



A Handbook for marketing and fundraising for  
non-profit nature conservation organisations

**BirdLife International and EuroNatur**

8 February 2023

## PROJECT OBJECTIVES

The objective of this consultancy was to provide capacity building to each participating BirdLife/EuroNatur partner in marketing and fundraising, including:

- Trainings through marketing and fundraising workshops
- Mentoring sessions supporting each participating BirdLife/EuroNatur partner in the creation of a marketing and a fundraising plan.
- Creation and publication of a handbook containing all the content for fundraising and non-profit marketing.

This training in Fundraising and Marketing for BirdLife and Euronatur partners are part of a bigger capacity building program. Branded as 'Hatch' it comprises a simplified, three-pronged approach emphasising Partner Development, Innovation and Leadership as three main strategies to ensure that BirdLife conservation organisations become secure, strong and influential and able to deliver sustained conservation impacts in the long-term.

# CONTENT OF THE TRAINING SESSIONS

## Fundraising Sessions:

- Introduction to Giving and Private Sector Fundraising
- Introduction to different fundraising streams
- How to develop your first fundraising plan?
- What internal processes are needed to support sustainable giving and fundraising?
- How to do a fundraising campaign?

## Marketing Sessions :

- Let's talk about marketing @nonprofit organizations (NPO)
- Opening the marketing toolbox
- What is the Marketing Mix in a nonprofit context?
- Digital Marketing
- Marketing plan

Final double session: membership strategy and web shops



## HANDBOOK OBJECTIVES

- This practical handbook shows how you can use some of the existing marketing and fundraising tools and methodologies.
- The aim is to focus on tools useful for nature conservation organisations like BirdLife and EuroNatur partners, working with small teams that are simultaneously in charge of fundraising, communications, marketing, or membership.
- This handbook will guide you through the essential steps in building effective marketing and fundraising strategies and plans.
- It will also present real examples of organisations that have built effective solutions to the challenges they faced - some maybe like those your organisation faces.

### A *Handbook* for marketing and fundraising for non-profit nature conservation organisations

Learnings and Practical examples

January 2023

# HANDBOOK STRUCTURE

- Despite the fact that there are similar methodologies and tools in both fields, like the SWOT analysis or the donors' journey, we separated marketing and fundraising into two chapters for explanatory and clarity purposes.
- Each part is composed by a summary of the training sessions and a practical toolbox.
- We included a section called "Dive deeper" for in-depth learning about a topic:

Dive deeper:



- **What is the marketing mix in a non-profit context?** *in capacity building materials.*
- **Let's talk about marketing for non-profit organisations** *in capacity building materials.*

- Each tool presented in the toolbox section is rated by difficulty and shows the expected results:

How easily can you implement this in your non-profit organisation?



Expected results:



Understand preferences of key target groups



Improve your communications to key target groups

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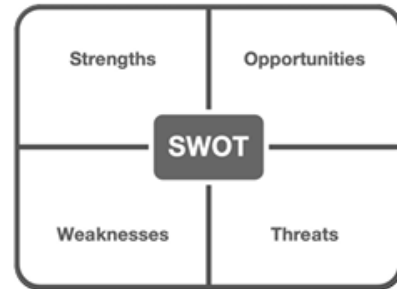
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## Definition of a marketing plan



### SWOT Analysis:

A SWOT analysis is a framework/tool used to identify and analyse an organisation's current strengths (S), weaknesses (W), opportunities (O), and threats (T). In marketing, the aim is to create awareness of the main external and internal factors that hinder or support the organisation in this area.



How easily can you implement this in your non-profit organisation?



Expected results:

Identify the current present situation of the marketing process

Identify future opportunities for the marketing process

Dive deeper:



- [How to Conduct a SWOT Analysis in 5 Steps](#) in useful links

# TOOLBOX

- Each marketing or fundraising tool used during the training and/or mentoring session is described in a section of the marketing/fundraising toolbox
- Visually, the reader can understand quickly where the tool fits in the whole process (here: 1. Assessment and 3. Market segmentation).



### Stakeholder mapping:

This visual process maps out all the target groups the organisation interacts with. The main benefit is to get a clear representation of all power relationships within the organisation and the risks involved.

Stakeholders can be classified according to different criteria: internal or external; primary, or secondary and marginal - differentiated by the greater or lesser degree of relevance they have for the organisation. It is important to create a visual map to represent all the intricacies of these relationships.

How easily can you implement this in your non-profit organisation?



Expected results:

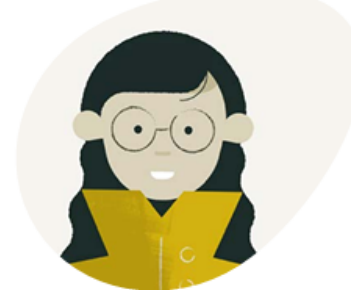
Improve the identification of target groups

Improve understanding of key target groups

Dive deeper:



- [Opening the marketing toolbox](#) in capacity building materials
- [Complete stakeholder mapping guide](#) in useful links



# CASE STUDIES

- The handbook features real life case studies from BirdLife/EuroNatur partner organisations.
- These are good practices that are worth sharing with other organisations:
  - Description of the project / activity
  - Actors (internal / external)
  - Execution
  - Results
  - Resources
  - Lessons learned





**Case Study**

**Protection and Preservation of Natural Environment In Albania (PPNEA), Albania**

During the mentoring sessions, the first objective was to review PPNEA's fundraising strategy to create the next steps towards achieving financial sustainability, detailing the specific actions and goals.

With the mentor, PPNEA followed the following steps:

1. Revision of the timeframe of the strategy: The current drafted fundraising strategy ends by the end of 2022, and it was not being implemented properly within that time frame.
2. Rearranging objectives, priorities, and goals. The organisation needs to be more concrete in terms of what can be achieved given its capabilities and resources.
3. Reviewing and resetting all the results to be achieved in the new timeframe. Remaining realistic by aiming towards the final goal of sustainability.
4. Rearranging priorities because some processes are out of the influence of the organisation and might take longer than expected (for example, the possibility for the organisation to become a membership-based one).
5. Reviewing the membership strategy and thinking about the best way to include profiles of people that will be more active and contribute to fundraising.



**Case Study**

**Association Biom, Croatia**

In 2021, Biom started a project to develop its capacities for fundraising from individual donors. Through learning-by-doing, Biom developed a fundraising plan and implemented a first digital fundraising campaign dedicated to saving endangered seabird species in the Adriatic Sea.

A newly formed fundraising team, coordinated by the fundraising and membership officer, together with the CEO, directly supported the process, with the help of external experts on non-profit fundraising, a web developer, a designer, and a digital marketing expert. Throughout the development of the fundraising plan, which took several months, external experts worked closely with the internal team. The fundraising campaign was developed by a smaller team led by the same experts. The main results were a fundraising plan for individual donors, campaign landing pages showing reasons to support the campaign, "thank you" packs for donors, and Biom's first digital fundraising campaign for individual donors which raised EUR 4,000, attracted 1,200 new social media followers and 17,500 visits to the landing page. The first campaign did not offset the costs of setting up the whole system, but the second hopefully will. All staff need to know how to present the organisation and campaign landing pages can help this. Top management needs to support the fundraising efforts and be directly involved when necessary. Settling up the payment system takes time and expert knowledge. The organisation needs to constantly build its supporter base and reach out to a wide audience. Storytelling needs always to be approached from the donor's point of view.

## BOXES

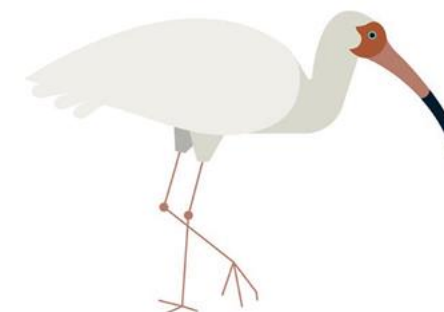
### The **best available fundraising techniques for individual donors:**

- Box donations, where individuals can make small donations on the spot (airports, nature reserves, shops, etc.)
- In-kind donations (charitable giving in which, instead of giving money to buy needed goods and services, the goods and services themselves are given)
- Membership fees (collected on a monthly<sup>9</sup> or yearly basis from the members of the non-profit organisation, usually against benefits)
- One-off donations (for donors who do not want to commit to a longer relationship)
- Regular donations (for donors who want to give on a monthly / yearly basis)
- IRS consignment (when taxpayers can freely assign a small percentage of the total tax they paid to the State to any non-profit organisation<sup>10</sup>)
- Crowdfunding (i.e., the practice of funding a project by raising money from a large number of people, typically via the Internet for a smaller project)
- Legacies or bequests (a gift of personal property from a deceased individual through a will)
- Specific campaigns (e.g., to protect a particular species or ecosystem)
- Peer-to-peer fundraising (when an individual launches a personal campaign to collect donations from their friends and relatives, for example on a birthday)
- Fundraising events (event or campaign whose primary purpose is to raise money for a cause, charity, or non-profit organisation).

<sup>9</sup>Monthly donations are preferable, because there is a constant relationship with the donor and thus a closer one. People also pay higher amounts per year in monthly donations than in annual ones.

<sup>10</sup>Only applicable in countries where this feature is available.

- The handbook also feature boxes to highlight techniques or concepts (for instance here: the best available fundraising techniques for individual donors).



# MARKETING

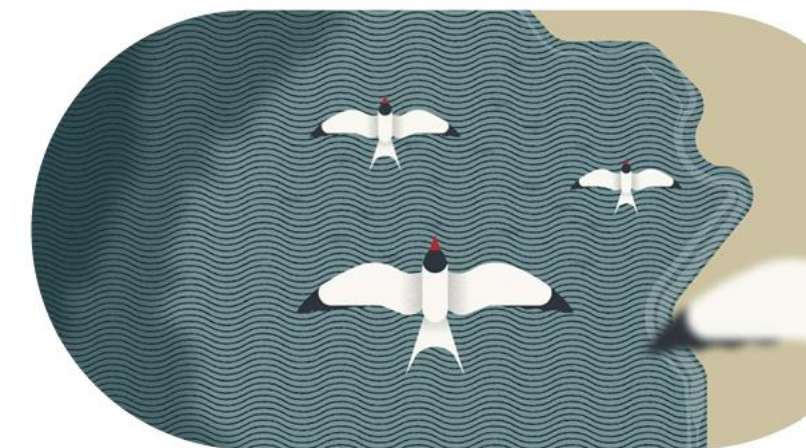
The handbook covers the following topics for marketing that go through the different key stages of a marketing plan:

- What is marketing?
- What is non-profit marketing?
- What is a marketing strategy?
- Target groups
- What is a marketing plan?

The tools described in the Marketing Toolbox are the following:

- Creating a marketing strategy: Marketing mix, Branding
- Definition of a marketing plan: SWOT Analysis, Surveys and interviews, SMART objectives and targets, Stakeholder mapping, Empathy map, The journey map, Uniqueness exercise, Data analysis, A/B testing, Brainstorming

## Key Stages of a Marketing Plan



# CRUCIAL LESSONS FOR MARKETING

Three crucial lessons before building or following a marketing plan:

1. There are different ways of achieving the desired results within the field of marketing. It is important that an organisation is always open to testing, and for this, it needs to collect data, measure its results and analyse data on marketing tools, messages and channels.
2. Every best practice becomes part of the status quo in the industry. Creativity and innovation are very important in differentiating your organisation from others, attracting the necessary initial attention from the general public or individual.
3. The process of building a good marketing strategy, and respective plans, depends on hard and continuous work. Results are not immediate, so patience and consistency are required in every marketing effort.



# TIPS FOR MARKETING

To conclude the marketing section, we wanted to highlight the following advice :

1. Understand your audience above all. Adapt visual and textual language according to your goals and target groups.
2. Testing and monitoring will allow your organisation to understand the context, the channels, and your target groups. Your marketing activities should be informed by previous data analysis through a continuous testing process.
3. Deploy and repeat call-to-actions (CTAs). Almost every message should have one practical, actionable, and engaging key ask.
4. Best practices can be inspiring, but creativity brings uniqueness. Brainstorming is therefore essential to the marketing process.



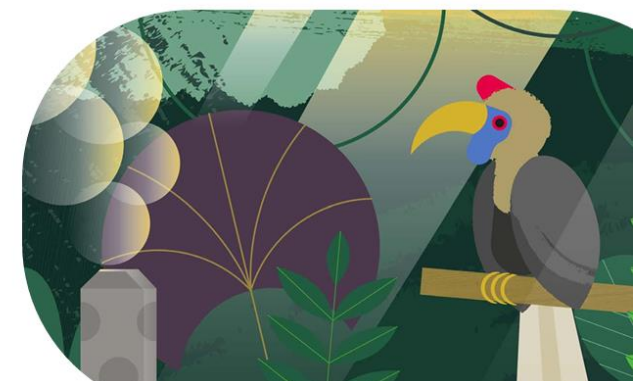
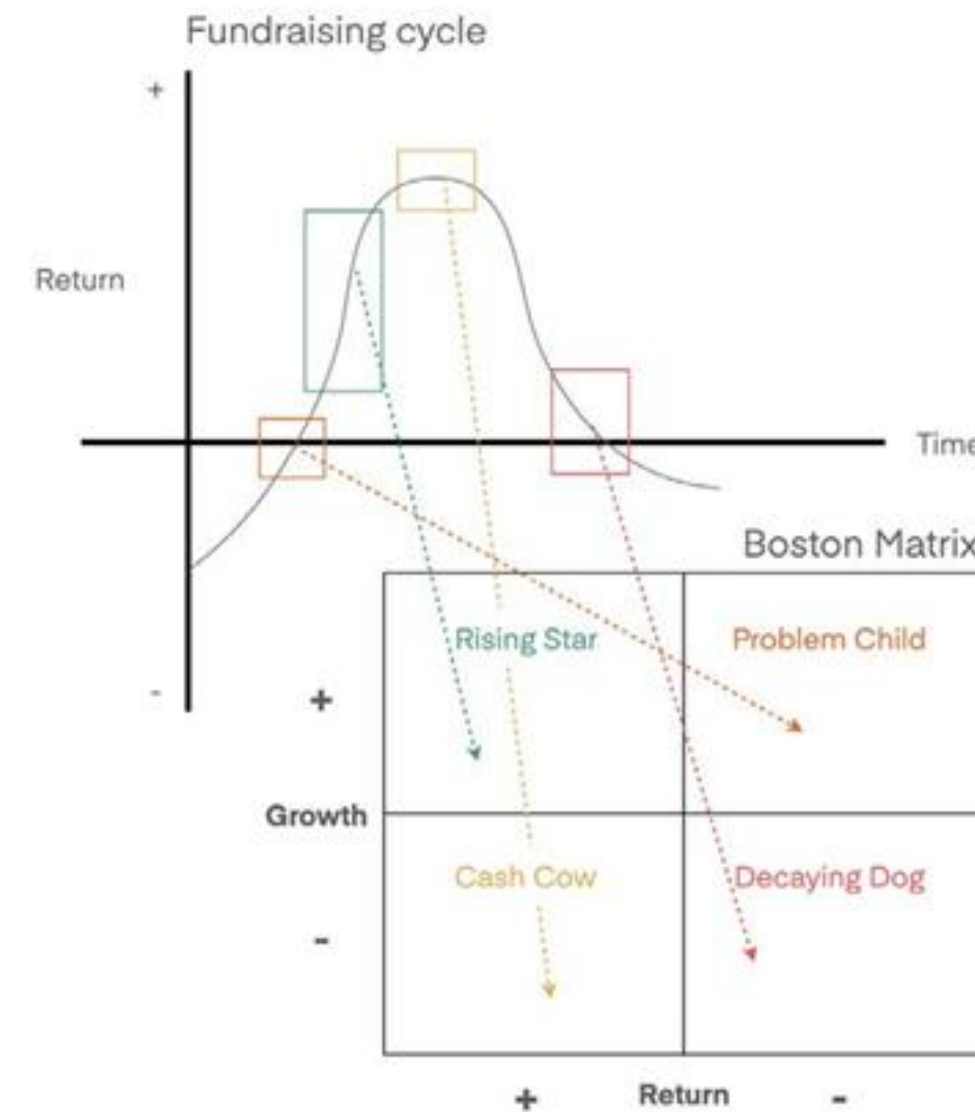
# FUNDRAISING

Similarly, the handbook covers the following topics for fundraising that go through the different key stages of a fundraising plan:

- What is fundraising?
- Fundraising for nature conservation
- What is a fundraising strategy for a non-profit organisation?
- Setting up strategic goals for fundraising
- Understand your funders: Individuals, Corporate giving, High-net-worth individuals, Foundations
- How to reach donors?
- Main steps towards creating a fundraising ask
- Building a lasting relationship with donors
- Financial sustainability
- More tips for financial sustainability (dos and don'ts)

The tools described in the fundraising toolbox are the following:

- Assessing the fundraising situation: SWOT analysis focused on fundraising, Boston matrix for fundraising
- Strategic planning: Fundraising plan / roadmap
- Raising Funds: The donor's journey, Fundraising campaign, Corporate giving: definition of a partnership offer



# TIPS FOR FUNDRAISING

Keep in mind these key messages on fundraising:

1. Fundraising is a process that should be based on ethical principles, due diligence, and building trust-based relationships with donors. This takes time, but your efforts will most probably pay off in the long run.
2. Raising short term funds to finance a project is just the beginning. With continuous engagement, non-profit nature conservation organisations may end up finding something even more valuable like unrestricted funding, technical support, capacity building programmes, networking opportunities, etc.
3. Always be ready to pitch! Have your organisation's main activities, results and key projects in mind and train yourself/your team to share it in a compelling and attractive way.
4. Communicate the on-the-ground impact your organisation creates thanks to the donation and the donors' support. Engage in meaningful and transparent relationships with your donors.
5. Always monitor your fundraising campaigns and use their results as a learning opportunity. Do not decrease your overheads if you want to reach financial sustainability, and always justify how you will spend these to your donors.
6. Finally, value the importance of being within a network of non-profit nature conservation organisations as it allows for mutual and constant knowledge-sharing as well as the joint implementation of projects which will contribute to systemic change.



# CRUCIAL LESSONS FOR FUNDRAISING

Strategy / proactivity	Emergency / reactivity
Routines and entrepreneurial culture	Inconsistent ideas and top down culture
Not having +40% revenue from a funder	Being overly dependent on one funder
Partnership relationship (win-win)	And not "only" donors (win-lose)
1 to 3 very good outcomes (impact data)	Absence or excess of quality data and information
Maintain and improve partnerships (cross-selling and up-selling). CRM mentality	Forget that funders exist after first contact/involvement
Test and validate. Diversify to narrow it down	Plan for the long term only on the basis of theoretical assumptions
Engage specialists in areas such as digital marketing (mentoring, probonos, consultants, staff)	Doing without knowing

Financial sustainability for non-profit organisations means getting enough funding to be able to cover current programmes, without jeopardising long-term financial security.

The ability of an organisation to raise funds through different funding streams is key to creating more resilient, and more financially sustainable non-profit organisations.

In practice, this means developing fundraising routines to manage and monitor your relationships with your existing or potential donors through:

- Strategic alignment
- Trust
- Engagement
- Feedback & reporting (accountability)
- Transparency
- A database / customer relationship management (CRM) tool

# CONCLUSIONS

To conclude this handbook, it is important to remember that here we present only an introduction of the above-mentioned tools. Their practical use should be accompanied by further theoretical reading and testing inside your organisation.

You may check recommendations provided within the Appendix session, which includes:

- 1) Stone Soup's training and capacity building materials
- 2) Further reading materials
- 3) Useful links to external resources.





## Appendix

### Stone Soup's training and capacity building materials:

- Let's talk about marketing for non-profit organisations (NPO); main themes: creativity, branding and marketing.
- Opening the marketing toolbox; main themes: Market orientation, market segmentation, value exchange marketing, positioning.
- What is the marketing mix in a non-profit context?; main theme: the marketing mix.
- Digital marketing; main themes: digital marketing, website, social media, copy-writing.
- Marketing plan; main themes: strategy and planning, marketing plan, templates.
- Introduction to giving and private sector fundraising; main themes: Fundraising: transaction or relationship?
- Introduction to different fundraising streams; main themes: fundraising tools and channels of giving.
- How to develop your first fundraising plan?; main themes: fundraising plan step-by-step
- What internal processes are needed to support sustainable giving and fundraising?; main themes: strategies to achieve financial sustainability, donors' lifecycle, overheads
- How to do a fundraising campaign? main themes: the basics of fundraising campaigns, pitch and testing
- Double session; main themes: membership strategy and web shops.

### Other useful links:

- AIDA Model;
- What is Market Orientation?;
- How To Conduct a SWOT Analysis in 5 Steps;
- Complete Stakeholder mapping Guide;
- The human challenge in designing for sustainability;
- The Communications Network;
- Think With Google - Decoding the Messy Middle;

- The Field Guide to Human-Centered Design - IDEO.org;
- What is A/B Testing? Use Data to Make Decisions;
- Seth Godin on Successful Fundraising - Ask the Fundraising Expert;
- Are emotive appeals effective in persuading people to give to charity?;
- Preferences for different flagship types for nature conservation;

### Book references:

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- Mobile for Good: A How-To Fundraising Guide for Nonprofits. Heather Mansfield. 2014.



# LINK TO THE HANDBOOK

<https://www.birdlife.org/wp-content/uploads/2023/02/A-Handbook-for-marketing-and-fundraising-for-non-profit-nature-conservation-organisations-BirdLife-Hatch.pdf>



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