Capacity Building Training Programme

Lesson Plan | Module 6

Module Title	CSO Fundraising
Module Learning Objectives	Financial management and fundraising are intrinsically interlinked. They are premised not only on skills but predominantly on leadership and mindset. Leading a CSO is not different from leading any other type of organization, be it public or private. Keeping a CSO healthy and sustainable requires effective financial management. When attracting donors, a CSO must be confident that it can distribute and manage its finances efficiently in order to uphold integrity, reputation, and reliability Upon completion of this module, learners should be able to: 1. Create clear, concise, and accurate communication with various stakeholders 2. Understand the different types of donors and how to approach them 3. Optimize the donor's journey 4. Create a budget for their CSO 5. Track expenses 6. Manage savings and debt
Module Duration:	3 Hours (175 Minutes)
Materials/Equipment	▪ Training venue with IT equipment including laptop and projector ▪ A computer for the facilitator ▪ Internet connection ▪ Projector ▪ Flipchart and markers ▪ Sign-in sheet ▪ Electronic device (mobile or computer) for each learner (optional) ▪ A notebook and a pen for each learner
Resources/ References	▪ Commonwealth Education Fund [CEF]. (2011). A Budget for Civil Society Organisations Working in Education. In Commonwealth Education Fund. Retrieved from https://docs.campaignforeducation.org/csef/CEF%20Budget%20Guide%20for%20CSOs.pdf

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- How to perfect the donor journey. (2022, March 28). Charity Digital. Retrieved from https://charitydigital.org.uk/topics/topics/how-to-perfect-the-donor-journey-9932
- Preventing War. Shaping Peace. (2022, November 15). Crisis Group. Retrieved from https://www.crisisgroup.org/who-we-are
- Shattuck, S. (2020, July 21). Why It's Important to Understand the Donor Journey. Kindful. Retrieved from https://kindful.com/blog/donor-journey/
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Unit 1	Communication and Donors				
	Learning Activities	**Duration**	**Training methods**	**Materials**	**Handouts and Activity sheets**
	Introduction to the Module and Unit Describe the content and the aim of Module 6 and Unit 1	5 min	▪ Presentation	▪ Computer ▪ Internet Connection ▪ Projector	PPT Presentation (PPT_Module 6_Unit 1)
	Stakeholders Present the key considerations for a CSO when looking to raise funds	5 min	▪ Presentation	▪ Computer ▪ Internet connection ▪ Projector	PPT Presentation (PPT_Module 6_Unit 1)

	Narrative Activity *Steps* ▪ Divide learners into groups of 3 or 4. ▪ Groups should then begin a discussion following the questions on the slide. Groups should use their own CSO as the example. ▪ Use the International Crisis Group "Who we are" page as an example if groups need guidance on answering some of the questions. ▪ Share out as a big group	15 min	▪ Presentation ▪ Discussion ▪ Group Work	▪ Computer ▪ Internet connection ▪ Projector ▪ Notebook and pencils/pens	PPT Presentation (PPT_Module 6_Unit 1)
	Understanding Donors ▪ Go over consideration when deciding on how to approach potential donors and how to best understand them	15 min	▪ Presentation	▪ Computer ▪ Internet connection ▪ Projector	PPT Presentation (PPT_Module 6_Unit 1)
	Donor Activity *Steps* ▪ In the same groups that the learners were in for the first activity, ask them to complete this activity on which types of donors their own CSO is pursuing and what they could offer them. ▪ Clarify with the learners that these are considerations of a donor, and not a CSO	10 min	▪ Presentation	▪ Computer ▪ Internet connection ▪ Projector	PPT Presentation (PPT_Module 6_Unit 1)
	Donor's Journey Guide the learners through the slides of the donor's journey, highlighting that there are 4 key parts to it that must be treated as a whole, not individually	20 min	▪ Presentation	▪ Computer ▪ Internet connection ▪ Projector	PPT Presentation (PPT_Module 6_Unit 1)

	Worksheet Activity	20 min	▪ Group activity	▪ Computer	Worksheet 1
	Steps		▪ Reflection	▪ Internet	(Module
	▪ Print and distribute the worksheet to the learners		▪ Worksheet	connection	6_Worksheet
	▪ The aim of the worksheet is to engage the learners as a united team in developing a fundraising strategy			▪ Projector ▪ Handout	1_Unit 1)
Unit 2	**Financial Management**				
	Learning Activities	**Duration**	**Training methods**	**Materials**	**Handouts and Activity sheets**
	Introduction to the Unit Describe the content and the aim of Unit 1.	5 min	▪ Presentation	▪ Computer ▪ Internet Connection ▪ Projector	PPT Presentation (PPT_Module 6_ Unit 2)
	Budgeting Go over two slides on budgeting.	5 min	▪ Presentation	▪ Computer ▪ Internet connection ▪ Projector	PPT Presentation (PPT_Module 6_ Unit 2)
	Activity 1 **Steps** ▪ Ask the learners to stay in the groups that they were in for Unit 1 ▪ The core purpose of this exercise is so that the learners can consider and discuss the various elements that may go in a CSO's budget ▪ Instruct groups to come up with two budget items for the each of the three categories.	15 min	▪ Group activity	▪ Computer ▪ Internet connection ▪ Projector	PPT Presentation (PPT_Module 6_ Unit 2)

	▪ If there is time, groups may share out their discussions.			
	Expenses, Debt and Managing Finances Go through the rest of the slides and go over the review.	20 min	▪ Presentation	▪ Computer ▪ Internet connection ▪ Projector	PPT Presentation (PPT_Module 6_ Unit 2)

	Worksheet Activity
	Steps
	▪ Ask learners to access the worksheet digitally. Ask them to make their own copy.
	▪ The aim is to encourage learners to consider the possible expenses and income streams of their CSO, and to visualize the CSOs annual budget
	▪ Ask learners to create a forward looking cash flow for a 3 month budget that includes:
	  ▪ An income line
	  ▪ Must-do expenses
	  ▪ Wanna-do expenses
	  ▪ Savings
	  ▪ The total difference for each month
		20 min	▪ Group Activity	▪ Projector
				▪ Computer
				▪ Access to internet
				▪ Handout
					Worksheet 1 (Module 6_Worksheet 1_Unit 2)

▪ **Module Assessment Exercise**					
Duration: 20 minutes					

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