FUNDRAISING AND MARKETING

intrac for civil society

CSOs often use monitoring and evaluation (M&E) information to help raise funds from individuals or commercial organisations, or seek their support in other ways. Some kinds of M&E information are more useful than others for fundraising and marketing. There are sometimes conflicts between using M&E information for fundraising and using it for other purposes.

Many CSOs seek to raise funds from individuals or commercial organisations, or seek their support in other ways such as volunteering, taking part in campaigns or attending events. Some CSOs, particularly those operating at a national or international level, have large teams dedicated to fundraising and marketing.

Monitoring and evaluation (M&E) information is often used to support these efforts. However, there are sometimes conflicts between presenting reliable and credible M&E information on the one hand, and providing messages designed to attract support on the other. In particular, some kinds of M&E information are generally considered more useful than others for fundraising and marketing. This is summarised in the box below

Fundraising and marketing is ***most*** likely to be interested in ...	Fundraising and marketing is ***least*** likely to be interested in ...
▪ information describing the direct achievements of an organisation ▪ in-depth case studies focusing on individuals and households ▪ interesting lessons learned which show how an organisation adapted its behaviour to achieve success ▪ stories that emphasise the contribution of an organisation to change (sometimes minimising the contribution of other agencies) ▪ stories based around simple cause and effect interventions ▪ descriptions of services provided directly to poor people ▪ M&E findings that are straightforward and certain	▪ descriptions of errors or failures ▪ changes seen as stepping stones on the way to ultimate impact (e.g. mobilisation or capacity change) ▪ M&E findings which cast serious doubt on whether an organisation is doing the right thing ▪ stories in which many different agencies contribute to change, and it is hard to isolate the contribution of one individual organisation ▪ lengthy explanations of how evidence was produced, including its limitations ▪ stories dealing with complex situations, where change is often unpredictable ▪ M&E findings that are inconclusive or uncertain

Of course this is a generalisation, and some audiences for fundraising or marketing information can be very knowledgeable. But members of the public may not have the same level of knowledge and understanding of social development as people and organisations that work within the sector. They are often unaware of the limitations of social development work, and are unlikely to know much about M&E.

In the past, many initiatives have been designed to educate the public on the realities of work carried out in the social development sector. But there are still frequent conflicts between the type of information needed for effective fundraising and marketing, and the type needed to help organisations learn and improve, or demonstrate accountability to institutional donors. M&E staff need to be aware of these conflicts, and work to manage them. This means recognising the need to produce credible and reliable M&E findings, whilst at the same time the need to raise essential funds and support.

The relationship between M&E and fundraising

If M&E work is carried out to a high standard, and the findings are then used for fundraising or marketing purposes, there should never be a conflict. Equally, if information developed for fundraising and marketing purposes is generated to the same standards as best practice M&E there should not be a problem. Indeed, many CSOs use information originally collected for fundraising purposes to supplement M&E evidence.

Of course, information may be presented and communicated differently for different audiences. A separate paper in the M&E Universe covers some of the different ways in which M&E information can be communicated, such as formal reports, newsletters, press releases, blogs, use of social media, tables, diagrams, photographs, videos, cartoons, TV & radio, infographics, theatre, songs and poetry. However, the relationship between M&E and fundraising becomes more problematic when:

- M&E information is represented partially or selectively so it shows a false or misleading picture; or

- information generated for fundraising or marketing purposes that does not conform to best practice M&E standards is presented as credible M&E evidence.

In either case, the conflicts need to be managed. This means M&E staff within a CSO need to take steps to ensure that information is not misunderstood or misused.

Potential conflicts

Although there is wide recognition within the social development sector that information needs to be presented differently to different audiences, no CSO really wants to present information that is dishonest. But sometimes the use of M&E information for fundraising or marketing purposes can push the boundaries of what is acceptable. This is perhaps most evident when CSOs produce glossy annual reports designed for mass audiences which claim to be based on rigorous evidence. Some of the most obvious potential conflicts are described below.

- It is common for changes to be reported as if they were due solely to the intervention of an individual CSO, with little or no analysis of how they were influenced by other organisations, or wider socio-economic factors.
- Changes are often reported as if they have been properly verified, when in fact they are merely claims that have yet to be properly investigated. For example, a large NGO working through a partner CSO might be tempted to accept a story of change from the partner and report it without qualification. A more honest way of presenting the claim would be to say *"according to our partner ... "*.
- Changes may be reported as facts even though they were revealed via a single source or a non-trusted informant. Most M&E findings are expected to come with a degree of triangulation – which means examining changes or lessons learned from different points of view, or in different ways. But when information is needed urgently for other purposes these steps may be missed out.
- Sometimes, changes are reported without reference to what was initially considered realistic. For example, reporting that *"over three hundred people have been trained in governance"* could be misleading if the intention was originally to train a thousand. Failure to compare change with what was expected limits an audience's ability to appreciate whether or not it represents a positive outcome.
- CSOs often use case studies without specifying what they represent. Are they the best cases a CSO has? Are they representative of a wider number of cases? Were they cherry-picked or chosen at random? The same case studies are often used over and over again in annual reports and promotional materials. Case studies and stories of change can play a vital role in many CSO M&E systems, but only if an explicit sampling methodology is used and properly explained.
- Sometimes statistics are reported as if they were certain, when in fact the methodology used to generate them is dubious. Examples include quoting statistics based on very small sample sizes or using an inappropriate sampling methodology.
- In many situations (not just in reports designed for fundraising or marketing purposes) CSOs report only the evidence that supports their argument, whilst ignoring counter evidence. A typical example is the selective use of quotes – picking just one or two positive quotes and ignoring negative ones. CSOs also tend to report just one side of a story, when in fact there may be many different versions.
- For obvious reasons, messages presented to the public rarely have caveats concerning the reliability of the data that led to the conclusions. By contrast, any serious report that highlights M&E findings should be accompanied by descriptions of how evidence was generated and conclusions reached. It is normally good practice to highlight the limitations of M&E data so that others can make up their minds about the reliability of findings.
- Finally, information communicated to raise funds or seek support sometimes predicts future change as fact, rather than a theory of what may happen. For example, reporting that *"efficiency measures at a factory will lead to job creation"* is misleading. It would be more honest to say *"it is hoped that efficiency measures ..."*.

People in the social development sector often discuss whether the end justifies the means. Presenting information in certain ways may help generate vital revenue and support that enables a CSO to help more people, or better support its existing beneficiaries. And the wider system within which many CSOs work does not always reward honesty or uncertainty.

But in INTRAC's opinion there are two clear lines that should not be crossed. CSOs should not present information that they know (or suspect) to be false, whatever the situation. And, just as importantly, staff working within a CSO should always thoroughly understand the limitations or uncertainties of any information they present. The risk otherwise is that credible M&E findings are unfairly compared to less reliable findings, generated for other purposes and applying different standards.

"All organisations use propaganda to some extent, and this is ok. The real problems come when an organisation starts believing its own propaganda."

Further reading and resources

Two further papers in this section of the M&E Universe deal with the reporting of change and the communication of M&E information. These can be accessed by clicking on the links below.

Reporting change

Communication

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INTRAC is a not-for-profit organisation that builds the skills and knowledge of civil society organisations to be more effective in addressing poverty and inequality. Since 1992 INTRAC has provided specialist support in monitoring and evaluation, working with people to develop their own M&E approaches and tools, based on their needs. We encourage appropriate and practical M&E, based on understanding what works in different contexts.

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