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Step by step guide

for establishing your NGO



There is a need for a medium-term strategy for the further development of European youth work and a strong vision that is based on sustainability. One of the main factors in achieving sustainability in any NGO is building a team of people who work together, contribute according to their strengths and see a career path in the NGO sector. One of the main challenges facing the entire sector is finding the right people committed to the causes and keeping them in the sector.

With the project “Get to know the NGO sector. Lead the change” Bfree (Bulgaria), together with CONCEPTI (Bulgaria), NORTH (Iceland), GEYC (Romania) and TuF1rst (Italy) aimed to create a clear process for the selection, training and 'onboarding' of youth in NGOs across Europe, to lead to a more sustainable development of the sector and more opportunities for young people in terms of their professional development.

To achieve this goal, all partners actively participated and shared know-how, experience and expertise for all modules of this guide, so it is a collective intellectual output combining different perspectives, culturally and economically specific, from across Europe

The guide can easily be applied elsewhere, with certain adjustments, according to the current situation in the NGO sector of the different countries.

Audience

This guide is to serve individuals working within existing NGOs who are looking to enlarge or strengthen their NGO's, move into leadership, and/or start their own NGO. This is especially focused on individuals who have experience in the NGO sector and are looking to address a challenge/need/problem that they have identified.





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Establishing your NGO

Honing in on the issue you are addressing

If you are looking to start your own NGO, you have already either

- (1) observed a problem and have an idea of how to address that problem (ex. you see an issue you want to help solve) or you have
- (2) identified an audience that you want to serve (ex. creating a Parent Association to represent parents in school decision making) .

Whichever route you are taking you need to clarify and assure that your thinking about how to achieve your goal is correct.

In order to do this important due diligence, you need to conduct some in-depth research about the issue, people who are impacted by the issue and the landscape **locally, regionally, nationally and maybe even internationally.**

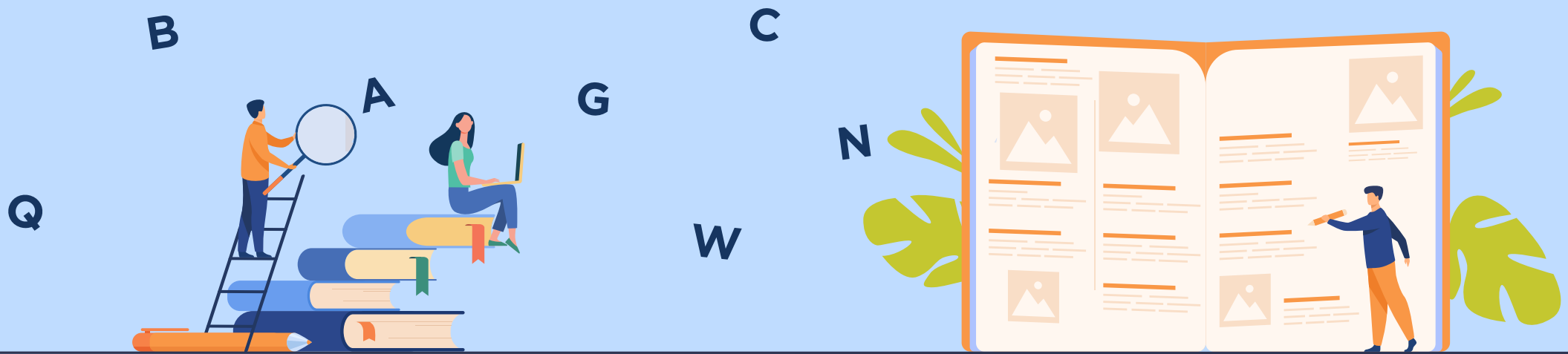




Many ideas are largely untested. That's why it's important to check your hypothesis and validate the need. **Some questions to consider:**

- How do you know this need exists?
- Is the aspect of the larger problem you are looking to address clear, are you correct on how to address it? How do you know?
- Have you engaged with the audience you want to serve and heard what their needs are?
- Do you know what the landscape is for this issue on both the macro and micro levels?
- Is anyone else out there working on this issue? If so, are they working on this particular aspect of the issue?
- What is your value proposition?

Is there anyone locally and internationally from whom you can learn?



Begin by gathering your information, **learn about the issue in depth and do so relentlessly.**

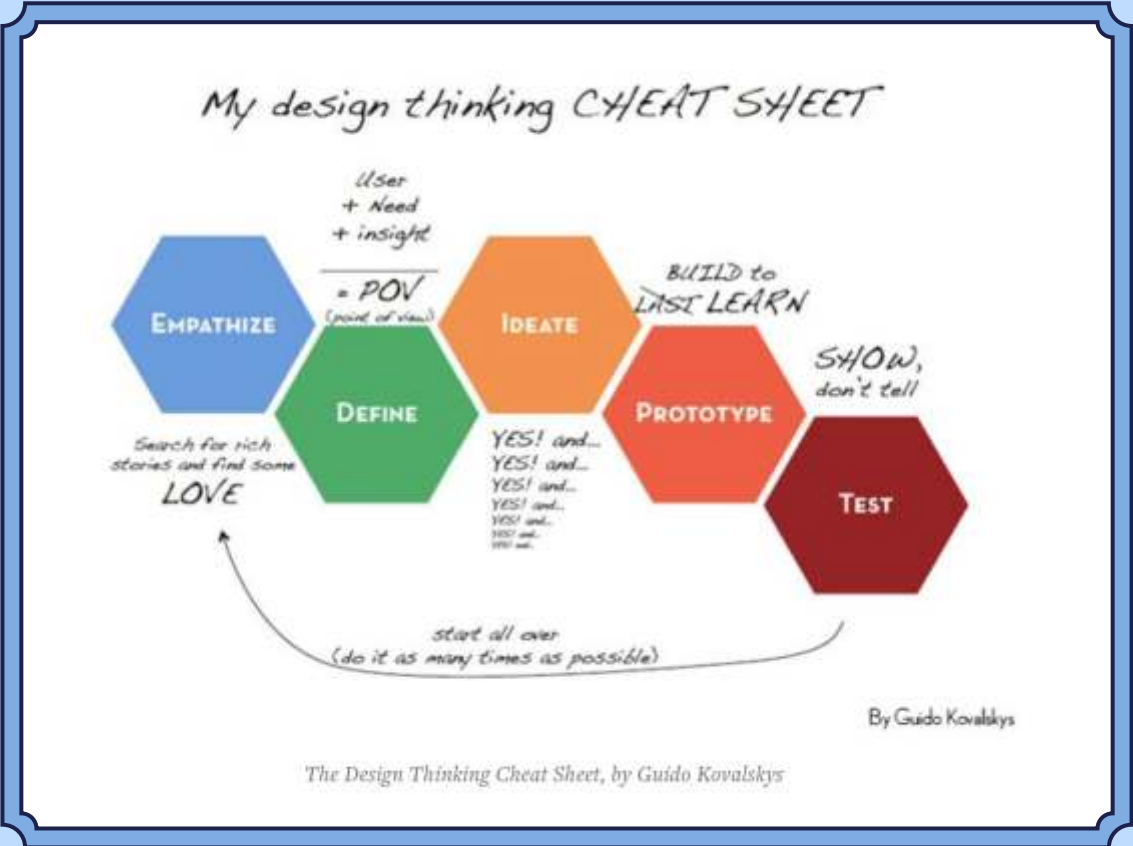
Importantly, if your idea is to serve a specific population (of which you are not a part), go and speak with people in that population. Learn about the issue from their perspective and listen to what they say is needed to address the issue. You will likely learn that what you thought was needed is different from what is actually needed. It is tempting to sit outside of a problem and offer a solution; **you must embed yourself in the issue and listen carefully to those most affected by it.**

It's great that you want to bring a positive change in the world and you want to help people. However, you might learn that your solution needs to be delivered differently. **Just be sure that you're solving the real problem and not its effects.**



There are many strategies that you can use to deeply understand an issue. **Design thinking** is a proven method that most importantly begins with the end user. Carefully applying a design thinking process to your learning **will assure that you begin by learning from those you seek to serve.**

The Design Thinking Process is generally defined by five steps:



Empathize: research and understand your users' needs. This is the most important step, that's why it's important to go in-depth and use a tool called the [Empathy map](#).

Define: the information needs to be organized (from the Empathy Map). Based on the observation, core problems have to be defined. Defining the problem and problem statement must be done in a human-centered manner. You can use the [problem tree](#) to help you craft your problem statement. In this stage, you will start to progress to the third step, the ideation phase.

Ideate: a great way to ideate solutions is to answer the questions: How might we...? and What if...? brainstorm ideas, challenge assumptions (there are many [brainstorming techniques](#) and using them intentionally is effective).

Prototype: begin to create solutions/products/methods for addressing the issue at hand. Create Solutions and Build to learn, not to last.

Test: it is where you give it a go (check your prototypes), show (go back to your end users and beneficiaries and see how this addresses their needs) and get feedback (see what works, what doesn't) with the purpose of evolving/improving it - starting all over. This cycle needs to be done as frequently as possible. The ITERATION - take what you learn and plug it back in and make the necessary changes

More useful links:

[Design-thinking methods in details](#)

[Design Thinking Process Guide](#)



Value proposition

When exploring the business model of an NGO, start with the question, '**what value are you creating for your target audience AND more importantly for society?**'



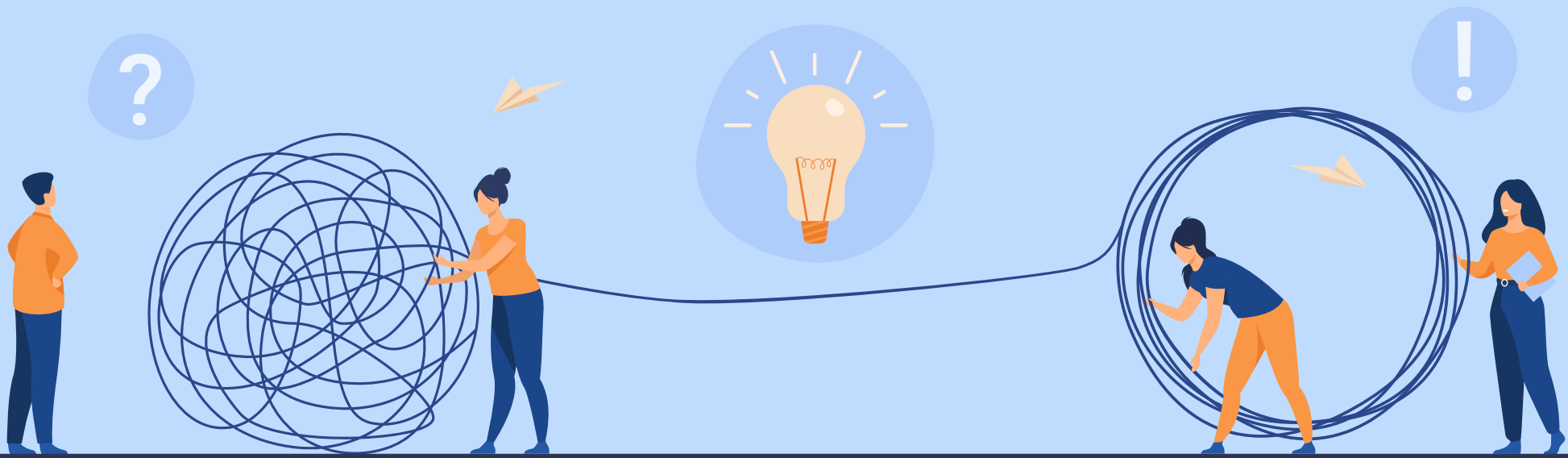
When businesses use the business model canvas (BMC) in commercial businesses they often start with the customers - because ultimately, they are at the heart of the business. Of course, **this is the case for NGOs as well**, who are seeking to serve their beneficiaries.

When creating an NGO you have a **social impact value**. Impact value proposition is defined as the social outcomes and benefits that are generated through the NGO. This social impact must be clearly defined and articulated.

Useful links:

[Value proposition canvas](#)

[Impact value proposition explained](#)



Legally Setting up your NGO



There are many legal issues that you must learn about as you work to establish your NGO. It is essential that you understand that these issues and processes are not only country specific, they may also be regional. **It is your responsibility** to research and learn about the laws and processes for the exact location in which you will establish your NGO. In addition, some countries provide this guidance through government websites while in other countries this guidance can be found on lawyer websites. In either case, getting legal council is highly recommended, especially if anything in the laws or processes is unclear.

Below you will find some introductory information about each of the Causeland partner countries. Here you will notice that some sites are federal, others regional and others from legal entities.



Bulgaria

In Bulgaria your NGO can have 2 forms: Foundation or Association and it's up to you to choose which one you prefer and would better serve your mission and purpose. The main difference is in the structure your NGO would have depending on the form you choose.

Another thing you should decide is if your NGO would be for a public or private purpose. We advise you to choose the public one (in this way you'll have access to more possibilities for funding and collaboration with the authorities).

When you have reached your decision you need to set your goals, find your co-founders (you need to be 3 people for foundation and 7 for association) and to register it in the **Commercial register and register of non-profit legal entities**. If everything is done correctly your NGO will be ready in 3 days and you can start working on your cause.

Here you can find a detailed explanation of the steps (in Bulgarian. If you need assistance in English you can reach out to **YuYa Consult** or **Bfree**)



Iceland

In order to register an NGO in Iceland you need to register online at the **tax office**. Not everything is available in the English version of the site, so please be aware of that. In addition, what you send into the tax office needs to be in Icelandic as well.

Here is the **registration form**

Here are **sample bylaws**

To register a “real owner” of the NGO use this **form**

This is a **very helpful video** with step by step instructions in English about registering an NGO in Iceland, begin at 6:40.

How to establish business in Iceland



Italy

Setting up a non-profit organization in Italy requires different steps and there are numerous legal aspects to fulfill to successfully operate an organization.

Non-profit associations in Italy are legal entities under the legislation of Italian law that works for charitable purposes. The concept of charity has no specific legal definition in Italy, but the term is partly defined under the **ONLUS concept**, which refers to a non-profit organization for social purposes.

In Italy, foundations fall under the governance of the Civil Law and can only take the form of private autonomous NGOs. The process of setting up an NGO requires preparation by the interested parties since it is a multi-step process, including one that will precede the actual formation and the registration with the authorities. To learn more about the process of setting up and operating an NGO, please refer to the following links:

[Find out more detailed information on how to set up an NGO according to the Italian regulations.](#)

[To find out more about the process of setting up an NGO and the documentation needed for the project have a look at this website.](#)

[A guide to community foundations in Italy](#)

[A guide to set up the NGOs in Italy, the regulations to follow and the taxes to pay \(this page is in Italian, set up the translator in your language\)](#)



Romania

In Romania, the establishment of an NGO is regulated by Government Ordinance no. 26/2000 and by Law no. 276/2020 to amend the previous legislative act.

According to OG no. 26/2000, you can become a member of an NGO in your own name, but also through a limited liability company (SRL) or another legal entity. Even minors over 14 can be members, but only with the consent of their parents or legal guardians. Also, foreign citizens can be members of some Romanian NGOs.

Law no. 276/2020 brings a series of changes that facilitate the establishment of an NGO, as well as the development of the activity. Thus, starting with December 5, 2020, the date on which the law entered into force, you no longer need to obtain the consent of the neighbors to establish an NGO in an apartment. Moreover, it is no longer necessary for an NGO to have a constitution, but only the statute in order to be recognized.

Also, Law no. 276/2020 also provides for the reduction of the minimum patrimony of a foundation. If previously, the minimum patrimony was one hundred gross minimum wages, so 223,000 lei, with the entry into force of Law no. 276/2020, its value has decreased significantly, up to ten minimum gross salaries, currently, 22,300 lei. Moreover, there is no longer the obligation to deposit a minimum patrimony of 200 lei, in order to establish an association.

You can find out more about the steps [here](#), find out more about naming your NGO and setting up a starting fund [here](#), find out how to expedite the process [here](#) and have an overview about all the paperwork [here](#)



Social entrepreneurship

Social entrepreneurship is an approach in which **you develop, fund and implement solutions to social, cultural, or environmental issues**. This concept may be applied to a wide range of organizations, which vary in size, aims, and values.

Social entrepreneurship typically attempts to further the broad social, cultural and environmental goals often associated with the voluntary sector, in areas such as poverty alleviation, health care and community development. For-profit entrepreneurs typically measure performance using business metrics like profit, revenues and increases in stock prices. Social entrepreneurs, on the other hand, are either building non-profits, or **they blend for-profit goals with generating a positive "return to society"**. Therefore, they often use a broader set of metrics.



NGO's, Nonprofits & Social Enterprise

It is good to understand some of the terminology used when discussing Social Entrepreneurship, as there are several methods for achieving social entrepreneurial goals. Social enterprises, NGOs and nonprofits function with some overlapping values and some overlapping financial models, however in many cases they remain distinct. The primary overlap can be found between NGOs and nonprofits. While all NGOs are non-profits, depending on the country and context, not all nonprofits are NGO's.

Both NGOs and nonprofit organizations use their surplus revenue to help achieve their purpose or 'mission', rather than distributing their surplus income to the organization's directors (or equivalents) as profit. Both also operate in a unique manner, seeking support from governments, donors or through membership fees.



A non-governmental organization (NGO) is a group that functions independently of any government. It is usually non-profit. NGOs, **sometimes called civil society organizations**, are established on community, national, and international levels to serve a social or political goal such as a humanitarian cause or the protection of the environment.

- NGOs play a major role in international development, aid, and philanthropy.
- NGOs rely on a variety of funding sources, from private donations and membership dues to government grants.
- Advocacy NGOs work to influence public policy.
- Some well-known NGOs include the Red Cross, the Salvation Army, and Amnesty International.



Social enterprises are, most often, structured as for-profit, and **may take the form of a co-operative, mutual organization, or a social business**. A social enterprise uses the money it makes from selling a good or service towards furthering a cause. Social enterprises have traditionally operated on a blended ROI (return on investment), which is a mix of social and financial ROI. They **put part of their revenue towards a social cause, and part of their revenue towards furthering their good or service**.



A non-profit is an organization that puts all the money it raises towards a social issue. Non-profits operate with an almost absolute social ROI, **putting almost all revenue towards its mission statement.**



Strategic Leadership



What is strategy and how to use it

Once your NGO is established, you are ready to begin thinking strategically about your work. Your NGO's strategy and management of that strategy involve the clear articulation of your work and the prioritization and implementation of your NGO's major goals and purpose.

This includes writing a mission, vision and core values, designing your business model, defining your goals (both long and short term), writing out a strategic plan as a roadmap for your implementation.



These goals and purposes are determined by listening carefully to all your stakeholders, understanding the limitations of the resources available to your NGO, and your careful assessment and understanding of the context of your NGO.

These include local/national culture, history and needs, what other NGOs are doing, and who else is looking for similar resources. **The strategic plan for your NGO clarifies the direction of the NGO.** You will create its mission, values, main objectives, policies and plans and how to allocate resources appropriately. **An effective strategy and its plan are not static.** They are in a constant feedback loop which monitors progress. You use that progress to inform your next round of planning. In addition, a strategy and plan help with decision making. **They clarify the unique need your NGO is addressing.** They help you decide what “not to do” and align all projects and activities so that they are working together to achieve your mission.

Models of Strategic Planning



Purpose and Vision

Purpose keeps you focused on **why** you exist, vision **aligns** you with your goal, and mission empowers how you will accomplish it. **Done well, your purpose will inspire and motivate you every day, and just might inspire your audience.**



Purpose: Simply stated your purpose is why your NGO exists and it's what drives every person in your NGO. People feel good about their work when they achieve the big goals and also during the process because they believe in the purpose. **Your purpose is the core of all your other guiding statements.** The purpose answers the question of why you are doing what you are doing and it's the purpose that brings together your mission and your vision. To clearly define your purpose you will need to dig deep into the morals and ethics that drive you and the challenge your NGO is trying to address.



Vision is where your NGO is going. **It's what the future will look like 5 to 10 years from now if you achieve your goals and it's the driving force of how your NGO defines success.** It is usually created by the leadership team and/or executive who then use it to help the team and all the stakeholders get excited about what they are doing and working toward. A well-conceived vision consists of two major components: **core ideology and envisioned future.** Your core ideology is your purpose, it's why you exist and the envisioned future is what you aspire to become, to achieve, to create—something that will require significant change and progress to attain.



Useful links:

Purpose, or why you do what you do.

Vision.



Mission

*Before writing your mission you have already defined and validated the strategic issue you are going to address. Once that is clear you are ready to write your mission.



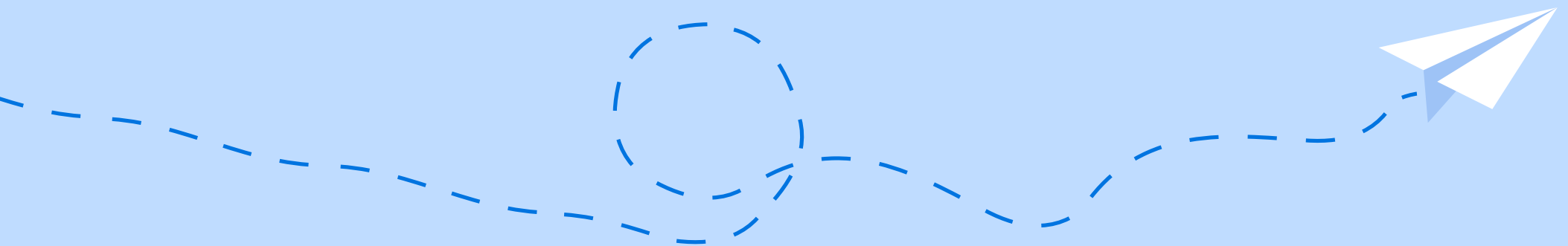
A mission is a **short** and **clear** statement that tells the world why what you are doing matters. It tells you how you are meeting that need. **It keeps you accountable to what you say.**

Now that you know what you want to do it is time to articulate it clearly in writing. This will take practice and you will likely write many times until you get it right. What does right mean?

- Short, clear, no extra words
- Says what you will do, with/for whom

If you have others on your team in founding your NGO, do all this work together. If you don't, gather some friends to help you think. An effective way to begin is through storytelling. This is a workshop you can lead with people to help you write an effective mission statement. (As an added bonus, learning to lead workshops such as this one is part of building your communication and facilitation capacity; both are essential to leading an organization).

Mission Writing Workshop



Core Values

Core Values are a way to intentionally set the unique culture of your NGO. Culture is what you believe and how you treat people. It is the expectations you have and the values that guide you. Every organization has a culture. It is best to create yours thoughtfully.



As the founder or member of the founding team you need to be thoughtful, pedantic and highly intentional in determining the Core Values of your NGO. When done well, your Core Values determine how you will go about doing your work. They will set the culture you want to create. Determining 3-5 core values for your NGO will help guide your NGO both internally and externally. **Your Core Values, and your mission, help you make decisions.** They should help you determine your organizational structure. Also how to: communicate, develop relationships, hire, train your staff, structure and build your Board, resolve conflicts, and serve your stakeholders. (Stakeholders are all the people that are impacted by your NGO. For example they are your employees, beneficiaries, board, and donors.)

[This post gives you examples of Core Values and real life examples](#)

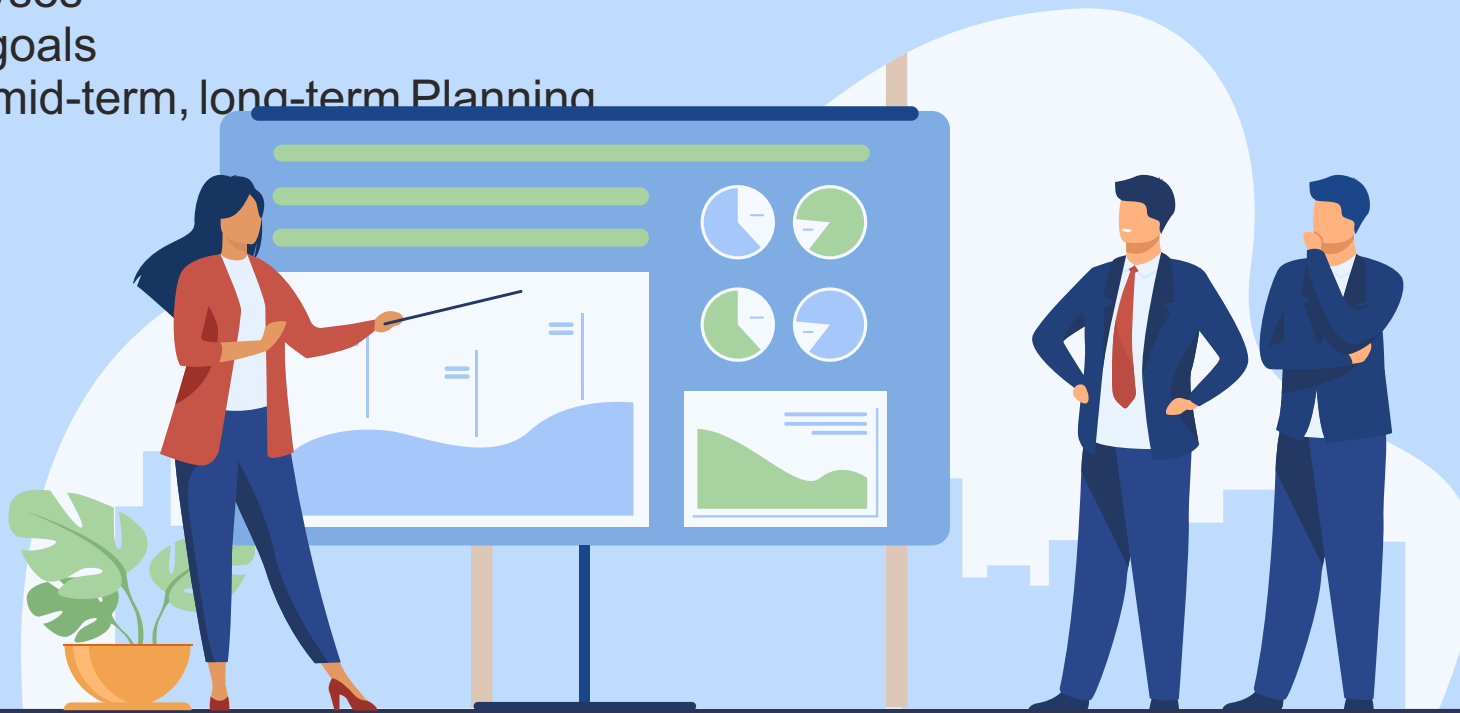


Strategy and Planning



There are different **practical tools** that can be used for strategy and planning phases of an NGO. Here the suggested ones will be as follow:

- Blue Ocean strategy
- 6 thinking hats
- Design thinking (see above Honing in on the Issue)
- The problem Tree (see above Honing in on the Issue)
- Business Model Canvas (BMC)
- SWOT Analyses
- SMARTER goals
- Short-term, mid-term, long-term Planning



A great starting point is: **Blue Ocean Strategy**

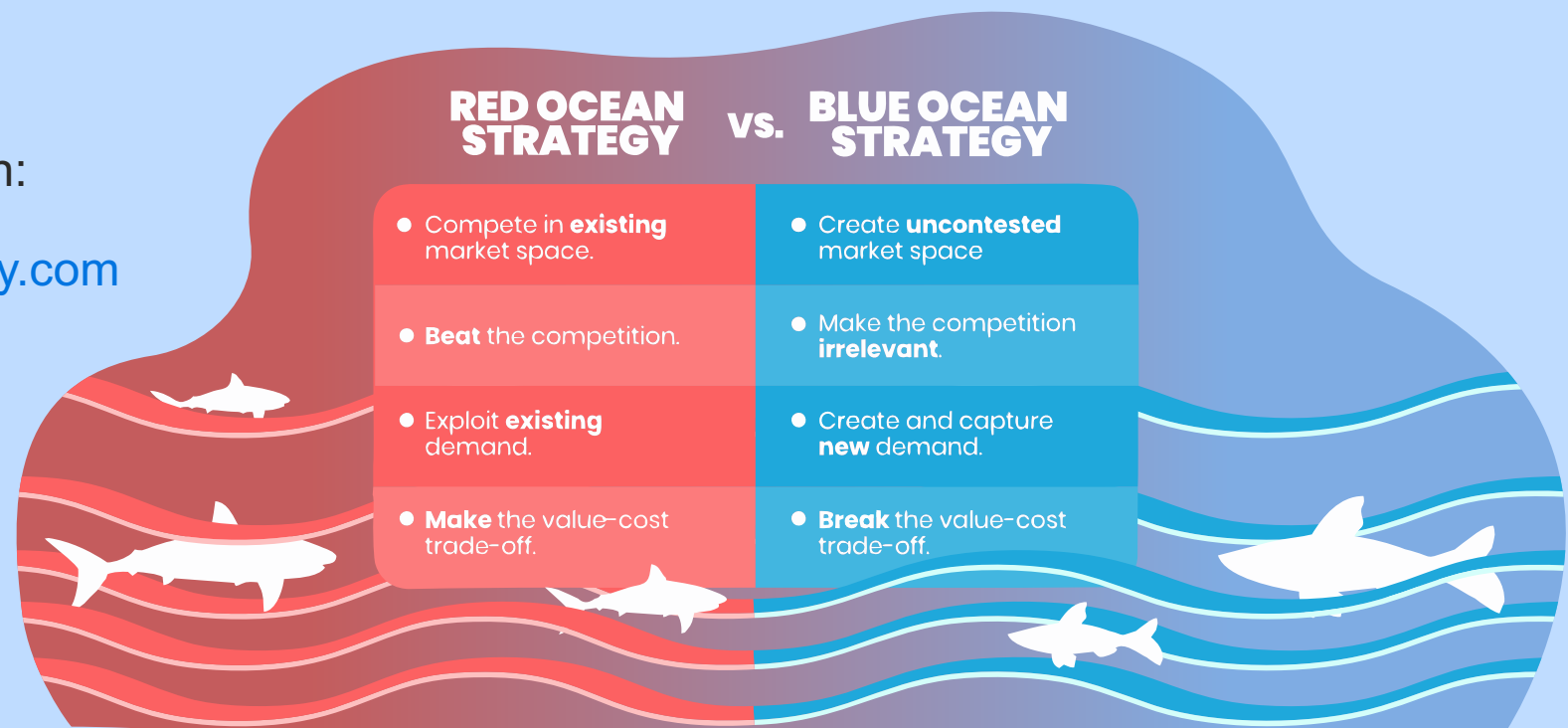
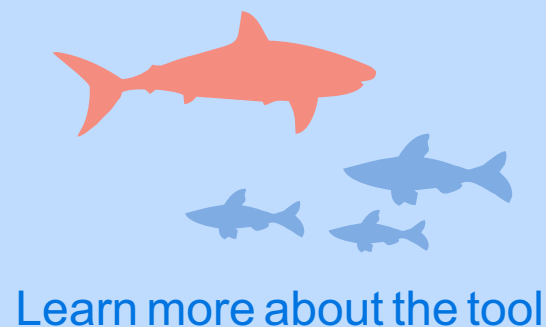
The tool triggers creativity and identifies niche services. It is a great tool to reveal the uniqueness of the organization - all of the ways it stands out.

The definition by the founders:

“BLUE OCEAN STRATEGY is the simultaneous pursuit of differentiation and low cost to open up a new market space and create new demand. It is about creating and capturing uncontested market space, thereby making the competition irrelevant. It is based on the view that market boundaries and industry structure are not a given and can be reconstructed by the actions and beliefs of industry players.”

Blue Ocean Strategy
is a nutshell - see the graph:

source: Blueoceanstrategy.com



6 Thinking Hats

The 6 Thinking Hats of Eduard De Bono is a tool that helps people engage in "lateral thinking," a method of solving problems indirectly, often in creative and surprising ways. Lateral thinking simply means a laser focused one.

Each hat has its role and meaning. In a group of 4-5 people according to the problems, different hats can be used.

- ① **Blue Hat is the process** - thinking about the design of the activity. What thinking is needed. Will all of the hats be included? It is the plan for the action. This is the Hat of the Facilitator of the group.
- ② **Green hat is for creativity** - brainstorming ideas, alternatives, possibilities are brainstormed, solutions to blackhat problems.
- ③ **White Hat stands for Facts** - all the information and data available. It is done in a neutral and objective manner. No emotions are involved.
- ④ **Yellow Hat stands for benefits** - all the positives are presented. What if ideas. What are the things that have already been done and worked well?
- ⑤ **Red Hat stands for Feelings** - here intuition is involved, hunches are welcome, how everyone feels about it. Logical thinking is excluded.
- ⑥ **Black Hat stands for Caution** - difficulties, weaknesses, dangers, spotting the risks - what could go wrong?

PROCESS**Blue Hat - Process**

Thinking about thinking.
What thinking is needed?
Organizing the thinking.
Planning for action.

CREATIVITY**Green Hat - Creativity**

Ideas, alternatives, possibilities.
Solutions to black hat problems.

FEELINGS**Red Hat - Feelings**

Intuition, hunches, gut instinct.
My feelings right now.
Feelings can change.
No reasons are given.

BENEFITS**Yellow Hat - Benefits**

Positives, plus points.
Why an idea is useful.
Logical reasons are given.

FACTS**White Hat - Facts**

Information and data.
Neutral and objective.
What do I know?
What do I need to find out?
How will I get the information I need?

CAUTIONS**Black Hat - Cautions**

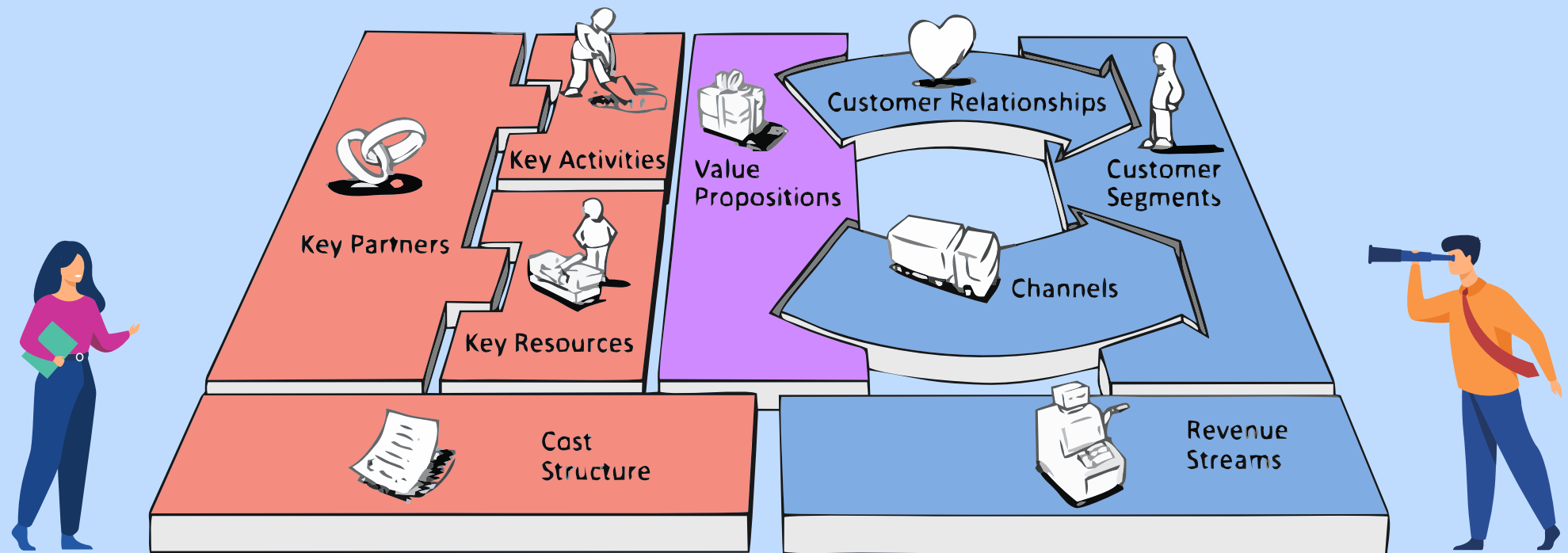
Difficulties, weaknesses, dangers.
Spotting the risks.
Logical reasons are given.

Business Model Canvas

Doing Business Model Canvas is absolutely essential for an organization. **At minimum once per year.** A business model is simply a plan describing how a business intends to make money. It explains who your customer base is, how you deliver value to them, how you make and spend money. The more frequently it is revised, the better - and better clarity will be achieved. **Your NGO isn't a business, but it doesn't mean that you don't have to pay attention to the model with which it operates.**



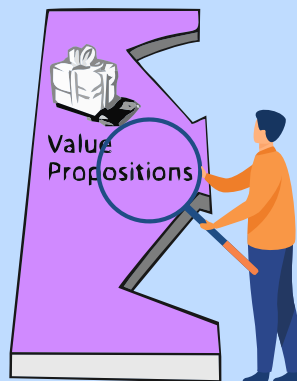
The business model canvas (BMC) lets you define these different components on a single page. **This one-page document contains nine boxes that represent different fundamental elements of your business** (Customer Segments; Customer Relationships; Channels; Revenue Streams; Key Activities; Key Resources; Key Partners; Cost Structure; Value Proposition)



The right side of the canvas focuses on the customer or the market (external factors that are not under your control) while the left side of the canvas focuses on the business (internal factors that are mostly under your control). In the middle, you get the value propositions that represent the exchange of value between your business and your customers.

The Customer Segments reflect who are the people who pay for or are the beneficiaries of the product/service. Many times they are the beneficiaries as well, but often customers and beneficiaries could be different groups - especially in the case of an NGO. **Customers here need to be seen as people, entities that fund the activities.**

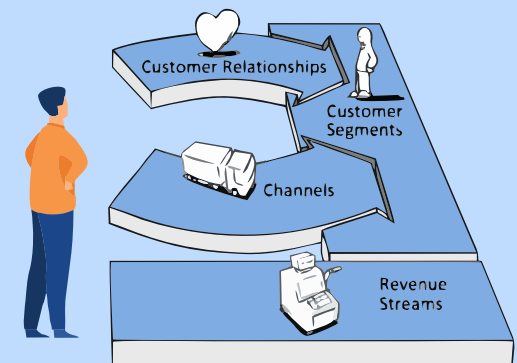
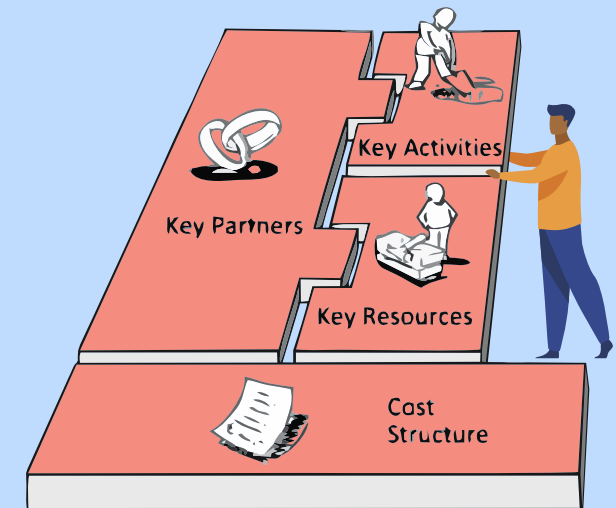
Customer Relationships, and channels are the bridges that connect your solution with the customers, and beneficiaries.



Value proposition is the reason for getting these funds - including the size of the issue, how it is addressed/what is the solution.

Key Activities, Key Resources, Key Partners is the infrastructure (all of the resources available) to the NGO, and **Cost Structure and Revenue Streams** are about the financials of the NGO.

[Here](#) one can learn more about the different steps, and segments:
[Here](#) is a BMC adapted to NGOs



Tools for Strategic and Operational Planning

SWOT analysis and how to use it

Now that you know who and why you are founding an NGO, you can begin the essential task of strategic planning. **It can be overwhelming to look at a problem as you determine how and what to do to address it.** SWOT, is a **clear systemic approach to help** you prioritize your objectives.

S – Strengths

W – Weaknesses

O – Opportunities

T – Threats

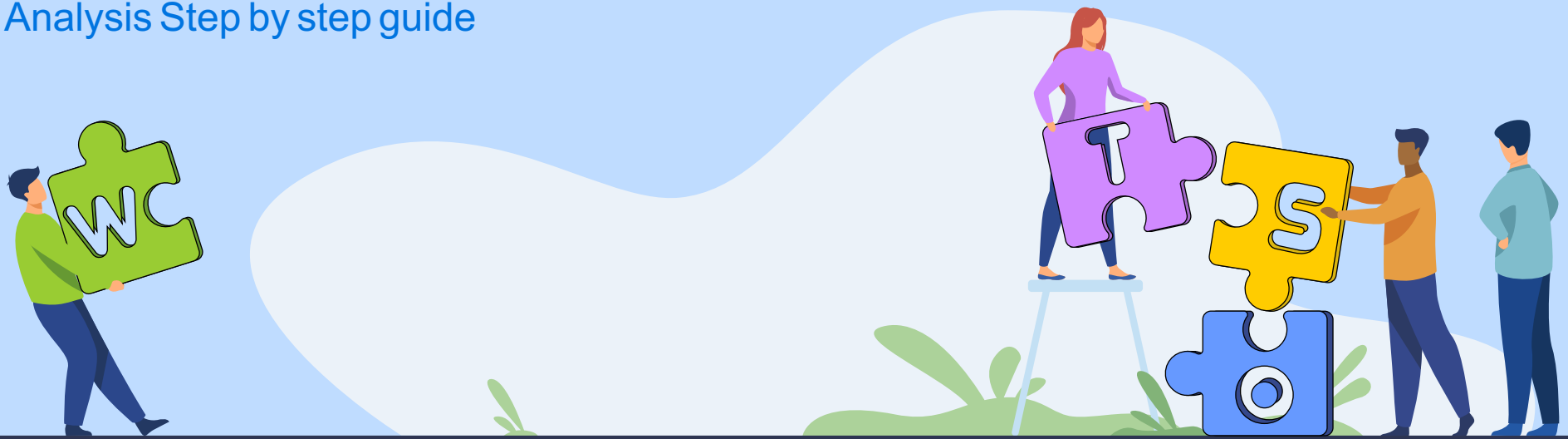


Strengths and weaknesses are internal to your company. They are things that you have some control over and can change.

Opportunities and threats are external. They are things that are going on outside your company, in the larger market. You can take advantage of opportunities and protect against threats, but you can't change them.

At this stage you do not have a fully functioning NGO with a diverse team to gather information for a SWOT. Instead, you will find different stakeholders and voices to provide insight into your initiative. **Remember, multiple and diverse viewpoints will strengthen your analysis and help you make sound decisions regarding your work.** Once you have a full team in place, you would assure that you have voices from every department in subsequent SWOT analyses.

SWOT Analysis Step by step guide



SMARTER Goals

“A goal without a plan is just a wish.”

Although most commonly known as SMART goals, you will learn about SMARTER goals. SMARTER goals are **a tool for effective communication, management and implementation of your goals.** Here it is important to understand the difference between goals and objectives.

Goals are the distinct results of the assignment or project.

Objectives are the determined steps that will direct full completion of the project goals.

S - specific

M - measurable

A - attainable

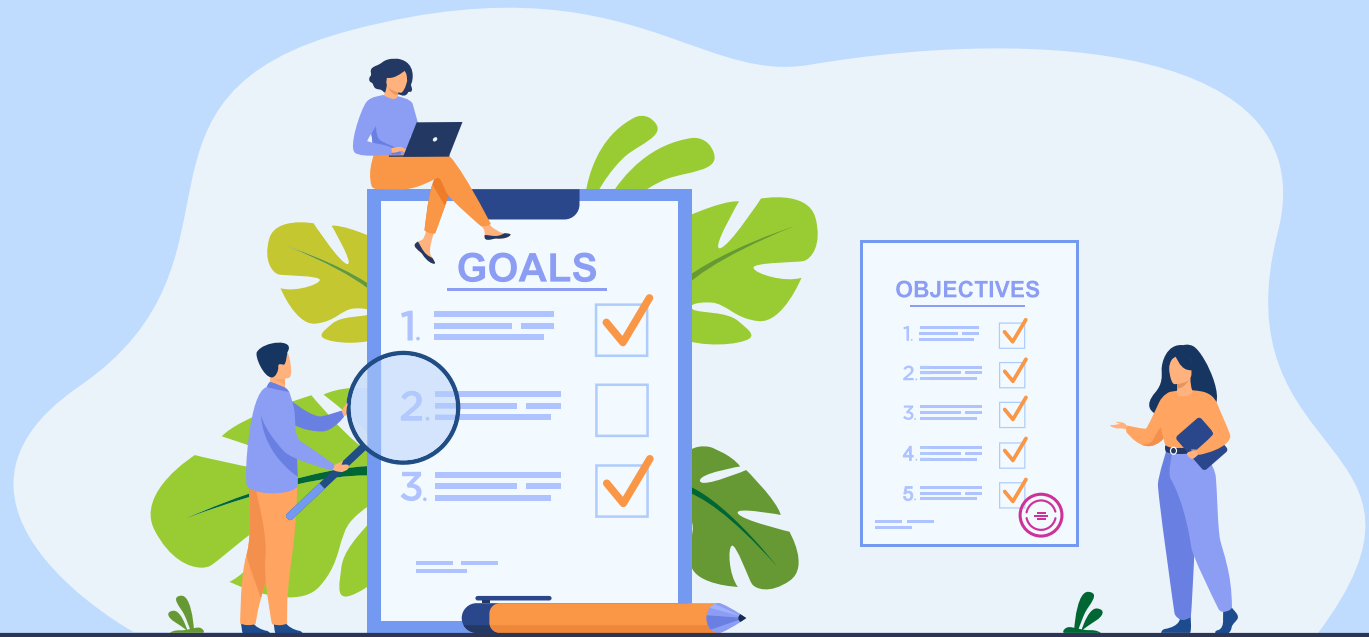
R - relevant

T - time-bound/trackable

E - ethical / ecological

R - resourced /relational

SMARTER Goals guide
SMART Goal Worksheet



Short-term, mid-term, and long-term planning

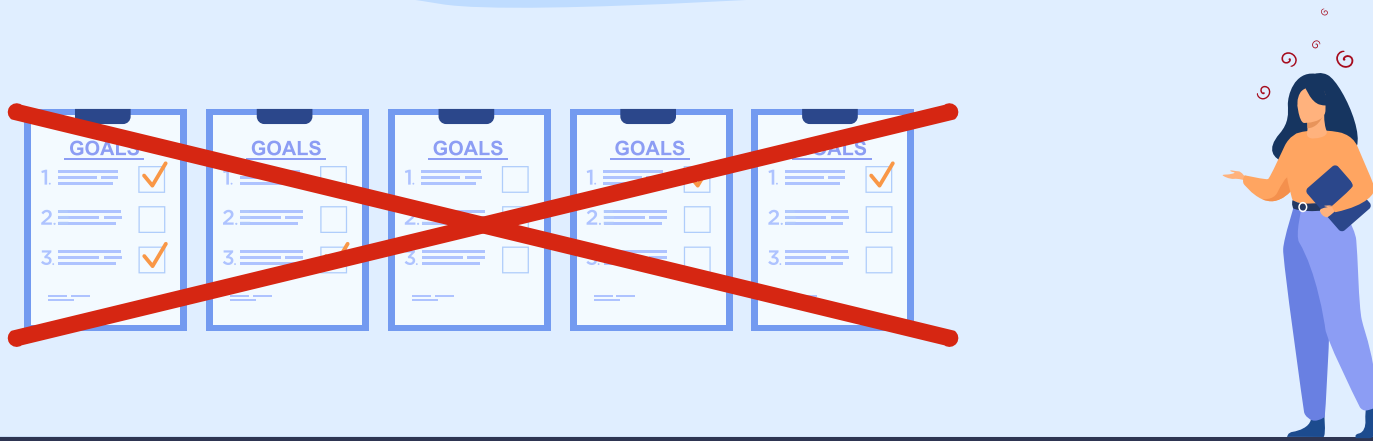
You might feel like you have to do everything right now. **The problem is that you cannot do everything at the same time.** You want to do high quality work to have the strongest impact. **Take a good look at the SMARTER goals you have created.** Some of them are long term or mid-term goals and some of them are short term goals. **Short-term** planning focuses on resolving present issues and takes 12 months or less. **Long-term** planning is more complex and tactical and takes more time, usually in the 5-year time frame. **Mid-term** planning generally falls into the 2-3 year timeframe.



Make sure that you don't have too many goals you are working on at one time. Once you have a basic idea of the time frame for each of your goals, go back and check that your time frames are realistic. Once you have confirmed your estimated time line you will likely need to **prioritize** your goals or even edit some out. Everytime you work on your goals and prioritize them you must **revisit** your strategic plan to assure alignment.

As you reach various goals and reassess your context and situation, you may find that you will need to tweak, refine, or even re-define existing unmet goals. **This process is on-going and iterative at all moments.** You want to stay focused and clear on where you are going and you balance that with flexibility, agility and calm responsiveness.

Remember that some of your biggest goals may be many years away. Those are often the most inspiring goals. **Keep those goals where you can see them.** On hard days they will help you focus and stay inspired.



Budget & Reporting, and Financing



Budget and Reporting

Financial Statements

A nonprofit/NGO financial statement is a fundamental tool for running and transparently reporting on your financial reality. It is a record of your NGO's income and expenses. Your financial statement also demonstrates that your NGO has spent income from donors, grants, membership fees and other sources as intended and which align with your mission.

Your financial statement should include:

- **Income:** Generally, this includes gifts, grants, membership fees, and income from fundraising events or investments.
- **Expenses:** Generally, this includes expenses in two primary categories
 - **Overhead expenses:** including management, general, and fundraising expenses (ex. rent, utilities), etc.
 - **Program expenses:** associated with the fulfillment of your mission (cost of supplies for programs you run/offer, etc).

Financial Statement Template



Funding Opportunities Including European Commission, Regional and National Funding



In order to access funding within the NGO sector you must first have a **clearly defined goal** which meets the criteria for Non Governmental Organisations in your own country plus that of the European Commission and a structure that complies with the legal framework. This means that **you will need to have aims and objectives; an organisational structure; a board of management and usually an innovative project idea.**

All funding is accompanied by reporting requirements which will necessitate organisations having the ability **to measure the outcomes and impact of their work.** An essential component should always be **the involvement of the target group** at all stages from ideation to evaluation.



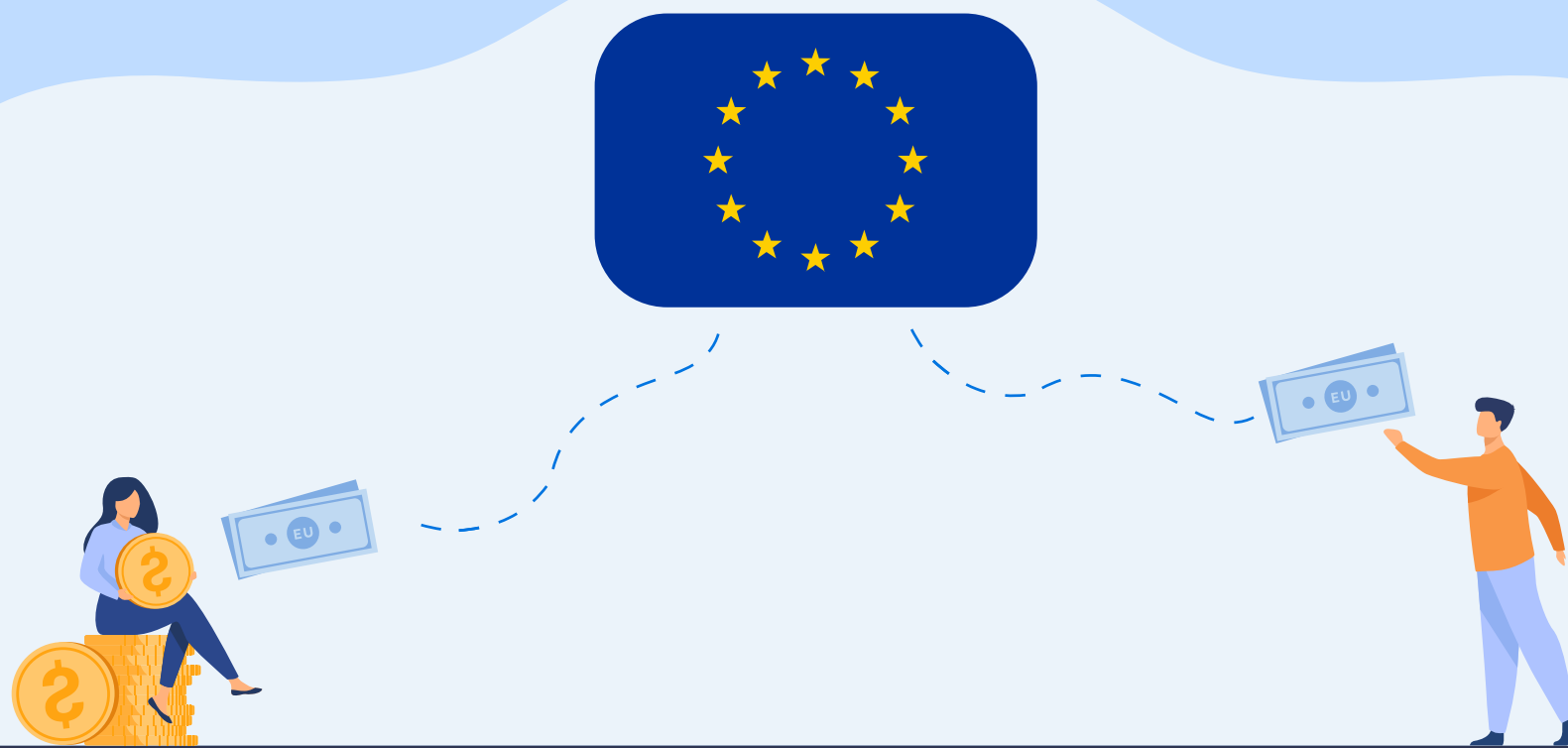
Funding can take many forms including:



Funding can come in at different times and different stages of your development, but be prepared to wait for it to arrive and that you will not always get it all at once.

The European Commission provides many opportunities to access funding which can be a mix of centralised and decentralised funding. Centralised programmes are funded from Brussels and decentralised programmes are funded from your country.

There are open calls to apply for funding and these are usually once a year although can be more frequent. Funding can be based on both a fixed amount for Unit costs or, what is called an intervention rate, which is where the EU provides a percentage contribution to the total cost of the project. Some of the funding programmes are:



- **Horizon Europe**

The Horizon Europe Programme is a new EU funding programme that provides funds for the period of 2021-2027. The programme has the objective of stimulating social action for a high impact on society. The programme is funded in 3 pillars and 1 horizontal priority.



- **Health Programme**

U4Health programme was created by the EU as a collective response to the COVID-19 pandemic. The programme wants to tackle the challenges brought to light by the pandemic in the health sector and it wants to promote action for a more “healthy EU”. U4Health focuses on 4 areas of intervention: Improve foster health, Protect people, Access to medicinal products, medical devices and crisis-relevant products and Strengthen health systems. Within these 4 thematic areas we have a total of 10 actions.



- **European Structural and Investment Funds (ESIF)**

- **Cohesion Fund**

The Cohesion fund focuses on actions in the field of environment and transport infrastructure. The Fund is accessible only to a limited number of EU countries with the objective of helping them strengthen the economic, social and territorial cohesion of the EU.

- **European Regional Development Fund (ERDF)**

The ERDF programme was created to address the imbalances between the different regions of the countries part of the Union. The objective has been to be closer to citizens and their needs. The investments wish to make all regions of the EU competitive, more connected, greener and closer to citizens.

- **European Agricultural Fund for Rural Development (EAFRD)**

The objective of the fund is to provide to the rural areas a direct and immediate support to answer their needs. The EAFRD fund supports rural development and innovation based on 6 specific pillars that orient the action and make the support cohesive and effective.

- **European Maritime, Fisheries and Aquaculture Fund (EMFAF)**

The EMFAF funds are targeted at improving the management of the maritime and aquatic resources like for example the improvement of fishing practices within the EU countries to make them more efficient and sustainable.

- **European Social Fund (ESF)**

The new ESF+ has been improved after the pandemic with the objective of supporting employment-related projects and invest in the EU human capital (job-seekers, workers, young people) with a stronger focus on the socio-economic consequences the pandemic has brought.

- **Environment and climate action (LIFE)**

The LIFE programme has been introduced to produce actions in the field of environmental protection in order to achieve real results with actual impact on climate change. The projects must address one of the 4 priorities: Nature and biodiversity, Circular economy and quality of life, Climate change mitigation and adaptation and Clean energy transition. You can download the regulation [here](#).



- **Erasmus+**

The Erasmus+ programme is one of the most fruitful and innovative funding programmes provided by the EU. Erasmus+ was established 35 years ago and provides individuals, schools, universities and organizations with the chance to participate and create a number of projects with different social objectives. The Erasmus programme is organized in 5 “key actions”:

- **Key Action 1 (KA1) Learning Mobility of Individuals.** This action allows schools, universities and organisation to create projects that allow individuals to have a learning experience abroad with the objective to prepare themselves and improve their knowledge, skills and competences.
- **Key Action 2 (KA2) Cooperation among organisations and institutions.** This action supports projects with the objective of developing, transferring and/or implementing innovative practices that can support the EU countries on a local, regional, national level with the objective of benefitting the whole Union.
- **Key Action 3 (KA3) Support for Policy Reform.** The EU wants to promote the involvement of citizens, especially young people, in the democratic life of the EU. With this Key Action organisations can develop the basis of policy-making and support networks and tools for new policies implementation.
- **Jean Monnet** The objective is to inspire action within the EU and provide opportunities for teaching, research, learning and policy debates.
- **Sport.** The sport action has the objective of promoting participation in sports, physical and voluntary activities for the development of individuals.

In addition to the key actions of the Erasmus+ programme detailed above there are the following targeted specifically at Young people and Youth organisations and these are:

Young entrepreneurs - Erasmus+ Erasmus for Young Entrepreneurs is a cross-border programme facilitating the exchange of entrepreneurial and management experience.

Young volunteers - European Solidarity Corps helps young people take part in projects that benefit communities, either abroad or in their own country.

Young farmers - European Agricultural Fund for Rural Development Supporting the next generation of European farmers

Young unemployed - European Social Fund+



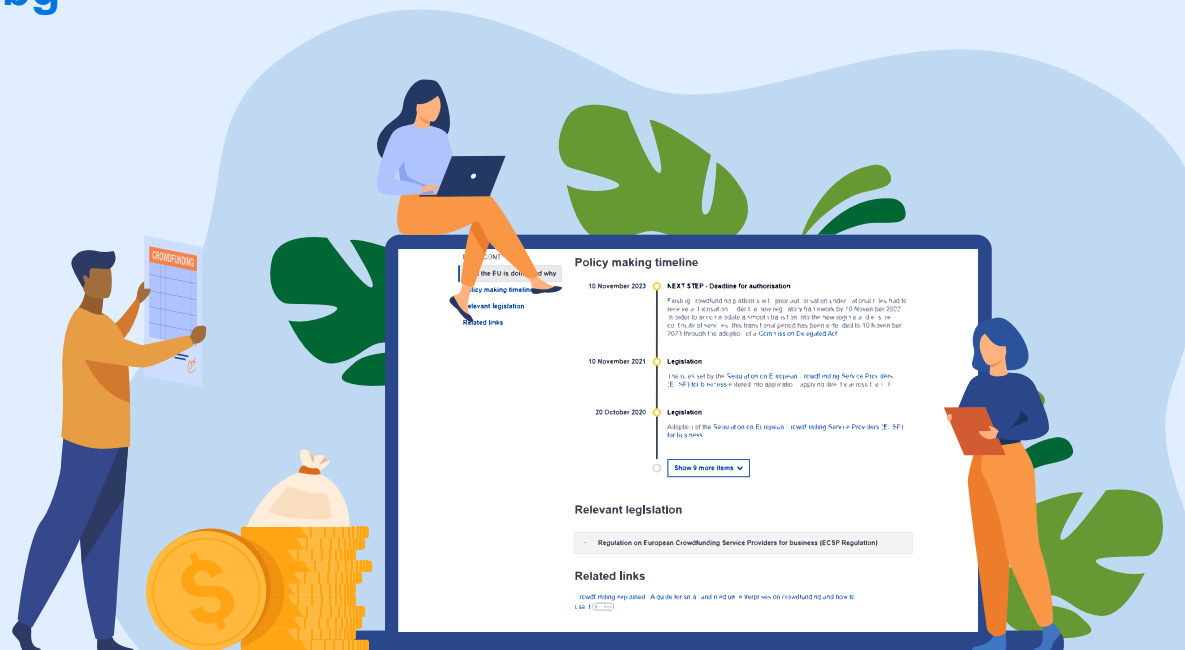
Fundraising Platforms

European Commission funding is managed from a centralized platform in Brussels where you will find links to the de-centralised actions. Crowdfunding is a new way of raising funds and the EC provides information on their platform link below. Funding can also be accessed via municipalities and regions in addition to local Trusts, Foundations and Grant-Giving philanthropists.

European Commission funding platform

Crowdfunding

You can also search if there are local fundraising platforms in your country. For example, in Bulgaria there's platformata.bg



Grant Budgeting and reporting

In order to access funding it will be necessary to provide a budget for your Project/Organisation and this can be provided either using Excel Spreadsheets, or Templates provided by the funding body.

It can also be provided using software packages or other online tools. A budget detailing all costs required to deliver the outcomes for the organisation/project and will usually be split into **Direct and Indirect costs; Fixed and Variable Costs and should include staff costs directly related to the Project**. It is essential that all costs are included even if funding is not being requested for these items. In NGO's it is vital that the full cost is calculated and included within the budget and this is called Full Cost Recovery. **Having a clearly defined budget will assist monitoring, evaluation and reporting.**

Reporting methodologies are generally determined by the funding body and they will usually provide the format and specify the timescales for reporting back. **It is essential that clear and accurate records are maintained and that receipts are retained and stored securely.** There are many software packages available to assist with financial record keeping, but you can also keep a copy in excel.



Tips and Tricks for writing funding applications

- Make sure that your project/services fits the funding criteria
- Read the application guidance carefully
- If you are sure that your funding need is a good fit for the fund then prepare for completing the application, but make sure that you're not changing your initial idea just to fit the grant requirements
- If the application is online prepare it in Microsoft Word or Google docs, so that you can save your work regularly
- Ensure your aims, objectives and impact are clearly identified
- Produce a project plan
- Prepare a clear and detailed budget identifying which items you are requesting to be funded from this application and which are coming from other sources
- Ensure that your answers clearly match each criterion in the scoring matrix
- Ensure that you don't ask for funding for costs which the funder says they will not fund



Country Specific Funding and Processes

Each country has its own funding opportunities, criteria and processes. Below you will find country specific information for the partner countries in Causeland Erasmus+ Project. You will need to research these funding opportunities in your own country.



BULGARIA



<https://www.ngobg.info/bg/financing.html>

<https://eumis2020.government.bg/bg/s/Default/Index>

<https://ncf.bg/bg>

<https://www.eeagrants.bg/>



ICELAND



Rannís administers the main public competitive funds in the fields of research, education, innovation and culture within Iceland.

EEA

Nordic Co-operation





ITALY



International Youth Foundation

Supporting young people as creative and innovative contributors to local society.
[supporting youth entrepreneurship in italy | oecd](#)

[Italy Archives - fundsforNGOs](#)

[COUNTRY SHEET ON YOUTH WORK IN ITALY](#)



ROMANIA



Some financing examples include financing for social initiatives

In Romania, EU funding can also be accessed through a national platform [here](#) and more specifically [here](#)

A national program called Start NGO exists and, under the shape of a contest, participants could get support with starting their own NGO

A vast number of financing opportunities are also centralized [here](#)

Iceland Lichtenstein and Norway grants



Tips for Finding Financing

There are several things you need to keep in mind when looking into finding financing for your NGO. Below are several tips for when preparing a funding application:



The **first tip** is adequate preparation. Before starting looking for funding options, write down your project idea - the aim, specific objectives and expected outputs of the project and highlighting clearly the target audience that should benefit from the project. Remember to **highlight** single words, short sentences and the focus theme (-s). See below a template for preparing a project idea.



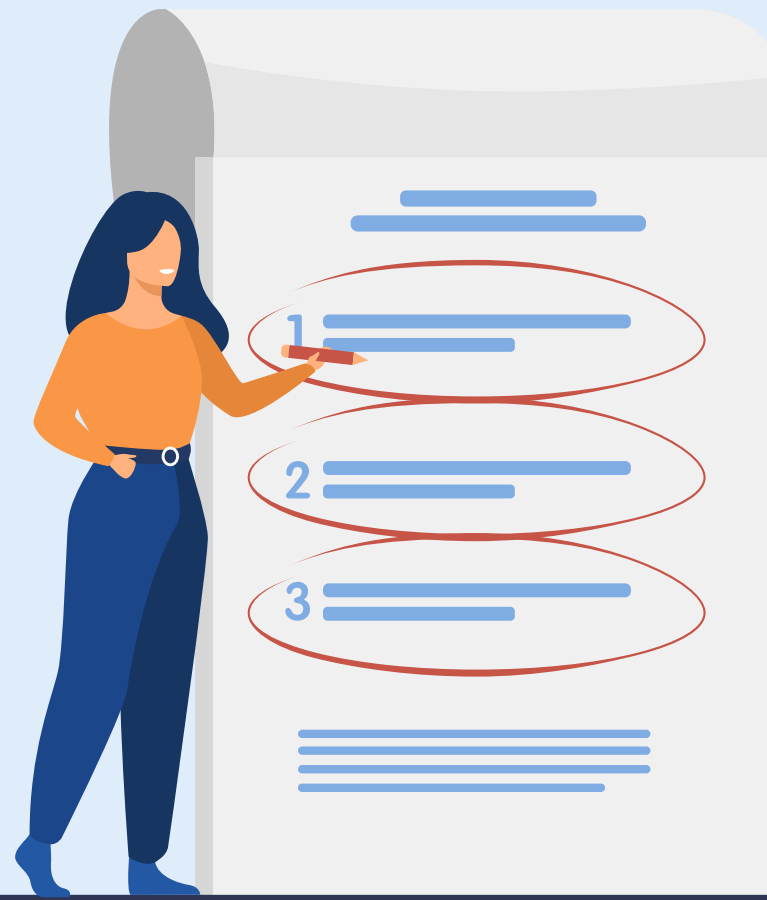
The **second tip** is a careful read of the aim(-s) and listed priority areas of each funding programme. Too often people don't read the application guidelines carefully enough resulting in their project idea not "fitting" within the funding programme structure. Many ideas could be adapted to fit different funding programme but that requires adequate preparation.



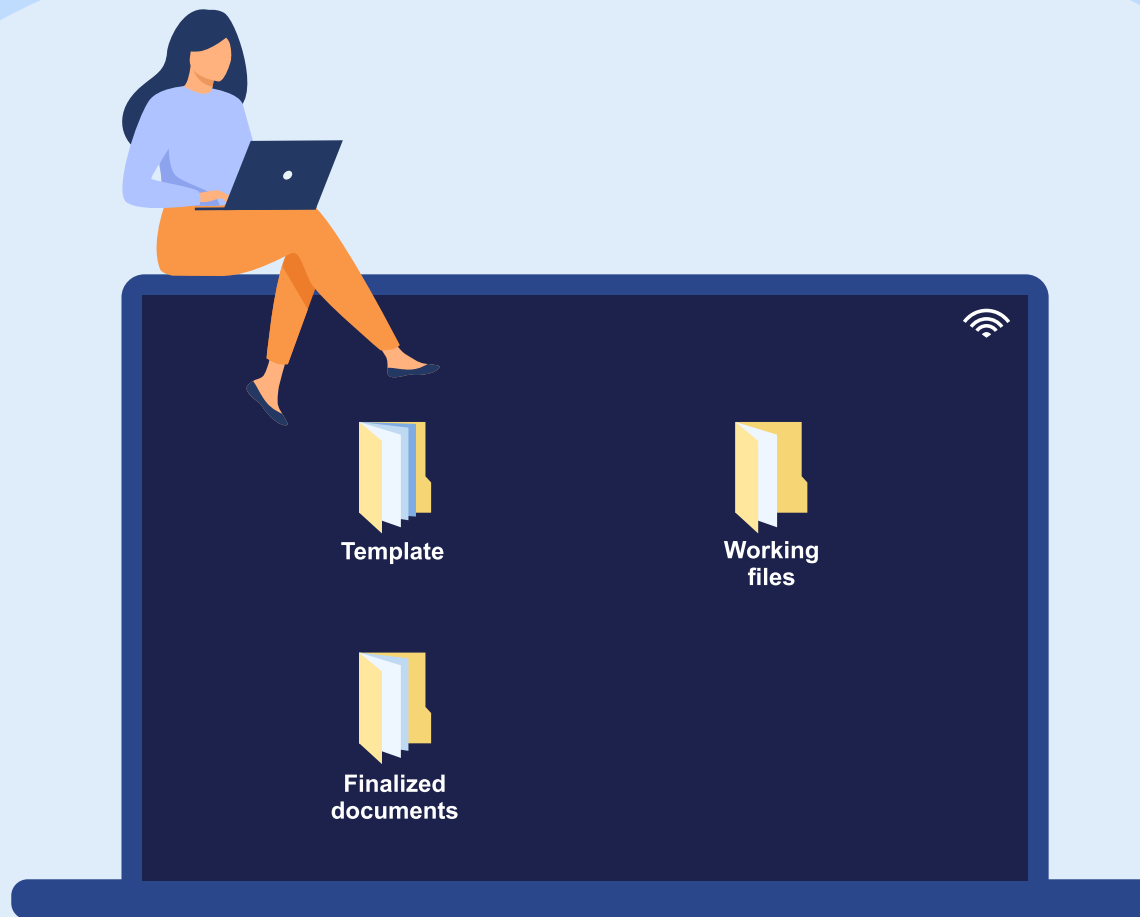
The **third tip** is to check carefully if you're an eligible candidate. Sometimes the programs have requirements on years of experience, number of projects implemented, legal status, etc.



Tip four: Create a checklist with everything you need to prepare for the application. All the required documents, registrations, offers and whatever else they might be asking you for. Also write for yourself in what format they ask you to provide the documents, should they be stamped and signed? This will help you keep on track and provide everything in the needed format.



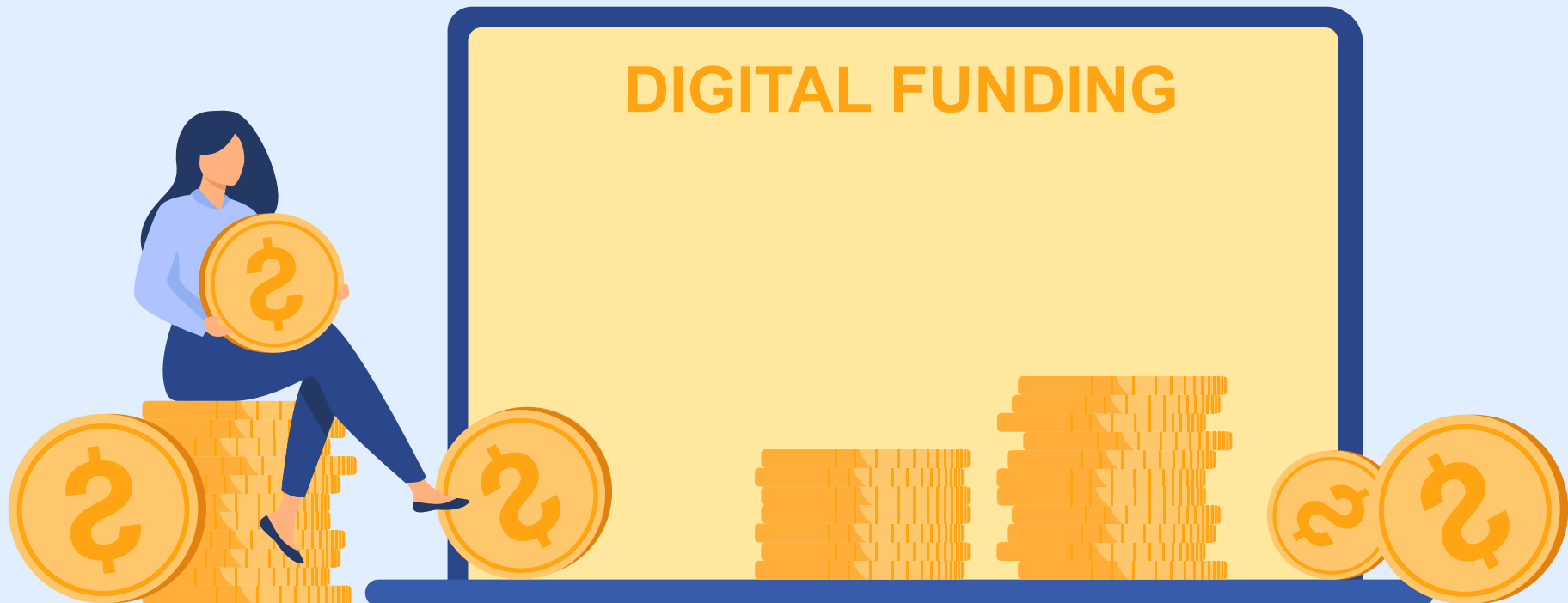
Tip five: Create folders: one with the templates provided by the funding organization, one with the working files and one for the finalized documents you'll send. In this way you'll minimize the chance to send a document that's not with the final edits and also you'll have an overview on the application progress. Keeping the templates will help you in crisis situations such as the need to rewrite a document at the very last moment.



Digital Fundraising

Digital fundraising can be an important part of your fundraising arsenal. If you choose to embark on a digital fundraising campaign it is important to understand the space, and have a competent team mate to run the campaign. This guide will help you assess your online fundraising capacity, set fundraising goals, and implement your plan successfully.

Guide: Build your Digital Fundraising Strategy



Team Leadership & Management



Strategic Leadership Team Building

Strategic Leadership takes deep and honest reflection on yourself first. Why? Because you need to build a great team and you cannot do it alone.

A great team needs at least the following. Someone who:

- inspires others to action (vision and communication)
- Identifies potential talent
- develops the talent you recruit
- creates workable and replicable systems
- manages the finances
- has great emotional intelligence
- translates vision into action (see the separate and necessary steps along the way to the goal)
- raises money



Take the time to honestly assess where your strengths lie and then find and recruit the people who fill in the team. Your primary job as a leader is to recruit the right people into the right roles. Don't be afraid of being honest - you may discover that a new recruit will be better at being the primary face of your NGO.

Within your team you also need to assure that there are strong managerial skills, including:

- Being Able to Execute a Vision: take a strategic vision and break it down into a roadmap to be followed by the team
- Ability to Direct: day-to-day work efforts, review resources needed and anticipate needs along the way
- Process Management: establish work rules, processes, systems, standards and operating procedures. It will make your life so much easier!
- People Focused: look after your people, their needs, listen to them and involve them



Time Management & Work-Life Balance

You are the leader of your NGO and how you manage your work life balance is the culture you will set in your NGO. **It is essential for any leader to understand that telling employees to care for themselves and make sure they have a healthy work-life balance will not take place and shape in your organization if you don't model it as well.**

The NGO sector is often filled with passionate individuals who are driven by personal and societal missions. Their desire to do good in the world can, oftentimes, lead them to overwork and most severely, burn themselves out. **You want to build a sustainable organization and one of the most important ways of doing that is making sure that you and your team do not burnout.**



Sometimes the most challenging aspect of this can be understanding this basic truth: **Even if you and your team worked 24-hours a day, there would still be work to do.** So, you have to know to draw the line, end the day, enjoy the weekend, as well as allow for time within your team for socializing.

Here are a few ideas to consider as you work to create a healthy work-life culture in your NGO.

- Offer remote work and flexible working when appropriate
- Look for results and high quality work, not hours
- Make sure that you and your team take breaks during the day (providing opportunities for your team to sit and drink coffee together, also creates opportunities for new and generative thinking among your team - an extra benefit).
- Review workload regularly for yourself and with your team
- Support parents in your workplace, employees caring for elderly, etc



Project Management

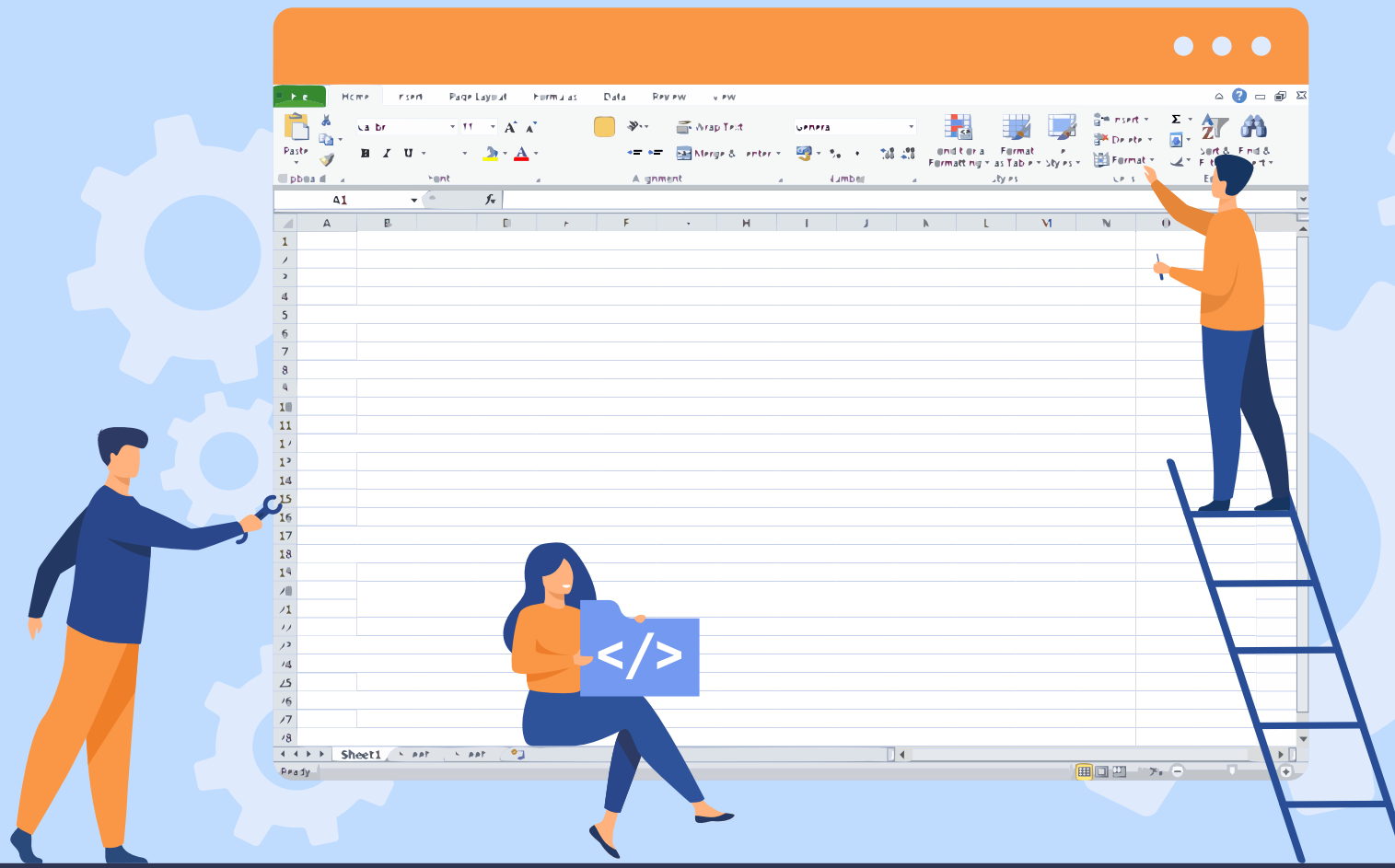
Project management in NGOs can be overwhelming and it requires specific clarity, defined terms and shared tools to manage effectively. **Often, an NGO is managing several projects, each funded in different ways and which require different reporting structures.** This can quickly become incredibly challenging within your NGO. It takes time to develop your internal strategies and you will certainly begin with ideas that you will need to tweak as you and your team work together. There are effective strategies and tools to use as you begin. Well managed projects utilize strategies to assure: timely completion and delivery of outcomes, effective implementation of the project, enhanced visibility, reduction in confusion, and timely modification of activities as necessary.



As a successful NGO you want to assure that you are best serving your target audience and/or beneficiaries by providing them with high quality services. Once you have a defined project and the funding you need to manage the project in a way that fulfills the requirements of the funding body and/or donor/s. **When you are managing a project you are managing: implementation, communication, external risks, budget and resources.** In addition, during the project timeline your NGO may face issues arising in the political climate, and evolving in culture and community.

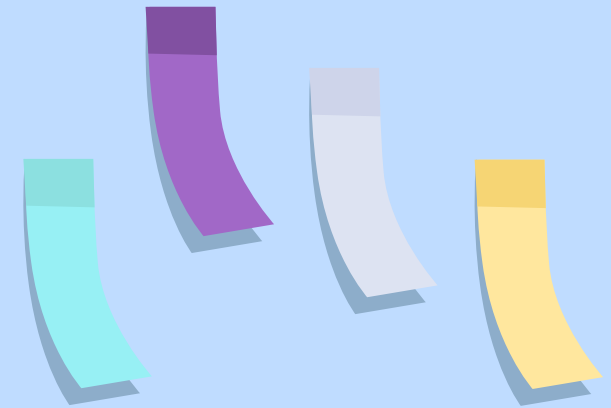
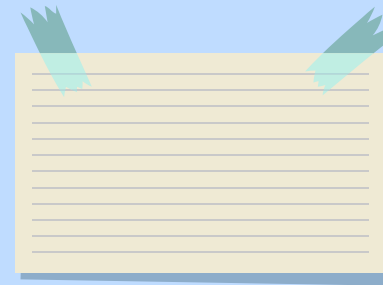


There are several effective **digital project management tools** that can help you manage this work or to create your own in excel. **Remember**, each tool will take time to learn and to use most effectively and you need to make sure that the entire project team is comfortable with the tool. **The tool can only be effective if the team can use it well and often.**

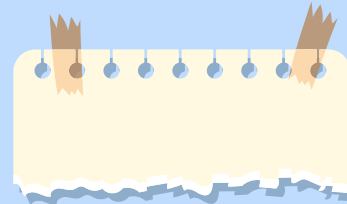


A **GANTT chart** is a common chart used for project management (and can be a requirement for your grant applications). A GANTT chart **is a visualization of your project plan over time**. At a glance your GANTT chart will capture and communicate:

- The breakdown of tasks in the project
- when each task begins and ends
- how long each task will take to complete
- who is assigned to each task
- the relationship between tasks
- the progress of the work
- the full timeline of the project from beginning to end

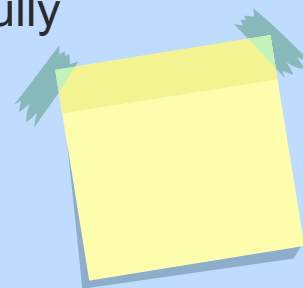
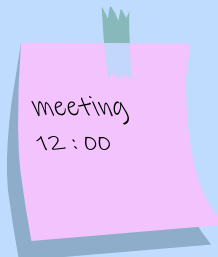


A GANTT chart is a clear and transparent method for seeing and communicating how to deliver your project on time and on budget, which means both your team and stakeholders are on the same page from the beginning.



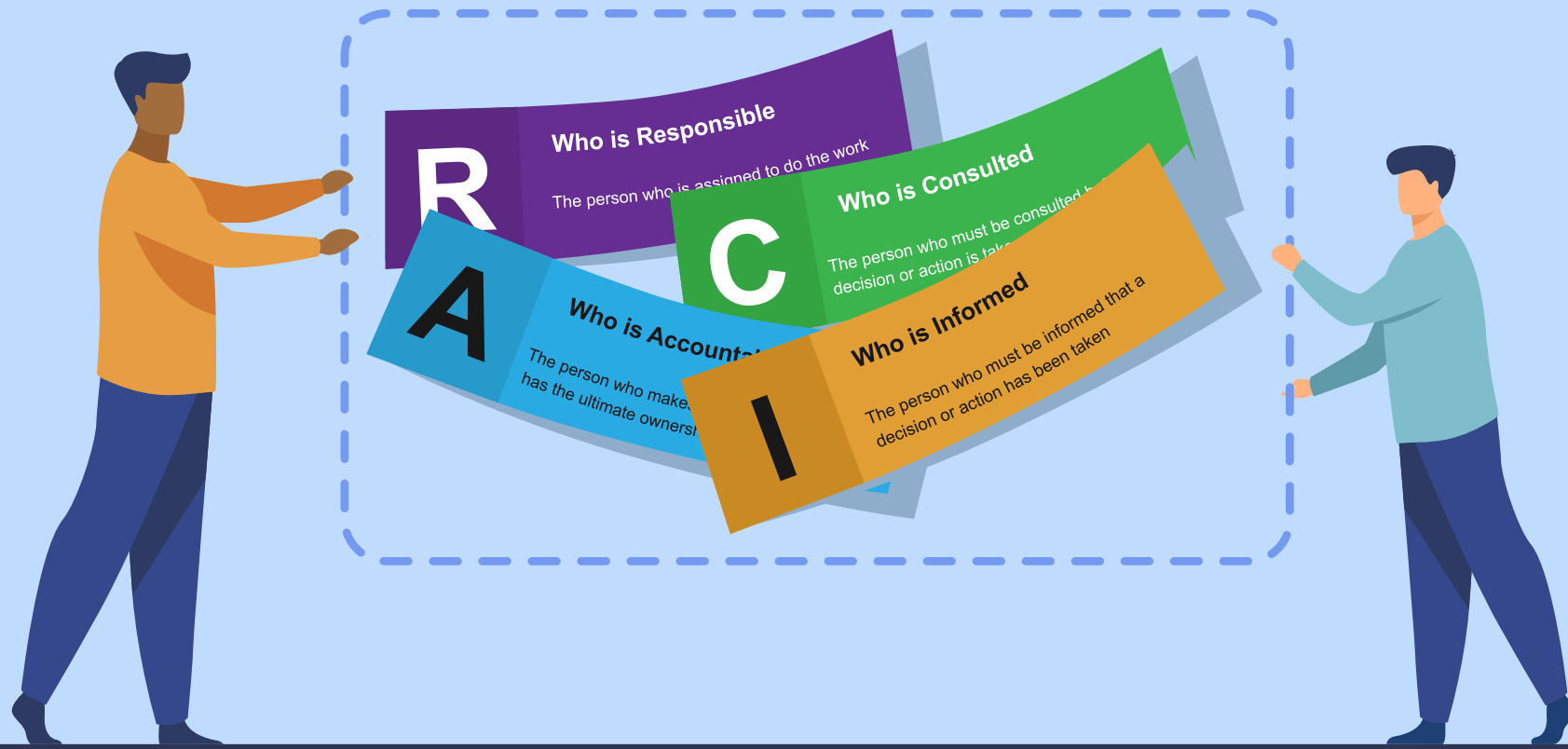
GANTT chart template

This site offers a list of open source project management tools and is worth reading carefully



The RACI Matrix aka Linear Responsibility Chart

RACI helps engage people in a discussion around roles and responsibilities. It is crucial to review a RACI matrix at least once a quarter to make sure everyone is on the same page. If something is not going according to plan, the roles and responsibilities may need to be changed. **RACI provides more clarity on who does what for each task, and coordinates the team effectively.**



Starting with:

R that stands for **Responsible**. This is the person who is assigned to do the work, who will actually get it done.

A stands for **Accountable** - this is the person who makes the final decisions, whoever has the ultimate ownership; he/she will ensure the task will be delivered on time - if something goes wrong, they need to be able to explain what happened and what is to be done. One person can be Responsible and Accountable.

C is for **Consulted** - the person who needs to be consulted before the decision is made with the purpose of having know-how before acting.

I is for **Informed** - the person who needs to be informed that a decision or action has been taken, and thus will have an effect on his decisions and everyday activities.



Conflict management

The work of conflict management should be front loaded. As the leader, you help set the culture of your organization and create a sense of a strong team and community based on shared agreements for meetings, work completion and communication. **Understanding the work styles in your team help reduce potential conflicts.** Much unnecessary conflict can be avoided simply with clear and accurate written and verbal communication. Not all conflicts can be avoided and you also want to create a culture where healthy, productive conflict can thrive.

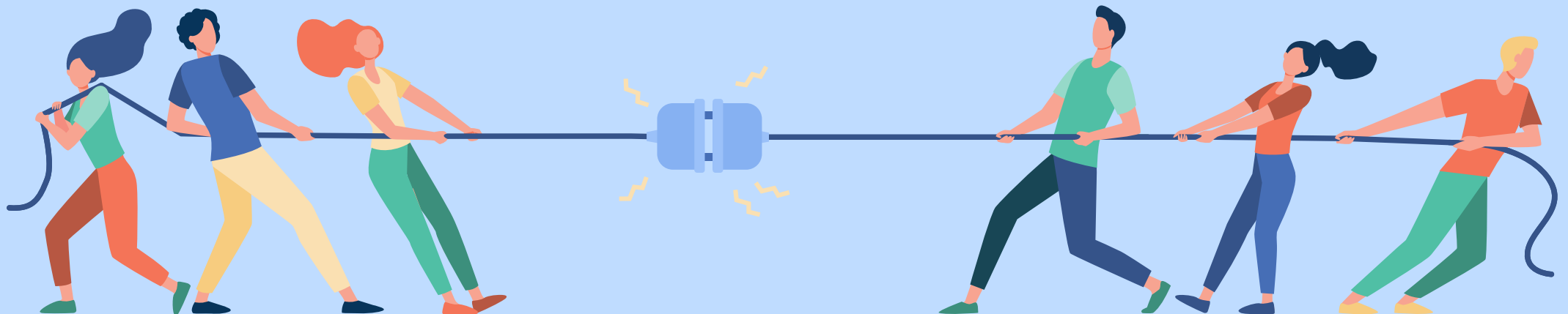
It is human nature to disagree, and disagreements are healthy when approached effectively. Conflict management is the process by which disagreements are resolved, where negative results are minimized and positive results are prioritized.



Each person has a different way of handling difficult situations. Fight, flight, freeze, and fawn are the four most basic stress responses.

- The **fight** response is your body's way of facing any perceived threat aggressively.
- **Flight** means your body urges you to run from danger.
- **Freeze** is your body's inability to move or act against a threat.
- **Fawn** is your body's stress response to try to please someone to avoid conflict.

It is essential for each member of the team to reflect on their own threat response and for the responses to be discussed within the team, so that everyone can understand how each person may initially respond to a conflict. **This knowledge will help the team and/or individuals work toward a resolution.**



Imagine, as the leader, you have a conflict between people with different responses.

- Your first task is to get everyone on the same page with a process for addressing the difficult situation.
- Then you have to clarify its source. Defining the cause of the conflict will enable you to understand how the issue came to grow in the first place.
- Listen actively and let everyone have their say. Give each party equal time to express their thoughts and concerns without favoring anyone.
- After listening to the concerns of all parties, take time, and investigate the case.
- Then identify ways to achieve the common goal. You need to sit down with all parties and discuss how to meet the common goal, which is managing and resolving the disagreement.
- Find common ground. Afterward, determine the responsibilities each party has in resolving the conflict.
- Look for lessons you can learn from the conflict and how you handle it.

Be careful!

Eliminating conflicts entirely would cause its own problems: there would be no diversity of opinions, and no way for you to catch and correct mistakes.

Communication style Assessment - **Leadership Compass**
Creating **Team Working Agreements**



Communication

Communication and marketing are absolutely issues that need to be thought about, strategize about and plan for. In this section of the guide only certain aspects that fall into this large category will be addressed and they have been chosen as some of the key issues in communication you need to consider as you establish your NGO. They are: making a pitch, intercultural understanding, and digital competencies.



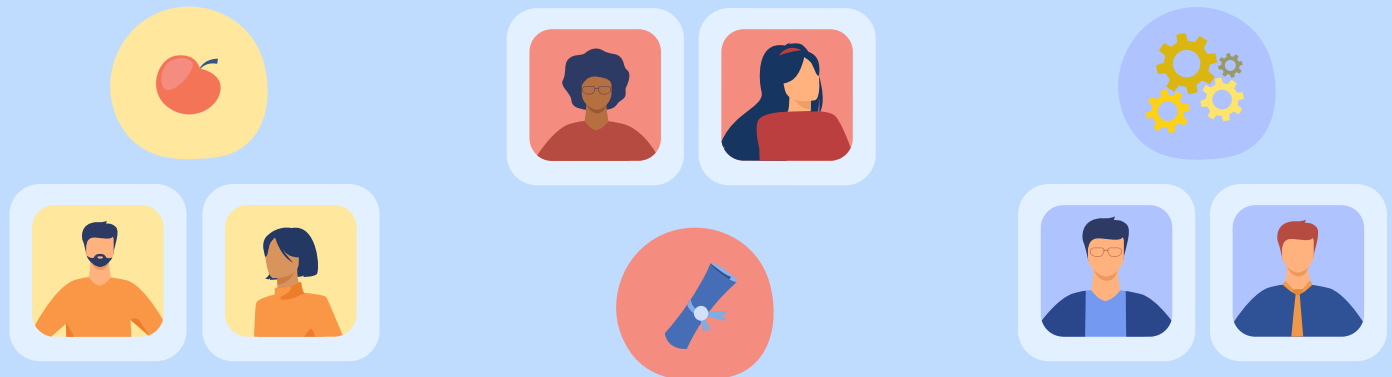
Making a Pitch

Pitching is about selling your idea/concept/project to someone who knows nothing about your organization or project in a clear, succinct and engaging way. Pitching helps others understand, not only what you do, but why you are passionate about what you do. A well developed pitch can expand the reach of your organization and help you gain funding and/or new partners.

As you prepare your pitches, work on at least two versions (**remember different audiences need different messaging**). The first is more in depth, may have a presentation and it is used for formal situations and pitches. The second is commonly referred to as an “**elevator pitch**”. It’s no more than a few minutes and is used to capture attention quickly in informal situations.

In our fast and busy world where we’re bombarded with information from all directions **you can use the pitching in order to grab the attention of potential partners and funders. Your goal is to give them the most important information and get them interested in asking the next question.**

How to Pitch a Brilliant Idea 9 Tips for a Great Pitch



Intercultural understanding and communication

Intercultural understanding is an essential part of living with others in our diverse world. It assists us to become responsible local and global citizens, living and working together in an interconnected world. **Intercultural understanding encourages awareness of our own cultural identity and helps us cultivate mutual respect.**

We're all different. We have different languages, education, beliefs, experiences, perspectives and behaviors. Culture defines how we behave & interact. **Most of the time we don't even know that we understand things in different ways until a misunderstanding occurs.**



That's why when you communicate with a person from another culture it's important to make sure you mean the same things saying the same words. **You can ask things like: What do you mean when you say “soon” and “in the beginning of the next week”? You think it's obvious? Well, in some countries as Israel the week starts on Sunday.**

That's why **it's important not to make assumptions** when communicating in a multicultural environment. **Ask questions, explain what you mean, be patient and curious.** Intercultural communication should foster mutual respect and trust, there is no space for hate speech, but for understanding and diversity.



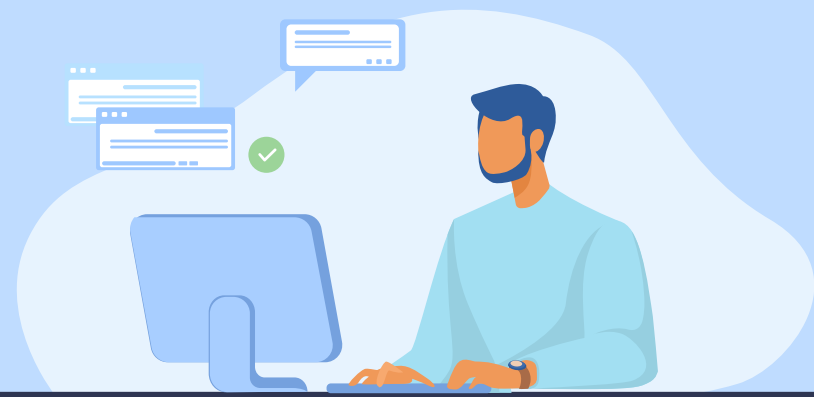
Digital Competencies and Communication



Current trends, challenges and stakeholders (European Digital Competence Framework, trends and challenges, stakeholders mapping)

Effective use of digital communication tools (e.g. video conferencing, social media) or interactive learning tools (e.g. online quizzes) enable NGO's to re-invent and sustain their work practices. The digital transformation tied to the success of digital work is understood as a multi- stakeholder and inclusive process encompassing the co-design, implementation and utilization of people-centered digital technologies with all of your relevant stakeholders (local communities, public institutions (Eu Commision, National Agencies, municipalities), youth councils, facilitators, ministries, volunteers, influencers, youth, researchers, scientists, other NGOs, social enterprises (CSR), trainers,etc).

At a European level, there are some resources that can help both citizens and practitioners assess their digital competence. For example, The **Digital Competence Framework for Citizens (DigComp)** provides a common understanding of what digital competence is, and outlines what a digitally competent citizen and employee needs.



Having digital technologies is a central part of your work. You and your team must together possess the necessary digital competencies for a host of reasons, including but not limited to: **workflow, project management, communication, marketing, and effective outreach.** Nowadays digital communication is a key pillar in every sector. Digital communication improves the internal communication within an NGO and also the external communication with different partners and collaborators. It also makes work much easier and more efficient.



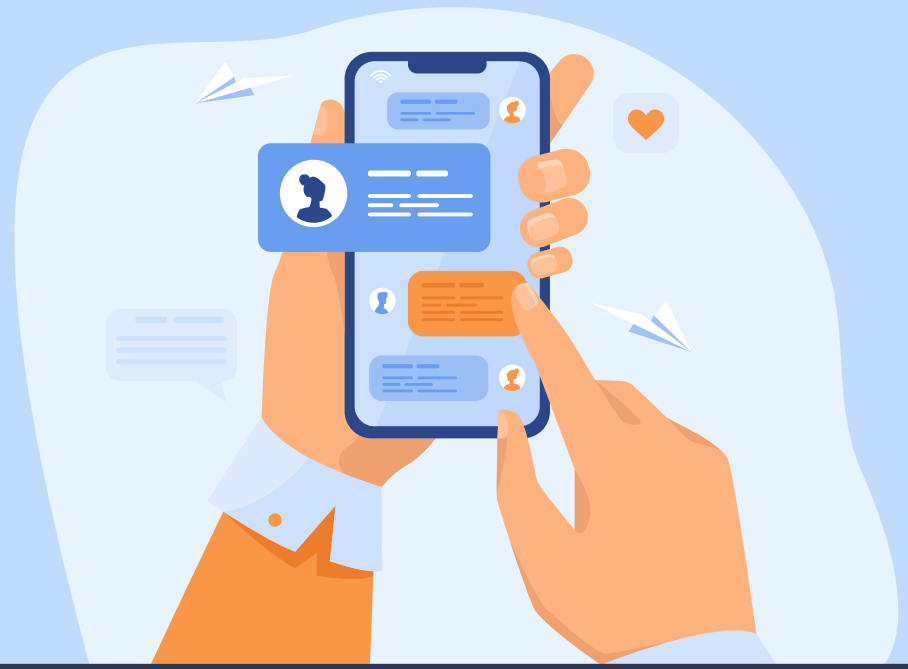
Innovation in e-participation

E-participation refers to the use of the internet, social media, mobile technology and other information and communication technologies (ICTs) to enable people's participation in democratic life. It is also sometimes called smart participation.



The digital world and digital tools can enable participation by providing:

- **An information** channel through which young people can access information that supports their participation. For example, news sources, information about political debates and details of policy making.
- **A communication** channel through which people can communicate with each other, and other people relevant to participation, such as decision makers.
- **A platform to create**, share and distribute content. For instance, to recruit new project participants, or to distribute a campaign message,
- **A virtual space** in which participation activities can take place and where virtual communities can form.



E-participation is an important process for the NGO sector as it allows your team to be more **efficient** in transmitting information, **reaching your target audience quicker**, with more **specific messages** and on **multiple platforms**. One of the most innovative aspects of e-participation is that, without physical barriers and limits, it becomes possible to do things like involving very large numbers of people or hosting interactions with people in multiple places across the world simultaneously.



Human Resources

Human Resources is a large and often legal area of running an organization. This guide will not be offering advice on the legal aspects of this issue. **It is your responsibility to research and understand the laws and policies in your country.** However, there are issues of human resources that are not legal and are **important for building a sustainable work culture.** The two areas this guide will introduce are Onboarding Talent and Developing and Retaining Talent.



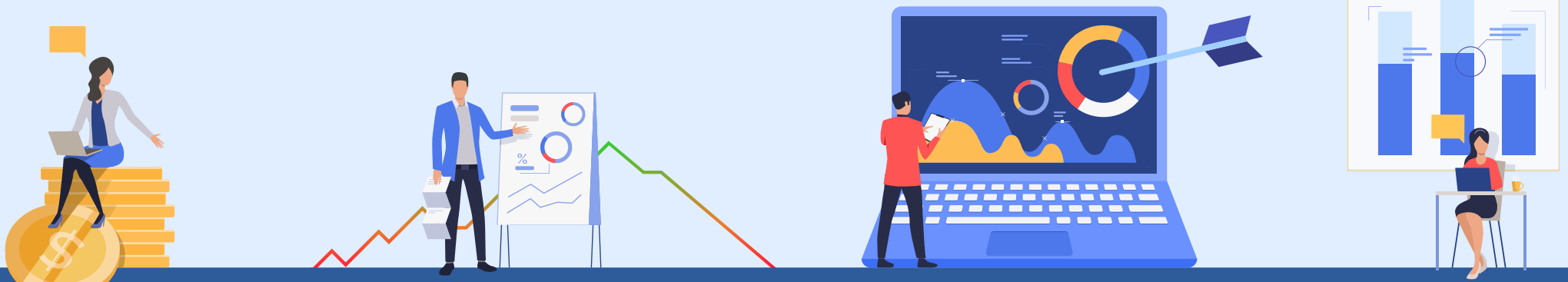
Onboarding talent

Onboarding talent refers to the processes in which new hires are integrated into the organization. It includes activities that allow new employees to complete an initial new-hire orientation process, as well as learn about the organization and its structure, culture, vision, mission and values.

Begin by creating an Onboarding process which has been established and written. **Four areas are important to include in the process of onboarding:**

- **values:** Presenting the values of the NGO, and the behaviours/actions that are aligned with them. Values need to be repeated and included in the NGO narrative as much as possible.
- **priorities:** clearly articulate and teach the priorities of your NGO
- **achievements:** what has your team and NGO achieved so far, celebrate them
- **and failures:** also deserve attention - when a mistake is made, one needs to be open and admit it. Failure is the foundation of success.

Every NGO needs to create a culture where constructive feedback is well implemented, constantly measures progress and improves along the way. By sharing all of this during the onboarding process you begin to establish, with your new hire, what the culture of your NGO is.



Developing and Retaining Talent

Once you have hired someone to join your team, your work with them has only just begun. In addition to ensuring that your onboarding process is welcoming and thorough you, as the leader, have the responsibility to get to know your employees and to help them develop professionally. There are many ways to do this and doing it well requires creating both **formal and informal methods** for learning about your employees and working with them to develop them professionally.



One way is by creating a **Team Vision Board** with individuals' career profiles consisting of their:

- **Values** - broad desirable goals that motivate people's actions and serve as guiding principles in their lives - they need to be defined and fostered in the workplace.
- **Talents/strengths** - the natural aptitudes, the inner qualities that emerge effortlessly need to be defined by using different tools. A tool that is worth mentioning is the **Clifton Strength Finder**. It consists of 4 domains with 34 traits/talents. The domains are Executing (people who get things done), Influencing (people that naturally take charge, stand up, speak, and make sure the team is heard), Relationship building (people who naturally hold the team together and make the team together than the the sum of its parts), and Strategic Thinking (absorb and analyze the information to inform better decisions). You can also use the **VIA Strength and Character Assessment**
- **Passions** - understanding what fires people up with a feeling of enthusiasm or excitement.



Everyday, the question that any NGO founder should ask is - how can I maximize and utilize the potential of the human resources that are part of the NGO, how can I help my employees develop in the ways that excite them, and how can I delegate more, and motivate the people I am working with?

Being part of a passionate and well managed NGO can be very satisfying to your employees; they get to be part of a cause and transformation. And, taking care of your employees is still paramount to their retention. There are benefits for the employees that may develop and retain them. The NGO founder needs to understand what are the things that motivate his/her employees the most, and provide them. **Carefully consider what types of lifestyle benefits your NGO may be able to provide.** Some examples include:

- Multisport cards allowing employees to practice any sport they would like to
- Health benefits packages
- Food vouchers
- Weekly happy hours or NGO lunches
- Time in the week to volunteer
- Creative time in the week to develop their own ideas to present to the team





Credits

Huge thanks to our amazing team who invested their hearth and passion in this guide:



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