RESOURCE MOBILIZATION
Resilient & Responsive Health Organizations (RRHO)
2018
Training Agenda

- Introduction
- Objectives and Resource Gaps
- Understanding the funding landscape
- Roles and Responsibilities
- Resource Mobilization Strategy Development
- Resource Mobilization plan presentations, feasibility check, and next steps
Objectives

By the end of the training, participants will:

- Understand the components of a resource mobilization strategy
- Identify and define clear links between a strategic plan and a resource mobilization plan
- Understand the funding landscape
- Prioritize objectives and activities and establish clear roles and responsibilities
- Perform funding gap analysis
- Develop the foundation of a resource mobilization strategy
Agenda

- **Introduction**
  - Objectives and Resource Gaps
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Resource Mobilization in Context

Who are we?
- Mission/Vision
- Strategic Plan

What do we need?
- Leadership
- Resources
- Systems

From Where?
- Mix of resources
- Funding Sources

How do we get it?
- Communications
- Networking
- Advocacy

Organizational Assessment Process

Resource Mobilization Strategy

Communications Strategy
Defining Resource Mobilization

Quick breakout exercise:

Step 1: What are resources?
Write the words, terms, and phrases that define “resources.”

Step 2: What is resource mobilization?
Come to a consensus on a definition of “resource mobilization” and be prepared to share.
What are Resources?

**Human**
- Skills
- Experience
- Ideas

**Physical**
- Facilities
- Equipment
- Materials
- Tools

**Social or Political**
- Partnerships
- Good will
- Reputation
- Favorable policies

**Financial**
- Money
- Unrestricted funding
- Access to credit
- Revenue from business activity

**Natural advantages**
- Location
- Natural resources
- Fertile land
Resource Mobilization Defined

“A process through which the resources that are essential for the development, implementation and continuation of work for achieving the organization's mission are identified, pursued and managed.”

“A process organizations use to acquire and put to use those things they need to implement activities and pursue their mission.”
The RM Cycle

Step 1: Identify Needs

Step 2: Map Sources

Step 3: Develop Strategy

Step 4: Implement Monitoring Plan

Needs are linked to strategic plan
The RM Cycle

1. **Identify needs:** The organization identifies its needs. Those needs are linked to a cost for establishing priorities. This is usually done during strategic planning.

2. **Identify potential funding sources:** Once the costing has been done, the organization identifies potential sources of the resources needed. They can be current donors, the community or the board.
The RM Cycle

3. **Develop an RM strategy:** Once sources are identified, develop a strategy that includes a structure and systems for raising the required resources.

4. **Implement a monitoring and consolidation plan:** It is important to keep a record of progress and to have a clear monitoring system that will determine if the strategies are working or not. Once a plan is in place, consolidate effective strategies and change those that are not working.
Reflection

Consider the following questions:

• What is the relationship between resource mobilization and strategic planning?

• How will the theory of change shape the organization’s resource mobilization strategy?
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- **Other notes / info**: Other notes / info
RM Guiding Questions

• What are the needs/priorities of your target group?
• How many resources do you need and when?
• Who are you going to ask for money/resources?
• What methods will you use (including key documents)?
• How much will this cost your organization (LOE, allocation of funding)?
• Who will be responsible for what?
• How will you know your strategy is working?
RM Strategy Outline:

• Executive summary
• Introduction: information on your organization; key needs and rationale for RM strategy
• Context and lessons learned
• Goals and objectives (priorities, needs, potential funding)
• Timeframe and structure for implementation
• Budget—Costing for RM activities
• Key documents (e.g., strategic plan, organogram).
• Monitoring & evaluation plan: reviews, indicators, reporting
Resource Mobilization

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Objectives / Activity Mapping and Prioritization

Group Exercise:

• Identify objectives and activities in the theory of change that require resources.

• Ensure that we account for all necessary resources.

• Prioritize objectives or activities to focus on for RM strategy, if necessary.
The RM Cycle

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Needs are linked to strategic plan
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Objectives / Activity Mapping and Prioritization

Group Exercise:

• Identify objectives and activities in the theory of change that require resources.

• Ensure that we account for all necessary resources (not just financial).

• Prioritize objectives or activities to focus on for RM strategy, if necessary.
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Unrestricted vs. Restricted Funds

• What are restricted funds? Almost everything you get, including USAID and MOH. Comes tied to specific budget lines.

• Unrestricted funds are more flexible and, in that way, can be more valuable as it can be used to fill gaps such as training, staff development.
Understanding the Funding Landscape Objectives

By the end of this session participants will be able to:

• Define the funding landscape

• Identify potential sources of funding

• Identify the benefits/challenges associated with each type of funding

• Understand the importance of resource diversification and define the organization’s desired funding mix
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Reflection—What do we mean by funding landscape?

The “funding landscape” refers to the collection of potential funders available to provide resources in the organization’s geographic and programmatic area.
Reflection continued…

The funding landscape includes many different types of funders.

What are some types of funders that you work with or are familiar with?
Examples of Funders

Governments
- Government/ MOH
- US Government contracts / grants
- Bilateral pool funding
- Implementing Partners
- PEPFAR
- DFID
- JICA

Multilaterals
- World Bank
- EU
- UNICEF
- UNAIDS
- UNFPA
- UNMIL
- UNHCR
- Global Fund

Key Foundations
- Bill and Melinda Gates Foundation
- David and Lucile Packard Foundation
- Ford Foundation
- Johnson & Johnson Foundation
- Clinton Foundation

Other Sources
- DevEx
- Communication Initiative
- Funds for NGOs

Adapted from the Resource Mobilization Implementation Kit, Johns Hopkins University and MSH
INGO Funders interested in Nursing and Midwifery in Africa

**Funding Nursing in Africa**
- The Bristol-Myers Squibb Foundation, Inc.
- The M.A.C AIDS Fund
- Open Society Institute
- The Aspen Institute, Inc.
- The Nick Simons Foundation
- The Charles Hayward Foundation
- National Hospice Foundation, Inc.
- Urologic Cancer Foundation
- Johnson & Johnson Corporate Giving Program
- The True Colours Trust

**Funding Midwifery in Africa**
- March of Dimes Foundation
- Health Professions Education Foundation
- Ted Adams Trust Limited
- Dominican Community Bridge Fund
- Edith Cavell Fund for Nurses
- Groundswell Fund
- Nursing and Midwifery Council
- The Royal College of Midwives Trust
- Foundation for the Advancement of Midwifery
- New Zealand College of Midwives
Recent Funders in West Africa

The Save the Children Fund  
The Salvation Army International Trust  
Tearfund  
Oxfam America  
Brac USA, Inc.  
The Salvation Army World Service Office  
Muslim Hands  
Moondance Foundation  
Fund For Global Human Rights, Inc.  
Hidaya Foundation  
American Jewish World Service  
New Field Foundation  
Mortenson Family Foundation  
The Evan Cornish Foundation  
The Innocent Foundation  
The James Tudor Foundation  
William Adlington Cadbury Charitable Trust  
International Labor Rights Forum  
Edgar Spencer Memorial Fund  
Mother Teresa Children's Foundation  
Franciscan Works  
The World Children's Fund  
Trustees of Donations for Education in Liberia  
The African Cultural Exchange  
African Well Fund, Inc.  
Amanat Charity Trust  
Children In Crisis  
The Coles-Medlock Foundation
Recent Funders in West Africa

Charity:Water  Norwegian Human Rights Fund
The Bloom Foundation  Open Society Initiative for West Africa
The One Foundation  Open Society Foundation
Rotary Club Of Dartmouth  Pump Aid Limited
Charitable Foundation  Pro Victimis Foundation
MAVA - Fondation pour la Nature  Shelter Rock Ministries, Inc.
International Rescue Committee, Inc.  Anastasios G. Leventis Foundation
International Development Research Centre  New Frontiers International Trust Limited
International Development Through Sport Uk (Ids Uk)  Stichting Shortlink Foundation
ID Identifying Discourse, Inc.  The Phelps Stokes Fund
Importance of Diversification of Funds

Discussion:

• Why is it important to diversify an organization’s funding streams?
• What is your organization’s current funding mix?
• What is your organization’s ideal funding mix?

Direct Government Funding

Direct International Funding (Grants from foundations or IPs)

Innovative Business Models / Revenue Generation

Formal Sub-recipients of International Funding
Types of Funding Mechanisms

**Direct Government Funding**
- Usually restricted
- Short to medium term funding
- Dependent on MOH budget process

**Direct International Funding** (grants from INGOs and foundations)
- Short to medium term funding
- Could be unsolicited by the funder; specific projects identified by recipient
- Usually less stringent reporting requirements

**Innovative Business Models / Revenue Generation**
- Unrestricted
- Short to long-term funding
- Requires different management approach/skills
- Provides a potential base of revenue to cover operational costs

**Formal Sub-recipients of International Funding**
- Requires coordination at the proposal stage with IP
- Restricted funding
- High degree of reporting and regulatory requirements
- Short to medium term (5 years)
Quick Donor Mapping (group exercise)

Within your groups, select 2-3 funders with which you are familiar.

As a group, discuss what you know about each organization and write down 1-3 activities you know that they have funded previously. What is their technical focus?

Share with the group.
Researching Donors

It is important to answer the following questions before you contact potential donors:

- What is their mission?
- What are their specific topics of interest?
- What type of support do they provide?
- Who are their primary beneficiaries?
- What is their current funding strategy?
- How much money/commodities do they donate every year?
- What programs/organizations have they funded in the past?
- What is their application process, if any?
- What connections do they have, if any, to your organization? (Are they a past or current donor? Do you or your staff have professional or personal contacts with Board members or staff?)
Identifying Funders & Priorities

Examples of how you could stay updated on the funding environment and trends in the funding landscape:

- Appoint a staff person or committee whose task is to assess the landscape
- Designate a staff person to read the local news for announcements and notices related to your core areas of interest
- Listen to what your core network of peers, friends and partners are talking about and decide if it is relevant and worthy of further exploration
- Tap into your relationships with international NGOs—Ask what they know about new initiatives and practices and technologies
Deciding When to Approach a Donor

- What the funder wants
- What the situation requires
- What the organization can offer
Researching What They Fund—Sources

- Local media (newspapers, magazines, TV, radio)
- Google/search engines
- Donor websites
- Guide Star at www.guidestar.org
- Foundation Center at www.foundationcenter.org
- Charities Aid Foundation at www.cafonline.org
- NGO Pulse at www.ngopulse.org
- Competitors’ annual reports
- Philanthropic publications
- Corporation websites
- European Foundation Centre at www.efc.be
- Global Giving at www.globalgiving.com
  (A US hosted website where Southern NGOs can apply to register projects with the aim of attracting the interest of potential funders. The website is promoted to individuals interested in funding Southern NGOs directly.)
- www.euforic.org
  (a social network connecting projects, events, people and organizations engaged in international cooperation and development.)
Tracking USAID or other USG Funding Opportunities


For current opportunities:
www.fedbizopps.gov
Approaching Foundations and Corporate Giving

• Foundations are “in the business” of giving money away
  – Giving is targeted or cause-specific
  – Systems are often more mature and prescribed

• Corporations are “in the business” of making money
  – Smaller in size
  – Often giving is focused on where company has physical presence (plant, distribution, etc.)

Adapted from NPI Resource Development Training, Washington D.C., USA, June 2010
Tips on Foundation & Corporate Fundraising

1. Public-sector grants and contracts are almost exclusively for project activities, while private sources will often give “general support” contributions.

2. Foundations and corporations seldom put out a “request for proposals” or other announcements of funding availability. You must take the initiative.

3. It is often important to submit grant requests early in the corporation’s/foundation’s funding year; budget allocations may be determined early in year

Adapted from NPI Resource Development Training, Washington D.C., USA, June 2010
Tips on Foundation & Corporate Fundraising

4. Most foundations are unlikely to provide large grants for ongoing service programs. They prefer to fund new or demonstration efforts, and usually make funding commitments for a specific project for only a limited time period, usually not more than three years.

5. It is both necessary and proper to make personal contacts with potential private-sector funding sources. Many funding decisions are based on personal connections.
Tips on Foundation & Corporate Fundraising

6. A brief and effectively written proposal summary, usually not more than one page, is particularly important for private-sector proposals. Often, the Board or Committee will make a decision based on a one-page summary.

7. Foundations and corporations have great discretion in funding. There is usually not a strict review requirement. However, many foundations and corporations are following the Gates lead and becoming more formal.

Adapted from NPI Resource Development Training, Washington D.C., USA, June 2010
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What is the “Funder Gap”?  

- **INFORMATION**: Knowledge of the requirements and application process that you need to gain in order to secure funding.  

- **ACCESS**: Contacts at a target funder that you are missing.
Exercise

In small groups, use the RM plan handout to populate the Resources Required, Potential Donors, and Funder Gap columns.

Be as specific about the resources as possible

Potential donors could be a specific organization or a type of funder (foundation, MOH, local or international company, implementing partner, etc.)

Funder gap could be TBD if a specific organization is not identified.
Resource Mobilization

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- Objectives and Resource Gaps
- Understanding the funding landscape

**Roles and Responsibilities**
- Resource Mobilization Strategy Development (small group exercise)
- Resource Mobilization plan presentations, feasibility check, and next steps
Roles and Responsibilities Session
Objectives

By the end of the session, participants will be able to:

• Understand the roles and responsibilities for RM within your organization
• Understand the typical role of a Board in Resource Mobilization
• Be better able to separate the role of the Board from that of Management
## Resource Mobilization Strategy

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Roles and Responsibilities for RM

In a sustainable organization, everyone is responsible for resource mobilization.

• Who in your organization is involved in resource mobilization?

• In what resource mobilization activities are they involved?
Exercise: Roles and Responsibilities

Group Activity (Part 1)

• Consider each of the general roles in the organization.

• Each group will receive a few RM tasks.

• Assign the RM task to a role according to how you think your organization functions currently.

• If you think more than one role does a task, write another sticky note and place it on the appropriate role.

• Check each role. Is this accurate? What do you observe?
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<td>No Role Assigned for Task</td>
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<td>Program Staff (Staff working N/M Desks and M&amp;E)</td>
<td></td>
</tr>
</tbody>
</table>
Exercise: Roles and Responsibilities

Group Activity (Part 2)

- Now that we see what the current roles and responsibilities are, rearrange the tasks to reflect how you think your organization *should* operate.
- What did we need to change?
Exercise: Roles and Responsibilities

Group Activity (Part 3)

• Take a look at the *typical* roles and responsibilities set up.
Importance of Leadership

Resource mobilization demands committed leadership to provide vision and direction.

Management and even the board needs to understand their specific responsibilities for RM and support each other in performing their roles.
The (typical) Board’s Role

In many countries, the primary responsibility of a board is to ensure the organization’s sustainability and its solvency.

Donors are more likely to fund an organization with a credible board than an organization without one.
The (typical) Board’s Role

- Participate in developing a strategic plan that sets objectives and priorities of the organization and costs them
- Draft resource mobilization objectives and plan
- Draft proposals for review and approval by the board
- Mobilize and retain human resources
- Implement the resource mobilization plan
- Report to board, donors and stakeholders on the progress of the plan and use of resources
Discussion: Role and Responsibilities at Your Organization

- Think through the structure of your organization, keeping in mind what you have discussed in this session.

- Identify areas that the organization needs to work on to improve how RM roles and responsibilities are assigned, managed and implemented.

- Would you make any changes to the ideal set up, now that you have seen the typical set up? Would you change anything and why?
Resource Mobilization

Agenda

- Introduction
- Objectives and Resource Gaps
- Understanding the funding landscape
- Roles and Responsibilities
- **Resource Mobilization Strategy Development**
- Resource Mobilization plan presentations, feasibility check, and next steps
Complete RM Plan

• Return to your groups to complete the Actions Required, Persons Responsible, Timeframe, and Challenges columns.

• Be specific about the actions required. For example, instead of “apply for grant funding,” elaborate with “research funder, make initial contact to gather information about opportunities and process, develop grant proposal.”

• Present out to group.
## Resource Mobilization Strategy

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Resources required</th>
<th>Potential donors / other sources of funding</th>
<th>Funder Gap</th>
<th>Actions required to raise the resources</th>
<th>Persons responsible</th>
<th>Timeframe</th>
<th>Challenges</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are we trying to achieve?</td>
<td>What do we need to accomplish our goal?</td>
<td>Where will the resources come from?</td>
<td>What or who do we need to know that we don’t know now (info / access)?</td>
<td>What are the steps required to secure the resources?</td>
<td>Who will do what, specifically?</td>
<td>When will each step happen? When are the resources needed?</td>
<td>What internal or external factors will we need to consider?</td>
<td>Other notes / info</td>
</tr>
</tbody>
</table>
Resource Mobilization

Agenda

- Introduction
- Objectives and Resource Gaps
- Understanding the funding landscape
- Roles and Responsibilities
- Resource Mobilization Strategy Development (small group exercise)
- Resource Mobilization plan presentations, feasibility check, and next steps
Resource Mobilization Plan

A few questions to consider as we review:

- Do the resource mobilization activities link to the strategic plan?
- Do we currently have enough resources to implement the plan?
- Now that we see the full picture, are there certain RM activities that should be prioritized? Are there certain activities that should come before others?
- Do the proposed roles and responsibilities fit within our defined understanding of what they should be? Are they realistic?
RM Strategy Outline

• Executive summary
• Introduction: information on your organization; key needs and rationale for RM strategy
• Context and lessons learned
• Goals and objectives (priorities, needs, potential funding)
• Timeframe and structure for implementation
• Budget—Costing for RM activities
• Key documents (e.g., strategic plan, organogram).
• Monitoring & evaluation plan: reviews, indicators, reporting
Now what?

What are the next steps for putting the plan into action?

How will you finalize the plan?