

STANDARD OPERATIONS MANUAL

Resource Mobilization and Donor Relations

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STANDARD OPERATIONS MANUAL

Resource Mobilization and Donor Relations

Overview

Donor relations and resource mobilization are aimed at securing adequate, predictable, flexible funding to deliver results to deliver the results outlined in UN-Habitat's strategic plans. UN-Habitat's main sources of funding are:

- a) **Regular budget:** UN-Habitat's allocation from Member States' assessed contributions to the United Nations system.
- b) **Foundation non-earmarked:** voluntary non-earmarked contributions mainly from Member States for the core work of the organization.
- c) **Foundation earmarked:** earmarked contributions from Member States and other donors for global programmes that are largely normative, such as the Global Land Tool Network and World Urban Forum.
- d) **Technical cooperation:** earmarked contributions from Member States and other donors for programmes at the country and regional level.
- e) **Programme support:** a percentage is charged on earmarked contributions to cover the additional indirect cost of technical and administrative support

Resource mobilization is carried out by all offices in UN-Habitat. Regional offices focus on raising funds for technical cooperation activities in their countries and Headquarters offices focusing on raising funds for global normative programmes. This work is supported by the Donor Relations and Resource Strategic Partnerships Unit in the External Relations, Strategy and Innovation Division and a system of donor focal points ensures that we develop and maintain good relations with development partners

Services provided by the Donor Relations and Resource Partnerships Unit

1. Develop the corporate [resource mobilization strategy](#) and monitor its implementation
2. **Core contributions:** The unit prepares letters twice a year from the Executive Director requesting non earmarked contributions for UN-Habitat's core work and follows up directly on payment of these contributions with Member States through their missions in Nairobi and through the donor focal points.
3. **Donor meetings and events:** organize and support a) strategic funding dialogues between UN-Habitat and development partners in line with the Secretary General's Funding Compact, b) joint consultations with donors at global and regional levels, c) bilateral meetings with donors and development partners to develop and strengthen strategic relations
4. **Communications:** encourage offices and regions to provide impact stories and coordinate production of the quarterly Urban Impact brief to donors and partners

5. **Tools:** maintain and ensure access to all staff to the [Donor Information System](#) which provides a) profiles of over 600 donors and partners, b) dashboards on UN-Habitat's donors by region and globally and the status of the organization's income by year, fund and donor type c) donor reporting calendar and central repository of donor reports on earmarked contributions; d) central repository of resources on resource mobilization including training materials, among other features. Develop resource mobilization guidelines such as the [Donor Visibility Guideline](#).
6. **Donor intelligence:** a) carry out targeted donor intelligence at the request of offices b) regularly update the donor profiles in the Donor Information System, c) provide offices with access to external donor intelligence systems such as [Devex](#).
7. **Monitoring and reporting for Member States and Management:** a) provide monthly updates to Member States on UN-Habitat's income, b) provide income projections against approved budgets, c) provide monthly updates on donor reporting status to senior management, d) organize and provide updates to the quarterly meetings of the Resource Mobilization Steering Committee
8. **Donor Reporting** a) organize monthly meetings with donor reporting focal points to improve timely reporting on contribution grants b) provide regular reports to management on corporate wide reporting on contribution agreements, c) maintain the donor reporting calendar
9. **Capacity building:** a) organize training by external experts for staff with resource mobilization functions, b) offer internal training on the Donor Information System and other resource mobilization guidance
10. **Focal point role for key donors and donor categories:** act as focal point for selected donors such as Norway and Sweden and for Foundations and Philanthropists

Guidelines relating to donor relations and resource mobilization

1. For information on donor relations and resource mobilization contact unhabitat-donorrelations@un.org
2. Resource Mobilization Strategy 2020-2023
3. Donor Visibility Guidelines
4. Contributing to quarterly Urban Impact brief that goes to over 14,000 partners including donors
5. Relations with Foundations and Philanthropists
6. Donor Information System
7. Donor Intelligence and Market Research
8. Donor Focal Point System
9. Bilateral and joint consultations with donors
10. Donor Reporting
11. Standard Interim Donor Reporting Template – aligned to UN System template
12. Standard Final Donor Reporting Template – aligned to UN System template

1. Core Contribution Letters

The Donor Relations and Strategic Partnerships Unit, as part of its responsibilities, coordinates in the inscription of the core contribution and reminder letters which invite Member States to provide financial support for the urban development agenda and more specifically, implementation of UN-Habitat's strategic plan and approved work programme. This is done in close consultation with Office of the Executive Director (OED) and Secretary to the Governing Bodies (SGB).

The core contribution letters are to be written in the official UN languages: Arabic, Chinese, English, French, Russian and Spanish.

Services coordinated by Donor Relations and Strategy Resource Partnerships

1. Setting up a proposed minimum contribution according to World Bank economic ranking for every Member State.
2. Drafting of the core contribution letters with guidance from SGB, Regional directors and Executive director's office.
 - Consultations with regional directors on their respective regional project portfolio to be include in the letters.
 - Preparation of the invoices based off the established minimum contribution metric in Number 1
 - Generate a unique reference number and/or statement in the invoices for easier identification of received funds.
 - Preparation of the status of General Purpose (non-earmarked) contributions (see annex) as well as update on the three UN-Habitat fund types and budgeted funding for each.
3. Share the final version approved by regional directors, SGB and key staff members from Donor Relations and Strategic Partnerships Unit with the Executive Director's office for final approval.
4. Coordinate translation of the final core contribution letter to the respective Member State's preferred correspondence language based on the UN-Headquarters Blue Book and guidance from country focal points.
5. Proofreading all 195 letters addressed to every Member State.
6. Establishment of a common drive, with version control, of all documents relating to the core contributions
 - This is in Teams/One-drive that allows for easier communication in the event there is need to make changes to the document immediately.

7. Establishment of a distribution criteria of the letters i.e. based on region or location of the office or the language. This ensures no region is missed, nor a language group neglected.
 - In the event a member state would need to receive their letter in two or more different languages, a separate batch will be created to ensure that they are not left out or missed.
 - Have a list on countries that would receive the core contribution letters
8. Establishment of a tracking system of all the responses received from Member States which allow easier projection of funding for the year.

Guidelines for Staff

1. Donor Relations and Strategic Partnerships Unit and Donor Focal Points are required to follow up with the Member States on the contributions and pledges.
2. In follow up with member states/donors, respective Donor Focal Points should emphasize the use of the reference (provided in the invoice) during their bank transfers to UN-Habitat for tracking and identification purposed when funds are remitted into the organization's bank accounts.

2. Donor Consultations

The Donor Relations and Strategic Resource Partnerships Unit (DRSRP), in the External Relations and Partnerships Branch, ERSKI coordinates and supports joint donor consultations, as part of its responsibilities. The consultations, aimed at strengthening relations with key donors, provide an opportunity for UN-Habitat to update on progress in implementation of its strategic plan, consult Member States on proposed future plans and explore new partnership opportunities, and get feedback from key donors on the organization's performance.

Donor consultations are organized in close consultation with Office of the Executive Director (OED), Secretary to the Governing Bodies (SGB), the Communications and Media Section and Donor Focal Points to that topics of the consultations are relevant and substantive and achieve desired outcomes.

Consultations with donors include:

1. Annual Joint Consultations led by Norway and Sweden: the consultations are a statutory requirement for the Government of Sweden as part of its Cooperation Agreement with UN-Habitat and have been broadened to invite 'like-minded' donors. These consultations are organized by DRSRP. There are plans to hold broader annual consultations to include a wider group of donors.
2. Dialogues between the Executive Director and UN Regional Groups – organization of Regional Dialogues is led by SGB and OED with DRSRP providing background information and follow up on action points. Regional Offices play a significant role in presenting the impact of UN-Habitat's work in countries that are of interest to the Regional Groups and proposing areas of collaboration.
3. Other funding dialogues within regions – strategic funding dialogues are sometimes organized by Regional and Liaison Offices or incorporated in existing forums such as the meetings of the Arab League of Nations and MINURVI, among others.

Procedures for organizing Donor Joint Consultations

1. Development of checklist in (see Annex) to guide organization of the donor consultations, outlining roles, responsibilities and timelines
2. Establishment of organising team with key staff members from relevant offices.
3. Agreement on list of participants, and the donors who would take a lead role to mobilize other partners and develop the agenda of the consultations.
4. Consultations with Donor Focal Points, Directors and Office of the Executive Director (OED) on key objectives and desired outcomes of consultations, programme and key messages and issues that may arise.

5. Consultations with lead development partners to finalise the programme, duration and the structure of the meeting. Where possible, field visits or virtual tours are arranged to demonstrate impact of UN-Habitat's programmes.
6. If a field visit is part of the programme, coordination with the relevant country office to organize the content and logistics of the field visit. This includes the list of authorities and beneficiaries that will interact with the donors, programmes to be showcased, international and local travel arrangements, and meals, among others (see checklist).
7. Arrangements regarding logistical issues including budget, ICT requirements, procurements, travel etc., as outlined in the checklist.
8. Invitation letters, including Note Verbales to Member States with guidance from SGB and invitations to participating staff members.
9. List of background documents, presentations, speeches and talking points the Executive Director and key managers, and videos of UN-Habitat programmes; the list includes the persons accountable for producing the materials with submission deadlines. These documents are stored in shared folder accessible the organizing team and staff participating in the consultations.
10. Visibility materials and communications strategy for the event – this may include, web articles, press releases and social media messaging depending on the nature and exclusivity of the meetings.
11. Finalisation of the programme of the consultations and preparation of an annotated agenda and run of the show script for the moderator.
12. Dry run of the session with OED, presenters, ERSKI colleagues and ICT at least 48 hours before the consultations.
13. Creation of a WhatsApp group with all key staff to facilitate smooth operation of the session.

Guidelines for Staff

1. Staff organizing donor consultations should contact the DRSRP for advice.
2. Donor Focal Points will be requested to provide inputs and advice on the consultations and priorities of their donors through the Donor Focal Point meetings and more targeted meetings.
3. Presenters are required to provide background information and presentations within the defined deadlines that will be communicated to them.

Annex 1 – Donor Consultations Checklist

	Action	Deadline	Accountable person	Status	Comments
CONSULTATIONS					
1	Venue Coordination or Teams for Virtual Consultations a) Inform ICT of dates and technical requirements for physical venue including inks for virtual meetings b) Name plates if physical meetings c) Recording of sessions, where agreed with participants d) Photography if physical meeting				
2	Date and Time - confirm date and time of the consultations				
3	Participation and invitations a) Determine if meeting is limited to Member States or to include other development partners b) Confirm list of participants and their mail addresses c) Identify key speakers – internal and external d) Prepare and get clearance for invitation letters e) Send out invitation letters at least one month before consultations copying donor focal points, Regional Directors, and Heads of Liaison Offices for their follow up f) Email and calendar invitations to participating staff including donor focal points				
4	Programme – develop programme for the consultations, considerations include: a) Resource Mobilization objectives b) Desired outcomes e.g. financial, political, strategic engagement, c) Priorities of donors to be invited d) Information that UN-Habitat wants to convey. e.g. progress on strategic plan, vision for the future e) Issues raised by donors to be addressed f) Intelligence from Donor Focal Points				
5	Background materials – create shared drive, with version control, of all documents relating to the consultations and share link. Ensure all documents and presentations are received on time from authors: These may include: a) Programme b) Agenda, annotated agenda c) Background documents and presentations for relating to agenda items d) Statutory documents for consultations e.g. Annual Reports, Financial Statements, Audit and Evaluation Reports etc. e) List of participants – internal and external – confirmed and declined f) Key speakers against agenda items g) Speeches and talking points h) Previous minutes, if any i) Run of show script j) Visibility materials e.g. videos of impact, web stories, k) Any other relevant documents depending on the programme				
6	Publicity – prepare communications strategy and publicity materials – these may include: a) Social media b) Press release				

	Action	Deadline	Accountable person	Status	Comments
	<ul style="list-style-type: none"> c) Web story d) Story in following issue of Urban Impact 				
7	Minutes – create minutes template, assign minute takers and agree on timelines for finalising minutes				
8	Dry Run – <ul style="list-style-type: none"> a) Develop run of show script b) Ensure all presentations complete and in shared folder c) Organize Dry Run 				
9	Meeting facilitation – create WhatsApp group for meeting facilitation and communications during the meeting				
10	Post consultations feedback – organize meeting on best practices, lessons learnt and update SOPs, where necessary				
11	Set up WhatsApp group systematically for communication during session				
FIELD VISIT (IF APPLICABLE)					
12	Choice of Country and Programme Consult with UN-Habitat senior managers, focal points and lead donors for the consultations on country of visit for field visit: criteria to include: field visit shows <ul style="list-style-type: none"> a) impact of programmes on beneficiaries b) collaboration with other UN agencies under UN Sustainable Development Cooperation Framework c) collaboration with national and local authorities and other stakeholders d) shows programmes funded by some of the development partners taking part in the visit 				
13	Confirm participation in field visit – to include: <ul style="list-style-type: none"> a) donors to take part in the visit and representatives from their embassies in the country of the visit b) authorities, stakeholders and beneficiaries in country c) share profiles of all participants prior to the visit d) organize invitation letters 				
14	Logistics for field visit includes <ul style="list-style-type: none"> a) visa permits and processing b) international and local travel arrangements c) hotel arrangements and pickup d) meals and refreshments e) ensure program allows for prioritization of project visits if more than one project, effective discussion, transfers between sites, meals, travel and from airport, and travel to and from hotels. 				
15	Publicity <ul style="list-style-type: none"> a) local photographer briefed on visits b) web stories c) coverage of visit in local media where possible d) social media 				
16	Donor pre-briefing and background materials <ul style="list-style-type: none"> a) briefs programmes to be visited b) profiles of persons to participate in field visit c) briefing at start of mission on what to expect 				
17	Report of field visit – prepare template for minutes and note takers for report of the visit and way forward				

3. High-level engagement

Overview

With the mandate to securing adequate, predictable, flexible funding to deliver the results outlined in UN-Habitat's 2020-2023 strategic plan. The Donor Relations and Strategic Resource Partnerships Unit meets with high-level individuals such as Ministers, Ambassadors, CEOs and other key partners in an effort to fundraise and build strategic partnerships. These partners often have different interests and objectives. In order to operate most effectively, strengthen collaboration, improve accountability, and reduce duplication of efforts, the Donor Relations and Strategic Resource Partnerships Unit works closely with the Office of Executive Director and other relevant offices when it comes to planning and organizing High-level meetings. The Standard Operating Procedures (SOPs) describes UN-Habitat's process for engaging with High-level partners.

Intended Audience

This SOP is intended for all UN-Habitat staff, particularly staff working in the Donor Relations and Strategic Resource Partnerships Unit.

Before the High-level Meeting:

High-level meetings must be planned well in advance. Ideally, three weeks in advance where possible. The lead for the High-Level meeting should consider the following:

- Background research and review the relevant donor profile
- **Agenda:** Liaise with relevant UN-Habitat staff invited to establish the meeting agenda and desired outcomes. Most High-level partners will want to know the agenda before deciding whether or not to accept the invitation.
- **Invitations:** Send invitations as early as possible. If you are sending an invitation via e-mail, ensure correct spelling, titles and pronouns are accurate. For meetings with member states, liaise with Donor Focal points, Office of the Executive Director and SGB. Once the meeting is confirmed, liaise with relevant UN-Habitat staff, for example, if High-level partners are interested in Flagship 1 ensure lead for Flagship 1 is invited to the meeting.
- **Participants List:** create and keep up to date meeting participant list. Liaise with High-level partner to ensure participants from their side are included. Also, ensure relevant substantive UN-Habitat staff are included in the participant list. Closer to the meeting date, make sure to communicate the expected number of participants to confirm everyone has the right virtual connection details. If the meeting is in person, having a participant will help you reserve the appropriate meeting room.
- **Talking Points:** Prepare talking points (using the UN-Habitat template) for the UN-Habitat lead chairing the meeting. For example, if the discussion is led by the Office of the Executive Director (OED), coordinate with OED to provide Talking Points **48 hours in advance** of the meeting. Liaise with Donor Relations and Strategic Resource Partnerships Unit to get donor intelligence brief.

During the meeting:

UN-Habitat staff leading the High-level meeting will need to consider arrangements for:

- Minute taker
- If the meeting is virtual, ensure the meeting detail link is working and record the meeting where appropriate
- Provide a summary of the discussion within 24 hours internally to the lead UN-Habitat staff in the meeting.

After each meeting:

- Share the minutes of the meeting internally for review before sending them out to partners.
- Create a list of action items to be shared with relevant UN-Habitat staff to follow up on.
- Share final minutes with Donor Relations and Strategic Resource Partners Unit to capture the meeting's outcomes in the Donor Information System portal.
- Draft a thank-you e-mail to be sent to the High-level partner
- Organize a follow-up meeting in two weeks with relevant UN-Habitat staff to ensure all action items are followed up.

4. Foundations and Philanthropies

Overview

The important role of philanthropy and foundations as catalysts for sustainable urbanization is undeniable at the local, regional, and global level. Foundations have a unique flexibility and access to resources to invest in innovative technology, processes, and financing and are able to take the risks related with developing innovative solutions. Partnering with UN-Habitat provides opportunities to test these innovative solutions on the ground and to scale them to deliver transformational change and impact for urban beneficiaries globally. Foundations contribute over 5% of ODA, of which 97% is channeled through intermediary organizations.

UN-Habitat is committed to collaboration with foundations and philanthropy to further leverage knowledge, thought leadership, influence and strategic investments to make cities and human settlements inclusive, safe, resilient and sustainable for SDG 11 and all other SDGs which will be realized in urban areas where most of the world's population lives.

In 2020, UN-Habitat established a **Foundations and Philanthropy Platform** to enable more structured and coordinated engagement on specific areas of common interest. A focal point on Foundations and Philanthropists was established in the Donor Relations and Strategic Resource Partnerships Unit in the External Relations, Strategy, Knowledge and Innovation Division (ERSKI).

The platform will meet in person at the World Urban Forum and four times virtually.

Guidelines on Foundations

1. A database on all donors including foundations and Philanthropists is available in the Donor Relations and Strategic Resource Partnerships Unit
2. All foundations that have had contribution agreements with UN-Habitat are automatically included in the [Donor Information System](#).
3. If you have any questions on engaging with foundations or wish your foundation to be included in the Foundations and Philanthropy Platform meetings, send an email to unhabitat-donorrelations@un.org.
4. Agreements entered into with foundations must be cleared by the Legal Unit in the Office of the Executive Director.

5. Annual Pledging Session

The Donor Relations and Strategic Partnerships Unit, as part of its responsibilities, coordinates the annual pledging session which invites Member States and other development partners to provide financial support for the urban development agenda and more specifically, implementation of UN-Habitat's strategic plan and approved work programme. This is done in close consultation with Office of the Executive Director (OED), Secretary to the Governing Bodies (SGB), the Communications and Media Section as well as Donor Focal Points who consult with their donors prior to the pledging session.

The first pledging sessions was in 2019, after approval of the organization's strategic plan at the UN-Habitat Assembly at which 152Million was announced for urban SDGs and the second in 2020, after approval of UN-Habitat's programme of work, when over USD 164 million was announced, mainly for earmarked programmes.

Services coordinated by Donor Relations and Strategy Resource Partnerships

1. Establishment of checklist in (see Annex) to guide organization of the pledging session, outlining roles, responsibilities and timelines.
2. Consultations with Donor Focal Points to consult with donors on the earmarked portfolio that can be announced at the session, and to encourage Member States to pledge core contributions and advise on which donors will make pledges.
3. Consultations with Donor Focal Points, Directors and Office of the Executive Director (OED) on the key messages of Executive Director that will resonate with Member States and other development partners.
4. Consultations with ICT unit on the technical aspects of the session.
5. Preparation of letters and Note Verbales to Member States, high level speakers and other development partners with guidance from SGB.
6. Preparation of visibility materials and communications strategy for the event; includes background paper to accompany invitations to the session, press release, social media messaging, web story, etc.
7. Preparation of video to demonstrate impact of UN-Habitat's work and added value during the pledging session.
8. Establishment of a common drive, with version control, of all documents relating to the pledging session.
9. Consultations with the Secretariat to the Governing Bodies (SGB) on the programme, format of the session, timely invitations of Member States, including representatives from focal ministries, and scenario and other matters on the checklist.

10. Consultations with OED, SGB and ERSKI Director on high level dignitaries to provide supporting messages e.g. President of the UN-Habitat Assembly, Deputy Secretary General, Chair of the Executive Board.
11. Compilation of the pledges to be made at the session in consultation with all Divisions and Regional Offices and write script for the Executive Director for pledges to be read out by UN-Habitat on behalf of the donors.
12. Establishment of a focal point to respond to queries from Member States and other development partners.
13. Preparation of final programme, event scenario and annotated agenda including script for Moderator and Executive Director.
14. Dry run of the session with OED, SGB, ERSKI colleagues and ICT at least 48 hours before the pledging session based on the scenario template developed by OED and annotated agenda with the requisite scripts for the Executive Director and session moderator.
15. Creation of a Whatsapp group with all key staff to facilitate smooth operation of the session.

Guidelines for Staff

1. Donor Focal Points are required to consult with donors for whom they are responsible to maximise the pledges during the session and provide inputs into talking points of the Executive Director
2. Directors and Head of Divisions, Branches and Regional Offices are required to provide information on pipeline projects that can be announced at the session and provide inputs into the talking points of the Executive Director.

Annex 1 – Pledging Session Checklist

	Action	Deadline	Accountable person	Status	Highlights/Comments
A					
1	Teams/ Venue Coordination 1. Inform ICT – about dates and when to send the invite links 2. Name and email addresses of the participants 3. Make sure all documents are on one Teams folder for easy access 4. Ask for recording of meeting				
B					
2	Confirm date and time of pledging session				
3	Create of a common drive, with version control, of all documents relating to the pledging session				
4	Clearance of invitation letters g) Member states h) Other donors i) High level speakers e.g. President of UNHA, Regional Chairs, Chair of the Executive Board				
5	Send invitation letters to a) Member states at missions and capitals b) Other donors and development partners c) High level speakers				
6	Copy of invitation letters to donor focal points, Regional Directors, Heads of Liaison Offices for their follow up				
7	Individual outreach to key donors at appropriate level (Director, OED)				
8	Template for pipeline projects				
9	Send information package for pledging session: a) Template for pipeline projects to Regional Directors Brussel Office, Global solutions, OED and ERSKI b) Template for pledging statement				

	Action	Deadline	Accountable person	Status	Highlights/Comments
	c) Template for soft earmarked packages				
10	Monitor and compile the responses on templates for pipeline projects by region and domain of change				
11	Video showing impact in all regions- 2 min per region in consultation with Regional Offices and Branches at HQ				
12	List of participating staff, senior management, donor focal points and donor relations staff				
13	Email to participating staff, senior management, donor focal points and donor relations staff				
14	Programme/event template 1. Preparation of the programme and agenda (SGB, Donor relations, OED) 2. Ensure programme is attached, together with background paper as part of external and internal invitations				
15	Executive Director messages and inputs for key speakers at the session a) Consultations with key managers including the OED and Global Solutions on key messages of the Executive Director on value of core work for opening remarks, b) Regional Directors for video and messages on impact of work in the countries c) Script for announcing pledges based on hard pipeline after verifying that these can be announced with relevant staff d) Draft script for closing remarks to be updated during sessions e) Inputs to messages for key external speakers				
16	Pledging background paper, pledge forms – to be sent as part of the invitations				
17	Donor Focal Point meeting to prepare for pledging session				
18	Dry run of pledging session (SGB/donor relations/OED)				
19	Publicity materials e) Social media f) Press release g) Web story				

	Action	Deadline	Accountable person	Status	Highlights/Comments
20	Set up WhatsApp group systematically for communication during session				
C	In-session and post-session documents and actions				
21	PowerPoint on Teams/ common drive				
22	Pledging session - document with all donors and all pledges compiled by domain(bar chart) of change and country (Map)				
23	Minutes <ol style="list-style-type: none"> 1. Meetings template 2. Write minutes 3. Review of minutes 				
24	Web story on results of the session				
25	Final approved minutes circulated within a week of the session attaching detailed pledges				
26	Follow up on action points post the meeting				
27	Meeting on lessons learnt				
28	Inclusion of pledging session in next Urban Impact				

6. Digital Fundraising Campaign – Donate Now Button

In 2020, UN-Habitat launched a [Donate Now](#) button on its website to encourage contributions for humanitarian, emergency responses to urban crises such as the global COVID-19 pandemic and other emergencies affecting cities and the most vulnerable who live in them.

To strengthen UN-Habitat's fundraising efforts and to achieve the objective of securing adequate, predictable flexible funds to implement UN-Habitat's strategic plan. The Donor Relations and Strategic Resource Partnerships Unit at UN-Habitat has launched an online targeted humanitarian appeal campaign to raise funds.

The digital fundraising campaign will raise funds for people and communities most affected by humanitarian crises across various regions of the globe. UN-Habitat is on the front line of the world's urban crises responding immediately to help the people most in need and support a quick recovery to improve livelihoods and build thriving communities. Donations from the campaign will contribute directly to helping UN-Habitat provide clean water, sanitation, adequate shelter, rebuild critical infrastructure and provide services to those most affected by crisis in each region. Each campaign will last approximately 3 months, with a focus on a specific region, with the first campaign focusing on the Arab States.

The Donor Relations Unit will work closely with the Communications Team and relevant Donor Focal Points to ensure the execution of the campaign is relevant, substantive and achieves the desired outcomes.

Procedures for coordinating the digital fundraising campaign

1. Development of checklist in (see Annex) to guide all parties involved, outlining roles, responsibilities, and timelines.
2. Establishment of organising team with key staff members from relevant regional offices.
3. Select a crowdfunding platform to use during the campaign.
4. Creation of a digital marketing strategy. This includes identifying the target audience, sourcing content material, building a Trello Board for the social media campaign, creating a press kit and survey URLs.
5. Create a mailing list / contact list of all internal and external colleagues.
6. Creating an updated email signature for staff to use to promote the campaign.
7. Update the landing page on the UN-Habitat's website. This includes ensuring language translation relevant to the current region, collect images from each region, collect testimonials from member states, local governments, and stakeholders to add to the campaign page.
8. Upload all necessary documents and launch campaign.

Our Promise

We commit to ensuring that your contributions will help the most vulnerable. This includes:

1. Repairing and building resilient homes for families in conflict affected cities.
2. Building infrastructure and basic services affected by war or natural disasters.
3. Supporting safe, peaceful and sustainable livelihoods for IDPs, refugees and their host communities.

Annex 1 – Digital Fundraising Checklist

	Action	Deadline	Accountable person	Status	Highlights	Comments
A	Teams Coordination					
1	Identify the focal point for each region. Coordinate social media campaign and campaign material with UNH communication team. Select a crowdfunding platform.					
B	Digital Communication Strategy.					
1	Identify the target audience for each campaign.					
2.	Content Material Create a 1-month social media campaign for the targeted region.					
2.	Created Trello board with the following content for a month: <ul style="list-style-type: none"> • Images to use • Quotes from UN SG regarding the ROAS region • Important Dates to exploit • UNH ED video • UN-Habitat Ambassador for Arab States, Princess Lamia • Beneficiary quotes • Social media cards • Social media copy • Accounts to follow • Hashtags 					
3.	Press kit. <ul style="list-style-type: none"> • Create a press kit including a press release, beautifully designed and saved as a PDF with bios, talking points from UNH and project team members, testimonials and high-resolution images to be shared with journalists, bloggers and media outlets. 					
4.	Add survey URL to all digital marketing tools. <ul style="list-style-type: none"> • Add survey URL to your website, social media pages, on your campaign page, if possible, to track and monitor social media engagement. 					

C	Create a mailing list / contact list					
1	<ul style="list-style-type: none"> Create an internal and external mailing list for colleagues. 					
D	Email Signature.					
	Create a new email signature signifying the campaign.					
	Create slogan for campaign.					
	Create an email workflow. <ul style="list-style-type: none"> Create an email workflow that includes a series of email templates to be used to engage campaign supporters, journalists and influencers. 					
E	Campaign page.					
1.	Update Landing Page on website linking it to the campaign.					
2.	Upload videos and photos to the campaign page <ul style="list-style-type: none"> Translate language, collect images from each region, collect testimonials from member states, local governments and stakeholders to add to the campaign page 					

7. Urban Impact quarterly brief to donors and partners

The Donor Relations and Strategic Resource Partnerships coordinates production of the quarterly *Urban Impact* brief which goes out to over 14,000 partner including Member States and donors. The brief provides the latest information on organization developments, impact stories demonstrating the impact of UN-Habitat's urban programmes around the world, publications and other normative products, and financial updates. The newsletter goes out around December, March, June, September.

Standard operating procedure

1. To feature your content in Urban Impact – send an email to unhabitat-donorrelations@un.org.
2. Articles have a maximum of 200 words – provide links to the fuller article preferably on UN-Habitat public sites, youtube for videos, or partner sites, where applicable.
3. The articles may be recent and may cover the following
 - a) Governance issues – e.g. decisions of the Executive Board (Secretary to the Governing Bodies)
 - b) Organization developments – e.g. institutional reforms (Office of the Executive Director)
 - c) Normative programmes, - e.g. new findings (Global Solutions, External Relations, Strategy, Knowledge and Innovation - ERSKI)
 - d) New programmes – (Programme Review Committee)
 - e) Regional highlights – e.g. impact stories from programmes in countries (Regional Offices)
 - f) Partnerships – (Liaison Offices, Partnership and Local Governments Unit)
 - g) Advocacy – e.g. ongoing campaigns Advocacy and Communications and Media Unit
 - h) Publications and Events – (Communications and Media Section)
 - i) Financial updates – (Donor Relations and Strategic Resource Partnerships Unit)
4. Impact stories provided should be maximum 200 words and preferably include a quote from the beneficiary, images showing the beneficiaries and demonstrating the challenge or impact, and link to youtube videos, if possible
5. Impact stories provided must be posted on the website, images and links to the full story provided, similarly content on events, publications, should be posted on our public websites or partner sites, were applicable – and links provided
6. All content must be written in clear language that is not technical and understandable to target audiences.

8. Donor Information System

The [Donor Information System](#) supports coordinated resource mobilization by providing consistent information on donors to guide the resource mobilization efforts throughout the organization and enable close monitoring of contribution grants to ensure compliance with donor agreement conditions and reporting timelines.

Main features

1. Management dashboard on the status of core and earmarked income, key donors, and income acquired by donor region and by which UN-Habitat region has acquired that income.
2. Donor profiles of over 600 development partners with data on themes and countries supported, themes and countries of interest, contribution history, projects supported, projects in country, overdue contributions, grant closure status, donor country personnel, donor country missions, implementing partners, reports and downloadable donor profile
3. Regional profiles with overview of funding by both UN and UN-Habitat regions showing their contribution history, projects supported by the region, projects implemented in region, personnel from region, implementing partners and downloadable summary regional profiles.
4. Reporting Calendar to track when reports are due, it show all reports due for grants that are not yet financially closed.
5. Resources including training materials on resource mobilization

Guidelines for staff

1. To access the [Donor Information System](#), send an email to unhabitat-donorrelations@un.org. If you already a userId to the PAAS system, then use the same User ID and password
2. To get training on the system, contact unhabitat-donorrelations@un.org.
3. Donor Focal points are requested to provide regular updates on their donors so that they can be updated in the system. They may also update the system directly, once they have been trained.
4. Staff to share proposals sent to donors prepared by their units so that they can be uploaded into the system.
5. The Management Advisory and Compliance Service (MACS) supports verification of financial data in the system.

9. Donor Intelligence and Market Research

The Donor Relations and Strategic Partnerships unit provides donor intelligence and market research services and updates donor profiles in the Donor Information System every six months.

Information to donors is regularly provided to support bilateral meetings by the Executive Office and senior managers.

Services to staff

1. Upon request, conduct research on specific donors, their funding priorities and contribution history to UN-Habitat and to the multi-lateral system.
2. Provide donor profiles before bilateral meetings.
3. Research on fundraising best practices from other agencies.

Guidelines

1. Request for donor profiles needed for any bilateral meetings at least one in advance of the meeting.
2. Staff may also request market research on what donors may be interested in funding specific themes or types of work or programmes in specific countries.
3. Be specific on the content needed in the research to be conducted on various donors e.g. on whether donors support particular themes or countries.

10. Donor Reporting

The Donor Relations and Strategic Partnerships Unit coordinates and supports timely reporting on contribution agreements to donors. To do this, the unit enters all the reporting dates for ongoing contribution agreements into a [Donor Reporting Calendar](#) which is part of the Donor Information System. Monthly meetings are held with Donor Reporting Focal Points to ask them to review and where appropriate correct the status of reporting and to request them to follow up on late reports with relevant colleagues in their offices. A regular report is sent to Senior Management on the status of donor reporting at the corporate level.

Timely reporting on contributions by donors is extremely important for transparency and accountability and was raised as a point of concern in the UN-Habitat donor survey of 2017.

Services provided:

1. Review all contribution agreements and enter the mandatory reporting times in the donor reporting calendar.
2. Organize monthly meeting with donor reporting focal points on the status of their offices' reporting.
3. Enter financial and narrative reports sent to the donors into a central repository or donor reports and update the status of reporting in the calendar.
4. Compile monthly reporting status at the corporate level.
5. Organize meetings with offices to explore ways of improving their reporting statistics.
6. Report on donor reporting to the Resource Mobilization Steering Committee

Guidelines for Staff

1. Staff must ensure that they read the contribution agreements signed with donors for their projects and provide both financial and narrative reports on their projects according to the schedule outlined in the contribution agreement.
2. Should the reporting schedule change – this should be put in writing by the donor – and the Donor Relations and Resource Partnership Unit informed – so that the calendar is changed accordingly.
3. Staff are requested to contact their donors, in case of reporting delays.
4. Where a donor does not require a specific reporting format, staff should use the standard reporting template available in PAAS – go to your project in PAAS and click on Donor Report and select Interim or Final – see PAAS screen below. Sample reports also attached in this document.


Interim Donor
Report.doc.docm



FinalDonorReportTe
mplate.doc.docm

P-17-10-24-99 ONGOING

2nd Phase of the City Resilience Profiling Programme

Home > Projects > P-17-10-24-99: 2nd Phase of the City Resilience Profiling Programme

Overview Financials Planning Monitoring **Donor Report** Project Document Document Uploads Export Word


Interim Report
 For the period 01 Nov 2017 to 21 Oct 2020
 Report prepared on 21 Oct 2020

1. Overview

Project Code		Project Title			
P-17-10-24-99		2nd Phase of the City Resilience Profiling Programme			
Location of the action	Cost of the action (USD)	Lead Manager or Partner	Donor(s) to the action (name)	Amount contributed (by donor(s)) (USD)	Dates of the action
Mozambique	250,000	Leon Esteban	BARCELONA CITY COUNCIL, AJUNTAMENT DE BARCELONA,	300,803.71	01 Nov 2017 - 31 Dec 2019

5. Financial reports sent to donors must be signed by UNON and the Management Advisory and Compliance Service (MACS).
6. Where the financial report format for donors differs from the standard UNON report – the UNON and MACS signed financial report must accompany the donor format report to ensure that figures are consistent.