



# ACADEMY TRAINING INFO

## Strategic Fundraising for Civil Society Organisations

**Addressed to:** CSO leaders, fundraisers, program managers, and finance officers seeking to improve fundraising strategies and ensure financial sustainability for their organisations.

**Brief description of the training:**

This online training is designed to empower CSOs identify and engage donors, and create compelling proposals that resonate with funders. With a focus on practical tools and real-world examples, the training will address common challenges faced by CSOs and provide actionable insights to overcome them. This training is interactive, with practical exercises, expert insights, and opportunities for peer learning. Whether you are just starting your fundraising journey or looking to refine your approach, this program will equip you with the resources to thrive.

**Content of the programme:**

**1. Fundamentals of fundraising and philanthropy:**

- Key principles of fundraising
- Understanding donor motivations
- Overview of philanthropy types and trends

**2. Diversifying funding streams:**

- Revenue streams: grants, individual donations, major donors, corporate donors
- Risk management through diversification
- Exploring innovative funding options (e.g., social enterprises)

**3. Strategies for individual and institutional donors:**

- Tailoring approaches for different donor types
- Researching and targeting institutional donors
- Creating personalized donor journeys for individuals

**4. Writing compelling grant proposals and donor communications:**

- Key components of a winning proposal
- Storytelling and emotional appeals in donor materials

Clarity and impact in written communication

**5. Leveraging digital tools and social media for fundraising campaigns and crowdfunding:**

Selecting the right platforms and tools

Tips for running successful crowdfunding campaigns

**6. Financial planning for sustainability:**

Budgeting for fundraising activities

Aligning fundraising goals with organizational strategy

**7. Monitoring and evaluation of fundraising performance:**

Setting measurable KPIs

Analysing return on investment

Using data to refine strategies

**8. Building long-term donor relationships:**

Techniques for donor stewardship

Creating engagement opportunities

Recognizing and retaining loyal donors

**Brief bio of the trainer:**

Patrice dos Santos is a Principal Consultant at Soup Consulting. He has an academic background in political science in France (Sciences-Po) and holds a master's degree in governance of organisations for international development, a master's degree in international economics, and a LL.M. (private law).

In over 20 years of professional experience, he worked as a policy analyst at the **European Commission (DG Joint Research Centre)** where he focused its work on the various dimensions of fairness in the EU and funding opportunities for EU lagging regions, and worked in the French Prime Minister Services.

He has provided consultancy with Stone Soup on more than 30 projects on fundraising, training, impact assessment, and strategic planning. He has recently implemented a training on non-profit fundraising for 15 partners for BirdLife International, as well as for various members of the Union for International Cancer Control, the NGOs Defensoria Ambiental (Chile), Happy Code (Portugal) and Biosfera (Cape Verde).

He has worked with organisations such as WWF France, UNICEF, IUCN, Aga Khan Foundation, Water.org, Caritas, the Alliance for Mediterranean Nature & Culture, Mediterranean Alliance for Wetlands, African Movement of Working Children and Youth, EDP Foundation. In 2022, he supported the EIT Climate KIC with its Skills4thefuture educational programme and co-authored several publications from the Joint Research Centre of the European Commission.



Patrice also delivered training courses on the enhancement of the participation of academia, business, civil society and public actors in regional development in Portugal on behalf of Porto Business School. Patrice is French (based in Porto), and speaks English, Spanish and Portuguese.