

Section 6

Use this section of the workbook together with the corresponding Action in the Guide, *Action 6: Fund your activities*

Tool 6.1: Existing and potential donors

Tool 6.2: Fundraising plan and timeline

Tool 6.3: Fundraising application checklist

Tool 6.1: Existing and potential donors

This tool will help you do two things: 1) identify your TB funding needs clearly, and 2) list your existing sources of funding and identify other sources that might be approached to fund your TB work. Remember to think about non-traditional sources of funds as well as the usual donors.

Funding needs

Use the activities you have developed in your work plan (Tool 5.2) to help you clearly define what you need funding to do.

<p>Types of funding needed</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Salaries <input type="checkbox"/> Organisational development <input type="checkbox"/> Administrative/operating expenses <input type="checkbox"/> Equipment and supplies (office machinery, vehicles, stationery, etc.) <input type="checkbox"/> Medications (TB and HIV drugs) <input type="checkbox"/> Project activities <ul style="list-style-type: none"> ○ advocacy/lobbying ○ training/education ○ service delivery (including community care, DOT, TB screening, etc.) <input type="checkbox"/> Travel/international conferences <input type="checkbox"/> Other <hr/>
<p>Main project activities/anticipated results</p>	<ol style="list-style-type: none"> 1. 2. 3.
<p>Populations served</p>	<ul style="list-style-type: none"> <input type="checkbox"/> General public <input type="checkbox"/> Women <input type="checkbox"/> Children <input type="checkbox"/> Minority groups <input type="checkbox"/> People living with HIV <input type="checkbox"/> Diabetics <input type="checkbox"/> People who use drugs <input type="checkbox"/> Migrant laborers <input type="checkbox"/> Refugees/displaced persons <input type="checkbox"/> Prisoners <input type="checkbox"/> Miners <input type="checkbox"/> Health care providers <input type="checkbox"/> Students

Tool 6.1: Existing and potential donors

Geographic areas covered	Region: Country: Local area(s):
Scale of funding needed	<input type="checkbox"/> <\$10,000 <input type="checkbox"/> \$10,000 – 99,999 <input type="checkbox"/> \$100,000 – 999,999 <input type="checkbox"/> >1,000,000

Existing funding sources

Use the template below to list your existing funding sources or any other support you receive, such as equipment, supplies or volunteer time. Include funding you use to operate any office you may have or other administrative costs, as well as your activity costs.

Current annual budget:				
Funding source	Amount	Time period	Activities funded	Comments

Tool 6.1: Existing and potential donors

Potential sources of additional funding for TB activities

Use this template to generate ideas about other potential funding sources for your TB work. Use the techniques described in the Guide under Action 6 to help you create the list.

What other sources fund TB work in your area right now or might do so in the near future?

Category	List of specific entities	Comments
Community groups		
Wealthy individuals		
Local government		
Private companies		
Large national non-governmental organisations (NGOs)		
International NGOs		
Global Fund (list principal and sub-recipient groups)		
Bilateral donors USAID, DFID, AusAID, JICA, or others		
Private foundations		
Other		

Tool 6.1: Existing and potential donors

Priority potential funding sources for TB activities

Now you can use the template below to prioritise which of the funding sources you have identified will be most likely to support the project you are proposing. List all of your current and potential funding sources in column 1. For each potential funding source, put a tick in columns 2 through to 6 where you can answer “yes” to the statement in the heading. Use the funding needs template you filled in at the beginning of this tool to help with this process. You may also have to do some research on that funding source to find the answers. Once you have finished with this task, identify the sources for which you have ticked all boxes. Those are your highest priority funding sources because your needs most closely match their interests, and your request for funding will have the best chance of being approved. For those sources, put a tick in column 7. These are the funding sources you will focus on in creating your funding plan in Tool 6.2.

1. Potential funding source	2. Will support the type of funding needed	3. Supports the kinds of activities and results the project will produce	4. Is interested in the populations the project will serve	5. Supports projects in the geographic region we will cover	6. Provides funding at the scale we require for this project	7. High priority funding source to approach

Tool 6.2: Fundraising plan and timeline

Now that you have generated a list of priority funding sources, use this tool to help you plan your fundraising strategy for TB. Be realistic about what you can handle in terms of writing proposals and managing grants. Many smaller organisations can handle one or two grant applications per year, but find it challenging to write multiple applications and manage multiple grants at the same time. It is better to write fewer applications and be successful than to try to do too many and not have enough time to do a good job with them. As stated in the guide, it is important to develop ongoing relationships with your potential funders so that your applications have a greater chance of success. Assign one person to be in charge of managing your relationship with a potential or current funder, communicate your successes to them regularly, and always thank them for their interest in your work. At the bottom of this tool, you will find a template to help you track your relationships with donors.

Funding application plan

Organisation: _____ Funding year: _____

Potential funding source	Contact information and website	Potential level of funding	Activities to be funded	Partners on application	Funding application deadline date	Lead staff person responsible for application

Tool 6.2: Fundraising plan and timeline

Other fundraising

In addition to funding applications, we will raise money through the following activities:

Category	Description	Anticipated funds raised	Timing	Person responsible
<input type="checkbox"/> Income generating activities				
<input type="checkbox"/> Membership dues				
<input type="checkbox"/> Community contributions				
<input type="checkbox"/> Other				

Fundraising assessment

Now assess whether your fundraising efforts listed in the tables above will allow your organisation to do the activities you planned. If not, think about how you will address that problem, either by finding additional sources of funding to support your work or by cutting activities.

A. Total potential funds raised (if all efforts are successful):	
B. Total needed for all activities planned:	
C. Funding gap or surplus: (A - B)	
D. If there is a funding gap, we will:	<input type="checkbox"/> Identify additional sources of funding <input type="checkbox"/> Cut activities
D1. If seeking additional funding, we will apply to:	
D2. If cutting activities, we will cut the following:	

Once you have identified deadlines and people responsible for managing each fundraising effort, use a calendar to map out what activities will need to happen in the months leading up to the application deadlines so that a successful proposal can be put together. Monitor fundraising activities every month to make sure you are on track.

Tool 6.2: Fundraising plan and timeline

Donor relationship maintenance

For every funder your organisation currently works with and every funder you would like to approach in the future, assign someone in your group to be responsible for communicating with them on a regular basis. For existing donors, write down when your reports are due to them and make sure they are submitted on time. In addition, you may want to communicate with them at other times in between reports. Set a schedule for doing so. Make sure you invite them to events you are holding so they can see the fruits of their investments, and send them copies of any news articles that cover your activities, documents you produce, or other items that result from their funding of your work.

Existing donors

Donor organisation	Donor contact person and contact information	Due dates of reports	Frequency of communication in between reports	Person responsible	Status

Potential donors

Donor organisation	Donor contact person and contact information	Frequency of contact	Person responsible	Status

Tool 6.3: Fundraising application checklist

Use this tool to track your progress in preparing funding applications to make sure they are complete and submitted on time. Good luck with your application!

Application information

Funding source	
Contact information	
Deadline date and time for application	
Address/email for delivery of the application	
Format in which it must be delivered (hard copies, electronic)	
Number of copies (if hard copies needed)	
Font and font size for application (if specified)	
Maximum number of pages (if specified)	
List of required attachments	
List of required organisational documents	
Maximum budget request allowed	
Budget format required (if specified)	

Tool 6.3: Fundraising application checklist

Proposal team information

Write down the names of the main people responsible for making sure the application is written, documents are prepared, budget is prepared, and everything is submitted on time. You should consider making specific assignments for writing each part of the application, including the covering letter, and setting specific due dates for each part to give you enough time to put it all together at the end and edit it.

Person in charge of preparing and submitting the application	
Support staff for application	
Person in charge of preparing budget	
Support staff for budget preparation	

Tool 6.3: Fundraising application checklist

Specific application assignments

If you are lucky enough to have a team of people to help you with the application, assign them specific tasks and record those here. Check on progress on a daily or weekly basis, depending on how long you have before the deadline. You can include the written sections, the budget and any needed attachments in this template.

Application section	Person responsible	Due date	Status

Tool 6.3: Fundraising application checklist

Partners involved in the application

Use this template to track your partners in the funding application and what you need to receive from them for the application. Assign one person in your group to make sure partners know what is required and that follow-up is done. Make sure your deadlines to them allow you time to put the entire application together. Their deadlines for getting things to you should be a few days before the submission date.

Partner organisation	Contact person Phone Email Mailing address	Person in our organisation responsible for working with this partner	Partner role in project	Documents/items needed from partner for application	Due date	Status

