

Winning support

UBS Philanthropy Fundraising Guide







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Why use this guide?

Many of us are ready to give to make a better world. For some, this means not only giving their resources to causes, but getting others to join in. Perhaps you want to raise money for your own foundation or a non-profit organization you support. Or maybe you have a passion for a particular cause and want to help raise resources in collaboration with others. Where do you start?

If you don't have the answers, don't worry – you're not alone. There are numerous resources available to support professional fundraisers in securing support from companies, governments, institutions and individuals. But there are fewer resources for philanthropists who want to leverage their social and financial capital to raise funding. That's why we refreshed our original 2015 guide, to continue supporting individual philanthropists like you.

Fundraising can be a challenging, time-consuming, and even costly undertaking. That said, with proper planning and a sound strategy, it can bring significant awareness and financial support to your cause.

One thing we know is that fundraising should start long before any ask is actually made. With a clear goal and carefully planned strategy, you will be able to approach the right funders and present your case in the most compelling manner.

Whether you run your own foundation, support a charitable organization, or are passionate about giving back, this guide can help you maximize your impact by creating a strategy for effective fundraising.



1

Clarify your goal

As someone who is passionate about a particular cause, you want to engage others. Before getting into the specifics of how you'll fundraise, it's important to clarify what you want to achieve.

Clarifying your mission and narrative

You've decided to fundraise for a particular cause. But why?

Your mission should include both:

- the **problem** you're trying to solve and/or the **overall impact** that you aim to achieve
- **what** you and/or the organization is doing to reach this goal

Your fundraising goal should clearly state:

- the reason **why funds are needed** to achieve this goal
- **how much** you need to raise
- **what** the money will be used for



Learn more

Speak with a professional if you want more guidance on how to shape or strengthen your philanthropy strategy or how this fundraising fits within it. And, if you haven't already, be sure to consult the [UBS Philanthropy Compass](#), this guide will provide you with steps, tips and tools to make your giving even more strategic and impactful.







Dive deeper

Shaping a narrative

Having a clear vision and mission helps you focus on the desired impact but it's also a powerful tool to communicate with potential funders. A well-articulated narrative and engaging story are central to fundraising. Developing a **case for support** can reinforce your key message and bring continuity to your communications.

Potential donors will want answers to these questions:

- What is the problem you are trying to solve?
- What is your big dream (i.e., your vision)
- What do you do to address the issue (i.e., the mission)
- What do you see as the solution to the problem?
- Who are you and what do you stand for?
- How do you add value?
- How can your donor be part of these endeavors to achieve impact together?

Your case for support is a way to inspire your audience. Be authentic. Leverage storytelling ingredients while making it personal with true stories that people can relate to. Explain the potential impact and back it up with data.



Work it out

Craft a mission statement and define your fundraising goal.

Check out mission statements from a variety of foundations and non-profits to get inspiration. An example? **UBS Optimus Foundation's mission:** To drive systemic and catalytic impact for marginalized communities, especially children and young people around the world.

The UBS Optimus Foundation is a global network of separately organized and regulated, tax-exempt, charitable organizations, founded and managed by UBS, that make grants and other financial contributions to implementing partner organizations aligned with their values and objectives.

Define what you're looking to raise and how much

While cash is often the primary focus, consider whether in-kind contributions, such as equipment, professional services, or volunteer time, might better support your goal. Clearly identify the type of support that will most effectively advance your mission.

Even when you're requesting monetary donations, be specific about how the funds will be used. Are they intended for program delivery, operational needs like fundraising, or to establish an endowment? Clarity helps donors understand the impact of their contribution and builds trust in your organization's strategy.



Dive deeper

Raising funds for catalytic philanthropy

Impactful organizations increasingly seek not only grants but also other forms of funding and support in the form of:

- Selling equity
- Taking concessional loans
- Other hybrid structures such as convertible grants
- Securing technical assistance to build capacity
- Obtaining debt or equity through blended finance structures funded by concessional and commercial sources

When pursuing more complex financing, e.g. through blended finance, ensure your audience understands the structure and purpose. These concepts often require explanation, so target sophisticated investors and donors and plan for education.

What Is Catalytic Capital?

Also called concessional capital, this funding, typically from philanthropists or public sources, de-risks blended finance structures to attract commercial investors and usually is more patient (long term) in nature reflecting the reality that impact accrues over a longer period of time.

Not all donors contribute financially. Many offer time, networks, or expertise – forms of support that can be equally valuable if your organization is equipped to leverage them.

Be specific about the non-monetary contributions that would benefit your mission – such as legal advice, event organization, or venue access – and ensure you have a clear process for receiving, recognizing, and managing these gifts.



Top tip

Donors may offer non-cash assets like real estate, artwork, or securities. Before accepting, consult the implementing organization's gift acceptance policy and assess how easily these assets can be converted to cash. Some may pose more challenges than benefits.



Define the resources needed to reach your goal

Considering your time commitment, strengths and who you have in your network will influence the expenses of your fundraising project. Where you lack the necessary skills to implement parts of your project, you might need to develop these skills, call on others who already have them or hire an expert.

Fundraising can be costly – in terms of money and time. Be sure to consider all resources you will need to allocate in order to achieve your goal. You may want to seek the help of a professional fundraiser, allowing you to focus on raising awareness for the cause. Just keep in mind that people donate to people, and this person will be representing you to your network.

Resources may be needed for:

- Staffing
- Expertise
- Material resources
- Media
- Travel and meals



Top tip

If you're running your own philanthropic program, you'll need much more support – like creating a budget, implementing a MEL (monitoring, evaluation and learning) program and addressing legal requirements. If you're considering this, think about engaging a professional.



How they did it

Pooling matching gifts and peer networks to reach a shared fundraising goal fast

Background: A successful young entrepreneur volunteers at a women's shelter.

Goal: The shelter needed USD 200,000 for a new security system.

Strategy: She was willing to give USD 20,000 in matching funds and recruited four friends to do the same. Each called on members of her respective network to donate a minimum of USD 500, utilizing social media. Because many gave more, they each quickly achieved the USD 20,000 goal. Resources used? Mainly time.





Work it out

My resource commitment

What financial resources do you bring to the project? How much time can you commit to fundraising and for how long?

My network

Which family members, business partners, clients, companies and colleagues could provide financial or other support so that the fundraising itself doesn't rack up expenses?

My expenses

What will you need to spend on staffing, expertise and material resources not covered by your network?

Contingency planning

Consider scenarios where things go better (and worse) than planned. How would you adapt your goal?

2

Map your target audience

Building a broad base of loyal repeat donors is essential for effective fundraising. Depending upon the type of support you're seeking, your pool of potential donors may be quite diverse.

Considering different kinds of funders

Looking at the following four different categories of funders, consider where you have the most promising prospects.

1. Individuals

Engaging other individuals with your cause is perhaps the most natural way to achieve your fundraising aims, especially if you're starting. Calling upon your network and peers to join you is a good first step. Fundraising can also be a strategic way to build your personal and business network, giving you the opportunity to reach out to those you don't yet know, but would like to.

There's a widespread understanding in the fundraising world that the bulk of funding comes from a minority of donors, known as **major donors**. Some say it's 80/20 while others say it's more like 95/5. The takeaway? Spend your time and energy cultivating a broad spectrum of donor types.



Top tip

Check out the **annual reports or websites** of organizations in your area of interest. They sometimes thank their large donors, which could be the starting point of your prospective list.



2. Family offices

Family offices increasingly represent the philanthropic interests of the family, sometimes acting as an intermediary to pre-select projects or run philanthropy on behalf of the family. Because you'll be facing professionals who protect the family's interests, you can expect them to be selective. Yet, they can be a good entry point for accessing significant funding to support your projects, if they are in line with the goals and interests of the family. If you have an inroad within your network and/or your cause aligns, this could be a promising possibility for building a long-term relationship and access potentially several families in the case of a multi-family office.



Top tip

When applying to large grantmaking organizations, many people will seek the support of a professional **grant writer** to help in submitting a successful application.



3. Grantmaking organizations

Grantmaking organizations like private foundations, community foundations, charitable trusts, government entities, NGOs and funding networks can be promising if your focus aligns with their mission. However, they often have strict criteria, follow defined and very competitive processes for giving grants, and can be quite long and intensive. If they are welcoming applications, funding priorities will typically be published on their webpage. Check to see if your cause meets their requirements and is worth the time to apply.

4. Businesses

Many companies have a budget that they typically assign to non-profit organizations aligned with their business objectives. The larger the company, the more strictly allocated its funding is and the more rigid their application and due diligence process can be. Only approach businesses for funding if you have a solid track record, evidence of impact and can make the case for a mutually beneficial partnership.



How they did it

Using a lead gift and matching funds to unlock generosity and accelerate fundraising

Background: A wealthy widow has provided long-standing support for a youth organization in her home city.

Goal: The non-profit needed USD 1 million for the redevelopment of its youth center. She wanted to donate USD 500,000 and fundraise USD 500,000 from friends, colleagues and acquaintances.

Strategy: She worked with the non-profit to organize a simple fundraising event at the youth center, where attendees could see parts of the center in action (alongside the need for redevelopment). Instead of making a straightforward donation, she decided to use her USD 500,000 as matching funds. She agreed to invite all the guests, to cover all costs of the event and to match all donations up to USD 500,000. By using her donation as a match, she created an extra-incentive for people to give. Additionally, the non-profit agreed to organize a Saturday afternoon BBQ and various activities to interact with the youth using the center, which helped the potential donor to not only picture what the donation will be used for but to create emotional connections.



Dive deeper

Working with businesses to grow your impact

You can get creative in the ways you garner support from businesses, because getting their stamp of approval is a great reference for your cause. Support can often come in a variety of ways:

Sponsorships

A corporation provides financial or in-kind support in exchange for promotional benefits related to a fundraising event, such as logo placement, advertising or access.

Cause marketing

A business promotes support for your cause through a marketing campaign, thereby raising awareness and attracting new funding. The company could include a share of profits from revenue generated by such a campaign.

Matching gifts

An enterprise supports your fundraising efforts by financially matching any donations made by their employees.

Volunteers

Corporations frequently have volunteer programs. Volunteers can be engaged in a variety of ways to support a cause, from direct program involvement like mentoring to supporting an organization with capacity building.



How they did it

Turning a business asset into a fundraising and volunteer recruitment engine

Background: A young couple own a small but successful t-shirt company. They volunteer at and support a program in their community that mentors children from disadvantaged backgrounds.

Goal: The mentoring organization needed USD 150,000 to expand their program while also looking for new volunteers.

Strategy: The couple made a limited-edition t-shirt sold during the holiday season, with all proceeds going to the non-profit organization.



Work it out

Develop a list of potential prospects in any of the four categories.

1. Individuals
2. Family offices
3. Grantmaking organizations
4. Businesses

And categorize them according to:

- your ability to access them (direct or indirect access, no access yet)
- their alignment with your cause (i.e., strong or medium alignment). If you know you don't align, pass your way.
- and the potential size of their donation (i.e., high or low donation potential)

You can use a **score card system** to help you prioritize your targets.

Score each prospect 1–3 in the three categories below, then total the score (max 9). The higher the score, the higher the priority.

Criteria	Low	Medium	High
Access	●○○ No relationship; only cold outreach possible	●●○ A warm introduction exists	●●● Direct access or an existing relationship
Alignment	●○○ Weak thematic fit; unlikely to support your area	●●○ Some overlap; possible interest	●●● Strong alignment; clear interest or track record
Donation potential	●○○ Small gift potential	●●○ Moderate gift potential	●●● Major gift potential

How to prioritise prospects:

- 7–9 points High priority: invest time, cultivate now.
- 4–6 points Medium priority, monitor and maintain light engagement.
- 1–3 points Low priority: deprioritise; pursue only if circumstances change.

Total score: _____
sum of the three criteria (maximum 9)

3

Plan your approach

You've got your fundraising goal. And you have a sense of the type of donors you will target. So, what kinds of methods are there to connect with them and get them interested in your cause?

Reaching out to prospective donors

The most effective methods to reach potential funders will depend on your skills, partners, and target audience. Remember that it takes time to cultivate relationships. Most donors do not grant large sums without some connection and stewardship.

Meeting one-on-one

Never underestimate the power of making an individualized ask in person. Plan a tailored approach based on the individual's personality and culture.

Be transparent by letting the prospective donor know in advance why you arranged the meeting. Being a good judge of character, listening and asking questions will inform how to engage for success.



Top tip

People who end up being donors don't always give on the first ask. Give them options and time. An initial meeting may not result in a "yes". Offer them some space to consider, send additional information and then follow up.



Bringing people together

Group events are a common fundraising tool and they don't always need to center on fundraising. They can be used to promote your cause, build a prospect base, celebrate results, or retain past donors.

Both gala dinners and smaller gatherings can be effective, but they work in different ways.

Gala dinners are best for visibility, social prestige or attracting many donors at once and they work well if you have a broad donor base, strong sponsor relationships and volunteers and staff who can organize and manage the event.



Top tip

When planning an event, be cautious that it is properly representative of the cause in question. Gala events, and the like, are time-consuming to organize, expensive, and can come off as too extravagant for a given cause.



Smaller gatherings are better for building or cultivating relationships with high-potential donors. They are usually lower cost and encourage deeper engagement but you'll need a strong host who will be able to influence the donors.

Some ideas?

1. **Philanthropic roundtables** with a small group to engage in conversation with the goal of building community and partnership around a cause
2. **Panel discussions** that brings together some experts on your cause, effective solutions or another topic that might interest prospective donors
3. **Informal gatherings** where you can tell people about your cause (for prospects) or how things are progressing (for existing donors). Consider asking an existing donor to host in their home or office as a powerful platform to share their own experience and endorsement while you brief prospective or current donors.

Keep your goal in mind so you organize the best platform to reach it.



How they did it

Mobilizing personal networks through culturally tailored, high touch events

Background: A wealthy entrepreneur and her partner from a diaspora community live in a foreign country.

Goal: A humanitarian crisis developed in their ancestral homeland and the couple wanted to raise at least USD 1 million for a trusted NGO working in the country by calling upon their networks.

Strategy: Working with the NGO, they organized a series of intimate luncheons and roundtables, each focused on a different theme of the crisis (like refugees, water and health). Each event was tailored to suit different groups across their network, catering to the cultural differences among their peers. with all proceeds going to the non-profit organization.

Capitalizing on a commercial activity

Fundraising typically involves soliciting financial or resource donations. However, some fundraisers introduce a commercial element, such as selling products to support a cause (e.g., charity shops or cookie sales), or partnering with brands where a portion of product sales is donated to the organization. These approaches can be innovative ways to generate income and raise awareness, offering publicity and scale. Still, they often require significant time and resources to manage effectively.

Using digital tools

Social media, fundraising websites, email campaigns and online auctions offer a powerful way to spread the word and connect to people who will support your cause. Many fundraisers leverage the power of digital crowdsourcing to raise money since exposure is possible far outside your network.

Keep your digital communication punchy and genuine. Links to stories, videos and evidence about the cause and proposed solution will help you connect. Simple clicks that make it easy (and fast) to donate can help you raise funds without incurring huge costs.



How they did it

Scaling fundraising impact by investing in professional digital outreach

Background: A successful hedge fund manager has his own philanthropic foundation that supports social enterprises.

Goal: After years of successful support of social enterprises, he wanted to use his network and position to help raise USD 15 million to increase his foundation's reach and impact.

Strategy: He knew a fundraising drive would be too demanding of his time and that his best assets were his networks and name. He chose to invest USD 120,000 to hire a fundraising professional to strategize a digital campaign that used electronic communications and multiple social media platforms to connect to his large network and their peers, with all proceeds going to the non-profit organization.

4

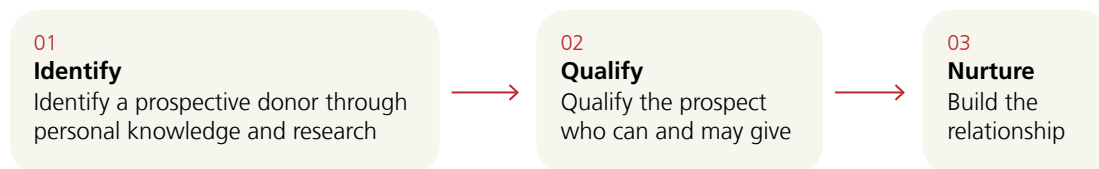
Build and sustain relationships

Fundraising is about building relationships that result in a donation (and then another). This takes time and planning. From determining who to approach to cultivating that relationship, to eventually making an ask, you'll want to be prepared to succeed.

Winning people over

Turning prospects into donors to your cause takes some effort. No one is obligated to donate, no matter their wealth or connection to you. What will help is to fully understand the motivations, fears and priorities of potential donors.

To acquire new donors, many fundraisers adopt a three-step process:





How to leverage potential donors' motivation?

To connect to your prospective donors, think about your own reasons for supporting the cause, as well as what might be appealing to them. Everyone is different and responds to different motivations – emotional, scientific, moral or factual. Reflecting on why you give can help approach others with greater authenticity and empathy.

Interest in a cause

Fundraisers have the opportunity to highlight a cause or project that a potential donor is passionate about or on the contrary, has never heard about. Making someone aware of a certain issue and conveying passion for the cause can be a powerful driver to give.

Commitment to doing good

Some people grow up in a faith-based or social climate that promotes the values of altruism and charity. These values can drive people to support good causes when they hear about them and are able to do so.

Professional interest

Some give because they have specific expertise which can help the cause while also providing professional visibility of that expertise. From a corporate point of view, giving back to the community (and making sure people know about it) can be good for business.

Forging new connections

Fundraising can be a way to build personal and business networks. Philanthropists who collaborate on a shared cause – whether through fundraising or collectives – are introduced to people they might not otherwise meet but with who they might share a common interest.

Simplicity of giving

It's not always easy to give. Often people struggle with knowing whether the program really has an impact or at least that the funds are allocated effectively. A knowledgeable and well prepared fundraiser can eliminate this hurdle by doing the background work, sharing information about the due diligence, and sharing proof of impact.



Top tip

Make it easy to donate

You can consider one-click or two-step donation forms, offer multiple payment options, make the “donation button” impossible to miss on your webpage, adding QR codes at events or on your phone, and/or offer monthly donations (incl. membership programs). Convenience is key.



Top tip

Membership programs

can provide a handy source of regular, and renewable funds, and boost engagement. Using tiered membership levels may even nudge some donors to greater giving.

Wanting to belong or to attend a fun event

Philanthropy can be an open and collaborative social undertaking, providing a forum to bring people together for a common cause. Not everyone will give purely out of interest in the cause. Some may be motivated to attend an event and rub shoulders with the other attendees or grow their network.

Returning the favor

If you've supported a colleague's cause in the past, an interest in reciprocity could motivate support for your cause.

No reason to say no

One cannot underestimate the power of being asked to donate by a trusted peer – many will find it hard to say no. When people are asked why they donated, the vast majority will say, "Because someone asked me."

**Top tip**

Treat fundraising like stewardship, not sales. The most successful fundraisers think long-term. Every interaction is an opportunity to deepen engagement through insight, transparency and care, rather than focusing only on the next ask.





Recognize some of the reasons people might not donate

Support for another cause

Many people already have a cause they're passionate about and their resources are already committed.

Donor fatigue

Prominent individuals, foundations and companies known to be generous in the community typically receive many requests for support. They simply can't support all causes.

Conflicting principles

Some believe certain causes are not theirs to champion, and that others (such as governments, businesses or those affected) have the power and responsibility to solve such issues.

Tax jurisdiction

A prospective donor might support your cause but be legally prohibited from giving in a particular jurisdiction or subjected to taxes for doing so.

Not feeling appreciated

Giving in the past without being thanked can make a person disinclined to give again.

Too many complications

Giving should be easy on the donor. If there are too many steps to take or too much paperwork, this could be a detractor.



Dive deeper

Delaying the donation

Sometimes, people don't have the means or wish to donate now, but they may be ready to make a legacy gift. It is a charitable contribution planned now to be made later, usually at death. Also known as planned giving, legacy giving encompasses both deferred estate gifts and gifts made through financial plans (that might be given during the donor's lifetime).

Appealing to different motivations

You'll be presenting your case for support to a variety of different audiences. Below are four effective ways to appeal to your prospects. Use one or more, tailoring your presentation to the specific person or group.

Appeal to the heart

Use stories to bring the cause to life, eliciting emotion by showing how the intervention is helping people and improving a situation.

Appeal to the head

Explain the tangible impact the donor's funding would have using logical, fact-based information – positioning your project as the natural solution to the issue at hand.

Appeal to shared purpose

There's a saying: "Ask for funding and you get advice. Ask for advice and you get funding." The collaborative presentation offers options for the donor to get involved, making a case for why you can't achieve the outcomes without it. Also consider creating a recognition platform. Public recognition can appeal to donors' sense of pride and accomplishment. Consider tasteful naming opportunities, such as listing major supporters on a website, or acknowledging their contribution in an official post.

Appeal to cultural context

Different audiences will respond differently to forms of recognition, publicity and tone. Adapt your approach to fit their cultural norms and expectations, balancing warmth, discretion, and respect.

Appeal to the moment

Timing amplifies impact. People give when the moment feels right: during a season of generosity, a shared reflection, or an urgent crisis. Link your appeal to what's happening now like a holiday, community event, or unfolding emergency. When donors sense urgency, their motivation and perceived impact grow stronger.



Dive deeper

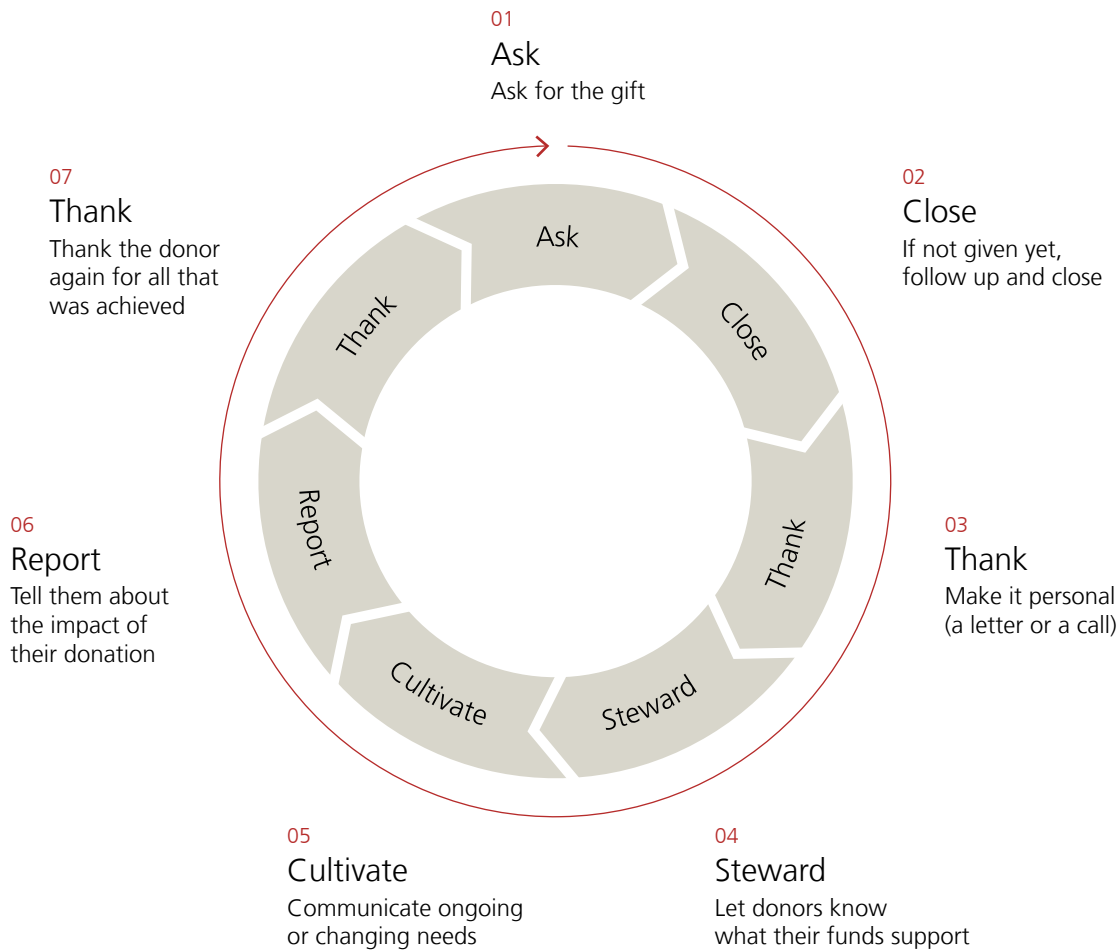
Offering board service

Offering a board seat can appeal to a donor's sense of pride and purpose. Board members play a vital role in shaping a non-profit's strategy, culture, and financial health, while also serving as ambassadors. While it's an honor that comes with responsibility. You'll need to be clear about expectations, including possible fundraising commitments and governance duties.

Read more about serving on a non-profit board in the UBS publication, [Do you want to serve on a non-profit board?](#)

Keeping them as donors

From the first ask, you can steward relationships with donors so that the connection continues. This involves showing appreciation, keeping the donor informed, and making your interactions bespoke for the individual. What to avoid? Make sure you aren't asking for funds each time you connect.



Top tip

Ask for feedback

Listening to what your donors have to say will not only provide you with valuable information on what you need to improve but will also make them feel that you value their voice as much as their donation.



Dive deeper

Be clear about your purpose

If you're hosting an event, be sure to tell the guests the goal of the event. Is it to inform them about the cause? Raise funds? Or continue engagement?

Be transparent with guests about the goal of the event in advance, both via the invitation and again at the start of the event. You don't want guests to turn down an invitation to a stewardship event thinking they'll be asked for funds. Likewise, you don't want guests attending a fundraising event thinking it's just a cultivation event.

Goal	Types of events	Goal
Cultivation to introduce a cause	Small, intimate gatherings over a meal or drink to share information about the cause and allow guests to ask questions.	Engage prospects
Solicitation to raise funds	Small gathering or large gala event to raise funds, using tools like auctions or pledge moments.	Secure funding
Stewardship to retain existing donors	Intimate gatherings to thank donors, communicate impact achieved and position them for the next ask.	Retain funders



Offer something in return

Giving doesn't require anything in return. But you can help retain donors by offering a visit to see the program in action, a thank you letter, an invitation to an event and (of course) information on impact achieved.

Be mindful of the name of your foundation

If you're a philanthropist fundraising for your own foundation, donors may be put off if the foundation is named after you, regardless of the cause it supports. In some cases, inviting donations directly to the program, with matched funds from your foundation, may feel more neutral and effective.

Steward relationships with donors

Prospecting for new donors is generally costlier than maintaining connections with existing ones. The major cornerstones of lasting donor loyalty are consistent service and communication, visible impact, and a sincere relationship.

5

Review, learn, and refine

Planning and developing your fundraising is an ongoing process. That's why it's important to plan for measurement from the start. You can then adapt your fundraising strategy based on the success of your existing initiatives. The clearer you articulate your goal and strategy, the easier it will be to assess.

Track, assess and learn

Keep an eye on what you're doing, what's working and what could be improved.

Tracking your activities helps you spot patterns. Which approaches or events generated the most interest, which messages resonated best, and how much time or investment each effort required.

Assessing your progress means stepping back from time to time to see whether you're moving in the right direction. Comparing results across different activities or donor groups can show you where to focus next.

Learning happens when you use this information to refine your approach. It is how you turn experience into insight and make future fundraising effort stronger than the last.



Top tips

Don't just measure how much you raised – also note how you raised it. Tracking time invested, who helped, and the quality of donor engagement can tell you more about sustainability than totals alone.

Bear in mind that some gifts may take longer to realize – but steady engagement often leads to stronger more lasting support.



How to track progress

After each meeting, event or campaign, take note of what worked best and what didn't. Record costs, responses, and follow-up actions so you can calculate roughly how much was spent to raise each contribution. This simple habit helps you see where your efforts bring the best return.

You can also track engagement over time – who reopens your messages, attends multiple events, or introduces new contacts to your cause. These small indicators often predict long-term commitment and can be a better measure of success than immediate donations.

Work smarter

If you're working through a foundation, collective, or donor circle, align your data with theirs. Shared dashboards or simple updates can make it easier to demonstrate collective impact and reduce duplication of effort.

Evaluate regularly

Every few months – or at least twice a year – look back at what you've recorded to build a clearer picture.



How they did it

Using data and reflection to focus on what delivers the strongest donor relationships

After several years of supporting a major health charity, one board member decided to review how their fundraising events were performing. Together with the organization's team, they analyzed guest attendance, follow-up rates, and the number of new introductions that converted into lasting donor relationships.

The review showed that small private lunches consistently generated deeper engagement than large gala dinners – at a fraction of the cost. By refining their strategy and focusing on high-touch experiences, they doubled returning donors the following year while strengthening the charity's overall network of advocates.

Keep learning

Use what you've learned to adjust how you work. You might find that certain types of meetings or events lead to stronger results, or that partnering with another fundraiser broadens your reach. Regular reflection turns experience into progress and helps ensure your fundraising continues to grow in both impact and confidence.



Work it out

Evaluation questions you might use include:

1. How would you describe your current progress toward the goals you've set?

2. Which activities led to the most engagement or largest gifts?

3. What were the biggest successes and challenges?

4. What should you change, avoid or add?

5. How much on average did it cost to bring on each donor? How can you bring that down





6

Make it happen

You now have a well-considered strategy for fundraising. It's time to get out there and raise those funds!

Over and above the sense of achievement of raising funds for your cause, fundraising can be an exceptionally rewarding activity for many reasons. Forging new relationships, expanding your network and learning more about impactful philanthropy are some of the other benefits.

This guide is a resource to help you on your journey, but it isn't exhaustive. Do speak to others to learn as much as you can. Members of your network can provide a good sounding board. Those who have fundraised in the past can provide valuable insights regarding lessons learned and best practices. And you can always seek professional advice to find support tailored to your needs.

Key takeaways



Have a clear mission and funding goal

Set your fundraising goal and be realistic about the costs of raising funds. A clearly articulated mission and theory of change will help you craft a compelling case for support to take to your prospects.

Use your network

Consider a variety of funders, but keep in mind that creating connections is the first step in fundraising. Starting with the personal and professional connections you already have makes the most sense.

Tailor your fundraising

Stick to fundraising activities that suit your targeted prospects. In most cases, connecting one-on-one, running a digital fundraising campaign and/or hosting small events are preferable to costly galas.

Attract and retain donors

Identify a prospective donor through personal knowledge and research. Qualify the prospect who can and may give. Nurture and build the relationship.

Pivot when necessary

Monitor spending and effectiveness of your interactions as you go. Use this data to conduct a more thorough evaluation at key milestones. Be willing to alter or end activities (or certain relationships) where you aren't succeeding.





About UBS Social Impact and Philanthropy

Changing the world needs leadership. As one of the world's largest wealth managers, at UBS, we aim to help guide the way to a better future.

We're seeing our clients place greater importance on creating positive impact with their wealth, with more of them turning to sustainable investments and philanthropic solutions to help achieve it. We're here to help you have more impact with your wealth. Together, we'll explore your purpose and help you make a difference through giving, investing,¹ connecting and leading the change you want to see.

We have over 25 years' experience in philanthropy. During that time, we've helped clients like you maximize their impact locally, nationally and globally. Today, we maintain that focus on developing solutions which can support you in driving the change you want to see.

Our philanthropic grant-giving foundation, the UBS Optimus Foundation, focuses on education, health and environmental and climate issues. And through our UBS Collectives we help you connect with other philanthropists to take action together, while accessing learning opportunities along the way.

¹ As with any investments, the value may fall as well as rise, and you may not get back the amount you originally invested.



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