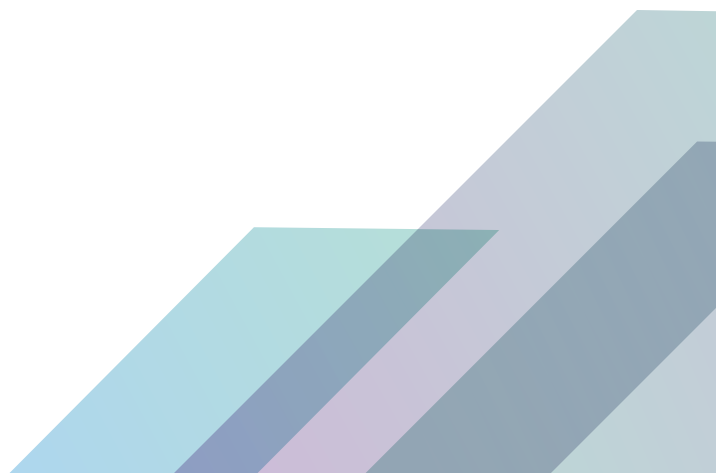# Robust and Sustainable Resource Mobilization: Building Comprehensive Strategies for Resource Mobilization Success

Robust and Sustainable Resource Mobilization: Building Comprehensive Strategies for Resource Mobilization Success

Table of Contents

Introduction

TRAINING GOAL

To identify key organizational building blocks and define strategies for successful resource mobilization.

TRAINING OUTCOMES

By the end of the training, all participants have the knowledge and skills to:

1. Define resources and identify different types of organizational resource needs;
2. Identify the range of potential resource opportunities;
3. Demonstrate introductory skills in at least two key resource mobilization areas, and
4. Develop initial appropriate and sustainable resource mobilization strategies for their organization.

Sample Program

TIME	DAY 1	DAY 2	DAY 3	DAY 4
9:00	Welcome, Introduction & Opening Prayer	Welcome & Prayer	Welcome & Prayer	Welcome & Prayer
		Resources	Successful Strategies/ Action Plans	Sustainability: Accountability & Learning
10:00	Break			
11:00	Resources	Individual and Corporate Donors / Events or Local Gov't Funders	Successful Strategies/ Action Plans	Sustainability: Accountability & Learning
12:00	Resource Needs and Gaps	Reflection and Lessons Sharing	Organizational Readiness: Structures and Systems	Action Planning
1:00	Lunch			
2:00	Resource Providers and Opportunities	Institutional Donors / Entre-preneurial Oppor-tunities	Organizational Readiness: Structures and Systems	Action Planning
3:00	Break			
4:00	Review & Reflection	Reflection and Lessons Sharing	Review & Reflection	Closing, Prayer and Evaluation
5:00	Closing Prayer	Closing Prayer	Closing Prayer	Closing Prayer

Day 1

OVERVIEW, RESOURCE NEEDS AND RESOURCE PROVIDERS

Stage #1 Identify Resources and Resource Needs	Stage #2 Find and Match Resource Providers

D1 SESSION 1: INTRODUCTION TO THE TRAINING

OBJECTIVE
Review of goals, expectations, agenda, ground rules and logistics

TIME
1 hour

SESSION OVERVIEW
• Welcome
• Opening prayer, as appropriate
• Introductions
• Review agenda
• Set expectations
• Review resource mobilization definition
• Lead resource mobilization game

KEY POINTS
• This is a comprehensive training about making your organization more successful in mobilizing resources.
• It is not a proposal writing or simple fundraising training.
• It will be highly participatory, and will include work on both specific resource mobilization skills and on issues relevant to the participants' own organization.

HANDOUTS
• *Roadmap to Successful Resource Mobilization*

#1 Identify Resources & Resource Needs

#2 Find & Match Resource Providers

#3 Understand Skills Needed

#4 Develop Strategy and Action Plans

#5 Check Organizational Readiness

#6 Execute Strategy and Action Plans

Success!
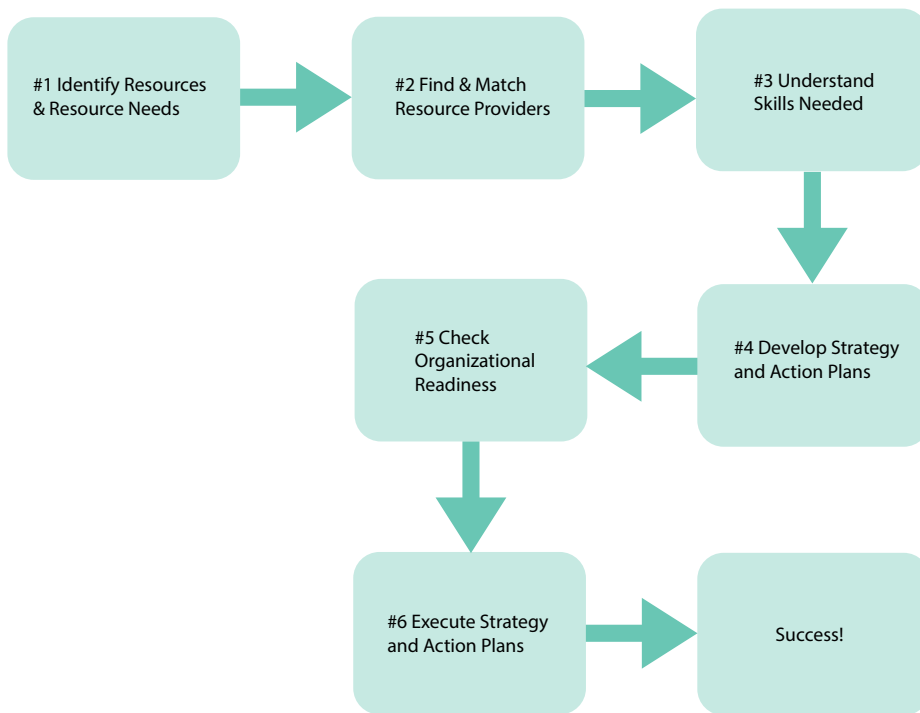
D1 SESSION 2: RESOURCES AND ORGANIZATIONAL RESOURCE GAPS

OBJECTIVE

By the end of the session, participants can define "resources" and identify their own organizational resource gaps.

TIME

2 hours

SESSION OVERVIEW

- Define "resources"
- Identify resource needs for participants' organizations
- Identify resource gaps for participants' organizations

KEY POINTS

- The first step in successful resource mobilization is to understand what resources are and what resources your organization needs.
- To be able to know your needs, your organization needs key tools and systems in place such as operational plans, organizational budgets, strategic or program plans. If these are available, up to date and accessible, resource needs and gaps can be easily identified.

HANDOUTS

- *Understanding Resources*
- *Identifying Priority Resource Needs*
- *Identifying Priority Resource Needs and Gaps*

D1 SESSION 2 HANDOUT: UNDERSTANDING RESOURCES

Organizations need money to successfully implement and expand their programming. However, they also need a range of other resources to succeed. Take some time to think through the range of resources you need in your organization.

- Consider with your group: What are some of your resource needs? Work with your group to name some different types of resources in the first column, and some more specific needs in the second. Also note if your group decides to create additional categories or sub-categories within those named below.

TABLE 1: DEFINING RESOURCES	
Resource category: What are the kinds of resources that might be relevant? *Example: Technical assistance*	**Resource needs: What are your organization's specific needs?** *Example: Medical expertise to train laboratory technicians under a health program.*

D1 SESSION 2 HANDOUT: IDENTIFYING PRIORITY RESOURCE NEEDS

Work with your teammates from your organization to reflect on the following questions.

- What are your organizational priorities? What are you hoping to achieve (in a specific timeframe)?
- What resources do you need to meet these priorities?
- What are the timeframes of these goals and needs?
- Does your organization have any additional areas where it would like to grow or expand? Be sure they correspond with an area of work where the organization is particularly strong and is ready to grow.

Based on you discussion above, work with your organizational group members to try to articulate some of your priority resource needs in the table below.

TABLE 2: PRIORITY RESOURCE NEEDS	
Organization	
Priority resource need #1:	*Example: Cover staff costs for a food security program within the next 12 months*
Priority resource need #2:	*Example: Secure funding to expand emergency food distribution in XX districts.*
Priority resource need #3:	

D1 SESSION 2 HANDOUT: IDENTIFYING PRIORITY RESOURCE NEEDS AND GAPS

In your small group, write down the priority resource needs from Table 2 in the first column.

Then, for each priority resource need, identify what resources you already have available and write them in the second column. Be sure to consider many different types of resources, not just cash.

Then identify the gaps (i.e. additional resources you will need to mobilize in order to achieve your goal), and enter those in the third column. This will help you better define and specify your priority resource needs.

Part A.

TABLE 3: RESOURCE NEEDS AND GAPS		
Priority resource needs from Table 2	**Current available resources to meet this need**	**Resource gap** *Current resources that you have available – what you will need to meet your need = resource gap*
Example: *Cover staff costs for food security program within the next 12 months*	*Approximately six months of salaries currently funded*	*Six additional months of salaries, benefits and other related staff costs*
Priority resource need #1		
Priority resource need #2		

Part B

What observations can you and your team make about your current and future resource gaps?

D1 SESSION 3: RESOURCE PROVIDERS AND OPPORTUNITIES

OBJECTIVE

Participants identify and define a wide range of resource providers and opportunities, and understand successful approaches to reach them.

TIME:

3 to 3.5 hours

SESSION OVERVIEW

- Introduce the range of resource providers and opportunities
- Explore donor/resource provider motivations and implications for receiving organizations
- Build on motivations to develop potential outreach strategies
- Begin to assess and prioritize opportunities

KEY POINTS

- Having good information and intelligence on resource providers and opportunities is critical for success.
- All resource providers have their own reasons, or motivations, for giving or investing. Organizations will need to understand these to build successful outreach strategies.
- These motivations also need to be understood to ensure that they fit within with the organization's mission and values.
- Understanding the resource provider is critical, but it is also important to assess their potential and prioritize outreach efforts.

HANDOUTS

- *Resource Providers and their Motivations*
- *Resource Provider Outreach*
- *Assessing and Prioritizing*

D1 SESSION 3 HANDOUT: RESOURCE PROVIDERS AND THEIR MOTIVATIONS

As an organization begins to think about potential resource providers and opportunities, it can be useful to think about each provider's motivation. Understanding why resource provider gives/funds/donates/buys can help inform how an organization reaches out to them, as well as giving the organization time to consider what implications a strategy targeted to a specific category may have.

Work with your colleagues to consider each category of resource provider below, their motivations and the advantages and disadvantages of engaging with that provider.

TABLE 4: RESOURCE PROVIDERS AND THEIR MOTIVATIONS		
Resource providers	**What are their motivations to provide resources? Why do they give away or invest resources? What is their biggest interest in investing their resources? What will be most important to them?**	**What might be the advantages and/or disadvantages of working with these kinds of resource providers?**
National, provincial, district, local governments		
International NGO donors or partners		
Foreign government funding agencies		
Individuals who donate money to the organizations		
People who contribute as part of a fundraising drive or event		
Corporate donors/businesses		
Clients who pay for services		
Foundations		
Others		

DAY 1 SESSION 3 HANDOUT: RESOURCE PROVIDER OUTREACH

Now that you have thought about resource providers and their motivations, what do you think might be some approaches that would be especially effective with different kinds of resource providers?

Work with your colleagues to fill out the table below. The first column is the same as in Table 4. In the second column, list any specific resource providers you may have in mind for a category, based on your experience and information, and place them in the appropriate box. In the third column, write any ideas you might have on how you might begin to approach or pursue your target.

TABLE 5 : RESOURCE PROVIDER OUTREACH		
Category of resource providers	**Possible potential target resource provider for your organization** *Are there specific targets within this category that are of interest to your organization?*	**Outreach approach:** *How might you find out more and/or reach out to them? What are some initial steps you would take if you were interested in these kinds of donors?*
National, provincial, district, local governments		
International NGO donors or partners		
Individuals who donate money to the organizations		
People who contribute to an event		
Corporate donors		
Clients who pay for services		
Foundations		
Others		

D1 SESSION 3 HANDOUT: ASSESSING AND PRIORITIZING

With this exercise, your team will start to match some of your organizational needs with some of the resource providers that you have in mind. Think about some of the resource providers or opportunities that you and your colleagues have identified in Tables 4 and 5 that you think are especially interesting to your organization. Now take a moment to assess how good a 'fit' or match they might be for your organization.

1) First, think about whether your possible target resource provider/opportunity from the second column of Table 5 has the capacity to provide significant resources or not. If they have a lot of resources, write the name of the provider/opportunity in the upper row. If they do not have a lot of resources to provide, write the name of the provider/ opportunity in the lower row.

2) Second, think about how good your organization is at getting resources from this provider/ opportunity. If you do not have any experience or are not very good at it, write the name of the provider/opportunity on the left side. If you are good at accessing resources from this provider, write the name of the provider/opportunity on the right side.

3) Once you have placed all your possible target resource providers in the chart, reflect with your organization on how the provider/opportunity placements might affect which ones you will think about pursuing.

TABLE 6: ASSESSING AND PRIORITIZING		
What is the level of resources available to us from this provider or opportunity?	**How good are we at getting resources from this category?**	
	not very good	**very good**
high amount	A lot of resources available, but low capacity to capture them. Invest in getting better at mobilizing these resources. *[Insert relevant provider category from **Table 5** here]*	A lot of resources available, and a high capacity to capture them. **Top priority.** *[Insert relevant provider category from **Table 5** here]*
low amount	Low amount of resources, not a lot of capacity to capture them. **Don't invest in cultivating this category.** *[Insert relevant provider category from **Table 5** here]*	High capacity to capture resources, but currently these might not be ample. Invest in increasing donor level of commitment. *[Insert relevant provider category from **Table 5** here]*

D1 SESSION 3 HANDOUT: RESOURCES AND RESOURCE PROVIDERS/ OPPORTUNITIES REFLECTION

REFLECTION: RESOURCES AND RESOURCE PROVIDERS/OPPORTUNITIES REFLECTION

Take a few minutes either by yourself or with your colleagues from your organization to reflect on the following questions. Write your answers below or at a minimum, jot down some notes. Keep these as they will help inform the group's work on Day 4.

What lessons or observations did you take away from these resource and resource provider activities?

To be able to identify resource providers and opportunities, what kinds of information, people, systems or structures does your organization need to have? Why?

What kinds of information, human resources, systems or structures does your organization need to reach these providers or tap these opportunities?

How ready is your organization right now?

What might be some ways to help your organization be more ready?

DAY 2

Stage #3
Understand Skills
Needed

D2 SESSION 1: THE RESOURCE MOBILIZATION CYCLE

OBJECTIVES

Participants understand the Resource Mobilization Cycle and understand its connection to all the day's sessions.

TIME

15 minutes

SESSION OVERVIEW

• Introduce the Resource Mobilization Cycle
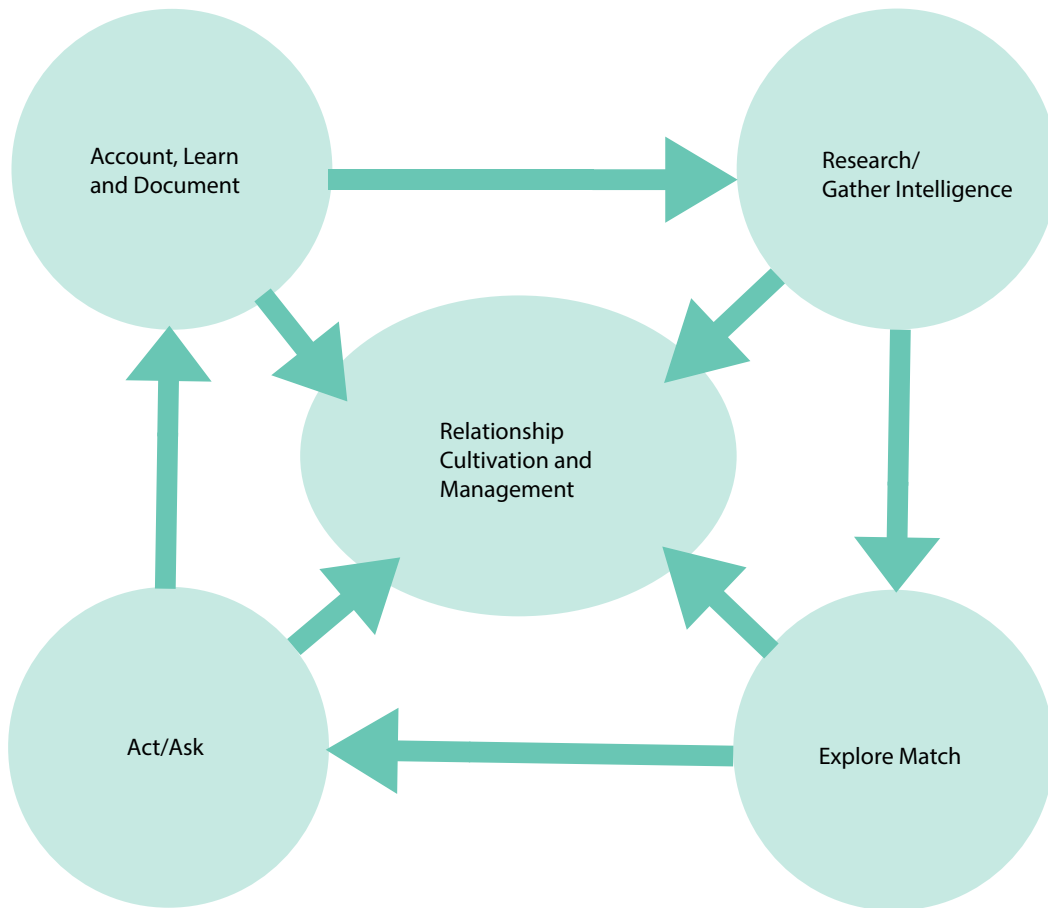• Set up the day's workshops

KEY POINTS

• Regardless of the specific donor or strategy, all resource mobilization efforts should follow this basic cycle.

HANDOUTS

• *Resource Mobilization Cycle*

D2 SESSION 2: INDIVIDUAL AND CORPORATE RESOURCE PROVIDERS

OBJECTIVES:

Participants can describe a basic approach to pursuing individual and corporate donors.

TIME

2-2.5 hours

SESSION OVERVIEW

- Introduce the individual and corporate donor idea.
- Identify ways to identify such donors.
- Explore how an organization would determine if an individual or corporate donor would be a good match for its mission and priorities.
- Practice how an organization might begin to reach out to this kind of donor.
- Consider how an organization might capture and leverage its experience with these kinds of donors.

KEY POINTS

- With individual and corporate donors, it is all about the relationship.
- Ensuring that the person or corporation is a good fit with your organization's mission, values and work is critical.
- Organizations that are successful at mobilizing resources from individual and corporate donors have good systems to support their identification, cultivation, reporting and relationship cultivation.

HANDOUTS

- *Thinking about Individual & Corporate Donors*
- *Individual and Corporate Donors Mission Match*

D2 SESSION 2 HANDOUT: THINKING ABOUT INDIVIDUAL AND CORPORATE DONORS

Consider the following questions. As you read through them, jot down a few notes for yourself. After a few minutes, discuss with your small group some of your answers and see what others might think.

Who might be the kind of individual and corporate donors that might be interested in your work?

What motivates people and companies to give in general, in your country, in your community?

What are the ways in which they give (e.g., one time, once a year, as part of a church drive, etc.)?

What might make individuals, groups and companies interested in contributing to your organization's work specifically?

D2 SESSION 2 HANDOUT: INDIVIDUAL AND CORPORATE DONORS MISSION MATCH

Discuss the idea of mission match with other participants in your small group and try to identify some elements that you might want to consider as you think about funding opportunities (e.g. potential monetary benefits, possible increased constituency, impact on reputation, etc.). List a few more considerations you discussed below:

Keeping all the different ideas from your discussion above, brainstorm some advantages and risks that different kinds of individuals might have.

TYPE OF INDIVIDUAL OR CORPORATE DONOR	ADVANTAGES FOR ORGANIZATION	DISADVANTAGES OR RISKS TO ORGANIZATION
Wealthy individual with ties to the community		
Politician who wants to contribute personally		
Church group		
Extractive industry		
Multinational corporation		
Others?		

D2 SESSION 3: FUNDRAISING EVENTS

OBJECTIVES:

Participants can describe the steps in planning a fundraising event.

TIME

2.5 hours

SESSION OVERVIEW

- Explore the key elements of successful fundraising events planning and implementation.
- Understand the importance of matching the event with organizational values, mission and work.
- Walk through how an organization would begin to plan an event.
- Reflect on how important follow up, accountability and learning are for future success.

KEY POINTS

- Events can be great in terms of increasing visibility and access to resources. However, they also can take a lot of work.
- Solid planning is essential. Knowing the target, the estimated costs and potential return from the outset is critical for success.
- Follow up, including a system for capturing names and information on those who attended is critical for longer term resource mobilization success.

HANDOUTS

- *Fundraising Events Brainstorming*
- *Mission Match*

D2 SESSION 3 HANDOUT: FUNDRAISING EVENTS BRAINSTORMING

<u>What</u> will the event be?

<u>How</u> is it tied to our mission?

<u>Why</u> is *this* the right kind of event?

<u>When</u> will the event happen?

<u>Where</u> will the event be held?

<u>How</u> much do we hope the event will raise?

<u>Who</u> else needs to be involved?

<u>Who</u> will lead the planning?

<u>How</u> much will it cost?

<u>Who</u> will be invited?

<u>Other</u> considerations to make the event a success?

<u>How</u> will risks be mitigated?

<u>What</u> will the event's program entail?

D2 SESSION 3 HANDOUT: FUNDRAISING EVENTS MISSION MATCH

Discuss the idea of mission match with other participants in your small group and try to identify some elements you might want to consider as you think about funding opportunities (e.g. potential monetary benefits, possible increased constituency, impact on reputation, etc.). List a few more considerations you discussed below:

Brainstorm some advantages and risks different kinds of events might have.

TYPE OF EVENT	ADVANTAGES FOR ORGANIZATION	DISADVANTAGES OR RISKS TO ORGANIZATION
Sporting event		
Celebrity hosted concert		
Corporate sponsored dinner		
Others?		

Additional guiding questions:

- Given these possibilities, which one is best suited to the target audience and desired resources?
- Would there be interest in this type of event/can we get people to come?
- Does the type of event match with our profile/organizational reputation and values?

D2 SESSION 4: INSTITUTIONAL DONORS (PUBLIC AND PRIVATE)

OBJECTIVES:

Participants can describe the steps in Resource Mobilization Cycle as they apply to institutional donors and name the key elements of successful institutional donor approaches.

TIME

2-2.5 hours

SESSION OVERVIEW

- Introduce and define institutional donors and their motivations.
- Explore how and why good intelligence and data are important.
- Explore how to match donors and organizational strengths, mission, capacity and values.
- Examine systems and processes for developing strong proposals.
- Link proposal development with relationship cultivation and management.
- Reflect on the need for strong systems for monitoring, accounting and learning from proposal-based and relationship-based approaches.

KEY POINTS

- Institutional donors, public or private, can be providers of significant resources. However, securing these resources, most often through proposal development, requires significant effort, skill and resources.
- Writing a good proposal is important, but equally so is the intelligence gathering; relationship development and cultivation; identifying the match with organizational strengths, mission and skills; and being prepared to monitor and account for any resources secured through grants.

HANDOUTS

- *Gathering Intelligence on Institutional Funders*
- *Sample Donor Maps*
- *Institutional Donor Match: Is this opportunity a good fit for my organization? Making a go/ no go decision*

D2 SESSION 4 HANDOUT: GATHERING INTELLIGENCE ON INSTITUTIONAL FUNDERS

The first step to engaging with an institutional donor is to do some background research on potential resource providers. Take some time to work with your colleagues to reflect on the follow questions. Be as specific in your answers and notes as possible.

WHO IS FUNDING WHAT?	
What kinds of programs are getting funded by which institutional donors? For example, do you know of any public or private agency funding areas of work that are of interest to you?	**How do you think you could learn more? What might be some ways of getting more information?**

WHO IS FUNDING WHOM?	
What do you know about other organizations similar to yours that receive institutional funding?	**How do you think you could learn more? What might be some ways of getting more information?**

HOW DID THOSE RECEIVING FUNDS OBTAIN THEM? WHY ARE THEY GETTING FUNDING?	
What do you know about how other groups that are similar to your organization are getting funded? How did they obtain the funding (e.g. a proposal, a contract, unsolicited award, etc.)?	**How do you think you could learn more? What might be some ways of getting more information?**

D2 SESSION 4 HANDOUT: SAMPLE DONOR MAPS

INSTITUTIONAL DONORS EXAMPLE					
Donor	**Strategic areas**	**Geographic areas of interest**	**Eligible?**	**Comments**	**Next steps**
Norway	Gender, environment, security, budgeting	Eastern regions	Yes	next call for proposals due in quarter 1	Check late July/ August on their website
USAID	Economic development	Priority: south and east	only in partnership w/ INGO		Ask for a meeting with the economic development officer
UNICEF	Children, food security	East, other drought pocket areas	Yes		Director should visit

INDIVIDUAL DONORS EXAMPLE						
Donor	**Strategic areas**	**Geographic areas of interest**	**Initial point of contact**	**Comments**	**Next steps**	**Relationship Manager**
Mr. X	HIV/AIDS	Eastern regions	Director met through community meeting	Enjoys meeting staff and seeing projects	Invite to the office for a meeting	Ms. XYZ
Mr. & Mrs. Y	Children and Orphans	West (they are from XY town)	Approached staff when seeing project	Want to know their contributions impact at the household level	Put on mailing list, determine next contact	Mr. ABC
Church group X interested in donating	Food security	Wherever greatest need	Called the office after seeing organizational materials	Want opportunities for church members to volunteer	Talk with leadership team	Mr. ABC

CORPORATE DONORS EXAMPLE					
Donor	**Strategic areas**	**Geographic areas of interest**	**Initial point of contact**	**Comments**	**Next steps**
Local Chamber of Commerce	Economic development	Eastern region	Program director went to school with president	Want to get more involved with local NGOs	Have director invite president to bring staff to a meeting to better understand their interests
National Soap Company	Health	National	Board Chair met at function	Looking for organizations to support their national "Wash for Health" campaign	Ask for a meeting with the economic development officer
Coca Cola Distributors	Health or children	Communities where they have plants	They invited local NGOs to community outreach meeting	Want to support local groups	Director should visit

D2 SESSION 4 HANDOUT: INSTITUTIONAL DONOR MATCH: IS THIS OPPORTUNITY A GOOD FIT FOR MY ORGANIZATION? MAKING A GO/NO GO DECISION

Discuss the following questions with your colleagues. Also discuss whether your organization has a dedicated procedure for making the go/no go decision, and how it works, as well as whether it might be effective in making sure they go through the right steps.

Intelligence on the resource provider:

- Do we have a relationship with the donor?
- Is the Request for Applications clear about what the donor is looking for?
- What else do we know about the donor's interest and goals in this area?

Intelligence on the competition

- Who else may be vying for this opportunity?
- What do we know about their strengths and weaknesses?
- How do we compare? Do we have a good competitive position in relation to others around us?
- Are there ways we could improve our position?

Assessment of organizational capacity to respond

- Is what the donor is asking for something we can do?
- Is it something we are known for?
- Do we have the resources to put together a good proposal in the time required?

Assessment of overall fit

- Is there anything in the donor organization or solicitation that is not a good fit with our organization's values or mission?
- Are we confident that we can implement the program and comply with the requirements over the entire life of the project?

D2 SESSION 5: ENTREPRENEURIAL OPPORTUNITIES

OBJECTIVES:

Participants describe key aspects of an entrepreneurial, profit-making opportunity approach to resource mobilization.

TIME

2.5 hours

SESSION OVERVIEW

- Introduce and define entrepreneurial opportunities.
- Brainstorm the aspects of feasibility planning and intelligence gathering.
- Assess the match with a for-profit activity and organizational values and strengths.
- Explore initial steps in business planning.
- Explore needs for tracking, accounting for profits and loss, and link to Resource Mobilization Cycle.

KEY POINTS

- No matter what the specific activity, when an organization initiates for-profit activities, it needs to put on its business hat and treat these activities as just that: a business.
- Income generating activities can reap great rewards for an organization, including unrestricted resources and increased sustainability. However, they can also be very risky, particularly if the organization has little experience with business planning and management.

HANDOUTS

- *Entrepreneurial Opportunities Consideration and Planning*
- *Entrepreneurial Activities: Mission Match*

D2 SESSION 5 HANDOUT: ENTREPRENEURIAL OPPORTUNITIES CONSIDERATION AND PLANNING

FEASIBILITY BASICS:

- What product or service are you considering offering?
- Why do you believe this product or service is of interest to consumers?
- Is it legally allowable under local law? Will generating revenue jeopardize non-profit status?
- Do you have the resources (financial, human, and organizational) to produce this product or offer these services?
- Do you have the technical knowledge to product this product or service?

MARKET ANALYSIS:

- What is the market for your product or services? Who is the intended buyer?
- What makes it different from other similar products?
- What pricing information do you have?

FINANCE

- What is the business model for generating both enough funds to run the business and also generate revenue for non-profit activities?
- Where will the operating funds come from?
- What is the expected profit?
- Over what kind of timeframe?
- Do you have any contingency if something unexpected happens?
- Can you afford to lose your initial investment without jeopardizing your organization

SKILLS

- What skills or capacities might need to be acquired or strengthened before starting a business (e.g. specific skills in accounting, marketing, financial management)?

D2 SESSION 5 HANDOUT: ENTREPRENEURIAL ACTIVITIES MISSION MATCH

Discuss the idea of mission match with other participants in your small group and try to identify some elements that you might want to consider as you think about funding opportunities (e.g. potential monetary benefits, possible increased constituency, impact on reputation, etc.). List a few more considerations you discussed below:

Brainstorm some advantages and risks different kinds of businesses might have.

TYPE OF BUSINESS	ADVANTAGES FOR ORGANIZATION	DISADVANTAGES OR RISKS TO ORGANIZATION
Fee for service		
Rental of space or equipment		
Sale of materials		
Another opportunity of specific interest to your organization		

D2 SESSION 6: DOMESTIC GOVERNMENT FUNDING INSTITUTIONS

OBJECTIVE

Participants describe the Resource Mobilization Cycle as it applies to funding from their government and list the key elements of successful government resource mobilization approaches.

TIME

2.5 hours

SESSION OVERVIEW

- Introduce and define government funders.
- Explore how and why good intelligence on funding from their government is important.
- Explore how to match resource provider and organizational strengths, mission, capacity and values.
- Explain that government fundraising may have a dual focus: proposals and participation in broader advocacy efforts (e.g. for core funding).
- Link resource mobilization with relationship cultivation and management.
- Reflect on the need for strong systems for monitoring, accounting and learning from the different approaches.

KEY POINTS

- For many organizations, government funders at the national, regional or local level can be key resource providers of significant and often more sustainable resources.
- Relationships with government can be complex, and it is important to carefully consider the match between the funding agency and the organization's capacity, mission, values and priorities.
- Seeking and securing resources from government agencies will likely require a strong proposal. However, securing resources long term and ensuring that these resources exist at all will likely require participation in advocacy efforts.
- This is not an advocacy training, however, if an organization decides to put significant effort into securing local government resources, and does not already have a good deal of advocacy capacity, they may want to seek additional training or technical support in this area (see *Additional Resources* section).

HANDOUTS

- *Gathering Intelligence on Local Government Funders*
- *Matching with Local Government Funding Agencies*
- *Exploring Advocacy Opportunities for Local Government Funding*
- *Thinking about Proposal Development*

D2 SESSION 6 HANDOUT: GATHERING INTELLIGENCE ON LOCAL GOVERNMENT FUNDERS

The first step in engaging with a local government funding agency is to do some background research on potential resource providers. Take some time to work with your colleagues to reflect on the follow questions. Be as specific in your answers and notes as possible.

WHO IS FUNDING WHAT?	
What kinds of programs are getting funded by which local government agencies? For example, do you know of specific ministries or other government agency funding areas of work that are of interest to you?	**How do you think you could learn more? What might be some ways of getting more information?**

WHO IS FUNDING WHOM?	
What do you know about other organizations similar to yours that receive government funding?	**How do you think you could learn more? What might be some ways of getting more information?**

HOW DID THOSE RECEIVING FUNDS SECURE THEM? WHY ARE THEY GETTING FUNDING?	
What do you know about how other groups that are similar to your organization are getting funded? How did they obtain the funding (e.g., a proposal, a contract, unsolicited award, etc.)?	**How do you think you could learn more? What are some ways you could get more information?**

D2 SESSION 6 HANDOUT: MATCHING WITH LOCAL GOVERNMENT FUNDING AGENCIES

Some key elements of the match phase are matching donor intent and goals with organizational capacity, goals and values. As you think about government funding agencies, what might be some considerations for your organization in this 'match' phase of the Resource Mobilization Cycle? Work with colleagues in a small group to consider the following questions.

CAPACITY

- Is what the government agency is asking from our organization, something we can do?
- Is it something our organization is known for?
- Do we have the resources to put together a good proposal (or response to a government request) in the time required?

VALUES AND MISSION

- Does the interest of the current government and/or specific government funding agency reflect our organizational values?
- Would working with this government funding agency require our organization to do, or to say anything that might not be in line with our organizational values?

OTHER CONSIDERATIONS

- Would working with the government enhance our ability to do our work?
- Might working with the government have any negative implications for our work or other risks?

Based on these considerations, what might be some overall advantages and risks to working with a local government funding agency?

ADVANTAGES	POTENTIAL RISKS

D2 SESSION 6 HANDOUT: EXPLORING ADVOCACY OPPORTUNITIES FOR LOCAL GOVERNMENT FUNDING

In order to support or engage in advocacy efforts, organizations should first be sure they are clear about what they are seeking, why, where and with whom. Work with your group to discuss and brainstorm around the following questions. Be as specific as possible.

OVERALL FUNDING AVAILABILITY	
Why are we interested? What do we want to know more about in terms of government funding? What are some of our key questions?	**What are some specific ways we could learn more? What documents are available publically or who could we meet with to learn more?**
Example: We want to know the level of funding available from the Ministry of Health for HIV/AIDS testing and treatment services in our region.	*Example: The annual Ministry of Health budget is available online.* *If that's not clear, the deputy minister has expressed his support for HIV treatment. Perhaps we could contact him for more information.*

CURRENT ADVOCACY EFFORTS	
Who is currently working on advocacy efforts around these issues? What do we know about them or these issues?	**How could we connect with these groups and how can we learn more?**
Example: We know there is a national network of healthcare facilities that has started to work on lobbying the Ministry of Health on a range of funding priorities.	*Example: Our president has been invited to their monthly meetings. Ask him to attend the next one and/or set up a meeting with network senior staff.*

THINGS TO CONSIDER FOR ADVOCACY	
What might an advocacy effort on the part of our organization require from us? What might be some implications or risks that could come with these efforts?	**How will we determine if we should move forward with these efforts?**
Example: Doing advocacy seriously might require more staff or staff skills. If we become closely linked with larger advocacy efforts like the network and they take on issues that might not be in line with our mission, it could be challenging.	*Put this issue on the agenda for the next organizational board of directors meeting.*

D2 SESSION 6 HANDOUT: THINKING ABOUT PROPOSAL DEVELOPMENT

Developing a strong proposal takes significant effort and investment beyond a simple writing exercise. Consider the following areas of questions that follow a successful proposal development process with your colleagues. Then share your organization's experience in each of the different phases. Finally, consider your organization's readiness to do each step well.

PRE-POSITIONING

- Do we have a relationship with the donor?
- Is the Request for Application clear about what the donor is looking for?
- What else do we know about the donor's interest and goals in this area?

INTELLIGENCE ON THE COMPETITION

- Who else may be vying for this opportunity?
- What do we know about their strengths and weaknesses?
- How do we compare? Do we have a good competitive position in relation to the others around us?
- Are there ways we could improve our position?

VISIBILITY AND TECHNICAL CREDENTIALS

- How well known are we for this work?
- What materials and communications support exist?
- What kind of impact can we demonstrate?

PROJECT DESIGN

- How will we approach project design?
- Who will be consulted?
- How will we determine the key problem to be addressed, project goals and objectives?

PROPOSAL WRITING

- How will we approach the actual proposal writing?
- Who will lead the process?
- Who else will need to be involved?
- What additional support might we need to seek to pull together a successful package?

D2 SESSION 6 HANDOUT: REFLECTION ON STRATEGIES AND ORGANIZATIONAL READINESS

REFLECTION: REFLECTION ON STRATEGIES AND ORGANIZATIONAL READINESS

Take a few minutes either by yourself or with your colleagues from your organization to reflect on the following questions. Write your answers or at a minimum, jot down some notes. Keep these as they will help inform the work the group does on Day 4.

What lessons or observations did you take away from the skills building session you attended?

To move forward with any of these strategies, your organization has to have some key skills. Based on today's work, do you feel your organization has these skills?

What additional skills or capacity strengthening might help your organization's resource mobilization strategy?

DAY 3

Stage #4 Develop Strategy and Action Plans	Stage #5 Check Organizational Readiness

D3 SESSION 1: RESOURCE MOBILIZATION APPROACHES

OBJECTIVES

Participants describe the key building blocks of a resource mobilization approach and begin to sketch out potential strategies for their organization.

TIME

2 hours

SESSION OVERVIEW

- Introduce the concept of a logical resource mobilization approach based on identified resource needs and resource providers.
- Begin to practice the steps from Day 1, by starting to build real-life action plans based on their identified priorities, needs and potential opportunities.

KEY POINTS

- Once the participants have a sense for their organization's priorities, its resource needs to meet those priorities and what resource providers are out there, they will need to sit down and start to put them together, adding potential logical outreach strategies to the targeted resource provider.

HANDOUTS

- *Building Resource Mobilization Action Plans*

D3 SESSION 1 HANDOUT: BUILDING RESOURCE MOBILIZATION ACTION PLANS

Work with colleagues from your organization to think about the priorities and resource gaps exercises completed earlier in the training. Take the priorities and gaps identified in Tables 2 and 3 that you consider most important and write them in the first two columns.

For each one, consider potential resource providers or opportunities that might be a match worth exploring and list them in the third column. Be sure to be clear amongst your team on why you think this is a viable avenue to pursue. This rationale may be taken from Table 5, but should also take into consideration Day 2's activities.

Remember that the resource provider or opportunity is not limited to one type, as demonstrated in the previous exercise. Following the chart are a number of discussion questions to consider as part of the exercise.

PART A

TABLE 7: STRATEGY BUILDING BLOCK		
Priority resource need from *Table 2*	**Resource gap from *Table 3***	**Target resource provider or opportunity from *Table 5 and Day 2 activities***
Example: *Equip 5 clinics with labs and equipment*	*Space* *Staff salaries*	*National pharmaceutical companies* *Donor funded health programs*
Priority resource need #1:	**Resource gap 1:**	**Target provider:**
Priority resource need #2:	**Resource gap 2:**	**Target provider:**

DISCUSSION QUESTIONS

• Why do you think this resource provider might be a good match for meeting your goal and/or closing your resource gap?

• How can you learn more about them?

Now that your team has identified priority resource needs and possible resource providers and opportunities, it's time to think about how you might begin to act on them.

For each provider/opportunity you identified in Part A, discuss the steps and strategies you might use to reach them and help cultivate an interest in your work and a relationship. Remember to consider the discussion questions below as part of the exercise.

TABLE 8 DEVELOPING INITIAL STRATEGIES		
Priority resource need from *Table 2*	**Target resource providers/ opportunities from *Table 5***	**Possible outreach strategy from *Table 5* <u>and</u> from Day 2's workshops**
Example: Equip 5 clinics with laboratories and equipment	*National pharmaceutical companies*	• *Gather intelligence on two current suppliers and explore their philanthropy efforts* • *Identify contact person* • *Set up a meeting* • *Develop communications materials and talking points geared towards their main interests.*
Priority resource need #1:		
Priority resource need #2:		

DISCUSSION QUESTIONS

• How did you identify these potential providers? Remember to use related reference handouts from Day 1 and Day 2.

• Why do you think these providers might be a good match for addressing your priority and/or closing your resource gap, particularly after Day 2's exercises?

What additional information or research do you think you would need to do before moving forward with these approaches?

D3 SESSION 2: ORGANIZATIONAL STRUCTURES AND SYSTEMS

OBJECTIVE

Participants practice using the tools necessary to consider the key elements of organizational structures and systems necessary for successful resource mobilization.

TIME

4- 4.5 hours

SESSION OVERVIEW

- Introduce the idea of organizational readiness.
- Put organizational readiness in the context of the Roadmap and to building successful organizational resource mobilization strategies and capacity.
- Identify key organizational capacity areas that may require investment for successful resource mobilization.
- Discuss the costs of such investments and how to think about the cost versus potential return on these investments.
- Link these capacity needs and investment with the process of identifying and developing appropriate resource mobilization approaches.

KEY POINTS

- Organizations that are successful in resource mobilization invest in their resource mobilization capacity across the organization.
- Resource mobilization requires investment: in staff, in staff skills, in communications capacity, in systems and structures, etc.
- Successful organizations build up systems for resource mobilization. They have clear roles and responsibilities, dedicate resources to it, and hold people accountable.
- The key is to make sure that you understand what kinds of investments are needed.
- This may be different depending on what kind of resource mobilization approach you are taking.
- There is a two-way relationship between the kinds of investments needed to have the capacity to successfully implement a resource mobilization strategy and the decision to pursue that strategy.

HANDOUTS

- *Making Your Case*
- *Meeting with a Resource Provider*
- *Thinking about the Costs of Resource Mobilization*

D3 SESSION 2 HANDOUT: MAKING YOUR CASE FOR RESOURCE MOBILIZATION

Part I - Messaging: Try to answer the following questions in the clearest, most concise way possible. Try to answer in no more than two sentences. Once you have your answers, think and discuss with your colleagues how these might change depending on the target audience (e.g. large international institutional donor vs. corporate partner vs. individual donors).

What does your organization do?	
What are you really good at?	
What sets your organization apart from other competitors?	
Why should the donor fund you rather than another organization that provides a similar service?	
Imagine you have found yourself sitting next to a potential donor or resource provider, what would be the one message about your organization that you would want them to remember?	

Part II – Communication Vehicles: Once you have completed the chart think of three possible ways that you could effectively get your organization's message out to resource providers, particularly those you have identified in earlier exercises as being of particular interest to you.

1.

2.

3.

•

D3 SESSION 2 HANDOUT: MEETING WITH A RESOURCE PROVIDER

Whether it is going to a conference of donors at an embassy, talking to a potential individual donor or meeting with a foundation program officer, whenever you meet with a potential resource provider, it is important to be prepared. Consider visiting the resource provider's website or doing additional research. Some things to keep in mind might include:

PRE-MEETING PREPARATION

- Do you know the name and title of the person or people you are meeting with?
- What do you know about their organization?
- Do you know their key areas of interest?
- Do you know why they are meeting with you?
- What do you want to get out of the meeting?
- Do you know where the meeting is and how to get there?

CORE MESSAGES

- If you only have five minutes with this person, what do you want them to know?
- Do you know your core message and what you are hoping to convey?
- Can you express your message clearly and succinctly?
- Can you also clearly and quickly introduce the basics about your organization and its key strengths?

  Example: We are the largest rural healthcare provider in XX district, serving over 10,000 people. We focus largely on maternal child health, but also do a lot of innovative programming with children and families.

SUPPORT MATERIALS

- Do you have business cards for everyone attending?
- Do you have any promotional materials for your organization, especially as they relate to the areas where you already know the donor has an interest?

QUESTIONS FOR THE PROVIDER

- What questions do you know you have for the person you will be meeting with?
- Can you think of at least two questions that might also demonstrate your own organizational success or effectiveness?

QUESTIONS THE PROVIDER MIGHT ASK YOU

- Are you prepared to answer any difficult questions about your organization?

AFTER THE MEETING

- Send a thank you note within 24 hours.
- Implement the follow-on action items.

Resource mobilization efforts are critical for an organization's health, but they are often costly. To be successful, it is important for an organization to think critically about the kinds of resources and money that will be necessary to support resource mobilization efforts, in order to inform and shape resource mobilization strategies.

Review: To remind yourself and your team about the kind of resource mobilization strategies your organization is considering, review the results of your previous exercise (especially Table 8).

Priority resource needs:

Target resource provider(s) or opportunities:

Initial outreach strategy:

• Cost Check List. Now think about what implementing this approach might cost your organization. Look at the list below and decide for each line if your resource mobilization strategy written in the box above will require investments on the part of the organization.

TABLE 9: RESOURCE MOBILIZATION COSTS			
	Do you have any of the following resources already available for the costs associated with implementing the strategy? (Yes or No)	Are there additional costs in these categories needed for your resource mobilization strategy? (Yes or No)	Will this be a significant new cost/investment for your organizations?
Administration/ salaries			
Professional staff (program, business development, etc.) for resource mobilization			
Office support staff for resource mobilization (administrative, etc.)			
Other staff			
Benefits			
Pay increases			
Consultants			
Office expenses			
Office supplies			
Phones			
Phone charges			
Internet			
Postage fees			

Printing			
Travel			
Vehicle			
Local travel			
Entertainment			
Dues/ memberships			
Insurance			
Office rentals			
New equipment			
Equipment maintenance			
Purchased services			

D3 SESSION 2 HANDOUT: REFLECTION ON STRATEGIES AND ORGANIZATIONAL READINESS

REFLECTION: REFLECTION ON STRATEGIES AND ORGANIZATIONAL READINESS

Take a few minutes either by yourself or with your colleagues from your organization to reflect on the following questions. Write your answers or at a minimum, jot down some notes. Keep these as they will help inform the work the group does on Day 4.

What lessons or observations did you take away from the strategy building activities?

What lessons or observations did you take away from the organizational systems and structures session?

To implement the identified strategies, successful organizations have to be "ready". Based on today's work, how ready is your organization currently?

How ready is your organization right now? Among the areas discussed in the Organizational Systems and Structures session, where did you feel your organization was strong? Where might there be challenges?

What might be some ways to help your organization be more ready?

DAY 4

RESOURCE SUSTAINABILITY, ACCOUNTABILITY AND LEARNING

Stage #5 Check Organizational Readiness and Sustainability	Stage #6 Execute Strategy and Action plans

D4 SESSION 1: RESOURCE SUSTAINABILITY

OBJECTIVE

Participants can assess sustainability of various resource mobilization approaches.

TIME

15 minutes

SESSION OVERVIEW

- Introduce the idea of long term resource sustainability and two of the key pillars to achieving it: accountability and diversification.

KEY POINTS

- Winning a proposal, getting a gift or holding a successful event is only as good as the follow up afterwards.
- Keeping resource providers coming back by showing you are accountable and are a responsible steward of their resources, and by demonstrating impact, which is critical for resource sustainability.
- Having a diversified portfolio of resource providers is also critical to risk management and to longer term sustainability.

HANDOUTS

- None

D4 SESSION 2: ACCOUNTABILITY AND LEARNING

OBJECTIVE

Participants describe the importance of accountability for sustainable resource mobilization and the link between donor accountability requirements and resource mobilization strategy development.

TIME

1.5 hours

SESSION OVERVIEW

- Introduce and define accountability.
- Explore the different means of accountability and impact that different resource providers may require.
- Identify the types of organizational capacity required to be able to deliver and demonstrate the appropriate level and means of accountability.

KEY POINTS

- Every resource provider whether a large public funding agency or a person buying a ticket to a fundraising event will want to know what you did with the money.
- It is critical to understand the level and means of accountability required and to have the systems in place to be able to deliver on it.
- The ways that resource providers will want to see results may impact your organization's decision to pursue resources from them. For example, if you know that a particular funding agency will require frequent and detailed financial reports that follow very specific rules and regulations, but you know that you only have one part-time accountant for finance staff, you may decide that your organization is not yet ready to pursue this donor.

HANDOUTS

- *Accountability Mix and Match*

D4 SESSION 2 HANDOUT: ACCOUNTABILITY MIX AND MATCH

Match the resource provider or opportunity with the means by which you think they might expect the receiving organization to account for the resources they have received. It is not a 1:1 match and some answers might have more than one possible resource provider. Once you have completed the game, discuss with your colleagues some observations you may have. See if everyone agrees.

MEANS OF ACCOUNTABILITY		RESOURCE PROVIDER/ OPPORTUNITY
Quarterly narrative reports		Corporate Funder
Personal stories of how work has changed people's lives		Foundation
		Contributors to an event
Financial records		People who bought services or products
Annual reports		International NGO
Detailed reports on profit and loss		Groups that gave material or other non-financial good
Photos of beneficiaries		USAID
Financial audit		People who gave the organization money
Evidence of monitoring and evaluation systems		Government of your country
Thank-you letter		
Trip to see a project		People or groups who donated services or technical assistance

D4 SESSION 3: DIVERSIFICATION

OBJECTIVES

Participants assess and reflect on the value of diversification of resources and on their own organizations' resource diversity.

TIME

1 hour

SESSION OVERVIEW

• Define diversification concept.

• Walk through sample organization resource diversity charts.

• Help participants assess their own organizations' resource diversity picture.

• Reflect on the observations from the exercise and link back to the resource mobilization approaches and action plans from previous sessions.

KEY POINTS

• Understanding how reliant your organization is on which funders is critical to resource sustainability.

• This is an easy but powerful exercise that organizations can do often as a check on their overall resource sustainability.

HANDOUTS

• *Diversification and Sustainability*

D4 SESSION 3 HANDOUT: DIVERSIFICATION AND SUSTAINABILITY

Discuss your impression of the two organizations in Part I with your colleagues. Once you have discussed the two scenarios, turn your attention to your own organization. In Part II, discuss your own organization's funding and what its own chart might look like with your colleagues.
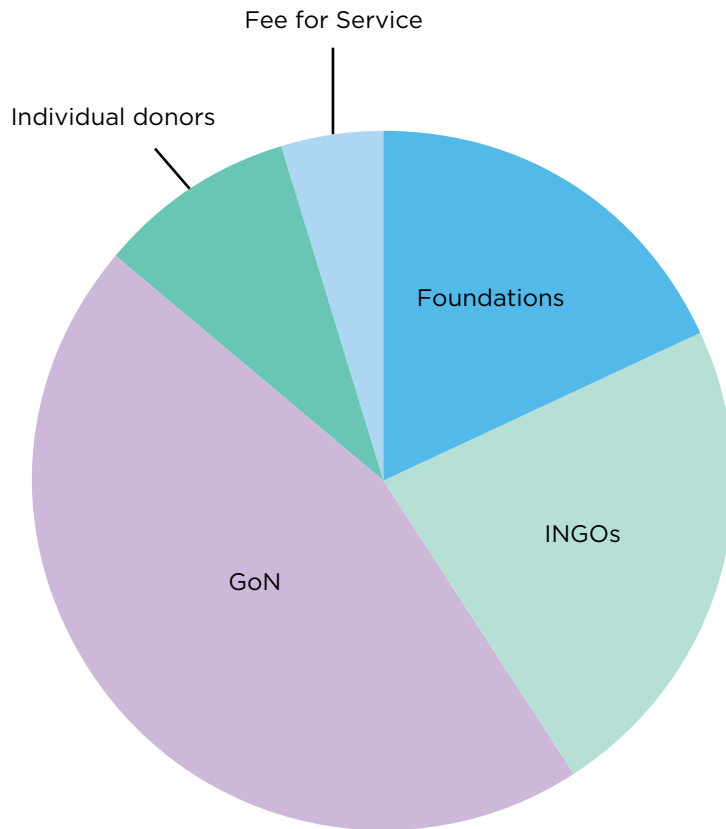
PART I. SAMPLE ORGANIZATION X

The pie charts below are a picture of the various ways this sample organization receives funding. What do you observe? Do you think they are better off in scenario A or scenario B? Do you think it matters?

Scenario A:
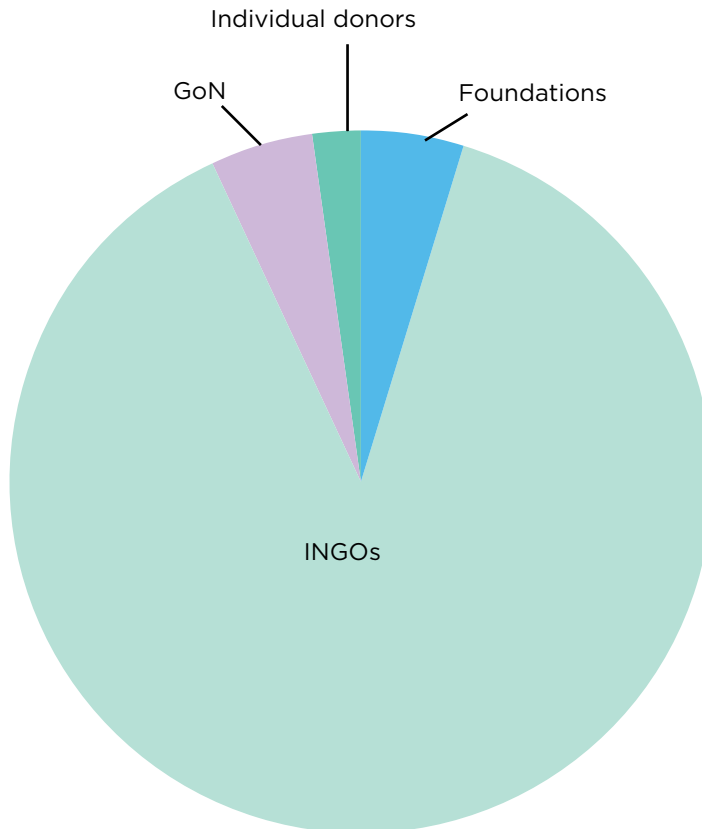
Scenario B:

PART II: YOUR OWN ORGANIZATION

What does your organizational funding look like now?

Use the circle below to make a rough pie chart for what you think your organization's funding looks like now. What can you observe about your chart? What do you think it might tell you about your organizational funding sustainability? Are there things you might like to change in the future? D4 Session 4: Implementation and Action Planning
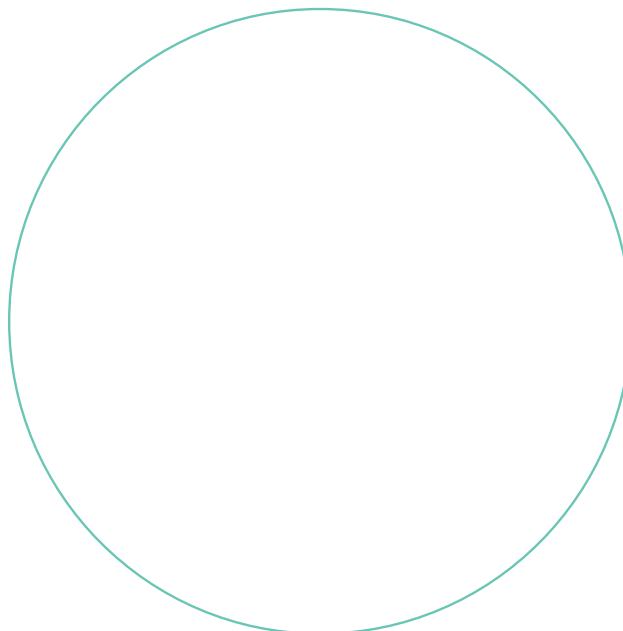
D4 SESSION 4: IMPLEMENTATION AND ACTION PLANNING

A. CONFIRMATION OF APPROACHES

OBJECTIVES

Participants assess and confirm organizational resource mobilization strategies or approaches.

TIME

1 hour

SESSION OVERVIEW

- Re-introduce the idea of prioritization and assessment of resource mobilization approaches.
- Have participants review the approaches they have identified as good for their own organizational resource mobilization and to see if they still seem like a good fit based on the full range of learning over the previous session.
- Confirm or amend strategies/approaches as needed.

KEY POINTS

- The process of prioritization and assessment is ongoing and critical to successful implementation of any strategy.
- Organizations should be constantly thinking about how feasible a resource mobilization strategy may be, what kind of investments may be necessary to carry out, and how likely it is to bring significant returns.
- The idea of return on investment, even in very broad terms, is important for successful strategy development.

HANDOUTS

- *Assessing Strategies*
- *Confirming Strategies*

D4 SESSION 4A HANDOUT: ASSESSING STRATEGIES

Now that the group has had the chance to look more deeply at what it takes to succeed with different resource providers (Day 2) and at what investments and capacities might be needed within an organization to be successful, it is time to assess and prioritize again.

Take your worksheets from Day 3 (Tables 7 and 8) and consider the following questions.

- Overall, what do you think about your approaches now that you've had time to explore other aspects?
- How feasible do they seem overall?
- How do they rate in terms of resource sustainability (accountability and diversification)?
- How do they rate in terms of the investments (physical, staff, organizational) that would need to be made to succeed?

Using your answers to the above questions, try to determine where you would now place these approaches (with targeted resource providers) on the assessment/ prioritization chart.

TABLE 8: ASSESSING STRATEGIES		
Expected feasibility (in terms of cost and capacity) ↑	**Expected Benefit** →	
	Highly feasible but potentially low benefit. Determine if worth the effort. *[Insert resource mobilization strategy from **Table 8** here]*	Highly feasible, high benefit. **Top priority.** *[Insert resource mobilization strategy from **Table 8** here]*
	Low feasibility and likely low benefit. **Do not pursue at all.** *[Insert resource mobilization strategy from **Table 8** here]*	Not easily feasible but potentially high benefit. Weigh pursuing carefully. *[Insert resource mobilization strategy from **Table 8** here]*

D4 SESSION 4A HANDOUT: CONFIRMING STRATEGIES

Taking your work in the previous handout (Assessing Strategies), confirm that the approaches you would like to move forward on still hold, or if you would like make any adjustments.

PROPOSED STRATEGY	ANY CHANGES TO STRATEGY?

B. ORGANIZATIONAL NEEDS AND INVESTMENTS

OBJECTIVES

Participants review what they have learned and compile reflections from previous sessions, including gap analysis, to create a detailed action plan for their organization.

TIME

2 hours

SESSION OVERVIEW

- Identify the range of capacity strengthening needs the participating organizations may have to successfully implement their resource mobilization approaches and strategies.
- Identify specific short and longer term next steps.

KEY POINTS

- Resource mobilization requires significant efforts and resource investment.
- All organizations that are successful in resource mobilization invest in increasing their resource mobilization capacity across their entire organization.
- The key to success is to assess and evaluate where to invest and where to increase organizational capacity for the greatest return.

HANDOUTS

- *Organizational Readiness Needs and Investments*
- *Next Steps*
- *Additional Resources*

FLIP CHART/SLIDES

- Roadmap
- Resource Mobilization Cycle

D4 SESSION 4B HANDOUT: ORGANIZATIONAL READINESS NEEDS AND INVESTMENTS

First, review the priorities, needs and approaches you and your colleagues have identified from previous exercises in your workbook. Start with your most pressing priority, write it down in the box below and then try to work through the questions below. You'll find another copy of this worksheet in your workbook. If you find that you have completed the exercise and there is still time, take the next priority need identified and explored in the previous days' program and repeat the exercise.

Review:

Priority resource need:

Target resource provider:

Resource mobilization strategy:

Now consider the following question: To successfully carry out this approach and secure these necessary resources from this targeted resource provider what will you need to do within your organization? The categories below mirror the exercises, and in particular, the reflections from the previous days.

Work with your teammates to consider what additional investments and efforts might be needed within each area for you to successfully meet your resource mobilization goals. Write down your answers to the questions below as comprehensively as is possible. Be as specific as possible.

Organizational leadership and governance: *What might the leadership of your organization need to do more of or do differently to achieve help implement this resource mobilization strategy? What kinds of planning processes might need to be improved or strengthened?*

Staff and staff skills: *What will we need to invest in terms of additional staff time or staff persons to achieve our resource mobilization goal? What additional staff training or skills might be needed? Do we need to further define roles and responsibilities between staff members?*

Communications: *What do we need to do in terms of developing communication messages and materials to achieve our resource mobilization goal?*

Finance management and administration systems: *How ready is our organization to pursue outside resources in terms of our finance and administrative skills? What might we need to do to track costs, and track and manage financial information, in order to both pursue and manage external resources? What might need to be strengthened for us to be sure that we will be able to account for any resources we do secure?*

Monitoring, evaluation, reporting (accountability and learning) systems: *What might need to be done to strengthen our monitoring and evaluation systems in order to both achieve our resource mobilization goal, and also to ensure that we will be able to account for external resources and their impact? How strong is our organizational learning? How might it need to be strengthened for resource mobilization success?*

Physical Investments: *Are there any physical investments that might be needed to achieve our resource mobilization goal?*

DAY 4 SESSION 4B HANDOUT: NEXT STEPS

The previous exercise identified a range of investments and efforts that may be needed within your organization to reach your resource mobilization goal.

Imagine that you are back at your desk and that you and your team have to determine where and how to start your resource mobilization efforts.

What are the first three things you will do to start addressing these needs and start to implement your resource mobilization plans?

1)

2)

3)

C. ADDITIONAL RESOURCES

D4 SESSION 4C HANDOUT: ADDITIONAL RESOURCES

CRS' Institute for Capacity Strengthening www.ics.crs.org is a robust resource library and dynamic learning space for CRS and partner staff, with helpful courses, tools, and resources on partnership and capacity strengthening.

Search the ICS www.ics.crs.org for some particularly helpful resources that include:

Institutional Strengthening Guide: The Institutional Strengthening Guide is intended to serve as a reference for organizations wishing to develop or improve existing institutional strengthening systems and processes. The guide presents principles, minimum standards and best practices, business processes, references and tools deemed important for effective, efficient, and sustainable organizations. The guide consists of ten chapters that cover the key functional areas of most organizations. Each chapter (and indeed each step and process within each chapter) can be used as a stand-alone document. CRS offers the guide as an adaptable tool which may be used to develop new, or strengthen existing, policies, processes and practices.

Project Design and Proposal Guidance for CRS Project and Program Managers (Pro Pack): ProPack (Project Package) aims to help CRS staff work in a consistent manner with partnering organizations to raise the quality of its planning processes.

Propack II: Propack II follows directly from ProPack I, Project Design and Proposal Guidance, and builds on the simple concepts and methodologies introduced in that volume. It includes sections on project management theories and concepts, detailed implementation planning, monitoring and evaluation, and builds on the tools introduced in ProPack I.

Propack III: This guide presents an approach to developing a monitoring and evaluation system for projects supported by CRS. The content is derived from guidance in ProPack (CRS, 2004 and CRS, 2007) and streamlined based on experience in CRS country programs in Africa, Asia, and Latin America. The new approach is called SMILER: Simple Measurement of Indicators for Learning and Evidence-based Reporting.

M&E Training and Capacity-Building Modules: CRS and the American Red Cross collaborated on this nine-part series of training and capacity-building materials in program monitoring and evaluation. The modules provide practical information across a wide range of topics, from hiring monitoring and evaluation staff to preparing for a program evaluation. They were conceived and developed to respond to field-identified needs for specific guidance and provide tools that are not available in other publications. Examples focus on Title II programming, but the material is also relevant outside the realm of food security.

The Foundation Center: A U.S.-based organization that links to foundation and corporate sites of interest to fund raisers, and provides general information on foundations and giving. http://fdncenter.org

Inyathelo - the South African Institute for Advancement: South Africa-based organization that offers resources, training and capacity building to non-profit organizations, particularly in relation to fundraising, organizational governance and their overall long-term sustainability. http://www.inyathelo.org.za/

The Resource Alliance: A UK registered charity, based in London, the Resource Alliance works to be a global network for fundraising, resource mobilization and philanthropy. http://www.resource-alliance.org/index.php

International HIV/AIDS Alliance: The Alliance has a range of practical information, tools, and guidance on supporting NGOs and community based organizations. http://www.aidsalliance.org/

Innovation Network: A network that helps NGOs evaluation tools on a range of topics from mission statements to logframes to program design to post-program evaluation. www.innonet.org/

CIVICUS: An international civil society organization, CIVICUS has a range of tools aimed at strengthening NGOs' organizational capacity. http://www.civicus.org/

Network Learning: For resources and manuals specifically for development and humanitarian NGOs, including manuals on financing income generation activities in conflict-affected countries, NGO capacity assessments, and building a small NGO. www.networklearning.org.

Board Source: An organization that offers information on governance and organizational structures support and on building effective boards. www.boardsource.org.

D4 SESSION 5: CLOSING

Handout

• Final Evaluation (see D4 Session 6 below)

D4 SESSION 6: DAILY AND FINAL EVALUATION

DAILY EVALUATION

Please take a few minutes to write down your answers to following questions. The facilitator will collect them from you before you leave. Your feedback is very important to us and your participation is appreciated. Thank you!

What was most useful for you today? What did you like the most?

What was most difficult? What suggestions do you have for overcoming this difficulty?

What would you do differently if you were the facilitator?

What suggestions do you have for tomorrow?

Other comments?

SAMPLE FINAL EVALUATION

Please take a few minutes to write down your answers to following questions. Your feedback is very important to us and your participation is appreciated. Thank you!

1) Please check the box that most fits your assessment.

	DON'T AGREE	SOMEWHAT AGREE	AGREE	AGREE WITH EMPHASIS	DON'T KNOW – PLEASE EXPLAIN
I can define resources and identify different types of organizational resource needs					
I can identify a range of potential resource providers and/or opportunities					
I gained new knowledge/ skills in at least two key resource mobilization areas (fundraising events, entrepreneurial opportunities, proposal writing, individual/ corporate donors)					
I know how I might develop appropriate, robust and sustainable resource mobilization strategies for an organization.					
I understand the kinds of things my organization should do to strengthen our organizational resource mobilization.					
I have clear and specific actions that I will take back to my organization.					

What was the most useful part of the training for you?

Can you name two things that you learned that you did not know before you came? What are they?

What was most difficult?

Was there something that would could have skipped? What would it be?

Were there any topics that the training missed or that you wished we covered more deeply?

What would you do differently when the training is held again somewhere else?

Please comment on logistics (meals, breaks, hotel, conference facilities, etc.).

Please provide feedback to the facilitator(s) so they may continue to improve their work.

Other comments? (Please use the back side if you need more room)

Thank you and safe travels home!