

I07 – Survival guide for NGO Founding and Funding

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Foster European Active Citizenship and Sustainability
Through Ecological Thinking by NGO's

Erasmus+ Programme - Strategic Partnership
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Introduction

- ❖ Many programmes teach ‘how to become an entrepreneur’ but most focus on the profit business approach, leaving people with fewer opportunities out.
- ❖ NGEnvironment develop skills and competences in EU citizens specifically towards leading civic action (in the form of NGOs), to promote the environmental and societal change towards sustainability, open and available for all.
- ❖ Starting an NGO usually is a lengthy, time consuming process that arises many doubts and uncertainties, leading potential leaders to give up or to join any other entity that already exist.
- ❖ Traditionally, the sort of information needed is spread among many services, documents or websites, and often the information between media is not coherent or is outdated.

Goals and objectives

- ❖ This survival guide will specifically provide aid to citizens willing to create their own NGOs or to take part of an existing one in an educated way.
- ❖ Target groups: actual and potential NGO leaders and staff members

General characteristics

- ❖ Type of material: Digital publication (interactive guide in pdf). Links to other resources (guides, manuals, laws, specific websites...)
- ❖ It consists of a step-by-step guide explaining all practical and legal requirements needed to found and manage an NGO in the project countries.
- ❖ It also provides funding mechanisms and important "survival" tips from experienced leaders. Up-to-date support for new NGO leaders.
- ❖ Contents are adapted to the reality and legal context of each country → General version + 8 countries' versions (Ireland, Spain, Germany, Italy, Romania, Portugal, Greece and Malta)
- ❖ The document is available in all languages

Research

❖ Current and future challenges

❖ Main needs:

- Training
- Communication
- Financial sustainability
- Legal needs

❖ Legal framework in each country

❖ Legal requirements to create an NGO in each country

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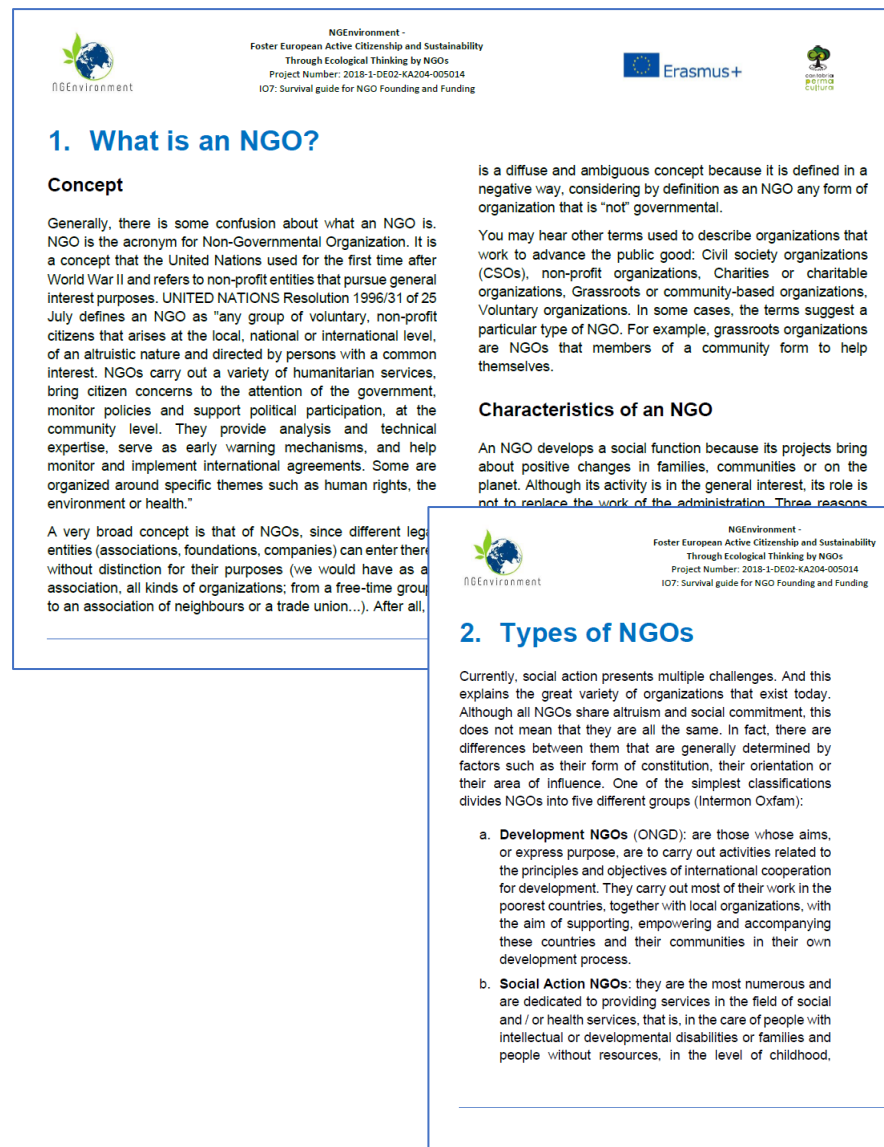
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3. Legal framework for NGOs

However, NGOs are not a legal form. NGOs can adopt different legal personalities, according to the legal framework of the countries.

After an NGO is aware of the purpose of its actions, it is important to decide which legal form to choose for the organisation. This decision results in various advantages and disadvantages in terms of tax law, liability, etc.

Generally, in all the countries there are different legal personalities for NGOs, like association and foundation, but there can be others. Associations and foundations, for example, are created with a deed of incorporation, have bylaws that regulate their operation, are registered in the corresponding registry and keep an annual accounting. In short, "association" is a concept that is legally defined, while "NGO" is a concept of social elaboration, in which different legal persons (foundations, associations...) can be included, as long as they comply with the requirement of not depending directly or inertly on a governmental entity. For example, in Spain the only case of the Spanish regulations where NGOs are considered as such, is the Non-Governmental for Development Organizations, which have their own law and recognizes the NGOs for international development cooperation. In Germany NGOs can adopt other forms, such as cooperative or Limited

Liability Company, which is the most commonly used corporate form for business purposes and is increasingly used by NGOs. In Greece, NGOs may take the legal form of the non-profit legal entities of private law provided for in the Civil Code, like association of persons, civil non-profit company, foundation and non-profit NPIs, provided for by specific laws; but the vast majority take the legal form of the association. In Ireland, they can become an Unincorporated Association, a Company Limited by Guarantee or a Charitable Trust. In Italy, according to the Code of the Third Sector, several categories are considered, such as recognised and not recognised associations, foundations, social cooperatives, etc. In Portugal they can take the form of associations, mutualist associations, cooperatives, foundations, Private Social Solidarity Institutions (IPSS), the Misericórdias, the local development organisations, federations, unions and confederations. Since 1987 Portuguese legal system provides a legal framework for the intervention and support to environmental associations. In Romania, most of the NGOs adopt the form of association or foundation.

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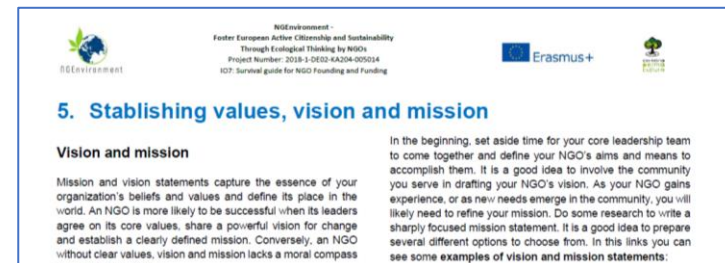
❖ The SDG

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9. The three pillars of sustainability: planning, managing and evaluation

Once you have a clear mission, you have to translate it into projects and activities that the community needs, wants and values, to have an impact on it.

Planning

Planning keeps you focused on your goals and enables you to organize your work and allocate your resources efficiently and prevent problems before they become crises (The NGO Handbook, 2012).

Strategic planning: is a systematic way of assessing where your NGO is now and where it wants to be in the future. It starts with the vision, mission and values and then it addresses priorities and goals, guides decisions about project development, new partnerships, allocation of resources, monitoring and assessing results. The strategic plan maps your vision for the association and its proposed impact. It describes evolving goals and circumstances. A strategic plan is the foundation of your organization — the who, what, when, where, and how you're going to make a positive impact.

The strategic plan helps NGO to remain relevant and responsive to the needs of the community. You can join board and staff together for one-day brainstorming meeting to make a strategic planning, through the following steps:

1. Identify the key issues and questions.
2. Make a SWOT analysis: strengths, weakness, opportunities and threats.
3. Discuss the findings of the SWOT analysis and establish priorities, goals and objectives.
4. Prepare the final strategic plan, writing the results of your analysis.
5. Share the plan with stakeholders.

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THE BASIC LOGIC MODEL

RESOURCES/ INPUTS	ACTIVITIES	OUTPUTS	OUTCOMES	IMPACT
1	2	3	4	5
YOUR PLANNED WORK			YOUR INTENDED RESULTS	

The basic logic model for project planning. Source: The NGO Handbook, 2012

Evaluation

Evaluation is the systematic assessment of the outcomes, quality and performance of a project, activity or the organization as a whole. Evaluation is a tool for answering the question: What difference did our work make in people's lives and communities? In other words, it measures what you achieved for the people you serve. For NGOs to be truly accountable to their stakeholders and to their mission, they must also quantify the outcomes, such as higher student test scores or higher numbers of students who demonstrated ability to apply what they learned in the workshops to their jobs.

The first step of evaluation is to define the outcomes you want a project to achieve. Do this at the design phase of a project. Your NGO's staff and volunteers should agree on an evaluation plan that is feasible, make a simple approach. And then:

- Train the staff and participants.
- Set up a system for storing the data.
- Choose a small group of people to compile the data.
- Have a review of data and identify the key findings.
- Use the evaluation results to improve your project.
- Summarize the data and share your analysis.

Management

Good managers and good management practices are crucial for an NGO to sustain itself over time. Even the smallest organizations need to set up basic systems for management. You need many systems for managing your NGO and you have to decide who has responsibility for every aspect: money, people, projects and facilities. When an NGO is small, the Executive Director (or Coordinator) is responsible for most of the organizational management. As the NGOs grows and hire

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money you spent on fuel, new tyres and vehicle insurance and calling them "Transport Costs".

The organisation Secure the Future offers an [NGO Financial Management Pocket Guide](#) to provide a reference to proper financial policies. It includes a list of examples of forms.

If you are not experienced, you should get advice to know how to manage finances and what are the requirements for your type of organisation in your country/region.

There is an interesting manual provided by Mango, now Humentum, that can help NGOS for financial management. [Humentum](#) is a global NGO which provides training and technical support in financial management for non-profit organisations working in the developing world.

[Financial management essentials](#). A handbook for NGOs.

Top ten reasons for good financial management (Lewis, 2017)


1. To be accountable to the people who give us money. With good financial reporting systems, it is easier to show donors and supporters that we are using their money for the purpose intended.
2. To be accountable to the communities we work with. We have a moral obligation to show that funds are being used correctly.
3. To be able to produce financial statements for regulatory bodies: As part of the registration process, NGOs are required to be accountable for the money they raise and spend.
4. To minimise fraud and abuse of resources. Internal controls help to stop fraud and protect the staff and the assets.
5. To plan for the future and become more financially secure: Financial information helps identify financial risks and long-term financing opportunities.
6. To enable staff to make better decisions on the use of funds: budget monitoring reports enable managers to monitor performance so far and take decisions on using resources going forward.
7. To achieve the objectives of the organisation: The management team and Board need financial information to ensure they are meeting the goals of the organisation and following the strategic plan.
8. To enhance the credibility of the organisation: If you demonstrate financial accountability and transparency, this will inspire confidence and trust in stakeholders.
9. To strengthen fundraising efforts: NGOs that present good budgets and audited financial statements with funding proposals are more likely to receive a favourable response.
10. To get better value for our money: Financial information allows us to compare and assess spending plans to make sure we make efficient, effective and economic use of financial resources.

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- ❖ Crowdfunding
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- ❖ Subsidies/ grants: exhaustive list of European funding sources (European Social Fund, Horizon Europe, LIFE, Creative Europe, Europe for Citizens, Erasmus+, COSME, EEA grants...); other grant sources (Artic Fox initiative, Global Fund Foundation...); platforms to find founding sources
- ❖ TIPS when applying for grants
- ❖ Collaboration NGO-business: Corporate Social Responsibility, Strategic alliances



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10. Fundraising

The survival of NGOs depends on capturing public and private resources, outside the target groups, and through very different mechanisms. However, the search for funding must be consistent with the mission and vision of the organization and must be consistent with the groups with which it works.

The public financing comes mainly from four ways: the subsidy, the agreement, the contracts and the signing of agreements. The subsidies are announced annually by the public authorities. It is essential, therefore, to have specialist professionals, in project formulation, who can submit the pertinent requests for subsidies (or for the award of tenders, agreements ...) to the Public Administrations. Agreements for services, contracts and agreements generate more certainty in NGOs, as they tend to be more stable. Regarding the raising of private funds, the objective is to obtain and retain donations and membership fees, especially through communication campaigns and initiatives, in which economic investments and creativity occupy a place of great value. It should also be added that the sale of objects that serve as "souvenirs" (in campaigns, awareness-raising activities ...). Fair Trade products or compensation for goods and services include other sources of


financing; whose weight, depending on the type of activity or specific NGO, can vary substantially.

Donation



It is a tool to activate citizen solidarity, which allows non-profit associations to obtain means to finance projects that contribute to mitigating inequalities, face natural or humanitarian catastrophes or help improve the situation of vulnerable groups. NGOs seeking funds from donors need to clarify and align/link their needs to specific donor priorities and themes, and not send out a generic fund request that is same for every donor. The law allows donors to deduct a certain percentage of the donation on their tax return.

Wired Impact organization offers several materials that can help you to boost donation:

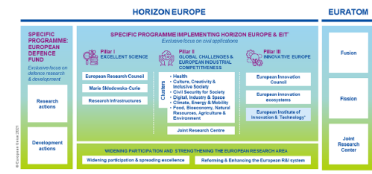
- [31 Ways to Boost Your Nonprofit's Online Fundraising](#)
- [Online donation system](#)
- [Donor Flow optimiser for non-profit websites](#)
- [9 common mistakes in digital Fundraising](#)
- [10 Great non-profit donation pages](#)



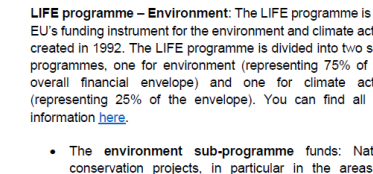
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HORIZON EUROPE



EURATOM



LIFE programme – Environment: The LIFE programme is the EU's funding instrument for the environment and climate action created in 1992. The LIFE programme is divided into two sub-programmes, one for environment (representing 75% of the overall financial envelope) and one for climate action (representing 25% of the envelope). You can find all the information [here](#).

- The **environment sub-programme** funds: Nature conservation projects, in particular in the areas of biodiversity, habitats and species; Environment and resource efficiency projects, in particular in the areas of air, chemicals, green and circular economy, industrial accidents, marine and coastal management, noise, soil, waste, water, and the urban environment; Environmental governance and information, in the areas of awareness raising, environmental training and capacity building, legislative compliance and enforcement, knowledge development and public and stakeholder participation; Integrated projects, to achieve full implementation of Strategies or Action Plans required by the EU environmental and climate legislation; Preparatory projects address specific needs for the development and implementation of EU environmental policy and law; Technical assistance

Development and humanitarian aid: NGOs can get funding under most of the thematic or regional programmes managed by the Commission's department dealing with [international cooperation and development \(DEVCO\)](#). NGOs are also eligible for [funding for humanitarian aid and civil protection](#) activities through the Commission's department dealing with humanitarian aid and civil protection (ECHO).

Transport, energy and ICT: Some funding areas of the [Connecting Europe Facility \(CEF\)](#) are open to NGOs. The CEF programme is managed by the Innovation and Networks Executive Agency (INEA).

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11. Collaborative approach in NGOs

Collaborative approach

Although many entities are linked or work with others, it is important to know if this helps them achieve their mission and if their social impact increases or allows them to be more efficient in their work.

The collaborative approach is based on the idea that in an environment such as the current one, collaborations are a useful and sometimes indispensable instrument for NGOs to advance in the fulfilment of their mission and expand their impact. Despite the interest of this approach, it is not predominant in the NGO sector today and it is not the approach from which all organizations must make decisions at all times, but it is a way of approaching the analysis of reality and build interesting responses to the challenges of today's social world (Iglesias y Carreras, 2013).


Using a collaborative approach implies, among other things, going beyond the entity itself and overcoming organizational limits when evaluating available capacities and resources. This forces to make an additional effort to know the resources and capacities available in the environment and to imagine the

possible existing combinations, which allow to enhance and multiply the results.



Cooperation at the operational level remains a challenge for NGOs, but it is complex. There are different barriers when applying it, such as the division of the sector by an approach based on the differentiation of vulnerable groups, resistance to change, diversity of interests, different organizational cultures, etc. It also appears that there are few synergies between some more flexible and innovative entities and others more conventional and more resistant to change.

Due to the fragmentation of the sector, there are entities that work in the same place and with similar objectives, similar projects with few possibilities of achieving impacts, tools, management systems or training actions that are not shared. There are also few common initiatives aimed at lowering management and fixed costs - such as purchasing centres, outsourcing services, etc. -. There is still much to improve in this regard. In the medium term, it is important to consider the benefits that a more intense collaboration, for example through strategic alliances and mergers, can bring to the sector and help it respond more effectively to the needs of society. A collaboration is significant when it creates strategic value for the participants and the results exceed the value of the sum of

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the individual contributions, in addition to increasing the capacities of each entity (Iglesias y Carreras, 2013).

In this section we want to provide concepts and examples on how to integrate the collaborative approach into NGO strategy.

Why do NGOs collaborate?

NGOs collaborate to:

1. Gain institutional capacity: gain scale serving the same purpose, access complementary resources, knowledge and skills, generate innovation and mutual learning and development, and replicate projects and programs;
2. Gain access to new areas of action, geographic location, recipients and other funders;
3. Increase the volume of resources, skills and
4. skills made available for mission and impact;
5. Generate an environment and an ecosystem favourable to the mission and the intended impact;
6. Gain positioning and legitimacy and reinforce the image;
7. Increase efficiencies, avoid duplication and reduce costs.

NGOs must make a rigorous reflection about their long-term vision and their role in a constantly changing society. Is collaboration at the core of the strategy of the organization? Or

is it one more strategy together with the rest of strategies for achieving the mission? The answer will allow us to know the collaborative level that should dominate decision-making.

Good practices

Some actions to advance in a more operational cooperation can be:

- Entities initiatives to jointly develop and apply management tools, joint training, outsource processes, etc.
- Joint projects between various entities or projects in which the entities act in a complementary manner at different times in the process.

If you are interested in implementing your project in a partnership with NGOs, [NGO Partnership website](#) offers online database of NGOs from all of Europe that will help you find the right organisation in just a few steps.

The [World Food Programme](#) offer to partner with them and has a lot of [experience](#) in partnering along the programme LIFE.

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Web contents and landing page

Website content

The information you provide on each page is a critical part of reaching your marketing and fundraising goals. Great content translates into results, whether your goals are to boost donations, build awareness for your programs or recruit volunteers. Website content is the foundation of marketing in this modern age — a time when people have incredible appetites for learning but won't wade through walls of text.

There are several pages that are typically found in most non-profit website structures, like About Us, Programs and Get Involved. [WiredImpact](#) has created a [content checklist](#) for these essential webpages as well as other common webpages for non-profit websites:

About Us: As one of the first stops made by a website visitor, the About Us page can also be one of the last pages to get much love from an organization. It tends to be a dumping ground for miscellaneous content without much purpose. An example: <https://www.worldwidelifeline.org/about>

Mission and Vision: Well-crafted mission and vision statements can inspire people to engage with your organization and deserve a well-thought-out place on your website. While the mission and/or vision statement may show up in other places on the site, it's a good idea to give the two a home of their own where visitors can learn more in depth about what the current and future goals are for your non-profit. Use this opportunity to explain how your work is moving toward your mission and vision and teasing the impact you've had so far. Consider designing your mission and vision page in a way that draws visitors in and makes it both easy and interesting to learn about the foundation your organization is built upon. Make your page stand out with photos showcasing how you serve your community. Or, create a video that tells viewers what drives your non-profit and why you do what you do everyday. If you're looking for inspiration, here are some [examples of non-profits](#) with well-designed, compelling mission and vision pages:

<https://www.specialolympics.org/about/our-mission>
<https://love145.org/mission-vision/>
<https://www.brightlink.org/about-us/mission/>
<https://mail.org/mission-history/>

History: Sharing the history of your organization gives you a chance to describe the background of an issue or the compelling scenario that led to the founding of your non-profit. By adding a History page, you can keep your About Us page from getting too cluttered and create a place to document exciting milestones. An example: <https://www.worldwidelifeline.org/about/history>

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They also offer a Beginner's Guide to Non-profit Website Content, with tips for beginners, crafted from years of working with clients across the sector <https://wiredimpact.com/guide/beginners-guide-nonprofit-website-content/>, and some tips for writing website content <http://wiredimpact.com/wp-content/uploads/2017/09/Nonprofit-Website-Content-Checklists.pdf>.

Website structure

A logical and straightforward website structure is a central piece of any [highly effective non-profit website](#). You could have the [best content](#) in the world, but if that content is tough for your visitors to find, they won't hunt for it. We are essentially talking about how you organize the pages and subpages of your website. [WiredImpact](#) has created a [guide](#) to help you with your website structure.

In Spain, there is a free tool provided by Bankia, to make an auto diagnosis of your website. [Indexi Social](#). It allows to analyse your website in a simple way from several viewpoints, such as mobility, transparency of the information, digital marketing, etc. The value of this assessment is both in the "doing" and then what you do with your answers to the questions. You do need to keep in mind the maturity of your organization and not expect that a newly formed NGO have in place many of the mechanisms and structures mentioned in the assessment form. But this does give the interested NGO leader, a way to monitor your NGO's development and also to take note of various aspects of NGO work that might be implemented.

Managing social media accounts

Social media is an important aspect of growing a digital audience for your non-profit. We see a lot of young Non-profits start out on Facebook before launching their first website. It's a great way to build awareness for your cause and attract new supporters. Here some [tips](#). The [Facebook News Feed algorithm](#) has the power to put your content front and centre or at the bottom of the content pile. Put your page's data to good use by digging into your Facebook Page insights. Find out where to look for metrics that can help you identify the effects of the update on your page's reach. From there, you'll be able to adjust your strategy based on what works and what doesn't for your Non-profit. There are plenty of other ways to give your page some love: Do Some Tab Maintenance, update your look, check your engagement level, set a Policy about Facebook Fundraisers (donate button), start thinking about Facebook groups.

Managing multiple social media accounts can be a hassle, and if your organization has a small team it can be even more

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12. Communication

Communication plan

It is very important for an NGO to create a communication plan that accomplishes even your most aspirational goals. NGO communication plan is an important piece of your strategy and help keep your NGO organized, accountable and innovative.

In order to reach your most aspirational goals, you'll need to set them. The first step is to make good objectives that must be concrete and measurable. We can differentiate goals (general objectives in long-term, more strategic) and operative objectives (more specific and addressed to action). To help us to establish the objectives we can use the [SMART technique](#) to create specific objectives measurable, attainable, relevant and time-based.

As you think through your plan as a whole, consider piecing it together to **include mini-plans for your most important components**. Dig into the resources below to start planning out each of the components you'd like to include.

Blogging strategy:

<https://wiredimpact.com/blog/nonprofit-blogging-strategy/>

Newsletter: <https://wiredimpact.com/blog/nonprofit-newsletter-best-practices/>

Use automated emails to cultivate new supporters: <https://wiredimpact.com/blog/automated-emails-cultivate-new-supporters/>

Google Ad Grants: <https://wiredimpact.com/blog/google-ad-grants-strategy/>

Better email Newsletter strategy <https://wiredimpact.com/blog/email-newsletter-strategy-nonprofit/>

Fundraising on Social Media: <https://wiredimpact.com/blog/fundraising-on-social-media/>

Landing pages: essential elements and management tips <https://wiredimpact.com/blog/nonprofit-landing-pages/>


Promote events: <https://wiredimpact.com/blog/how-to-promote-a-nonprofit-event/>

Non-profit Marketing strategy template <https://docs.google.com/spreadsheets/d/1nE3IMrVo5xeV9BQbwZv3dXS4lGaWCPgkAireiPaWf4/edit#gid=957927704>



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- ❖ Establish the goals (vision, mission, objectives)
- ❖ Give a name
- ❖ Draw up the articles of association
- ❖ Founding minutes
- ❖ Registration
- ❖ Organisational structure: assembly, board of directors
- ❖ Declaration of public utility
- ❖ Obligations of the association: registration, documentary, accountability and tax obligations
- ❖ Data protection



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13. Steps to create an association

When creating an NGO it is necessary to develop a series of steps. If you are creating a type of association or foundation you can be required to make the articles of the association, to prepare the founding minutes. In general, all the NGOs have the obligation of registry in some official register, depending on the country. You must also have an organisational structure, generally composed of a board of directors and an assembly. You also will have some obligations (documentary, registry, taxation, accounts, etc.) If you manage data of people you should also comply with the specific laws on data management.

Step 1: Give a name to your NGO

Give your association an original but easy-to-read name. Simple and self-explanatory business names prove as effective as unique names. Use search engines for determining the availability of your preferred name.

Step 2: draw up the articles of the association (Statutes)

To create an association, the first thing the founding partners have to do is draw up the statutes. Despite not having the

character of a legal norm, they are binding on the partners, since they voluntarily submitted to them when they joined the Association. These are the rules that will determine how the association will function and that will stipulate its objectives, as well as its organizational model. They usually are stipulated by law. They are needed for two reasons - (a) to ensure the smooth functioning of all aspects of an NGO, and (b) as a requirement for the legal registration of an NGO with national or public authorities.

Writing and gaining approval for a set of Articles takes thought, time, and the involvement of the organization's constituents. Articles of the Association should be written with an emphasis on fair treatment and transparent governance. Typical items addressed in the Articles are:

- Name and purpose (mission statement) of the association.
- The frequency, notice, and quorum requirements for organizational meetings, both internal or regular meeting of the association, and external meetings with other stakeholders etc.

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Annex I. Comparison of associations requirements in the project countries

The table shows the requirements to create an association in each country of the project partnership:

	Spain	Germany	Portugal	Romania	Malta	Greece	Italy	Ireland
Minimum people	3	In order to be registered, the organisation must have at least 7 members and if this number falls, below 3 after its registration	3	3	4	2	3	One single member At least two non-related directors over the age of 18.
Legal personality	Yes	Yes	Yes	Yes	Yes	Yes	- Yes, for recognised associations - No, for non-recognised associations	Yes
Govern body	Assembly (all the members)	Assembly (all the members)	Assembly (all the members)	a) General Assembly; b) the board of directors; c) the censor or, as the case may be, the	Assembly (all the members)	Assembly (all the members)	Assembly (all the members)	The group of trustees that are elected as the Board of Management

Thank you very much for your attention!



NGEnvironment

Foster European Active Citizenship and Sustainability
Through Ecological Thinking by NGO's

Erasmus+ Programme - Strategic Partnership
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