STRONGER ROOTS

The Stronger Roots Program

Social Base Building Toolkit

Nadace OSF

NADÁCIA OTVORENEJ SPOLOČNOSTI

NIOK FOUNDATION

glopolis

Are you a civil society organization trying to build up a stronger base of supporters, volunteers, and donors to help you achieve your goals?

If yes, let us help you strengthen the social base building efforts in your organization and create a vibrant and engaged community of supporters! This set of articles will provide you with useful information and practical tips.

THE TOOLKIT WAS WRITTEN AS A PART OF THE STRONGER ROOTS PROGRAM.

The Stronger Roots Program aims to increase the resilience of civil society organizations and their networks, strengthen their social capital, and embed them in the communities and societies in which they operate. It is implemented by Open Society Fund Prague, the NIOK Foundation, Open Society Foundation Bratislava and Glopolis.

Who We Are

Open Society Fund Prague (CZ)
OSF Prague is one of the largest foundations in Czechia and over almost 30 years of its existence it has supported 10 000 projects with almost 2 billion Czech Crowns. Its mission is to support a vibrant civil society. It coordinates the Stronger Roots Program consortium.

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NIOK Foundation (HU)
NIOK's mission is to strengthen civil society in Hungary. As the leading service provider, NIOK has strived to develop the sector with a complex, need-based ecosystem of services and programs for over 25 years.

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Open Society Foundation Bratislava (SK)
OSF Bratislava plays a key watchdog role in the development of civil society and sensitisation of the society on corruption and human rights in Slovakia and since 2009, it has been one of the operators of EEA grants with its total budget amounting to 3,5 millions EUR.

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Glopolis (CZ)
Glopolis is a think-tank facilitating collaboration towards sustainable democracy. After 15 years of research, awareness raising and advocacy it focuses on bringing together civil society, government, business and other stakeholders to address key challenges.

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Social base building – what it is and why it is worth dealing with

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The Stronger Roots Program

Nowadays any one of us can become a donor or an activist even with a single click: we can stand up for causes that matter to us and by sharing our personal stories we can make others think and get engaged. In our society, there is also a strong demand for volunteering, as many of us would like to do something together for causes that we believe are important and connect with those who feel the similar way. We can also express our solidarity, commitment and will to act by making a donation. Some of us dedicate their career to serve a social cause as co-workers of a civil society organization. These deeds we might proclaim proudly or carry out silently, but they give us a sense of collaboration and community. The sense of working towards change.

Whether it is systematic change or individual ad-hoc help it is easier to act and achieve goals in a community. If you are able to stand up for a cause with commitment that has touched something in you, then you are probably not alone and it will resonate with others as well.

Building a social base puts this very idea into focus: let's find each other with those who have a similar mind-set and connect to the social issue in their thousand ways that we also do. As an organization, you can create an opportunity for others to do their part in the work of serving a common goal in their very own ways.

ALL RIGHT, BUT WHY IS IT IMPORTANT TO YOUR ORGANIZATION?

You might now think that this is all good but does not help you with your everyday work. The roof of the special afternoon-school will be still leaking, the mayor will still reject you and it still leaves you three doing the work of ten people. Social base building is not a panacea (although we think so a bit) and it is not a thought-experiment painted in rainbow-color. **Social base building is a set of concrete activities based on strategies, where you can get to know people interested in your cause, bring them closer and create an opportunity for them to take action.** With this series of articles, we aim at bringing this idea closer and to explain it through practical examples. It is for civil society organizations, activists' communities, movements – i.e. for all who want to act in collaboration with others in an organized way and to make a real impact.

"Whoever wants to be seen and heard, whoever wants to change something, cannot do it without supporters, donors, ambassadors and other promoters of his or her reputation. No matter whether we talk about commercial or non-profit organizations."

Daniela Velová, Communications Director of Direct People and mentor of the Stronger Roots Program

The good news is that you do not need to start building something from scratch. If you work in a civil society organization, you probably carry out a lot of activities that promote building a social base even if you have not done it consciously yet. We all work together with communities, supporters and have a diverse range of relationships. **Communication, fundraising, work with volunteers, involving stakeholders in the planning of activities are all of key importance to building a social base.**

- **Community planning, engagement, impact measurement**

  Asking for feedback in the right way and engaging with as wide a range of people as possible already in the planning phase might be challenging. But if your activities are intended to provide real answers to real needs you have to co-operate with those who are affected by the specific problem. A strong social base provides a basis for sincere, deep and efficient discussions and co-thinking.

- **Communication**

  Having many people working for a cause in many ways often means that a lot of different voices are heard. What can your voice, the voice of your organization say in this diverse multitude? You need to know who you are speaking to and why. As one of the initial steps in building a social base you could learn about the motivations of those you want to work together with or you expect help or support from. This way your messages will better resonate with them, which leads to more and deeper connections and more efficient collaboration.

- **Fundraising**

  Fundraising, in addition to providing a financial background for your activities – which itself is of high value for the organization, as it may allow free and independent operation – provides an opportunity to build a community and also for many people to express this through a donation that your cause is important to them and to contribute as they can.

- **Mobilizing volunteers and activists**

  The stronger the social base around a cause the higher the number of those who devote many hours of work, knowledge, skills, and ideas to serve the goal and make their voices heard for change. As an organization bringing them together it is essential that vibrant, well-functioning relationships that add value to all are built with these people. This is also promoted by having conscious activities that are aimed at building a social base.

Coordinated planning of the above areas will make it more effective to reach out to people who are interested; and by engaging them, you will become stronger and more effective. For this, vibrant, strong and reciprocal relationships are needed.

In other words, if the community of an organization is consciously expanded and strengthened in the long term and according to an elaborate strategy, be it volunteers, activists, donors or professional partners, the organization will become more embedded: it will be able to better represent people's views, mobilize community, reach out to new groups and raise more funds. And over the long run, due to the supportive power of the community, it will be able to achieve much greater change and its operation will be more independent, sustainable and legitimate.

Who is your social base?

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The social base of an organisation consists of people or even other organisations that identify with its goals, therefore are relatively active in participating in its life. They support and share its messages, and campaigns; they are present when an important cause needs to be stood up for or they even financially support the programs of the organisation.

They connect to the organisation, and ideally to each other, so strongly that this connection and engagement establishes a community, which is meaningful for the members of the community, and also, the organisation is strengthened by these diverse connections and presence.

What groups can make up the social base of an organisation and in what ways can they strengthen it?

PEOPLE PERSONALLY AFFECTED /STAKEHOLDERS

They may be individuals who need support or people who can – due to being personally affected – help others in similar situations more effectively. They could be direct beneficiaries, such as clients for social service organisations, or stakeholders in a less direct way. They may be individuals in deep crisis, like homeless people or parents worried about the future of their children, or mathematicians who believe in the importance of promoting nature sciences or communities collaborating for environmental protection. A credible, efficient, and inclusive operation of a civil society organisation allows stakeholders to have a say in day-to-day operational issues and to be represented on the board of the organisation as well. Their opinions and feedback are actively collected and channeled into the planning, design, and implementation of programs. Their experience and in-depth knowledge of the specific cause are essential for the team so that the programs and activities of the organisation respond to relevant problems. However, if it is not the case, it is important

to reveal the underlying causes and make steps toward a more engaging and stakeholder-based organisational culture. The first steps can include organizing a focus group with the stakeholders to have their feedback, while some organizations even make it a rule to have representatives of the clients or stakeholders in the management and leadership.

VOLUNTEERS AND ACTIVISTS

Although not every CSO has a large team of volunteers, they can probably count on enthusiastic supporters who offer their skills and time. It is also common that there is no hard line between the members or staff of the organisation and the volunteers or activists as they are all highly committed supporters of the cause and take part directly in the work in some way. To volunteers, the cause is of high importance, and therefore so is the opportunity to work for it actively. In addition, a sense of belonging to a team is often a key motivation – one would not have the strength to fight for a specific goal alone, but joining an existing community, the idea that one's work contributes to the greater whole, helps move forward. To effectively engage volunteering individuals who come in different ways, it is important to provide them with diverse opportunities and ways to get involved, give feedback, or even shape the activities of the organisation. This can be achieved by simple steps, such as asking for feedback regularly and creating a system for these feedbacks to reach the responsible staff members, or with more complex structures where volunteers have different levels of commitment, mentoring, and involvement in the core activities.

DONORS

Donors are a highly important group of the community around an organisation. Donating needs as strong engagement and determination as taking up volunteering. Although it usually does not give as direct community experience as being a volunteer, as a donor one can also feel contributing to helping a cause. In the long term, a strong donor base provides the organisation with financial stability and professional independence, which allows it to stand for the donors' heartfelt cause on their behalf. Beyond financial support, donors can also give moral support, communication power, and outreach to the organisation and the cause itself. For instance, a crowdfunding campaign can include donors as ambassadors, who can tell their own stories on social media, thus giving more visibility.

PROFESSIONAL PARTNERS

A cause is usually promoted by a lot of people and this can be done in various ways. In collaboration with other civil society organisations, partners from the private sector, state institutions, researchers, etc., a larger target group can be reached for their shared goal; outcomes are more measurable, or more complex programs can be implemented. Partners can improve their own activities when enriched by each other's knowledge.

PEOPLE INTERESTED AND SUPPORTERS

Sometimes one has not decided on a cause yet, but it is getting important or interesting to them and they start to sympathise with those who stand up for it. Those who have already formed an opinion or are interested in our goals have already made the first step toward our organisation. An organisation or a community providing them with credible information helps them understand a specific cause, and also a community to act. To an organisation, such an initial relationship is of great value, as it can lead to deeper

engagement, reaching new supporters, or a deepening discourse on the cause. But for this, a conscious communication and engagement activity of the organisation is required – to be able to address and keep those interested.

DECISION MAKERS

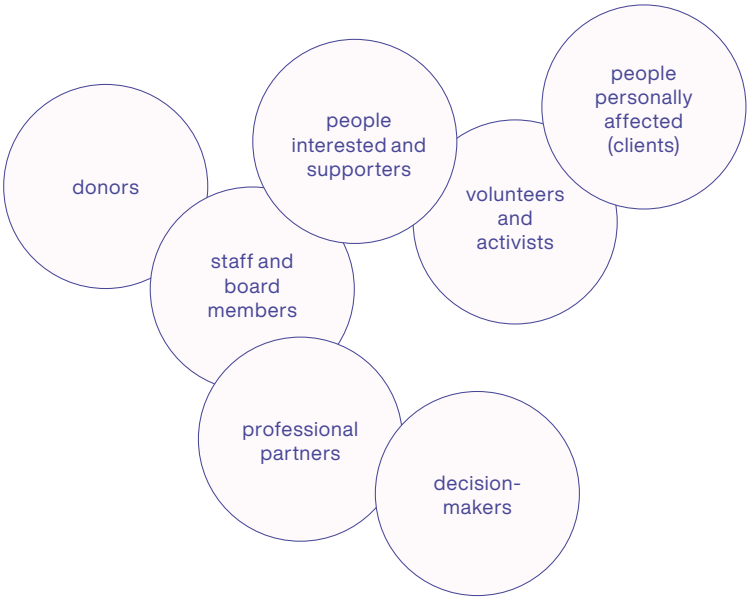
When a cause is advocated by a well-embedded and professionally credible organisation, it will be realistic to achieve a higher level of change and political or institutional decisions that promote the cause through policy activities and awareness-raising campaigns. At the same time (in an ideal world), it is of great value to a decision maker in a responsible position if their decisions are aided by experts and stakeholders of the specific field to whom they can turn for information and background knowledge.

STAFF AND BOARD MEMBERS

Those who are the core team, whether paid or unpaid staff, are usually highly enthusiastic about the cause. And social base building is also an approach that should be present at all levels of an organisation's work, so keep in mind to involve in social base building even those whose field of work might seem far away. Even after leaving the organisation, they are invaluable connections, who care about what's going on, so staying in touch is beneficial for everyone. Board members can also serve more than just an official position. They are also happy to have the opportunity to support the organisation with their valuable skills, knowledge, and even connection. They can be involved in multiple different ways beyond their official duties, be it engaging new donors, providing expert help for consultancy, or practical things such as finding a venue for an event.

Between these forms of support and engagement, there is a high level of interoperability and those interested can relate a cause in diverse and complex ways. One might contact an organisation as someone in need of support, then might become a volunteer (helping their peers) or might even become a staff member. Former volunteers, if they cannot offer their time, often offer their financial support or spread the news on their own channels. Finding an important cause and a team promoting it, that one can also identify with, is of great value. Engagement for a cause usually does not end with connecting once. This relationship sometimes deepens and one spends more and more time on that cause. Other times one gets briefly distanced from it, yet does not completely lose sight of it, and then welcomes the opportunity to reconnect. **Building a social base is in fact a never-ending process and means that the organisation consciously expands the community around it and engages it in its activities.**

Your community



How to create a social base building strategy?

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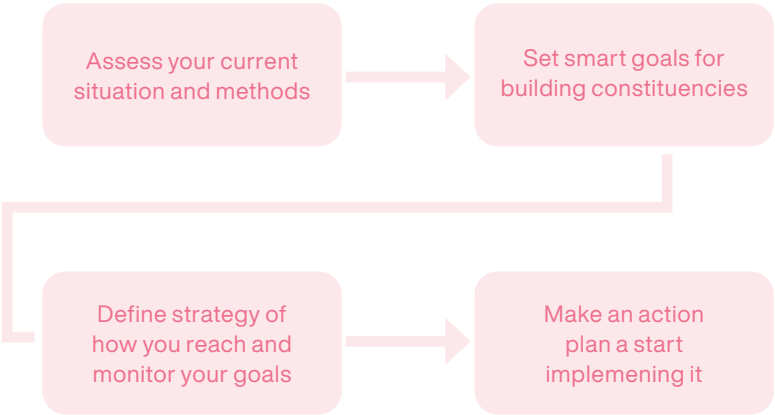
A social base building strategy (or constituency building strategy) is an overarching strategy that is based on the current strategy of the organization, and should be also reflected in the fundraising and communications strategies or plans, as well as the outreach and mobilization strategies or plans. In case these core documents do not include the aspects of building constituencies, then we suggest revising them to integrate this aspect into all of the future activities and plans of the organization.

In the following step-by-step guide we will describe how a social base building strategy can be formulated, what questions we need to answer to produce one, and what next steps or plans are needed to turn these plans into actions.

HOW TO PREPARE A SOCIAL BASE BUILDING STRATEGY IN FOUR STEPS



STEP 1: START WITH AN ASSESSMENT OF YOUR CURRENT SITUATION AND METHODS

Have a look at where you are now in your social base building efforts and what ways are out there to improve these efforts to reach your goals:

1. **Assess your current external and internal situation**

What are the specifications of the environment your organization works in? How do governance, laws and regulations, the media landscape, communication and technology trends, the atmosphere in society, and the economy relate to your work? How do these affect your goals, activities, your staff, your beneficiaries, your donors, your volunteers (or any other close relations that your constituency includes)? How do these trends affect your fundraising, communication and outreach activities, or your mobilizing and advocacy activities? Do they have an impact on the number of donors, volunteers, supporters of the organization?

Based on these assessments you can define some **opportunities** and **threats** in building constituencies for your organization.

2. **Assess your current efforts**

Where is your organization in social base building at the moment? Discuss your past efforts, provide reflections on any previous obstacles that prevented the organization from expanding its supporter community, and use it to draw conclusions (e.g. low level of diversity in the funding structure, inactive supporters, one-way communication, little publicity, etc.).

Assess your current level in building constituencies. How much is your organization committed to building a social base? Do you already have plans or strategies to do so? Do you have enough capacities and resources to implement social base building

activities? How well do you know your target audiences: do you have concrete knowledge of why they support you, what motivates them or what moves them? Do you consciously focus on building your relations? Is your communication built on the needs or motivations of your audiences? How well can you reach your different target audiences?

Based on this assessment you can define your **strengths** and **weaknesses** in building your social base.

3. Analyze your current target group and target audience, and their relationship to your mission

Make a list and description of your current constituents, and also examine their contribution to your organization's mission.

Who are they? (e.g. beneficiaries, staff and board members, volunteers, donors, professional and media relations, other CSOs, corporate and institutional partners, etc.)

How are they related to your organization?
Are they active or passive supporters? How strongly are they connected? (e.g. they use services, give donations at a specific level and with a degree of regularity, take part in events, sign petitions, follow social media channels, share and like social media posts, are a strategic donor of the organization)?

How do these groups contribute to accomplishing your mission? Do they contribute to the sustainability of the organization? Do they provide the necessary knowledge and skills? Do they amplify your messages and contribute to the outreach of the organization?

Look for data on or at least estimate the current number / impact of each category.

You may also use the following template to structure your findings.

Target groups	Type of constituency	The size of the group	Level or nature of engagement / support	Contribution to mission
regular individual donors (under Euro 500 / year)	donors	20 people	Euro 8000	long-term sustainability
partner CSOs	professional / institutional relations	3 organizations	advocacy force	policy change
...				

A vision for an ideal constituency
As a next step it is worth examining if the current size and structure of constituents is enough to fulfill the organization's mission. How would a stronger, more robust or diverse base of support enable your organization to reach its goals more effectively? Which target groups could be the most important in reaching your goals? What would the ideal social base look like for your organization?

Fill in the template again to present the ideal setup in 2-3 years.
Take the target groups one by one, and to provoke new thoughts recall the results of your assessment of opportunities and threats, strengths and weaknesses.

Is there any new target group that you should take into consideration? Are there any opportunities or strengths that would enhance your progress?

STEP 2: SET SMART GOALS FOR BUILDING CONSTITUENCIES

Have you accomplished the three steps above? Continue by defining specific, measurable, attainable, relevant and time-based (SMART) goals for social base building based on the following steps. In the example below we will take one of the most important groups of constituents: volunteers.

1. **How would the change affect your mission?**

Reflect on what impact your social base building efforts will have on your efficacy, what outcomes you expect from them.

By broadening and making our volunteer base more active we will be able to serve 10 times more beneficiaries in 2 years.

2. **Define in what ways you would like to see your constituent groups broadened or to become more connected to your organization**

We will double the organization's volunteer base (from 200 to 400) and double the number of volunteer hours (from 500 to 1,000).

3. **Define goals related to the human capacities and processes of your organization that will support you to fulfill your goal**

Train staff in online communication to be able to use social media effectively. Develop the processes to motivate and keep volunteers.

STEP 3: DEFINE YOUR STRATEGY OF HOW YOU REACH AND MONITOR YOUR GOALS

Take your goals one by one and define clear steps on how you will reach these goals. What do you plan to do, what will be the result of your actions, and how much will it cost your organization to do it effectively? Think about how your plans will appear in your communication, outreach, fundraising, mobilizing, volunteer management or advocacy-related activities.

You need to make decisions based on the previous steps and also based on your previous experiences and results. In case you are hesitant you can also engage a consultant to find the ways that best fit your organization's capacities and current stage.

Example:

Goal: *Increase outreach to young people by 20% by the end of the year to make sure your organization has a direct link to the younger generation and can affect their views and attitudes in the long run on how they perceive people living with disabilities (a SMART goal).*

Potential actions: *Conduct in-depth research by doing 15 interviews with current youth supporters to learn how and why they are connected to the organization. Develop messages and experiment with new communication tools to reach out to more young people and try to make them followers of the organization's Instagram page, and to get them sign up for the newsletter.*

Indicators: *1) your organization will launch an Insta page, 2) there will be 1000 followers by the end of the year, 3) 500 young people will sign up for your newsletter*

Costs: *Estimated cost of these actions will be 2000 Euro.*

STEP 4: ACTION PLAN & MONITORING THE ACTIONS

An action plan is not always part of the strategy but it helps the organization to implement it. Based on the steps above you can easily produce one. The action plan may consist of the goals and related activities, a timeline of activities and key deadlines, the persons responsible to implement the specific activities, and the indicators to monitor progress.

And then... **start implementing and regularly monitoring your social base building strategy**!

"To successfully grow our social base, we have created a growth strategy covering all areas, with each working group setting its own targets. The fundraising team was the driving force behind the project, so we felt it was important to be clear and transparent to everyone about the exact goals of the project and the methods and focus we were working on within the team. In many cases, it's difficult for the overworked NGO staff to find time for such joint discussions, but the hours set aside always make the collaboration smoother and faster."

Andrea Kolozs, Amnesty International Hungary

Six tips from the mentors to make your social base building efforts smoother

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Each organization supported by the Stronger Roots Program had the opportunity to consult their social base building efforts continuously over two years with a mentor, a person with years of experience in strategic planning and leading projects and teams. Here are a few tips that the mentors gathered to help you overcome your social base building challenges.

SOMETIMES LESS IS MORE: TAKE IT STEP BY STEP

Having big ambitions is great, but it is necessary to bear in mind that social base building is a long-term process and that all changes cannot be made overnight. It takes months or years (and a number of campaigns, projects, or other activities) to attract people and to bring them close to your organization. Similarly, time and capacities are needed to introduce necessary internal changes, such as finding the right person to take care of the donors and supporters and finding the right strategy for how often and with what messages you approach them, etc. And lastly, but perhaps most importantly, social base building demands the changing of the mind-set within the organization: it must be widely understood and accepted why people are important for your organization and how you engage and work with them.

Clearly state your goals and actions, and go step by step forward in each of the above- mentioned aspects. You will soon discover how the mind-set, internal processes and external actions mingle and together contribute to achieve your constituency building goals.

YOUR TEAM IS YOUR NUMBER ONE CONSTITUENCY: YOU CANNOT DO IT WITHOUT YOUR COLLEAGUES

Social base building cannot be managed by a single communications officer or a fundraiser. On the contrary, it is an overarching strategy that cuts across all different projects and activities, and its concept must be shared by the whole team

– starting from the organization's leader up to the individual coordinators who often get in touch with people through the projects they run.

Make constituency building be part of your strategies as well as regular internal meetings so that all of your team knows what kind of changes are going to take place and why they are being introduced. Show them how engaging people helps your organization and make them know how they all contribute to this.

SPEAK STRAIGHT: YOUR AUDIENCE MUST KNOW RIGHT AWAY WHAT YOU WANT

External communications is a crucial aspect of social base building. If you approach people, you must speak with language they understand and it must be clear to them how they can become engaged.

Pay a lot of attention to your messages, and test among your friends, relatives or your current supporters if they understand clearly what your organization does and why it is important. Consider using brief attractive stories of your clients or achievements instead of long descriptions of your projects. And do not be afraid to say directly that you need financial support (if you do not ask for it you will not get it).

FUNDRAISING PAYS OFF: BUT YOU NEED TO HAVE A STRATEGY AND CARE FOR YOUR DONORS

If you are starting fundraising efforts in an organization which has been used to paying for all activities from institutional grants or from a social business, you may need to focus on changing the mind-set again first. The staff may feel shy or awkward about asking for money directly from people and also they may need clear instructions on how to do it – what to say, which materials to distribute, to whom to refer potential donors, etc. Also, a number of internal processes need to be in place so that the donors are cared for well, feel they have all the necessary information and do not lose their willingness to support the organization.

Start with making a profound strategy of who your target groups for fundraising are, who, when and how you will approach them and how your organization will work with potential and existing donors. Engage your staff in all the discussions and tell them how they can contribute.

NEW IDEAS MAY COME FROM YOUR SUPPORTERS: ASK FOR FEEDBACK AND ENGAGE PEOPLE

If there are people who support your organization or volunteer in your activities, you can ask them what their reasons are and what could help them to get engaged even more. You may receive new ideas about what could be improved in your work and get new inspiration on how to get closer to more people. Asking for feedback is also another way of how to engage your supporters in your work and if you reflect on their opinions, perhaps you will see new ways of deepening their engagement.

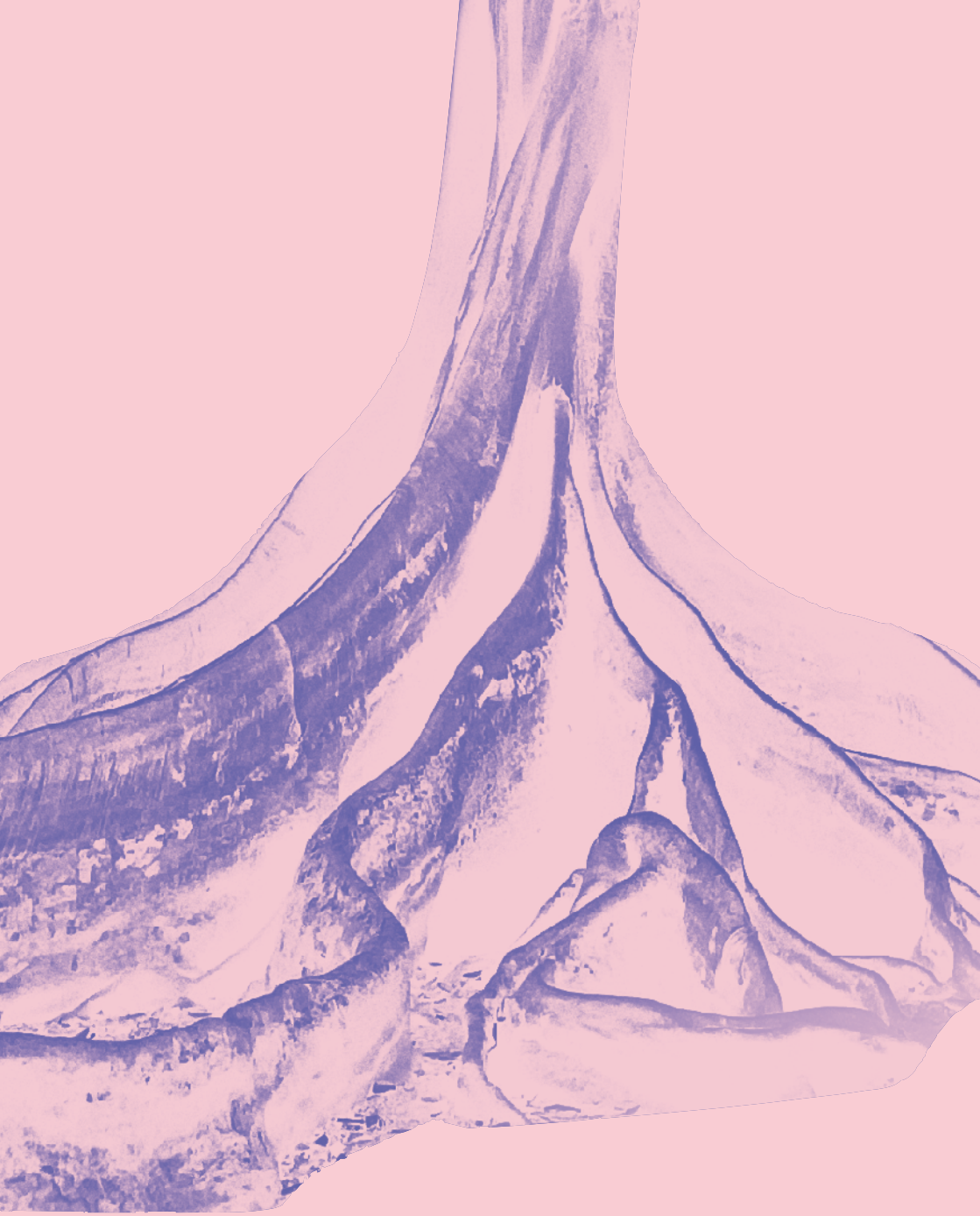
Do research through questionnaires or interviews to learn more about your supporters, their needs and opinions. Whenever you have the opportunity, ask your supporters and donors about how they evaluate your work and how they think they could get

engaged. And offer them different ways of engagement (financial support is just one of the options, you may also ask them to volunteer, to provide their know-how or expertise, to talk to their friends about your organization, etc.).

IT IS TIME TO GET YOURSELFS STARTED: SOCIAL BASE BUILDING IS A BIG BOOST TO YOUR ORGANIZATION

Social base building is a long-term and sometimes difficult process and it demands investing a lot of work, time and also some financial resources into the internal and external changes. However, it brings many benefits in the long run and it makes your organization stronger.

No matter how many resources you have or do not have, you can always start with some social base building efforts and it will pay off. As one of the mentors said: "Just start talking to the people and you will see that things you wish for are starting to happen."



Outreach and engagement

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It is especially true in the online world and on social media that as a non-profit organisation you cannot have an aversion to the marketing approach as a tool, if you aim to stand out from the noise and build your social base.

It is time for you to embrace the attitude that your mission is your „product" which you would like to make as many people be aware of and like as possible. In contrast to a market service however, the relationship does not end with the sale, but it starts there.

In order to understand this, it is essential to consciously use two frequently heard concepts – outreach and engagement – and to learn about the differences between them. In a nutshell: it is good to reach as many people as possible, but the fact itself that you have reached someone, does not necessarily mean that they have also become part of your social base. However, if you have managed to engage them and create a bond, you have taken the first big step. But what does it mean exactly?

If you consider **outreach** and its increase, your aim is to reach as many people as possible with your message. Sometimes you want to reach your followers, other times you target a completely new audience. This is however in both cases a one-way process controlled by you and can be easily quantified in the world of social media: in how many people's feeds have you shown up on, how many people have seen your video or read your post. Each reach is a short-term relationship and applies to a specific content. When increasing outreach, you create and advertise content for a targeted group of people, and then you can evaluate its efficiency with the help of statistics: whether you have reached those who you intended to and whether enough people have seen your content.

An **engagement** approach is more complex and this way also more efficient. In the long term it is worth focusing on this one, if you are trying to build a community around your organisation. Your aim is not simply to reach a wide audience with your message but also to build relationships and interact with those who are already interested or might be interested in your mission.

Engagement is based on creating an opportunity for action for your community with a call to action. This can be a small thing like voting, commenting, sharing, which is an easy step for less engaged followers to take. Once they have a bond, you can ask them to sign a petition, share their personal stories or their opinion. Social media platforms provide a lot of tools which help establish different levels of engagement: An Instagram story poll can be followed by a question that can be answered anonymously, which makes it easy to engage people; then you can make followers more and more active by sharing stories or posts that they can add their personal stories to.

"In the content of the letters, we saw that thought-out content production made a difference. Messages that were more general about our work captured readers much less than those that were more closely related to the topic of interest, as personal messages and individual stories have a greater impact than a newspaper article."

Andrea Kolozs, Amnesty International Hungary, on their newsletter editing practices

It is important to recognize that these are not separate actions, but part of a larger joint one: the followers, and those who are interested and get involved contact the organisation and work together with it towards a common goal. This also means that they act together with other supporters and people like them and can also see similar actions of others, which starts the process of community building. It helps to connect if the online persona of the

organisation appears to be approachable, personal and can truly be contacted. Ongoing and active commenting is an essential tool for this. If you do not have the capacity to do so, you can bring your supporters closer to you with Questions and Answers sessions in the online space at designated times.

It seems to be simple, but **efficient engagement is based not only on good ideas but also on an integrated approach within the whole organization.** As communication supports the greater goals of an organization, be it recruiting volunteers, the successful management of petitions or a fundraising campaign for a project, it is essential that campaigns are carried out in close cooperation. But it is not only that engagement helps to better carry out activities. If for example an awareness-raising campaign or a set of communications material is designed in a way that its goal is – instead of simply reaching and informing – to engage, people around you will get more engaged over the long run. The more your co-workers consider and take advantage of the opportunities that programs give you to engage people, the more active the community and social base can grow around your organization.

See also:

Community outreach vs. community engagement

https://leadingdifferently.com/2019/06/06/community-outreach-vs-community-engagement/

Outreach or engagement assessment tool:

https://nexuscp.org/wp-content/uploads/2015/02/BTF-DistinguishYourWork.pdf

How to learn more about your supporters through research

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sociologist

The Stronger Roots Program

Researching and analysing the opinions and needs of existing and potential supporters is an important part of social base building. A general goal of such research is to learn more deeply about the supporters (their needs, opinions, feedback on your work etc.) and then shape your activities, messages, etc. according to the findings. Such research helps not only understand your supporters better and channel in your supporters' feedback, but also contributes to strengthening mutual relationships as part of social base building.

This text aims to offer a handful of ideas and recommendations gathered from research experts and concerning three specific research methods: questionnaires, focus groups, and in-depth interviews. These are not the only available tools, but they are probably the most frequently used.

RESEARCH SHOULD BE PART OF A BROADER PROCESS

Importantly, research should not be just a stand-alone activity. If you want it to be worth the effort, you need to integrate it into the broader functioning of your organization.

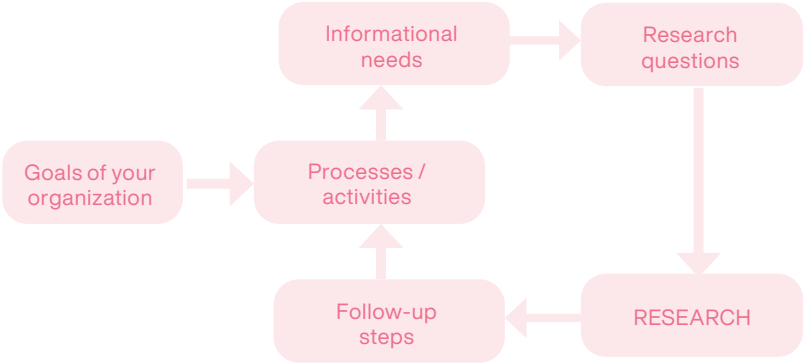
A common approach (but not very good):

A: "Hey, why don't we do research about our supporters?"

B: "Excellent idea. I would ask if they like our newsletter. What else could we ask?"

A much better approach:

Think of research as an integral part of your organization's functioning as indicated on the diagram and explained below.



- **Goals** – civil society organizations have goals which they try to achieve or contribute to.
- **Processes/activities** – the goals should be reflected in the processes and activities which organizations run or organize.
- **Informational needs** – when solving issues and navigating improvements, organizations naturally develop informational needs (e.g. questions about your constituencies, beneficiaries, audiences, etc.). Such needs can be satisfied from multiple sources. Sometimes, the best way is conducting your own research.

- **Research questions** – before starting your research, you should discuss and write down your research questions (i.e. the questions to be answered in order to achieve the goal of your research, they are not the questions you ask in the questionnaire, but somewhat higher-level questions you ask yourselves). **A nicely specific research question could be:** How can we sensibly split the people on our mailing list into groups for more targeted communication? Or: How many people in our database have noticed the new service we introduced a year ago? How do they use it, if at all? Are they satisfied with it? Or: What is the lived experience of our clients when they use our new service? How do they reflect on it right after they receive the service and what is their reflection of it three months after? **In contrast, a vague research question would be:** What are our supporters like? Or: Do our clients like our new service? Such vague questions can be a starting point, but they need refinement and specification before you start designing the actual research. Research questions then determine what research method you want to use.
- **Research** – once you have your research questions all set, it is time to design the actual research. This document will briefly address three common methods: questionnaires, in-depth interviews, and focus groups. There are other methods out there including but not limited to content analysis (for quantitative analysis of text including media articles and social media content), participant observation, and a variety of more specific quantitative and qualitative techniques.
- Follow-up steps – it may be a waste of resources to do research when you don't have the capacity and intention to make changes based on the findings of your research.

In short: you should know what research questions you want to answer and they should be relevant for your actual work. Research questions help choose the appropriate research method. It is a good idea to figure out the capacities to implement potential changes based on the research results.

CHOOSE YOUR RESEARCH TECHNIQUE: QUESTIONNAIRES, IN-DEPTH INTERVIEWS, FOCUS GROUPS

As mentioned above, there are various techniques available. These are the three most common:

Questionnaires enjoy their popularity partly due to standardization (everybody gets to answer the same questions asked with the same wording and is mostly offered the same choice of predefined answers). Standardization means that the results can be processed in a fairly straightforward way. This produces a flavour of objectivity (this can be misleading, especially if we don't avoid the errors discussed below). We usually choose questionnaires when we have a very clear idea of what we want to ask about, and are curious about the distribution of answers (how many percent say XY, how does a certain experience correlate with gender/age, etc. In relation to building your social base, you could ask about how your supporters perceive your organization (especially the trait you think you have or should have) and perhaps you could follow change over time conducting repeated measurements. You could also use questionnaires to give your supporters a voice in helping you make a decision, such as when you are deciding between two options for a new program. This can provide feedback, while also generating a sense of ownership.

In-depth interviews are intensive individual interviews, which means we can usually cover far fewer respondents (often called conversation partners) than with a questionnaire (typically less than ten or low tens). In-depth interviews focus on a specific topic and details rather than breadth, and they strive to cover a overall individual experience with the topic. We could also say they strive to acquire an understanding of the conversation partner's perspective. Attention is paid to where the person puts emphasis, what vocabulary they choose, etc. This method might be used when you want to understand the full scope of needs, ambitions, fears, and coping strategies of your beneficiaries to make sure your service is holistic and does not overlook any important aspect of the problem you want to tackle. As another example, it may be useful to do in-depth interviews with your major or regular donors to find out their reasons and motivations for supporting you, their general opinions on the situation concerning your cause, their view of altruism, or how they feel about your communication towards them.

Focus groups are group discussions of usually six to ten well selected people who come together to discuss a predetermined topic. The discussion is facilitated by a moderator according to a well-prepared interview guide. A similar technique conducted with individuals rather than groups is called semi-structured interviews. These are also based on a fairly detailed interview guide. The advantage of a focus group over semi-structured interviews is that it saves time and can produce specific insights thanks to the group dynamics (participants are encouraged to interact which may uncover other things that a simple one on one interview would not). We will only cover focus groups explicitly in this document, but most of the ideas about them apply to semi-structured interviews. Focus groups can be used when you want to get feedback on a specific concept, idea etc. Or when you want to learn about people's experience with a specific program, event, procedure etc. A good example in relation to social base building

could be a focus group with participants in a pilot program about their experience.

QUESTIONNAIRES

Formulate your questions carefully
Formulating good (sets of) questions to measure complicated concepts such as intelligence, wellbeing or political polarization is a whole scientific subfield. However, almost everyone can formulate decent simple questions if they strive for clarity and keep in mind and avoid typical beginners' errors:

- Avoid using double negatives (WRONG: Was the experience not unpleasant?) Also avoid negatives with adverbs such as often, rarely (WRONG: Agree or disagree: I don't often donate money.) Also avoid negative formulations in TRUE/FALSE or YES/NO questions (WRONG: Yes or no: The workshop wasn't well prepared.)
- Avoid asking two-barrel questions, i.e. asking about two distinct things in one question. E.g. you should not ask "Are you satisfied with the choice and quality of our services?", because what if the respondent likes the choice, but hates the quality? Or vice versa?
- Avoid so called leading questions, i.e. questions which by their wording push the respondents towards certain answers. E.g. Do you agree that responsible citizens should donate money to charity? The wording "responsible citizens" loads the question with some unnecessary emotion.

- Do not use absolutes unless you really mean to use them (such as always, all, ever). (MOSTLY WRONG: Yes or no: Do you always eat breakfast? ... Almost everyone has skipped breakfast at some time in their life. Even worse, respondents will not interpret this the same way, some will take such questions literally as always, some will take the always as whenever I can or most of the time)
- For questions with predefined answers (most typical questionnaire questions), due attention should be paid to the scale, not just the wording of the actual question. Generally, scales should be symmetrical (i.e. strongly agree – agree – disagree – strongly disagree, rather than for example disagree – agree a little bit – agree somewhat – strongly agree).
- Also make sure your predefined answers (a) do not overlap (such as in "0-5 times a day", "5-10 times a day", ...) and (b) cover the whole possible spectrum of answers.

Consider also using at least some open-ended questions to generate new ideas.

Design you questionnaire to work well as a whole

A questionnaire should not be cognitively demanding: when possible, ask simple questions that are easy to understand. If you need to ask questions which you expect to be hard/sensitive for the respondents, do not put them at the beginning. It is better to start with something lighter which will serve as an ice-breaker and will create interest. Simple but "boring" questions such as gender, age, size of municipality, etc. (so called socio-demographics) are usually best left for the very end of the questionnaire.

Make the questionnaire short. For each question, during the preparation phase, ask yourselves whether it really is bringing you closer to the objective of your research or not (if there is a question included just because the potential answer seems interesting to

you, but is not relevant for your research goal, consider deleting it so that your questionnaire does not get too long). Also omit questions that you can find the answers to from other sources (such as Google analytics for your webpage, data from your social media, etc.).

Generalizing from questionnaires

To be able to generalize from a questionnaire filled in by only a subset of possible respondents (i.e. by a so-called sample), the sample needs to be representative of the population you want to generalize for. This is often quite hard to ensure. When running a survey where we don't have control over who fills in the questionnaire or of who does not, we should be careful not to overinterpret. E.g., when we ask 1000 people on our mailing list, but only 200 fill in the questionnaire, the results may be very skewed (we could have received very different results if everybody responded).

Pilot the questionnaire

Before you release the questionnaire among respondents, let several people from the target group fill it in as a test. By doing so, you will be able to check its comprehensibility (talk to them afterwards, question by question) and then you can then correct any ambiguities. They should be people who did not participate in the preparation of the questionnaire. Piloting is also a good way to estimate how much time it is going to take to fill in the questionnaire.

Timing

It is good to think about the timing of sending out the questionnaires. Check other materials you are sending to your supporters and make a plan so that your respondents do not feel overloaded or do not “lose” the questionnaire among many other e-mails.

Consider making it a little playful or otherwise engaging

If you want to get regular feedback, think how you can make the questionnaire more fun. Maybe you can insert a fun fact or two about your work/topic/organization among the questions. Or close the questionnaire with a nice picture from your last event.

Get a better return

Getting a good return rate is hard, but may be crucial for the validity of your data. There are a few ways to strengthen the return rate on questionnaires. First, make sure you explain the questionnaire’s purpose. It can also help if the questionnaires are sent out by someone whom the respondents know personally (a face of your organization, an ambassador who is a celebrity). The “fear of missing out” method may also work – rather than explicitly emphasizing that you will miss out on something if you do not fill in the questionnaire, emphasize that the questionnaire is a special opportunity to contribute to a decision making or otherwise important process. You can also emphasize exclusivity (e.g. we are sending this questionnaire to you because you are very important to us, because..., or you belong to a selected group...). It is usually a good idea to send a reminder or two to boost the response rate. Most questionnaires are anonymous, so these reminders will also be received by those who have already filled in the questionnaire. Make sure to mention this early and explicitly in the reminder so that these people know they can ignore it and do not get confused.

IN-DEPTH INTERVIEWS

Unlike questionnaires, in-depth interviews have very little standardization. The idea here is not to generate a quantitative overview of reality, but to generate understanding of other people's specific perspectives and perceptions of reality in its fullness. **In-depth interviews typically focus on feelings, attitudes, behaviours, and motives in addition to just describing an experience on the surface.**

In-depth interviews are designed to generate very detailed information about each conversation partner and thus usually uncover new problems or explanations. (This is in contrast to questionnaires, where we already need to know what we are interested in to the point that we can formulate standardized questions.) Sometimes, in-depth interviews include participant observation (such as spending some time with the conversation partner in the situation you want to talk about).

The lack of standardization has obvious advantages: we can make the research more about the conversation partner and their view of the world and less about our preconceptions. By not defining, or at least not so strictly, what is being discussed, we give our conversation partner much more agency than when they just fill in a questionnaire. However, this also means in-depth interviews are more prone to bias. It is more likely that different researchers would end up having significantly different conversations with the same conversation partner than that they would end up receiving very different answers in the same questionnaire. In addition, to conduct and analyse in-depth interviews is far more time intensive (per one respondent) than conducting a questionnaire survey, so you can usually cover only a handful of people.

Principles of conducting an in-depth interview

To conduct good in-depth interviews, interviewers should be trained in interviewing techniques. Let us try to summarize some of the key principles here:

- Use open-ended questions rather than yes-or-no questions. Motivate the conversation partner to describe things with their own words. Use “please describe...” to get the initial impression, but also use follow-up questions to get more detail (“Could you elaborate on this idea?”, “Could you give me an example?”, “Is there anything else you would like to add?”)
- Do not be afraid to ask if you don’t understand something, you won’t be able to ask once your conversation partner is gone and you only keep the recording (“I am not sure I fully understand, could you explain it once more?”)
- You should be non-judgemental. Be a friendly, interested, but value-neutral recipient of your conversation partner’s responses.

Conducting in-depth interviews as a process

- Identify stakeholders/candidats who would be most beneficial to interview.
- Learn background information about you interviewees (sometimes as a group when interested in their collective experience, sometimes about each interviewee as an individual when interested in individual experience), and identify what information is needed from whom (chances are you will want to focus on slightly different things with different interviewees).
- Write up an interview protocol.
  This will include:

Guidelines to introducing yourself, the research, soliciting informed consent about how the information is going to be used and about recording the interview, discussing confidentiality. Signing an informed consent and confidentiality form is advisable, especially when sensitive information is likely to be shared.
Interview guide – what questions or issues you want to address in the interview. This should not be too dense so that there is enough space for follow-up questions and issues brought-up by the conversation partner.
What to say in conclusion (Will there be any report published? When? Are there any other follow-ups the conversation partner could be interested in? Etc.)
For you, what to do as a follow-up of the interview (Should the interviewer fill-in some additional form as a first reflection from the interview? Should a full transcript be produced? Or only selected key information? How to safely store the recording?)

- Train additional interviewers

  Mostly, multiple people will be conducting the interviews. They should be trained to perfectly understand the goal of the interviews, the context, etc.

- Analyse the interviews/transcripts

  Sometimes, you will be mostly interested in individual narratives. In that case, you can organize your analysis primarily by individual conversations.
  Even if the previous applies, you will almost always want to abstract some general, recurring patterns and typologies. Go through the transcripts / notes and look for themes, topics, or patterns. Group them or otherwise organize them in some kind of order to help you answer your research questions.

There are also special techniques of coding developed for working with qualitative data and software tools for organizing and analysing it. You can consult experts about them.

FOCUS GROUPS

As we stated above, focus groups have a twin technique called semi-structured interviews. We will only focus on focus-groups here as the basic principles are very similar and focus groups have some extra points to consider due to the presence of group dynamics.

Selection of respondents

The selection of respondents is key. Invite individuals who you think will provide you with the best and most relevant information. It is worth keeping an updated database of contacts segmented into groups, since it may be helpful here. If your capacity allows it, you can run multiple focus groups with differently defined participants (e.g. how is your communication perceived by donors?, clients?, subscribers?, social media followers?). The general rule is that focus groups should be fairly homogeneous (you want to capture the experience of a particular group). However, when conducting focus groups for feedback, you can also actively try to invite people who you expect to be critical in order to receive the full scope of feedback, both positive and negative. Sometimes, it can make sense to organize a separate focus group of just those who are dissatisfied.

When you approach your selected participants, it is important to explain to them what the focus group's goal is and why their participation is beneficial. If possible, also communicate how you are going to use the results. Consider producing a short version of the report which you can share publicly to further show the

participants that the input from them was used. This can motivate them to participate again in the future. You can also consider motivating participation with a material reward (money, a free product or service, etc.).

A population of ideas

Remember, you usually only talk to a handful of people in your focus groups. Sometimes, this can simultaneously be the entire population such as in case of large donors. Mostly, however, this will be just a small sample of all the other people who may have also been invited. As a result, quantitative generalizations from focus groups are usually unwarranted. E.g., if two thirds in a group of six think one thing and the rest another, it is very possible that the ratios are opposite in the population.

Instead of trying to generalize to a population of people (say mailing list subscribers), it can make more sense to think of focus groups as an effort to determine the population of ideas. A typical focus group research question can be built on the following puzzle: what are all the different ideas which come up in relation to this service/program/product. Rather than: how many people perceive this idea as the most important one, or what percent of them agree with this? The latter is a more typical puzzle for a questionnaire, and indeed, it is possible to have a follow-up questionnaire to quantify the inputs from focus groups.

Moderator

A key element of any focus group is the moderator or facilitator. They work with a discussion guide or scenario which includes several questions. Apart from making sure that all the questions get due attention, it is also their responsibility to ensure the following:

- Participants feel safe and are willing to speak their mind.
- All participants get space to make their view known. This does not necessarily mean that the speaking time of all participants should be exactly the same, but there should be some balance.
- When a seeming consensus is being reached early (such when the first three people who speak are in agreement), this may put pressure on participants to conform. The moderator should act against this pressure by gently, but clearly encouraging opposing views, if present.
- Despite being based on a clear guide (set of questions), the discussion should flow naturally.
- A key idea of focus groups is that participants can stimulate each other thoughts and ideas. The moderator should make space for mutual reactions among participants.

The moderator should be free to focus on facilitation only. Someone else (an assistant) should make notes (if notes are desired as an addition to recording, which mostly takes place – do not forget informed consent with confidentiality statement). The assistant also helps with other things which may be needed (distributing name tags, drinking water, etc.). The moderator should be non-judgemental, an attentive, encouraging listener and should be able to think while listening to come up with good follow-up questions. They should also know how to resolve conflicts and manage the group dynamics.

Questions

You typically want to start with some engaging/ice breaking questions. Only then, gradually, start asking the harder questions which may require more effort to think, reflect etc. It is a good practice to finish with asking an open-ended question about what else they would like to add or what they have been itching to say but did not find the right opportunity to do so.

Questions should be formulated as short and clear, without ambiguities. It is almost always better to ask a question which does not allow for a yes or no answer, so that participants must look for their own words to express themselves. One question should be asked at a time. Follow-up questions are important to dig deeper beyond the first, perhaps reflexive answers.

CLARIFYING SOME CONFUSIONS IN TERMINOLOGY

It is usually easy to understand the difference between questionnaires as a quantitative method on the one hand and the different qualitative methods on the other hand. However, people get confused about the differences between the various qualitative techniques. For example, people sometimes use semi-structured interviews and in-depth interviews interchangeably. Yet literature distinguishes between the two and will try to illuminate the distinction.

We think of focus groups and semi-structured interviews as closely connected by having roughly the same goal, whereas in-depth interviews have a bit more different centre of attention. Both focus groups and semi-structured interviews usually give less free space to the participants to determine in which direction the conversation develops than what is the case with in-depth interviews. Their interview guide tends to be more detailed.

Focus groups vs. in-depth interviews

Just like in in-depth interviews, we can also be interested in feelings, attitudes, behaviours, and motivations in focus groups, but we are usually unable to construct a full picture for each individual participant. In fact, in-depth interviews and focus groups typically have a similar duration of about 60 to 120 minutes, but in focus groups, there are about six to ten participants. It follows that we use in-depth interviews when capturing a full individual experience is of the utmost importance, or in other words, when we are primarily interested in the subject and their narrative. We use focus groups when we are primarily interested in an issue or topic and different perspectives in interaction are expected to illuminate the issue or topic from multiple directions.

Semi-structured interviews vs. in-depth interviews

The distinction between semi-structured interviews and in-depth interviews may seem less clear-cut. After all, they are both one-on-one qualitative interview techniques. Generally, semi-structured interviews tend to be shorter, maybe 30-60 minutes and each conversation partner typically answers to the same basic set of questions (the follow-up questions may be different and should react to the answers provided). As a result, we can, for example, produce a matrix of answers to individual questions by participants. We can also more easily code the answers according to categories such as positive view of the matter, negative view of the matter, neutral view of the matter, etc. The analysis and results presentation, just as is the case with focus groups, usually goes directly to observations, insights and suggestions concerning the issue or topic of interest. In contrast, we often produce full individual narrative stories from in-depth interviews and only then possibly decide to also analyse common patterns and suggest possible typologies.

ADDITIONAL ADVICE

Take the results of your research with a grain of salt

People want to look good and may thus bend the truth, exaggerate, or avoid saying some information to present a more positive picture of themselves. Think about how each particular result of your research may be biased.

We said that part of the research process is considering the follow-up steps and possible changes. However, changes should mostly be incremental rather than radical (chances are your conclusions from the research are not entirely correct and you don't want to put all your eggs in one basket).

Consider seeking professional assistance

- Conducting even relatively simple research is not easy. Consider hiring a professional consultant to review or design your research design and your research tools (questionnaires, protocols, etc.).
- Having a professional moderating your focus groups or conducting your in-depth interviews can not only ensure higher “technical” quality, but having outsiders interview the stakeholders can also generate different dynamics: for example, interviewees may be more open to sharing critical feedback.
- You can also consider hiring an expert to visualize your quantitative data. It can make a big difference in telling a precise story. Not just because it may be more beautiful, but mainly because they will know what kind of graph makes most sense in a particular context.

Would you like to learn how research helped an organization to learn more about their supporters and donors in practice? Read the case study of the School for Public Life.

How to create a communication strategy and plan

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BEFORE WE GET INTO THE COMMUNICATION STRATEGY...

The basis of successful communication about a brand is that you know who you are, why you are here and what you as an organization strive for. If you are not clear on these things, then even the best communication strategy won't help you. So take the time to describe your mission, your vision, your values and programs, products or services you offer:

Mission
Why is your organization here, what is its purpose.

Vision
What does your organization want to achieve in, say, 20 years?

Values – pillars
What are the three values of your organization, i.e. its pillars? What values is the organization based on, what is it that defines the organization and what would the organization be like without them?

Programs/Products/Services
What programs, products or services do you use to solve a social problem?

When it comes to communication, I recommend using methods based on the needs of customers or recipients known as Human Centered Design (HCD). These methods are commonly used when designing new products, services or their innovations and it is also a great approach for building communities or communication in general. You are putting a person – i.e. a recipient, client, supporter or volunteer – and their needs at the center of your activity.
So I need to ask myself questions like: Who am I talking to?

Do our services really meet the needs of these recipients? Will they understand the description of my services? HCD is an approach, but also a way of thinking that I recommend using in your work, both when determining target groups, designing services and programs as well as thinking about how communities can function.

In this way, you are creating real value for the recipient, you are connecting with them, and you are not just creating an advertisement or PR materials that are trying to sell at any cost. You are reacting to what the recipients want, need and value, so the energy you invested will pay off. It's a win-win.

THE ESSENCE OF A BRAND

Before starting the communication strategy itself, I recommend that you also focus on the strategy (or the essence or definition) of your organization's brand. This defines the basic framework in which we operate in terms of communication and serves as a supplement to all the assignments or briefs that you give to creative professionals – i.e. it complements, for example, the task of creating a website, which you give to a graphic designer when he is working on a poster for you, and it is also available to people from the fundraising department when they communicate with donors. The essence of the brand consists of the following parts:

Target group

Socio-demographic description of the recipients of your communication (see below).

Segment

Segmentation of one target group based on the motivation for your brand (see below).

Persona

A typical representative of one of your segments – imagine them with a name and a photo, their habits, communication style. You can use templates to create personas according to the Human Centered Design approach (*https://libdesign.kisk.cz/en/methods*)

A unique selling point

What sets your brand apart from your competition. In one sentence, what makes it unique.

Tonality of communication

How our brand is styled and expressed. Are we informal or formal? Are we rude or servile? Funny or unemotional?

Association

Associations are the words that first come to mind when we imagine a given brand. Through communication, we can intentionally create and support these associations.

Symbols

Symbols are a type of association – you clearly associate them with a brand. There are dozens of types of symbols: it can be a color, shape, object, person/face, name, number, slogan, place, gesture, ritual, word, etc.

TARGET GROUPS AND SEGMENTS

Once you know who you are, you can focus on who you're talking to. To be successful in building communities, start by getting to know your target group – it more or less describes the recipient of your communication in general terms. It doesn't say you're not trying to communicate with anyone else, it just tells you where the largest number of people you want to reach are right now – and this may well change over time. For example, if you want to find

participants in training courses for social workers, your target group will be women, although there certain are some men in this profession; but it is more effective to focus on women, since there are significantly more of them in this field, so that our efforts will be easier and our communication more effective.

The general public is not a valid target group – because this would mean targeting people indefinitely that your organization has no chance of ever reaching with its programs or services. There is nothing worse than having the general public as a target group, because it does not give us the opportunity to focus on anything in terms of communication. Even though I do awareness raising, it needs to be more targeted. Let's imagine that we want to spend CZK 1,000 on advertising on Facebook. If I target everyone, the money will spread out in all directions and get diluted – because I will also reach people that the topic will not resonate with at all and the effect will be zero (in the same way, if I target the men in social services from the example above, I will have to make a huge effort with few results to show for it). But if you decide to set as the target group people who, for example, are willing to change their attitude or have an elementary relationship with the topic, you are going to be more effective.

Tip: *When you start with a communication strategy – especially if you want to use communication to build a community – focus first on the people who are closest to your brand, who understand you the most, who are close to you in terms of opinion or the given subject. In the following years, try to expand the target group and target more broadly. Gradually expand the islands of positive deviation.*

Even so, simply defining target groups is not enough on its own. In the spirit of Human Centered Design, we would lack the motivation, desires and, above all, the relationship of the recipient to the brand. Only when you know their motivation for the brand – i.e. why they choose you – can you communicate effectively or even create higher quality programs or services.

Based on the individual motivations of your target group, you establish so-called segments. Each segment is paired with particular motivation. While the target group describes the recipient more generally based on socio-demographics, segments allow you to use a finer division within the target group, for example according to the recipient's motivation for the brand. This allows you to respond to the needs of your recipients and make your communication impactful. I recommend using a not too high number of segments within the target group – three segments are enough, five is the absolute maximum for our purpose.

Example:

An organization focused on helping people with disabilities

Target group: Socially sensitive women, age 35–55, married, living in a smaller town, university education, household income 50–60,000 CZK (picture a teacher from Nymburk)

Brand Affiliation Segments – donates money to your organization because:

1. has personal experience with a disability in her family
2. knows that financial support is an important part of her social status
3. she realizes how lucky she is that everyone in her family is healthy

Get to know your target group as well as their relationship to your brand. For this you can use, for example, the research methods described in this toolkit. You can also draw inspiration from other HCDs methods for researching target groups and problems, for example from the KISK workshop (*libdesign.kisk.cz/en/methods*). Only then should you start thinking about what you will say, why you will say it and how.

Setting up your target groups well, including the entire essence of the brand, mission and vision – is not rocket science. However, if you are not sure about this, do not be afraid to use a professional or to let yourself be guided through such a process by one. It will save you time, offer distance and enhance the quality of the output.

WHOLE SOCIETY

Target group of mothers

Individual 1
more time for yourself

Individual 2
something free for the kids

Individual 3
relationships for children

Target group of children

A COMMUNICATION STRATEGY

A communication strategy helps us to be effective in our communication activities – to spend resources where we need to and where it will have an impact, to communicate to those individuals or groups who need or will be able to use our communication. If you have completed step zero, i.e. that your brand is working, it is time to dive into the practical aspects of communication.

1. Establish communication goals and their measurement
2. Determine the target group – segments
3. Describe the purchasing behavior of the recipients (STDC)
4. Describe the existing Touchpoints
5. Select appropriate communication tools from the communication mix using the PESO model
6. Select appropriate communication topics and schedule them in the campaign / communication strategy along with a content plan
7. Set / check your budget
8. Evaluate and re-plan

1. Communication goals and their measurement

If I want to do communication, I need to know why. Set communication goals based on the organization's overall strategy, for example once a year. The assignment should be based on the discussion of the head of the organization and the PR officer or through a discussion with the whole team, in the case of smaller organizations. This is the key point that leads to an order being created for the communication team or the PR officer.

It will probably come as no surprise that goals should be SMART – specific, measurable, attainable, relevant, timely. For example:

- get 100 applications for the volunteer program by January 30th
- 30% of supporters in a poll after a short email campaign say they are willing to support your organization financially
- within the framework of the Christmas campaign, we will get at least 10% of new donors to give a one-time contribution that will be on average at least CZK 500
- by the end of March, we will convert 20% of one-time small donors into regular contributors.

However, assignments are often more complex in nature and could relate to things such as changing an individual's perception of a specific topic or raising awareness about something. Even in such a case, you should not be satisfied with a general assignment like start an awareness campaign aimed at the general public, but should find a more specific set of tasks for it.

The stumbling block is often the measurement of such outputs or the fulfillment of the goal. Even in terms of communication, we should be working with the principle of impact measurement and not just fulfilling auxiliary indicators such as we will have three articles in the national media. Such information actually tells very little about what our efforts actually managed to do. You can use the AMEC Integrated Evaluation Framework to set goals and, above all, their measurement and evaluation methods (http://amecorg.com/amecframework/). It can guide you in how to set the right kinds of communication goals, but also on the method of measurement through impact, not just indicators.

Strategy is not just about setting out what you want to achieve. Therefore, to achieve something means that you also determine what it is you are willing to sacrifice, to leave behind. Without consciously omitting some paths, tools or target groups, it will not be a strategy.

2. Target groups and segments

We already know the target group from the brand definition. For specific campaigns, we can select one of the already determined and researched segments or determine another target group or segment according to the needs of the campaign or project. Even when setting new target groups, make sure that the segmentation is based on the real needs of the recipients. We also distinguish between the recipient of the service and the decision-maker – typically in programs for children, the users are young children, but the parents make the decisions. Therefore, we are targeting parents.

Example:

An organization focused on free-time activities / low-threshold program for children

Target group: Mother of multiples from a small town, age 25-45, divorced, apprenticeship/high school education, household income up to CZK 20,000

Segments according to the relationship to the brand – the child is signed up for the program because:

1. she will have more time for herself
2. she gets something for the child that she would normally have to pay for elsewhere
   (a trip)
3. she wants him to go so that he/she can do the program with a friend (neighbor, ...)
4. the child wants it / she doesn't care

Target group: Boy aged 12–16, from a divorced family, elementary school student, at risk of social exclusion, household income up to CZK 20,000

Segments according to the relationship to the brand – he is coming to the program because:

1. he wants to hang out during his free time
2. he can see in it personal benefits (he gets to go somewhere where he could not normally go on his own...)
3. he wants to establish a relationship with a friend / girl
4. his friend goes there (coolness factor, relationships, ...)

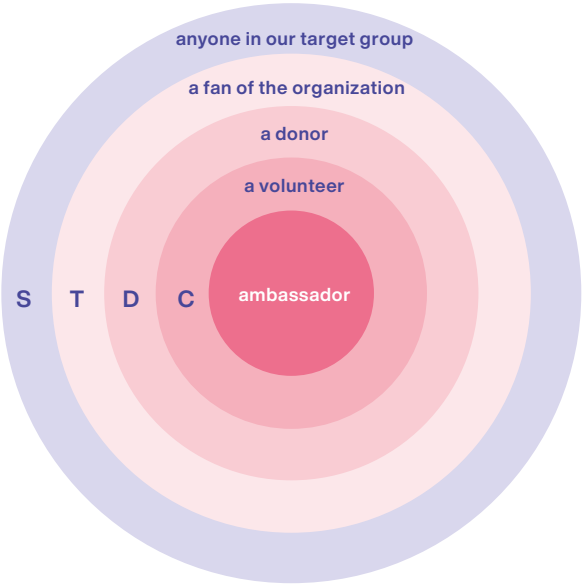
3. Consumer buying behavior and the STDC model

- The term buying behavior is used in business. It describes what stage the customer is in before they take the action we want – in this case it won't be a purchase, but it could be a donation or getting involved as a volunteer, etc. The STDC framework, which is an abbreviation of the English verbs See-Think-Do-Care, can help us. Also the STDC model puts the recipient at the center of thinking.
- S – In the **See** phase, represents all the people who have a need defined by our segment, so it's a very broad group. They haven't heard of or do not remember your brand.
- T – In the **Think** phase, people are already thinking about using a specific service (becoming a volunteer, donating money), but do not yet know where or to whom. They heard about your brand at a previous phase.
- D – In the **Do** stage, the recipient has just decided to make a "purchase" (signs up for volunteering, donates money, ...), or is currently doing the activity.
- C – In the **Care** phase, we are already trying to take care of our donors or volunteers, to fulfill their needs further and to lead them back to the point of taking an action through the Think phase – that is, for example, to donate again.

The STDC model works like a funnel – we have a broad mass at the beginning, with much lower numbers of people at the end. In each organization, the process will be a little different, it may even have multiple levels, especially when it comes to the community – at the end there can either be a volunteer, a supporter, a donor or a member. If you have different goals or programs, you can either generalize the individual phases, or if they are very specific, such as for a community, you can have a separate matrix.

See Think Do Care

Jenda Žáček
– brand strategist



Your model may not work in such a linear fashion either. Nevertheless, try to describe your stages of buying behavior. At each stage, state the recipient's need at that stage, think about what type of content would help them at that moment. Later, return to the channels that are fits to use in this phase.

	see	think	do	care
	People who want to be more beneficial to their surroundings	People interested in volunteering	People who want to volunteer	People who have participated in the volunteer program
expectations	Volunteering should be fulfilling	I want to know what volunteering will bring to me specifically	I am looking for a specific program that matches my needs, abilities and time	I want to be part of a community, I want to be appreciated
channel(s)	Social networks Media PPC	Blog	PPC	E-mail Get togethers
goal / measurement	Get 1,000 followers on Facebook by the end of the month	Increase organic traffic to 5,000 visitors per month	Get at least 50 new signups per month	Get al least 10 new reviews every month
content	Interesting facts, tips	Thematic articles	Targeted PPC ads	E-mail with a question about satisfaction
frequency	2× a week on Facebook and 3x a week on Instagram	1× a week	Evaluation every 3rd day of the PPC ad campaign	After every program

4. Touchpoints – points of contact

Touchpoints describe the places wherever the recipient encounters your brand. It is not only the website and social networks, but also the restrooms in your office that they visit. It is your flyer, news reports on the radio and public debate. Start by brainstorming about all of the touchpoints that come to mind.

Also record what buying stage the recipient is in, at which point of contact and what their needs or expectations from the brand are at that moment. This will allow you to subsequently adjust the content of the individual channels to respond to the needs of the recipient.

Don't only think about existing touchpoints, but also about other possibilities that can be used. Then prioritize the most important ones. Make sure that you have enough touchpoints at each stage of the buying behavior. Remember that in the initial stages of STDC you need to make a broader impact, while towards the end the process is likely to be more focused.

Example:

An organization that would like to get 100 applications to the volunteer program

touchpoint	phase	expectations of the brand	priority (1-5)	type
mass media	1 see – I don't know	Volunteering could be fulfilling	1	earned
PPC	1 see – I don't know	Volunteering could be fulfilling	2	paid
the program´s website	2 think – I've heard, I'm considering	I want to know what volunteering will bring to me specifically	2	owned
newsletter	2 think – I've heard, I'm considering	I want to know what volunteering will bring to me specifically	1	owned
references at work	2 think – I've heard, I'm considering	I want to know what volunteering will bring to me specifically	4	shared
website – application form	3 do – I want to, I'm thinking about where	I am looking for a specific program that matches my needs, abilities and time	1	owned
volunteering	4 do – I volunteer	I'm getting information and support from the organizers	1	owned
newsletter	5 care – I volunteer regularly	I want to be part of a community I want to be appreciated	2	owned
Experience a different city (stand)	1 see + 2 think	Volunteering could be fulfilling	3	earned

5. Communication mix and the PESO model

The prioritized touchpoints should still undergo one more review: PESO. PESO is an abbreviation of the English words, Paid, Earned, Shared and Owned and indicates the types of communication channels from the point of view of ownership.

Owned media are those channels over which you have complete control. Typically these are things like your blog, your website, your office, a product, an app or maybe a flyer.

Shared media means truly shared media, i.e. primarily social networks. The specific nature of such networks is that they use content that is owned (Owned media).

Earned media is what was called PR until recently. They come from the media space that we manage to get a hold of. This includes media relations, articles that someone writes about us based on our own story (owned) or the fact that the story resonates on social networks (shared) or that a well-known public figure posts on Instagram that he is one of our volunteers.

Paid media then represent a layer that blends under all previous media types. I can support my own content with, for example, PPC advertising, you can support posts on social networks with advertising, and you can also support publicized content with advertising.

The image below shows that brand authority, consistent communication, and credibility are all created in the center of the sets. Focus on not under-developing any of the areas. Start with your own content – if you don't have quality content on your owned media, you'll have a hard time succeeding in the area of shared media over the long-term, and you'll have poor quality content in earned media. Without your own content, even paid

media won't be able to help you. Besides our owned media, the paid ones are often forgotten – however, they can multiply our previous efforts while investing relatively little into it, which is especially reflected in the amount of time invested, which is the most precious thing of all.

Check the prioritized touchpoints, i.e. your communication mix, to ensure that there is a balanced representation of all media types. Also check your capacities – having a large number of prioritized touchpoints means that you have to devote a greater amount of time and resources to managing them. It is here that we should strategically choose the appropriate tools that will lead to the fulfillment of our communication goals and reaching the target group, but also those that we put aside for the moment so that we can focus our energy on fulfilling the goal.

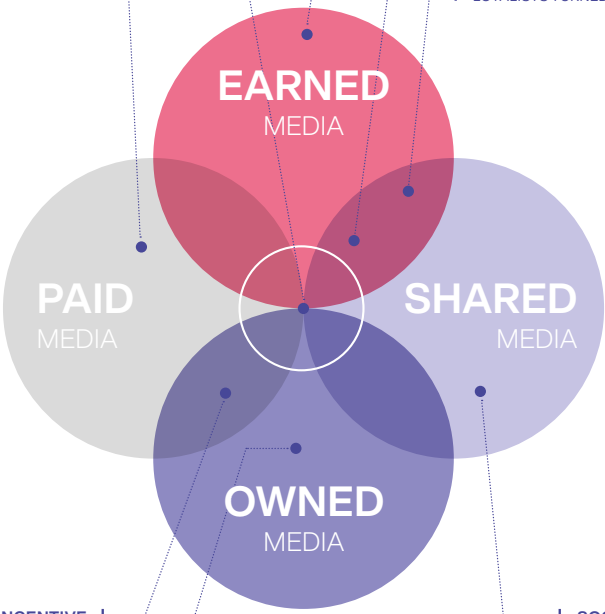
AUTHORITY
OPTIMIZED CONTENT
SHAREABLE CONTENT
ENGAGING CONTENT
GOOGLE AUTHORSHIP

PUBLICITY
MEDIA RELATIONS
BLOGGER RELATIONS
INVESTOR RELATIONS
INFLUENCER RELATIONS

PAID MEDIA
FACEBOOK SPONSORED POSTS
SPONSORED TWEETS
TWITTER CARDS
FAN ACQUISITION
LEAD GENERATION
OUTBRAIN

PARTNERSHIPS
CHARITY TIE-INS
COMMUNITY SERVICE
CO-BRANDING

INFLUENCER ENGAGEMENT
RESPONSE TO DETRACTORS
DETRACTORS TURNED TO LOYALISTS
LOYALISTS TURNED TO ADVOCATES



INCENTIVE
AFFILIATE
BRAND AMBASSADORS
SPONSORED CONTENT
NATIVE ADVERTISING

CONTENT
CREATE FROM EXPERTS
EMPLOYEE STORIES
CUSTOMER STORIES
USER-GENERATED CONTENT
REVIEWS
BRAND JOURNALISM
WEBINARS, VIDEOS & PODCASTS

SOCIAL MEDIA
PACEBOOK
TWITTER
LINKED-IN
YOUTUBE
PINTEREST
INSTAGRAM
VINE
GOOGLE+

6. Communication topics, campaigns and communication plan

A successful campaign / communication plan must contain three basic elements: 1) it contains an emotion, 2) it is based on the customer's needs or reminds them of a need, 3) it refers to the brand's symbols (i.e. it creates a connection between the need and the symbols). We understand a campaign as a communication plan that has a beginning, an end, a specific topic, goals and uses different tools.

In the communication plan, write down what topics you want to communicate in the coming year, taking into account the goals and other program activities your organization has set. For example, place them in a calendar-like format and mark them with the touchpoints that you will use for the given topics. In the overview, you can see if you have left any communication periods empty, or if some are, on the contrary, overloaded and your communication needs to be spread out more.

Make sure that for each theme / campaign you repeatedly use brand symbols in your creative outputs and messaging so that people associate the theme with you. Also, look back at the communication goals and make sure you fulfill them with the activities included in the communication plan.

Once you have a thematic / campaign plan for a one-year period, you can start working on individual campaigns and themes.
For each such activity, write a short action plan – a list of tasks that need to happen before the campaign is launched. I also recommend adding a short brief to individual campaigns that will be understandable to everyone – what the goal of the campaign is (what goal is being referenced), who it is targeting, what the driving idea is, what types of media are involved and what the budget requirements are. After that it's time to place specific content in a content plan or calendar, in which you will already have specific individual outputs across channels and which will

allow you to plan content in the short term, for example with a horizon of, say, 14 to 30 days.

Consult the communication plan with someone outside of your organization. Get feedback on topics and campaigns to see if they resonate with people. It is good to test them also directly with the target group.

Plan for topics / campaigns
This is used for a longer-term overview. Weeks or months can be used on the vertical axis. Individual topics or campaigns can be used in individual rows. The colors can indicate the type of campaign or media type.

Content plan
Use Trello, for example: everyone can write suggestions in the first column, the next 2 to 3 columns can be used for the current month with specific content details, dates and for the labeling of media types, the last column is the outlook for the following months. You can also add a label with the stage of buying behavior to the individual contents.

7. Evaluation and planning

Set a fixed date when you will revisit the communication strategy and continuously evaluate it within the team. This can be done on a monthly or quarterly basis. This allows you to keep your goals in mind and also allows you to fine-tune your original plan. Once a year is the timeframe for a more thorough assessment and planning for the next year. Refer to the Communication Objectives and the AMEC Integrated Evaluation Framework (http://amecorg.com/amecframework/). Focus on evaluating impacts, not just indicators or frequencies.

Get started right now!

You might think that the whole process is very complicated. It's true that it has a lot of steps, but once you start going through it, it will draw you in and you will understand more about how the various parts are interconnected. I'm sure you can do it – if not, put your heads together or get some advice.

With a communication strategy, you will be able to communicate more effectively and thus your work will have a greater impact – that's what you want :) So get right to it: write down the three first steps you will take for your communication strategy, also including the specific deadlines. You can do it. Good luck!

"Organizations with effective communication are 47% more successful in selling their products or services."

W. Wyatt Effective Communication, ROI Study Report

How to create a fundraising strategy

WRITTEN BY
Renáta Scheili,
NIOK Foundation

The Stronger Roots Program

To further your cause the best you can and achieve your goals as a civil society organization, you need complex types of support from your community – including their financial contribution. Financial stability and independence are crucial long-term goals, or sometimes only wishes, for many organizations. However, you can turn this wish into something with a realistic potential through conscious planning.

"Without a community of supporters the organization not only loses its meaning, but also a substantial source of its sustainability.."

Jiří Bárta, ex-Director of VIA Foundation and the Stronger Roots Program mentor

If you are in a constant struggle to cover your costs, or don't know how to sustain the organization and continue your activities over the next few months or years, it is time to create a fundraising strategy! Do not feel intimidated by the word "strategy" – it simply means that you plan what you will do during the next time period, typically in the next year or next few years, to raise funds necessary to continue your work for the cause you serve.

By following the key steps below you can create a grounded fundraising plan.

#1 THE STARTING POINT

Let's start with the basics. You need to have a clear and shared understanding of what your mission and essential goals are. Although it might sound obvious, it is not uncommon that discussions on an organization's mission expose differences in understanding, and even conflicting ideas. As it is your shared values, cause, issues and goals that brought you together as an organization, including your wider supporting community, everything you do needs to derive from these basic foundations.

You might serve your shared cause in different ways as a staff member, a volunteer or a donor, but you have to agree on your basic goals. And these goals will determine your funding needs.

You also need to consider your current fundraising experience and results, set realistic fundraising goals, and figure out how you can work towards them. You can use several methods for that, but the SWOT analysis is a popular one for mapping out your strengths, weaknesses, opportunities and threats.

It is also important to assess your organizational capacities and potential, as well as the opportunities around you, so you can plan realistically, and see the potential incomes as well as the related costs clearly. If you miss this, you might need to change your plans later and settle for lower results than what you hoped for.

#2 FUNDRAISING GOALS AND CHANNELS

Now you can set your fundraising goals:

- What's the amount you need and want to raise?
- Over what time period?
- How?
- And how much can you invest in it?

Example: *You want to raise 20 000 Euros by the end of next year from micro-donations, institutional and corporate funds, and you can spend 4000 Euros on the process.*

(It is worth mentioning that the early phases of fundraising usually require an initial investment to some extent, and to a lesser extent later. But keep in mind that it will all support your long-term fundraising goals.)

Once your goal is set, you can think of the various income channels: what channels are available for you, how much can you expect from each, how you can achieve that, and what are the related costs. You need to specify which institutions and companies, what circle of potential micro-donors (individual supporters) you want to reach out to, and what project or activity you want them to support. It is also important to create relevant and engaging messages, which could be different for each target group.

Example: *You want 1,500 Euros from companies to fund your summer camps next year. You will reach out to 15 companies with your offer. Work hours and other related costs are expected to be around 3,000 Euros. You consider this as the first step of your long-term corporate fundraising plans, and expect that in 3 years you will have 4-5 regular corporate partners, who will donate 7,500 Euros annually.*

#3 CAPACITY PLANNING

You will need dedicated capacities and time, and also some expertise to raise funds successfully.

If you do not have experience in fundraising within your organization yet, there are various ways you can prepare your team: a great amount of written content is available on fundraising, and it is even more efficient to look around for a training course or to ask an expert for a consultancy throughout the first campaign period.

You might also lack the necessary infrastructure, e.g. a fundraising platform, relevant administration and financial processes, a good database, a mailing list service, or ideally a complex CRM system.

#4 SETTING MEASURABLE GOALS DEFINING THE RELATED ACTIVITIES AND TIMING

It is time to think over your specific goals that you want to achieve, which will determine your tasks and timeline.

These could include the:

- number of micro-donation campaigns you will start,
- number of new donors / regular donors and the amount of micro-donations you want,
- number of companies you want to reach out to in a given time period,
- number of new corporate partnerships,
- number of grant proposals you want to write,
- number of projects and amount of funding from grants, etc.

Based on these, you can think over the specific tasks you will need to do, create a task list with a timeline, and monitor them throughout the process.

WHAT'S NEXT?

The next steps will differ based on the type of fundraising: you will create a campaign plan for your micro-donation campaign, prepare proposals for potential corporate donors, etc. Remember that proper planning will provide a foundation for your fundraising success, and that persistent communication and fundraising activities will be the keys to it.

How to do a successful crowdfunding campaign

WRITTEN BY
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The Stronger Roots Program

In a crowdfunding campaign a relatively large number of people donate smaller amounts to support a specific goal. From your perspective as a civil society organization it means that you reach out to your wider community, including existing and potential supporters, and ask them to make a donation towards a well-defined project, activity or event, and to help reach the necessary target amount within a given time period. Giving for a very specific purpose, and not just for a good cause in general, can be extremely motivating for people as they know exactly what they are contributing to and can be sure they support something valuable to them. It is a great opportunity for an organization to bring supporters closer, and engage new ones as well.

So how can you plan a successful campaign?

CAMPAIGN GOAL

First of all, you need to define the goal of the campaign based on what you need funds for, and which project or activity you cannot fund in other ways (e.g. by applying for a grant). Crowdfunding campaigns typically also raise funds for an urgent need, as this urgency can call a lot of donors to action.

TARGET AMOUNT

Ideally you have to set a target amount that can fund your goal as much as possible, and is realistic for you to raise. It is helpful if you assess the number of your existing and potential donors, your reach primarily in regard to social media and through your newsletter, and the organization's prior fundraising experience and results. If the amount you can potentially raise can only cover a small part of the costs, it probably means you need to narrow down the campaign goal, or find another way to fund the project.

POTENTIAL DONORS

The more you know about your community, the easier it is to determine who is likely to donate. If you know your existing supporters and where you can reach them, you can also reach out to other similar people, who could be interested in your cause and become supporters as well.

You can summarize your potential donors and potential donations in a table like this one:

Target groups/ potential donors	Number of group members you plan to approach	Estimate number of donors in this group	Estimated average donation	Total potential
Example: Facebook fans	1500	50	300	15000
Newsletter subscribers, etc.				

COMMUNICATION

Active and intense communication is the key to a successful campaign. Donations will not magically appear on your bank account, but will be the result of the work you put in, so it is your job to reach out to your community and ask them to donate. It is worth the time to create a communication plan with regular campaign content and asks.

The primary communication channels for a crowdfunding campaign are typically done through social media and your own mailing list. Do not feel reluctant to ask multiple times and via multiple channels. Some people might not act after your first call but if you ask them again it will be clear that you need their help. Also, social media posts only reach a fraction of your audience, so it is often necessary to boost them with paid ads. Additionally, your mailing list is a really valuable channel, as subscribers are generally more dedicated than Facebook followers.

As your community grows and you learn more about them, you can also segment them to different groups and communicate to them in a more tailored way. Facebook Insights and Google Analytics are great tools to learn about your audiences, and mailing services like MailChimp or Sendinblue can help with targeted communications.

MESSAGES

Once you know where to reach your community, you need to create a message that speaks to them. An efficient fundraising message is simple, easy to understand, and engaging. Besides the direct goal of the campaign it is essential to talk about the impact, the change that you and your donors can make in a person's life or for your cause. And let us not forget that a picture is worth a thousand words, and this is especially true on social media. Strong visuals that catch someone's attention, create curiosity and spark emotions can make a future donor stop scrolling, click on the link and donate.

PLATFORM

The landing page of the campaign can be on the organization's own website (if you can get it coded) or on an external website like Adjukossze.hu in Hungary, Darujme.cz or HitHit.cz in the Czech Republic, or international ones like Fundly or GoFundMe. Make sure to choose one that is reliable, easy to use, and affordable.

COSTS

Any fundraising campaign involves costs: it may only be salaries, but most often it also includes communication costs, service costs related to the platform you use, transactional fees, etc. These need to be considered compared to your budget and the campaign target. But it is also important to note that fundraising campaigns very often serve other long-term goals as well. In this case you can consider the related costs as an investment.

ADDITIONAL GOALS

Besides the valuable funds you can raise, a crowdfunding campaign usually also brings in new supporters – whose value cannot be overstated. Depending on the platform being used to collect donations, donors might be able to choose whether to provide their contact information and to allow you to get in touch with them. Now it is your turn to thank them for their support and to inform them about the project they supported once it was realized. Direct contact will allow you to bring them closer to your organization by reaching out, sharing regular content about your work, engaging them in your activities – that is, building and strengthening your relationship with them.

PLANNING AND CAPACITIES

Proper planning will be the key to a smooth and successful campaign. A timeline with all related tasks and the most important deadlines will help you plan your capacities, and coordinate with your other projects and tasks. If you do not have a person responsible for fundraising yet, you need to decide who will run and work in the campaign. If multiple people are involved, the delegation of tasks and responsibilities should be clear to everyone, and in this case overall coordination is crucial as well.

EVALUATION

Whether the campaign was successful or not, you can also learn from it. Discussing your experiences, so that you can figure out what worked and what did not, which will be valuable when planning your next campaign.

With all that said, a crowdfunding campaign is not only an exciting and creative process, but also a great opportunity for you to build old and new relationships. It will engage your existing supporters and attract new ones who are committed to your cause, and it allows you to start a dialogue with them that can grow and strengthen your community.

Why does an organization need a CRM system?

WRITTEN BY
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One of the important areas of social base building and fundraising is using databases. At a certain stage of the growth of every civil society organization, it is time to think about a CRM system that could help you target your audience effectively, make your work easier, more efficient, and, above all, automated. The sooner you switch to one complex system, the fewer problems you will have to face with the growing number of donors and supporters, and the better the social base is built. This method is an effective and simple way of organizing resources and is also suitable for the long-term building of a regular donor base.

We would like to give you guidance on where to go for help if you want to use a database for online communication and fundraising, and what systems and tools are currently available on the market.

THE MAIN BENEFITS AND FUNCTIONALITIES OF CRM SYSTEMS

The biggest benefit is **data and contact management**. You have data and an overview of the system, thanks to which you can set strategies to support building and increasing your social base and donor base. Using the information stored in the CRM, you can segment your target audience based on various indicators in your CRM and tailor your communication according to its particular needs and interests for the best reach and effect. CRM can be engaged in **multiple ways and treated in a more complex way** (contact management, volunteering base, advocacy, work with stakeholders, etc.).

You can take the best out of the CRM system in case your organization has **active fundraising**. You can keep track of donations, use reporting possibilities, have an overview of canceled payments as well as you can set the right communication strategies. All functionalities will be very helpful for donor care.

WHAT SHOULD THE DATABASE CONTAIN?

- Contact management including the history of the first contact
- Besides general contact data also comments according to your needs (e-mail, phone number, address, etc.)
- Recording of communication and activities concerning GDPR (on what kinds and extent of communication was given a consent)

If you have a database that allows you **to send emails**, or another integrated system (such as Mailchimp, etc.), you can also record the entire process of email communication in one place. Ideally, you should see all the information for that contact, as well as the **donation history if it's a donor**. Keep in mind that it is necessary to connect the database with banks or integrate a system for example darujme.sk.

Reports and data analytics will help us in compiling the following strategies. Thanks to CRM, you can look at data from different angles (e.g., what is the monthly growth of donors, what is the monthly influx of new contacts, what are your incomes, decreases, and increases; monitoring of volunteer hours, ROI, KPIs, etc.). You can read this data and thanks to CRM you can easily filter it. Because you do not have this data from different sources, you will not miss the information.

Furthermore, thanks to this data analytics, you can set up **strategic communication and segment it**, look closely at your

supporters, and break down the type of communication according to the relevant characteristics. For example, the tool can send a different type of communication to donors than to supporters or to newly acquired leads. You can also target emails and social networks with specific content according to the agenda your various contacts prefer. You can purposefully monitor what types of content they like and react to, at what time they click on your posts and open newsletters, or what kind of causes they prefer to donate to and set up communication so that, ideally, they become regular donors. You can set up automated emails, e.g., if you receive a new contact in the database, it will fall into a "supporter journey", which aims to introduce the organization and the opportunity to become a donor in the e-mail cycle, or set up automatic reactivation emails so that you do not lose donors and supporters. With the telefundraising module, you can set up automatic emails for different types of calls. Using these methods, you build, expand and consolidate the social base of your organization.

There are many possibilities, depending on the specific system. From setting up campaigns, welcome packages, care for donors (individual, corporate, major donors), systems integration, online fundraising, corporate fundraising, e-shop records, telefundraising module, setting up of automated communication, an overview of the behavior and path of the donor/volunteer/supporter/lead generation, text messages, reports, and data analytics. It is necessary to explore all the functionalities that CRM provides, or eventually to create and develop them.

HOW TO MAKE THE BEST USE OF THE SYSTEM?

If your technological capabilities allow it, try to create a **comprehensive database** that could be used by the entire organization.

Automate and integrate everything you can. Look at your contacts strategically, due to the development of social base and donor base.

This will **help you most with data analytics, reports, and research** on the behavior of donors and supporters. Thanks to data analytics and reports, you can identify risks, strengths, weaknesses, etc.

The CRM system is also best used to **set up fundraising activities**.

WHAT MISTAKES TO AVOID?

The issues that many non-profit organizations deal with are **underestimated internal capacities for development** or resistance to changing their system of work. Some databases will make it very easy for you (migration from databases, data transfer, setting up processes and reports, external support), but it takes time, capacity, and a well-thought-out user-friendly setup. That is why it is important to choose the right database that **will be as intuitive and usable** as possible for your needs.

If you go into the development of your own database, it is a "long-run". You need developers and internal people to set up the system according to your needs. Also, keep in mind that we live in an agile online age where new tools and applications are being developed continually. This type usually gets quite expensive once you start developing it, so it's worth considering an optimal cost-benefit ratio.

Clean the database regularly. The faulty assumption is that the goal is to store as much data as possible. Data from inactive, old supporters that could not be restored are misleading and do not help your work. Therefore, it is important to update the database regularly and ensure the deletion of data that can no longer be used.

FOR WHICH ORGANIZATIONS IS SUCH AN INVESTMENT SUITABLE?

This investment is suitable for civil society organizations that have active online fundraising, for organizations that have their own network with a certain number of supporters and donors, that needs to be systematically managed, and which work to gain leads and volunteers.

Another important decisive element is your long-term goal. If you plan to develop, grow, and strategically set up external communication with segmentation, in other words, systematically start building your social base, there is nothing better than to take advantage of a system that allows you to automate processes. It is necessary to take into account the capacity that needs to be considered in the team not only for implementation but also for regular “maintenance”, usage, and development.

WHAT PRICE TO EXPECT?

Prices are different, depending on whether you go to a functioning system that has experience with the non-profit sector, or to the sales database. Alternatively, find out if there is a non-profit organization that develops its own database and has developers, because there may be a way to share the cost of developers. Besides price you need to pay attention to the price of monthly fees for the database, especially if you go with the option of a business CRM system. Prices also vary based on the amount of data you want to insert into the database and how you want to use it.

The cost of implementation could vary greatly from 200 up to 3000 Euros, depending on the functions your CRM provides. The monthly fee range differs based on the amount of data and support provided from 25 up to 1000 Euros. Don’t forget about the costs of licenses for some systems in case you want to have more users.

We recommend that you follow the path of implementing a database that has experience with the non-profit sector and can integrate your already existing systems.

WHAT SPECIFIC SYSTEMS CAN BE IMPLEMENTED?

Salesforce: civil society organizations have better prices, and they have external support, so you only need an internal person to implement the system and then use it. (*crm pro neziskovky.cz*)

Donor care: a database, especially for fundraising purposes, which is transparent and intuitive, you can also calculate the direct amount of costs on their website. It was developed directly in a non-profit organization and offered as a novelty on the market. (*peceodarce.cz*)

Own database: you need a developer and a person in the organization who will be fully dedicated to it.

Shared database: some non-profit organizations that develop the database can offer it under certain conditions.

Sinch (onsinch.com): a volunteer database that was developed as a tool for working with volunteers at festivals. Very interesting platform if you only have volunteering programs (*vlnapomoci.cz*).

But there are other systems that are used by civil society organizations and adapted to their purposes, such as Navision Dynamics, Access, Civi, Friends (MS Access97), DonorPerfect, and many others.

If you would like to move your organization to the next level, consider this important investment to gain more agile, efficient, and transparent processes. At the end of the day besides the right targeting of the audience, you can bring more added value to your organization, strengthen relations with your donors and supporters and therefore enhance the impact of your work in society.

How to make all strategies work together?

WRITTEN BY
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An organisation can only function well, i.e. effectively achieve its goals if it organises its activities with the right awareness and focus. This is an ongoing process, which lasts from the development to the implementation of plans and to learning lessons, then starts again. This process is made up of several – both large and small – key elements, which need to be overseen and managed by the leaders of the organisation.

WHAT IS THE DIFFERENCE BETWEEN STRATEGY AND PLANNING?

The founders of an organisation set themselves a long-term goal or condition to be achieved (vision). They also set out objectives leading to this and the ways in which they want to achieve it (mission or mission statement) in a short and condensed form. These short documents can only give guidance to those working towards the organisation's goals (why do we exist?), but they do not explain the steps they will take to achieve them (how?). Therefore, there is a need for a bridge between the daily tasks (what?) and the vison / mission, i.e. a strategy is needed that defines how you get closer to your greater goal by implementing and achieving specific short-term objectives and steps. When developing a strategy, you should always think in terms of a timeframe of several (at least 3-5) years. These objectives and steps need to be developed according to this timeframe. Planning embraces a shorter period of time, usually one year. It is useful to break down these plans into smaller steps and activities or even into daily tasks to make it clear to every member of the organisations how their daily tasks relate to the greater whole, while motivating them to work better. If daily work is not focused on the vision, activities will become fragmented.

HOW TO DEVELOP A STRATEGY, AND WHAT SHOULD IT COVER?

Strategies can be developed for many things: for the whole operation of the organisation or for specific parts (sub-strategies), for example fundraising, social base building, IT, finance, HR, etc. It is essential that they do not stand alone, they must build on each other. The organisational strategy must serve the achievement of its vision / mission, the objectives of the sub-strategies must be consistent with the goals of the organisational strategy (the strategic goals are at a higher level than the objectives of sub-strategies, but all of them must be aligned with each other.) To illustrate with an example: two departments of an organisation develop their own strategies and set their objectives. If any of them contradicts the goals of the organisation as a whole or the goal of the other department in any extent, it is not good as it is inconsistent.

In summary: the vision is the basis for the formulation of the mission, which is in turn the basis for the strategic objectives, and these can be broken down into organisational plan objectives and then finally into concrete activities. If there are organisational units (e.g. finance, communication, fundraising, etc.), the overall organisational goals can be broken down for the specific organisational departments or units, down to the level of the staff: this way staff members can see and follow individually how their activities contribute to the objectives of the specific organisational unit and also how these also contribute to the goals of the whole organisation.

WHO SHOULD TAKE PART IN THE PROCESS OF STRATEGY BUILDING?

Involve as many staff members as possible, and always include those who are expected to achieve specific objectives – it is about teamwork. (Sub)strategies are always developed under the leadership and with the consent of the specific organisational unit leader, but it is also beneficial to involve into the work the direct reports of that leader and/or key people of the organisation, so that as many people as possible feel a sense of ownership about the outcome and know what they are working for.

HOW IS A STRATEGY DOCUMENT STRUCTURED?

The outcome of strategy development is preferably a written document in plain language, which is important for clear implementation and future retrieval. The strategy document of each organisation looks different, as to a large extent it depends on the characteristics of the organisation and its operating environment. But generally, it has to contain the following three great chapters:

An analysis of the current situation: assessment of the past and present, their description with facts and data series

A PEST or SWOT analysis: what is good and what is problematic and what are their implications, what objectives to set

Strategic directions: one or more options, their SMART description, risk analysis, Plan B, time schedule, deadlines, responsibilities

WHAT IS THE RELATIONSHIP BETWEEN SHORT-TERM AND LONG-TERM?

Although strategies are multi-annual, and planning is done annually within the strategies, it is beneficial to go back to the strategy again and again when you plan and review how well you are meeting the set objectives. Plans can be only very rarely 100% achieved. There will be some elements of it that you will manage to achieve earlier or better than planned or even exceed them and there will be some where you fall short of your objectives. This does not mean planning is not needed, just because it is not only about what will be achieved, and the future is always uncertain. Planning is important as it brings the right kinds of awareness into daily tasks and helps us to focus on things that are important in the long term and to break them down into daily activities. There has always been and will be uncertainty – no one knows the future but you have to know where you want to go. That is also why the so-called rolling wave planning method is important, where you always plan for the same period of time (e.g. for 2 years), then in the next planning period for 2 years again, using and updating the previous plan by completing it with another year.

WHAT PLANS SHOULD YOU MAKE AND WITH WHAT ELEMENTS? WHAT MAKES A GOOD PLAN?

You can make many different plans (e.g. time, financial, project, resources) even at the same time. It might be beneficial to create several versions of a plan (optimistic, pessimistic, realistic) assessing which elements might significantly affect the implementation of that plan (analysis of risks and opportunities) and what to do if one of them occurs. It is also a good practice to have a Plan B in case the objective has not been achieved.

It is essential that the plans, whether strategic or only annual, need to include so-called SMART (specific, measurable, achievable, relevant, timely) objectives.

Planning is fundamentally an iterative process, as for example changes to some elements of the strategy will affect other elements as well, and changes to some elements of the annual plan will affect other elements of the plan. For example, if you need a new staff member for an activity, its costs should be reflected in the financial plan as an expense, but you must also find or raise the resources for it for example in fundraising plans.

To be able to follow these complex interrelationships, **it is important that a strategy or plan is not a mere textual description but contains at least a time schedule** (how its elements are related in time, what can be implemented at the same time and what only one after the other) and also a financial plan (what costs does each element have and what revenue does it generate, whether the resources for each element can be realistically found. Creating a plan should not only be based on past facts but a list of future assumptions along which the objectives are expected to be achieved.

You also need estimates, even if you do not know exactly what the future will bring, as a bad estimate is still better than no estimate at all. You also need to define who is responsible for each of the tasks specified in the plans, what exactly they need to do and by when. This way the plan can be monitored and is personalised, and is not only created in a general sense. Every plan should have some reserves for coping with the impacts of unexpected events.

HOW TO MONITOR THE IMPLEMENTATION?

It is the management's task and responsibility to implement the plans with the help of staff members and to monitor the achievement of the objectives. For this, indicators need to be defined in the plans, the achievement or non-achievement of which will show the extent to which the objectives have been achieved. These indicators should be monitored throughout the

planning period, which allows for interventions into the processes, if the indicators show that the achievement of the objectives is at risk.

It is advisable to not only monitor the outcome (outcome indicators), as it is only visible at the end of the process, and then it will not be possible to influence the outcomes anymore, but also to create one or more success indicators (or sub-outcomes), which if monitored during the process, will properly indicate that if the process goes along this way, the right outcome will be achieved.

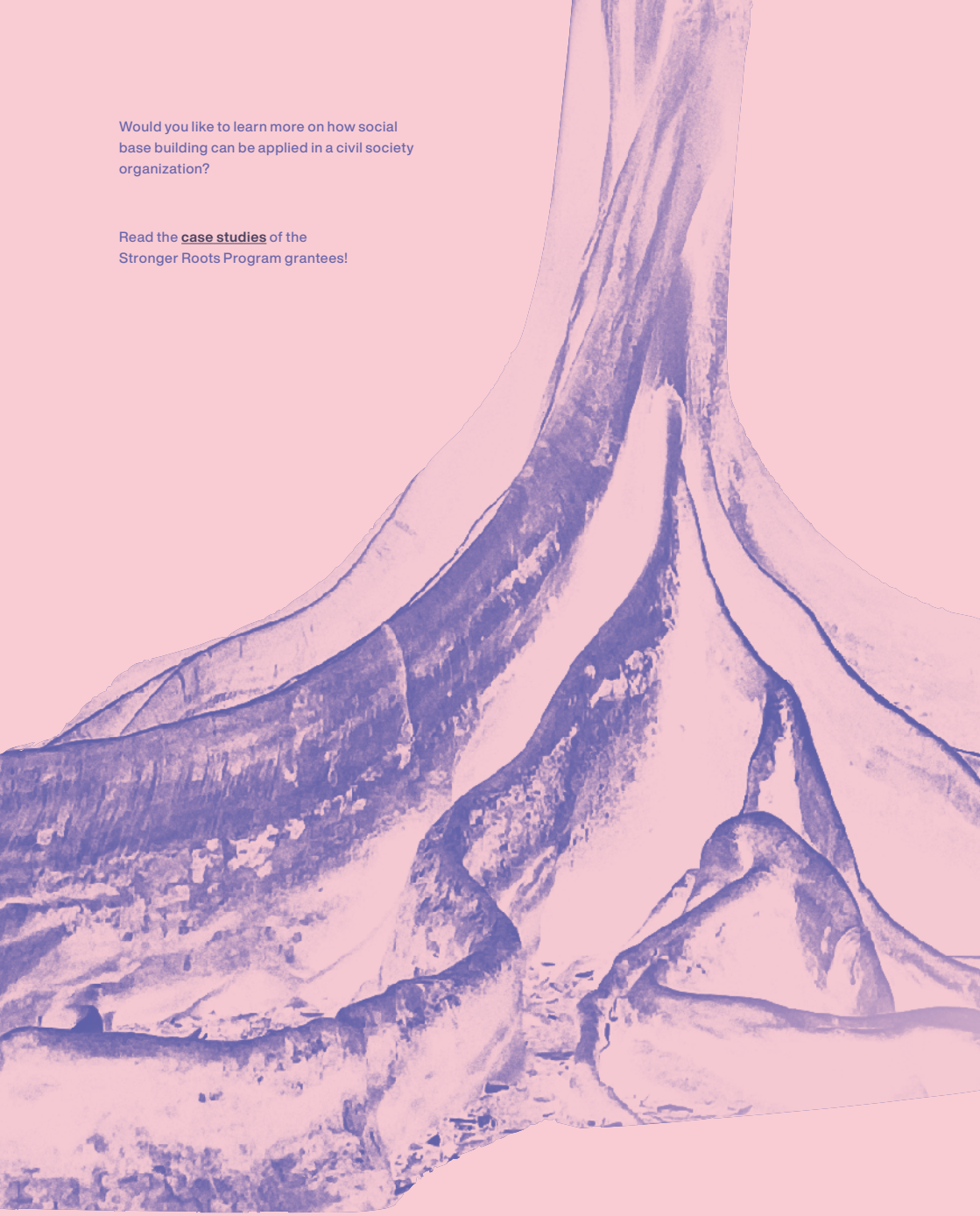
Monitoring can be applied to the main or sub-processes of the entire organisation, (e.g. the evolution of revenues and costs compared to plans, or the evolution of staff numbers compared to plans, which will help the leader and/or managers of the organisation to be informed of the evolution of processes, but it can also be a tool to manage implementation in the day-to-day interactions between the managers and their direct reports.

TO WHOM AND HOW SHOULD YOU COMMUNICATE YOUR PLANS?

To efficiently achieve the set goals, it is important to communicate them to stakeholders. For a civil society organisation, this usually means publicising the key elements of the strategy. But it is equally important to communicate these plans to all internal staff of the organisation in adequate detail for their tasks. Just as it is useful to involve others in the development of the plans and the strategy, likewise, it is also a prerequisite for appropriate and accurate implementation. Internal and external trust in the organisation is a key to successful and effective operation, which can be primarily created through transparency. Thus it is desirable that the leaders of the organisation regularly inform the public and the staff of the objectives and the strategic steps and plans they are pursuing and then of the outcomes achieved.

Would you like to learn more on how social base building can be applied in a civil society organization?

Read the **case studies** of the Stronger Roots Program grantees!



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