



CSR

Masterclass II

Bhumi Social Impact Fellowship Cohort II

ABOUT ME



Human Resources MBA
13 years of Fundraising
(Former Akanksha Foundation, Tata sons
MAD, GiveIndia Covid Warrior during
ICRF 1 & 2)

Director - Fundraising BHUMI



Proposal Writing & Pitching

CSR Master Class 2

- Saikrishna V, The/Nudge Institute

What we will cover today

01

Lead
Generation

02

Proposal
Writing

03

Proposal
Pitching

04

Donor Delight

ABOUT ME



Engineer, Fundraiser. Development
Professional.

Connect with me on [LinkedIn](#).

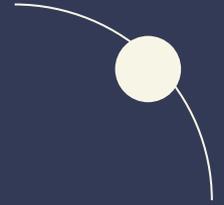


STORY TIME



Lead Generation

- Prospect Research
- Tapping Into Prospects
- Due Diligence



The background is a dark blue color. There are several white decorative elements: a horizontal line near the top, a vertical line on the right side, and a curved line on the left side. Three white circles are placed at the intersections of these lines: one at the top right, one at the top left, and one at the bottom left.

Fundraising is no different to sales

*you are just buying someone into a cause that you
believe in instead of selling a product/service.*

How to research for Prospects?

The dating phase



Donors

As much as the donor chooses you, you can choose the donor as well



Sector Specific Partners

Filter the donors based on the theme and prioritize



Similar Interests

check the orgs with similar interests and their partners



Resources

CSRbox.org,
csr.gov.in, ngobox,
thecsrjournal.in,
screener.in etc

Network Mapping



My Network

Board members, employees,
volunteers, donor referrals,
decision makers, leadership
team etc



ABC

Always be
contacting/networking



How to start from scratch

- Identify the people and decision makers

A good tool can go a long way (Lusha/Hunterio/Apolloio/Hubspot/zoominfo etc, LinkedIn Sales Navigator)

- Research on the people you are getting in touch with
- Drop a compelling mail/message if possible with a connection that the lead can relate with

Invest in grammarly (use non profit discounts)

Your First Response!

No
Response

Follow Up

Persist but don't freak
out the donor

NO as a
Response

- Send a Thank you email
- Ask for their recommendations for a suitable donor
- ask them if they would like to be updated on your orgs progress

Its a YES!

- get a follow-up!
- Capture your leads in a CRM (Zoho, Salesforce etc)/normal excel

Each and every communication is an opportunity to share about the work you do!

Tips

- Follow up on the next steps
- Build your brand and step up your social media game (marketing and sales go together)
- Shed your shame, make mistakes and emerge
- People hardly ghost you



Proposal Writing & Pitching

What Doesn't Work

Our solution

Our model

What do you think should a proposal have?

What Works

1. Bigger picture with facts and figures (cite the sources in the document)
2. About the org and vision
3. The problem (Entirety of the problem/TAM) (should include the target demography) Need for the org to exist
4. The solution
5. Outcome and Impact expected
6. Budget and a **powerful Call to Action**
7. Scale and sustainability plan (5 year roadmap) - Emphasize for Foundations
8. Risks and mitigation strategies

Start with Founder's Journey in the oral pitch

Stitch them together!!! A
good story telling goes a
long way.



Good to Have in your Proposal

1. USP (why your solution stands out)
2. Some notable donors
3. In the press
4. Quotes from donors
5. Program participants' stories and pictures

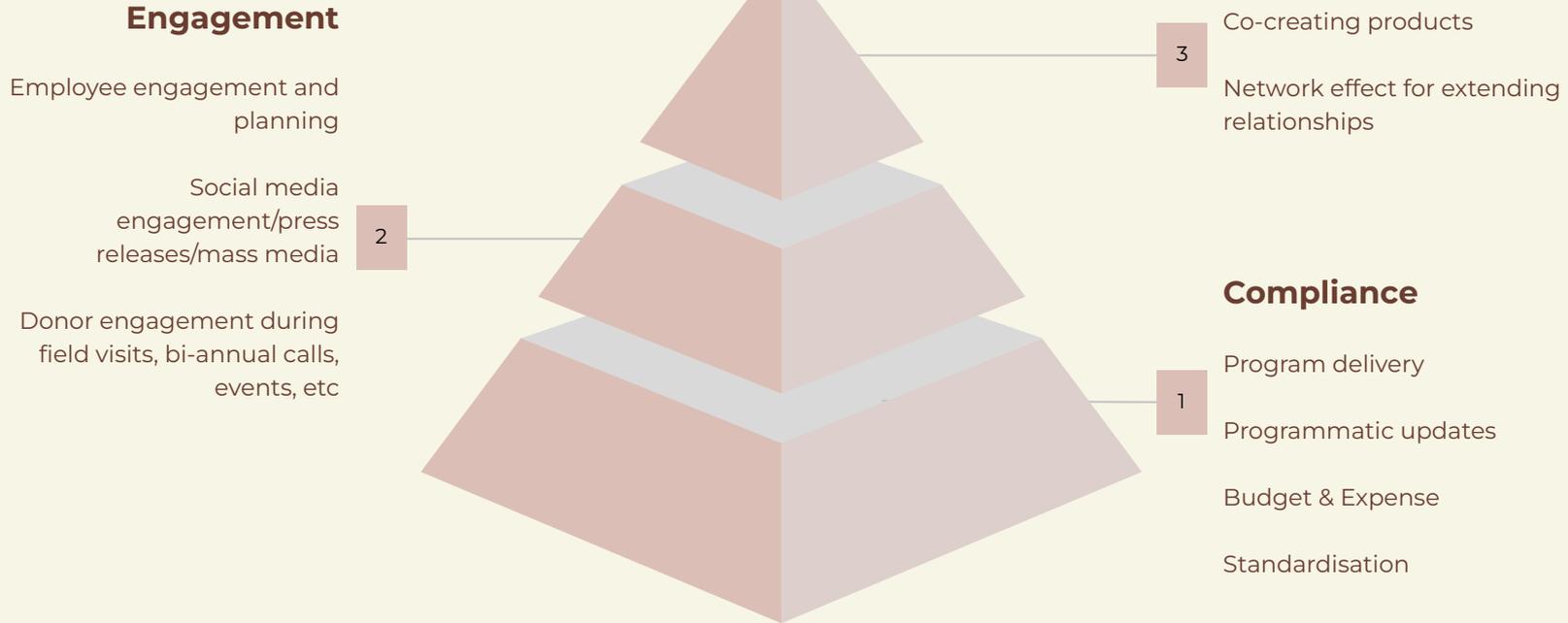
Keep these docs ready - A two pager and a detailed document (word and ppt)

Tips

- Understanding donor expectations, a thorough research and using the language that the donor is comfortable with
- Articulation with action verbs and a simple language
- Give the program participants the respect they deserve
- Don't overstate impact
- Be humble in the language
- conviction about the program - understand about the program, find loopholes have discussions with your program team members - helps you build deeper understanding of what you are pitching
- don't be afraid to agree that you haven't figured out certain things - call spade a spade
- practice your pitch! Become better!
- even if there is no alignment, have an exploratory conversation
- understand donor potential and frame your budget and ask accordingly

Donor Delight

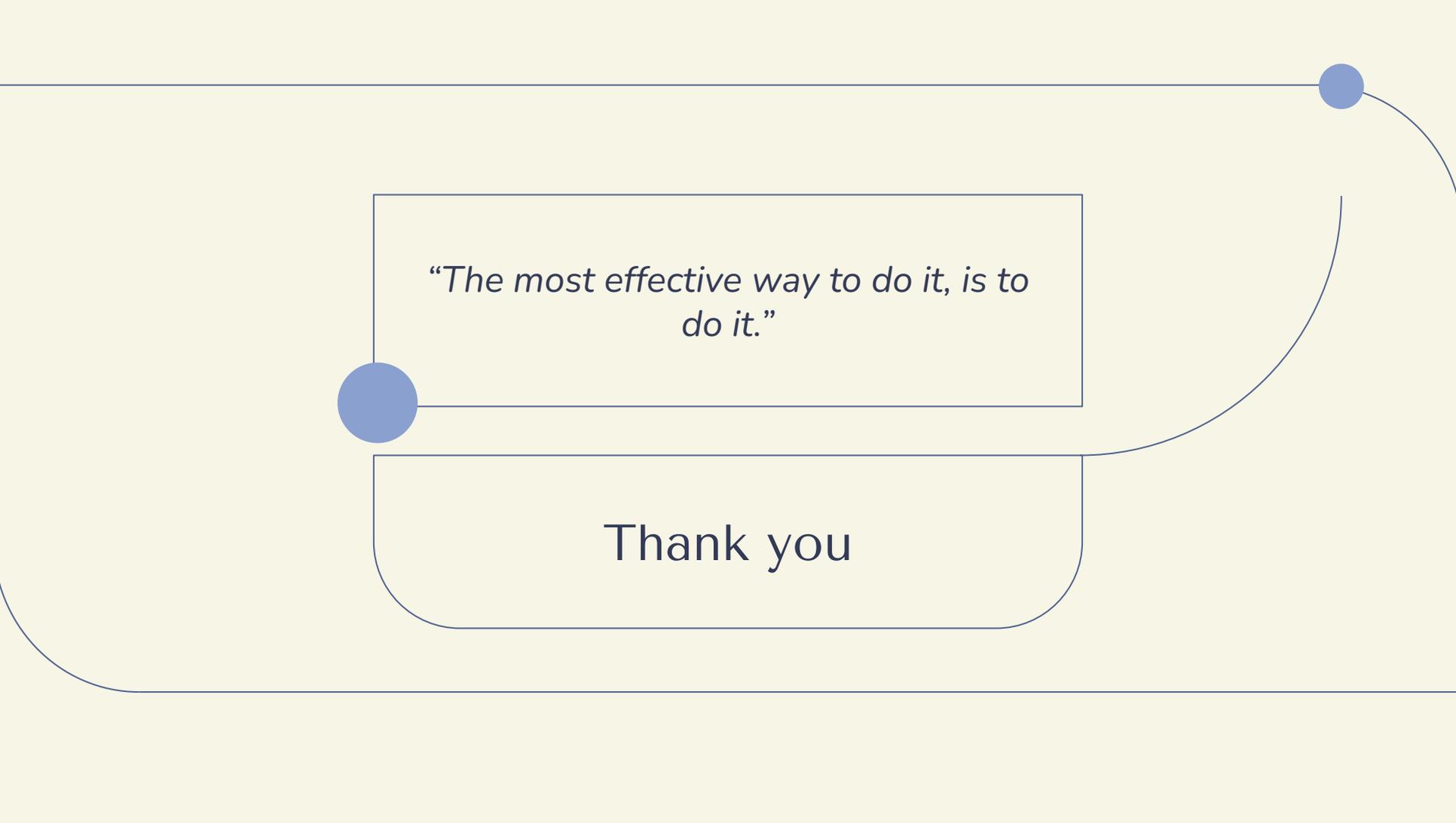
The hierarchical pyramid of donor delight



as much as you are seeking support, you are giving an opportunity for the donor to be a part of your movement

[Video Linked Here](#)





“The most effective way to do it, is to do it.”

Thank you

1. Do you actively raise funds from CSR?
Yes- 30.76% No- 69.23%
2. Do you actively engage your CSR partners through volunteering activities?
Yes- 27% No- 73%

Where do you get your CSR leads from?						
Website	Social Media	Online CSR Platforms	Events	Email Outreach	Volunteer Referral	Corporate Partner Referral
45%	63%	36%	54%	27%	36%	54%