audiences

- The organization communicates on an ad hoc basis, usually reaching out only to its existing, organically gained audience.
- The organization has no clear view and knowledge about its audience or its potential audiences.
- There is no conscious planning to reach out to new target groups.
- Messages and narratives are not formulated to serve different goals and audiences.
- The organization is not aware of techniques to reach out to new audiences and to increase their social base.

# Stage 2

# Transforming

## Stage 2 - Awareness, attitudes, capacities of leadership and staff

- The leader and staff members are getting acquainted with social base building processes and the importance of SBB.
- Some of the staff members are becoming committed, and some are becoming leaders of change within the organization.
- Conflicts are being resolved, and people start to perceive changes as positive.
- Hands-on successes in communication, fundraising or mobilization decrease staff aversions towards these areas of work.
- Capacities are consciously allocated to tasks related to communication, fundraising or mobilizing, but still less than needed.

## Stage 2: Plans, strategies, transparency, and accountability

- There are social base building plans or concepts in place. Leaders start to think of SBB as an integral part of the operation that affects several other areas.
- The organization starts to create strategies for fundraising, communication or mobilizing.
- SBB starts to appear in fundraising, communication or mobilizing strategies or plans. However, it is not yet part of the overall strategy of the organization, and there is no conscious SBB strategy.
- The relationships with constituencies are becoming mutual, the organization starts reflecting on constituencies' opinions.
- The organization tries to define processes and methods to capture results, impacts and to be able to communicate towards the different groups, to become more transparent and accountable.

## Stage 2: Understanding and engaging current social base

- The organization starts dealing with its constituencies in a more strategic manner.
- It clears and merges databases, and it starts capturing new data in a systematic way.
- The need arises to understand these current constituencies better: who they are, what motivates them and what moves them. The constituencies are grouped and profiled.

- The organization consciously starts dealing with the quality of its relationships: it starts planning constituency journeys and their engagement more systematically.
- The organization maps ways to become more accountable and transparent towards its constituencies.

## Stage 2: Identifying and reaching out to new audiences

- The organization realizes that it communicates in a bubble without reaching out to new audiences.
- It also realizes that they do not have information about the reactions of the target audiences.
- It starts to learn about and define its current and potential new audiences and tries to increase outreach (in e.g. the wider public, new groups, outside of the capital, outside of the bubble / echo chamber, the 'moveable middle', new individuals, new professional or cross-sectoral partners, other geographical areas).
- It starts to define and learn about new methods to reach out to new audiences: social media targeting techniques, organizing events, working in networks, working in other geographical areas, campaigning, fundraising, mobilizing.
- It rethinks its contents and messaging and tries to match them with goals and audiences.
- They start planning outreach and capturing the results of communication.

# Stage 3

## Integrating

### Stage 3 - Awareness, attitudes, capacities of leadership and staff

- The organization has gone through a major transition: the leader and the staff understand key aspects of social base building, and the leaders are committed and supportive towards SBB.
- Capacities are allocated to communication, fundraising, and mobilization. Programs, communications and fundraising staff are able to work smoothly together. Staff is enthusiastic about SBB.
- The key barriers to fundraising or communication are eliminated.

### Stage 3 - Plans, strategies, transparency, and accountability

- Social base building is seen as a concept that overarches communication, fundraising and mobilizing, and there is a SBB strategy in place.
- The organization's fundraising, communications, and mobilization strategies and plans are synchronized, they complement and build on each other.
- SBB elements appear in the different plans/strategies of the organization, it becomes an integrated part of plans and activities, and the overall strategy of the organization.



- There are deep and mutual relations with the constituencies, they actively take part in forming plans, strategies and actions of the organization.
- Measuring impact results and accountability is considered a key factor in engaging and keeping constituencies, processes are in place to fulfill transparency and accountability requirements.

### **Stage 3: Understanding and engaging current social base**

- The organization has a profound understanding of its current constituencies. It has learned and applied methods to collect data and information about them. Based on that information, it profiles various target groups and uses these profiles in its outreach strategy to reach similar new target groups.
- The organization uses an engagement pyramid and different strategies for the different target groups to move the different groups of constituencies to the next engagement level. The quality and strength of these relations are in special focus. The organization involves specific individuals from its constituency in planning, implementation and evaluation.
- The organization formulates meaningful and engaging or mobilizing messages that reflect constituencies' needs or interests. Apart from content and messages, the usage of communication channels and the frequency of communication is also set based on information on the different target groups.
- The board is also engaged in working with constituencies.
- The organization starts using a CRM system or a well structured Excel sheet to follow their communications and rela-

tionships with individual constituencies. All data and information about each individual in their constituency are stored in this system. In an ideal case, the system is also connected to mailing and registering donations, and it can manage individual campaigns and communication actions separately.

- The organization has defined ways and methods to remain accountable and report on its activities and impact on its social base.

### **Stage 3: Identifying and reaching out to new audiences**

- The organization has an outreach strategy or plan as part of its social base building strategy in place.
- In the outreach strategy, the organization defines and profiles its target audiences, the potential constituencies, and the content, frequency and channels to reach out to them.
- The organization reaches out to new target groups with diverse methods and messages, and they are able to greatly increase the number of different constituencies.
- The organization is widely known, its voice and opinions are heard and understood by various groups in society, and it has supporters based on its principles and values
- The organization sets targets for outreach, measures results, and alters methods and content based on results.
- It starts using a CRM system to keep track of the different audiences, and to be able to communicate with them in different ways.

# Chapter 5

## Fields of Expertise Related to Building Social Base

Several fields of expertise are directly connected to building a social base. The skills and knowledge areas in these fields are needed to be developed so that organizations and their staff can implement effective social base building strategies. Based on NIOK's experience as well as NIOK's survey in the V4 region among 30 organizations who have implemented social base building projects, we found the following key fields of expertise where capacity building is usually needed:

- Leadership, change management
- Communication
- Fundraising
- Mobilizing & activism, volunteer management, engagement
- Campaigning

The list, of course, is not complete as each field of expertise is complex and in constant change due to new trends and environments, but we believe it gives a detailed picture that will help select recommended experts, as well as potential training and networking focuses.

Knowledge and skills related to these fields of expertise will be developed through all elements of the support program. The mentor typically provides development in leadership and change management (although they might have strong skills in other relevant fields as well). The experts work with grantees in their specific fields of expertise, which can be any of the mentioned fields. The training courses and the networking workshops focus on more specific topics related to these fields, based on the grantees' needs and interests.

## Leadership, change management

As social base building is not a one-off project but an overall approach it often needs time and work for the organization to embrace it and integrate it to its operations. Thus support from their mentor or from an expert in leadership or change management, and specifically the below knowledge and skills, could be crucial to their success.

- Understanding of the key changes that social base building will bring to the organization
- Skills to transform the organization, trigger change and initiate new processes and ways of thinking
- Commitment of the leadership towards social base building, offering a positive and supportive attitude towards staff members implementing the project
- Strategies and action plans for SBB, dedicated capacities, redesigned workflows and work processes to implement the project
- Making SBB an integral part of the organization's core strategy and functions (e.g. communication, fundraising, mobilizing strategies)
- Skills to formulate and implement strategies
- Skills, capacities and infrastructure to run communications and fundraising campaigns
- Skills to deal with conflicts within the team deriving from changes in the organization
- Procedures to keep the organization accountable towards external and internal constituencies (transparency in decision-making, communication about impact)
- Learning about key barriers to fundraising and asking for money, or communicating complex issues and demolishing these barriers

# Communication

Whether an organization builds or strengthens their relation with their beneficiaries, volunteers, donors or the general public, communication will be a key part of their activities. Below is a list of areas of communications that they might need support in, in the form of workshops and/or individual consultancy.

- Communication strategies
- Understanding current and new audiences, targeting & profiling
- Campaigning
- Content development, including (new) narratives, messaging, visuals
- Result measurement/testing
- Increasing visibility, increasing outreach, reaching out to new audiences
- Increasing engagement, mobilizing
- Brand building, press relations
- CRM systems
- Online communication: setting up basics of an online presence, channels (websites, newsletters, social media), keyword development, Search Engine Optimization (SEO), Google AdWords, understanding new trends
- Skills to deal with a hostile and propagandistic environment and to operate in a shrinking media space

# Fundraising

Fundraising enables CSOs to diversify their funding and become not only stronger but also more independent and resilient to changes and uncertainties in their environment. Additionally, raising funds from individuals will support their efforts to reach and increase their constituencies. The below list covers the specific areas that can be covered in workshops and/or individual consultancy.

- Fundraising strategies
- Fundraising channels
- Campaigning
- Case for support, fundraising appeals
- Understanding current donors, understanding new audiences, reaching out to new audiences
- Engagement plan of leads and donors, conversion
- Stewardship, upgrading, making one-off donors into regular ones
- CRM systems
- Key fundraising techniques used in social base building projects: fundraising from individuals (crowdfunding, annual campaigns, individual regular giving, online/offline methods), major donors, peer-to-peer fundraising, employee giving), charity events, corporate fundraising

# Mobilizing & activism, volunteer management, engagement

Reaching and engaging supporters as volunteers or activists is a major way for CSOs to build a dedicated community, channel their input to the organization's work, often multiply their outreach and impact through them, become more embedded in society and increase their legitimacy. Grantees can be supported in the following areas, in workshops and/or individual consultancy.

- Engagement pyramid, engagement levels, engagement techniques
- Mobilizing techniques for diverse goals, and for diverse audiences (e.g. for fundraising campaigns, advocacy campaigns)
- Organizing events, demonstrations
- Volunteer and activist management (recruiting, motivating, rewarding, keeping volunteers and activists, developing leadership skills in volunteers and activists)
- Network building skills
- Strengthening relations with members of the organization
- Strengthening relations with beneficiaries of the organizations, learning about how to engage them in planning, implementation and evaluation of activities

# Campaigning

Planning and implementing effective campaigns can be essential cornerstones of a CSO's social base building process. The framework of a campaign will also provide valuable tools and experience for the organization to test and measure the efficiency of their outreach. The below list covers the most typical areas that the grantees might need support in, in the form of workshops and/or individual consultancy.

- Learning about different types of campaigns (brand, awareness-raising, advocacy, lead generation, crowdfunding, fundraising, mobilizing, visibility)
- Campaign planning & implementation: goals, target groups, channels, timing, costs, messages, visuals, outreach, campaign staff & management
- Dealing with complex messages
- Building campaigns on actualities / changing conditions
- Using engagement and communication techniques such as humor, storytelling, ownership, awards, celebrities, influencers, surveys, viral campaigns, gamification, hashtag campaigns
- Measuring and fine-tuning campaigns, online testing methods, evaluation
- Online vs. offline campaigns and the interaction/overlap between them and their relations
- How different campaigns relate to each other, how to schedule campaigns for the year

# Chapter 6

The background is a solid blue color. There are several white decorative elements: a large circle on the left side, a smaller circle on the right side, and two curved arrows. One arrow starts near the top of the large circle and points towards the center. The other arrow starts near the bottom of the large circle and points towards the right side.

## Good Examples of Social Base Building Activities

Below we have summarized a couple of examples from organizations that took part in the social base building program in the V4 region in 2018-19. These examples demonstrate some common challenges and typical dilemmas in social base building that were addressed within the social base building program.

- Communicating about complex causes and reaching new constituencies is a struggle for many CSOs. So how can an organization increase its visibility and reach out to new people? One human rights organization started a brand building campaign that showcased their existing supporters and their testimonies, as well as influencers wearing their merchandise on social media. They used online marketing tools to increase their outreach, and also implemented an open source CRM system to better record and track their contacts. A special feature of the brand building campaign was founding an award to acknowledge individuals standing up for democracy and human rights, and an award ceremony event. Their public vote reached tens of thousands of people. The project allowed them to double the number of their newsletter subscribers, merchandise revenues have increased nearly tenfold, and in the third year of the award they had three times as many nominees as in its first year.
- More and more organizations realize the need for financial independence. One investigative journalism organization created and launched a membership program. They realized that if they want their constituencies to buy in they need to provide them various engagement levels and benefits like behind the scenes content, an insight to their methodology of investigative journalism, exclusive newsletters and events that come with it. The membership program allowed them to turn round the ratio of individual/other funding. As a result, private donations are above 70% of their funding at the moment.
- There are great examples of how organizations can engage their supporters using the latest technology. One human rights organization used a social listening tool and 10 members of their membership program as researchers to monitor an election campaign, focusing on xenophobic speech and fake news. They watched the social media channels of selected candidates from all political groups, and candidates' and users' posts in 10 big cities with a significant population of migrants. The monitoring survey received high media interest and the lessons learnt helped them design their next mobilization action for the EU elections, broadening their thematic focus to include homophobic hate speech, and offering opportunities of active reaction.
- One watchdog organization realized they had a diverse supporter community, but knew little about them and engaged them in an ad hoc way. As a kick-off to a more systematic work with their supporters, part of the team used the engagement pyramid model and prepared a draft map of the supporter groups locating them onto various levels of the model and listing what was known about them. Then the whole team went on a one-day retreat to learn about the model and integrate holistic thinking about their social base. They realized that by systematic cross-promotion they would be able to engage their supporters in different ways and move them to other levels of engagement. A key to their success was identifying their existing supporters, creating a complex supporter life-cycle for one of the groups, and defining entry points, check points/milestones and exit points to provide various engagement options for them. Then they gradually replicated this model for other groups as well. The process enabled them to create personal experiences for their constituencies, including a mutual agreement that strengthened their partnership, and turn ad hoc work with their supporters into a consistent one.
- Micro-donor fundraising is often in the focus of social base building projects. One humanitarian aid organization ran a very common online Christmas fundraising campaign that excelled thanks to a cute goat. Their goal was to create a distinctive FR campaign to reach new supporters, and to collect and track their data

through online tools. Using their existing communication tools and with the integration of a CRM system they reached out to their audiences and asked them to make a donation for Christmas. The key to their success was creative and professional social media content provided by an agency at a discount price, starring a cute goat as the main character of the campaign (the organization uses the funds to help families in Africa buy a goat), and the involvement of influencers including a former president.

The above examples illustrate that social base building programs can have different goals and can provide various answers and solutions as well. The support program serves these specific needs and supports the grantees' constituency building efforts tailored to their individual needs.

## Additional readings and guidelines

In the framework of the Stronger Roots program NIOK Foundation's methodology first launched in Hungary has been also introduced and tested in two other countries, Czechia and Slovakia, in partnership with OSF Prague and OSF Bratislava. The Manual, which covers practical steps of setting up and running the support program, has been updated based on these additional experiences, and can be helpful in launching the program in other countries as well. With our partners' help we have also created a collection of case studies that showcase the most exciting learnings of various social base building projects in the three countries.



# Contact information

Please contact us if you are interested in the program. We are happy to help, whether you are a capacity building organization that wants to start a social base support program in your country, or a donor who wants to provide a meaningful professional support program to its grantees.



NIOK Foundation's mission is to strengthen civil society in Hungary through supporting CSOs to make them stronger, more efficient and impactful, visible and acknowledged, and able to reach out to and mobilize various groups of society. As the leading service provider for CSOs NIOK has strived to develop the sector with a complex, need-based ecosystem of services and programs for more than 25 years. To date Hungarian CSOs have raised 1.29 billion HUF via 1.6 million micro-donations on our donation platform, received tech donations in the value of 3.8 billion HUF, and our information and knowledge sharing portal has 68 000 returning visitors and

more than 1.5 million page visits annually. NIOK developed its social base building support program in 2014, and has provided support to 62 CSOs to date.

In the Stronger Roots program NIOK has shared its social base building support methodology and develops it with its partners in the region, and operates the support program in Hungary.

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