



# Incubation Hub

CENTRE FOR CIVIC ENGAGEMENT

## Resource Mobilisation

# Objective of presentation

1. Create a common understanding of resource mobilisation
2. Develop skills to raise resources
3. Nurture a shift from pursuing donors to being donor-pursued

# Features of Sustainable Organisations

## Governance

- Effective Board
- Effective Internal Systems and Processes

## Sustainable Resource Base

- Resource to support short- & long-term needs
- Competent team to achieve mission
- Capacity to retain talent

## Effective Communication Strategies

- Use of both traditional and new forms of media to reach a wide audience
- Proactively communicate internal development and mission related information

## Visible Program Footprint (Excellent Reputation)

- Clearly defined program goals responsive to context
- Documented impact of work done to date
- Accountable to different clusters of enablers, supporters and beneficiaries

# Introduction

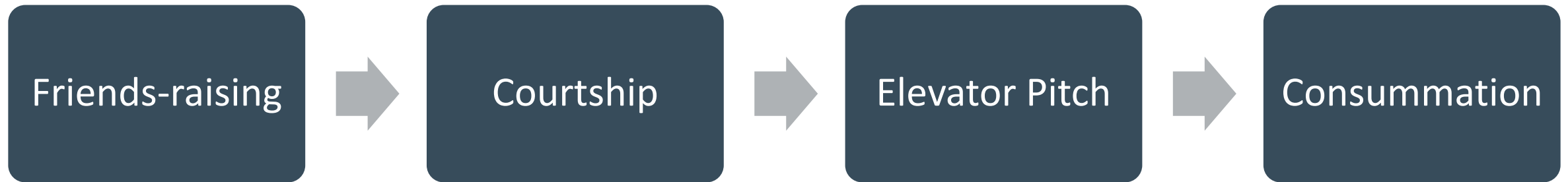
- Resource mobilisation entails the seeking of financial, technical, and other forms of support for a charity cause or other enterprise
- Most non-profits rely upon the generosity of donors for some or all of their funding
- Often, resource mobilisation has been reduced to the act or moment of preparing a proposal and submitting it to a potential funder
- Resource Mobilisation/Fundraising goes beyond just preparing and submitting a proposal.
- Everyone in the organisation contributes or plays a part in resource mobilisation.

# What is Resource Mobilisation?

- **an ongoing process** of seeking financial and other resources from external parties to ensure a non-profit organisation remains viable and implements activities to achieve its mission
- Larger non-profits have specific teams/units established for resource mobilisation.
- In smaller non-profits, the responsibility rests upon the head of the organisation with support from the board and senior management.
- Despite its central importance to organisational well-being, resource mobilisation remains the most under-studied and least understood area of organisational well-being.

# Ways to Fundraise - Route 1

The actual process of resource mobilisation can be understood not as a single event but as an ongoing phased process:



# Ways to Fundraise - Route 1

## *Phase 1: Friends-raising*

- Invest in widespread networking with fellow leaders in your sector, those working in funding agencies and with media personnel to make sure your brand is recognised.
- Beyond the exchange of business cards/contacts, there is a need to cultivate meaningful friendships.
- Invest time in understanding the interests of those in funding positions. It is said that most of the funding deals are discussed at social events.

# Ways to Fundraise - Route 1

## ***Phase 2: Courtship***

- Ensure that potential funders or connectors within your reach are kept up to date with developments in your organisation.
- Include them in your mailing list (*with their permission*) and where possible ask for names of others who should also be included.
- Organise networking events, especially around certain holidays like Independence, Workers and Africa Day.
- *Use such events to profile the organisation and hint at funding challenges (nothing written yet).*

# Ways to Fundraise - Route 1

## *Phase 3: Elevator Pitch*

- In all these networking platforms/events you will have to tell your organisation's story to different audiences and in informal settings.
- It is important to have a clearly defined and commonly agreed way of speaking about your organisation.
- An Elevator Pitch is a **short, memorable description of you and your organisation** which must be communicated in the length of time you might have with a stranger in an elevator.

# So, what's your story?

- Can you communicate what your organisation does within 60 seconds? What are the punchlines or keywords that you want the audience to hear? Be very clear about connecting challenges within the environment with solutions that you create. Demonstrate that you are solutions-oriented.
- Your elevator pitch should have the following components:
  - Component 1: Organisation's name and your role
  - Component 2 The problem you are attempting to solve
  - Component 3: Your proposed solution
  - Component 4: The key benefit of your solution
- Do not make the mistake of assuming donors will always be sympathetic to the challenges of lack of funding. Unfunded organisations are a red flag- potential donors will ask why they are not funded if they are that important.

# Ways to Fundraise - Route 1

## *Phase 4: Consummation*

- The networking activities described above are considered successful if your contacts start sending you opportunities, they think would be a strategic fit for you.
- The invitation to submit a concept note, a one-pager or even a full proposal does not necessarily mean that funding has been secured.
- There is a need to focus on developing a compelling, winning proposal that clearly articulates the problem (where possible using evidence) and a well-thought-out solution.

# Route 2 – Responding to Calls for Proposals

- The processes in this route to funding are not necessarily different from the ones discussed in Route 1. In many instances funding agencies issue either limited or open calls for funding.
- The steps described in Route 1 are essential for securing funding where there is a restricted call for proposals. In this instance, the funding agency approaches/heads hunt for organisations they already know or are in a relationship with. The open calls for proposals are more competitive.
- Funding agencies post their calls for proposals on their websites and share them on subscriber-based listservs.
- The organisation will need to make sure that the following is in place to effectively respond to opportunities that come through calls.

# Responding to Calls for Proposals

## *Phase 1: Have an Up-to-Date Funding Tracker*

- The tracker must be a simple, comprehensive system of tracking funding opportunities.
- The most basic tracker would be one that crawls the web using certain search words that relate to your focus areas such as ‘gender inclusion funding’, ‘youth opportunities funding’, and ‘human rights funding’. These will generate links to funding opportunities as and when they are posted. The organisation must then make decisions on which opportunities to pursue. An easy one to set up is **Google Alerts**.
- Make it a habit to share funding opportunities with other like-minded organisations. They will most likely also reciprocate the gesture.

# Responding to Calls for Proposals

## *Phase 2: Subscribing to Donor Databases*

- There are several subscription-based databases that an organisation can access. A few databases offer both an open access window and a paid-for access window.
- Paid access will always be superior to free databases.
- The list of funding databases provided below is exhaustive but there is a need to continuously update it

# Free online donor databases

- Coordination Sud: [www.coordinationsud.org/financements](http://www.coordinationsud.org/financements)
- Free Alert TripleFunds [www.triple-funds.com/](http://www.triple-funds.com/)
- FundsForNGOs [www.fundsforngos.org/](http://www.fundsforngos.org/)
- VC4A <https://vc4a.com/>
- Funding Scotland <https://funding.scot/search>
- Bond [www.bond.org.uk/hubs/funding-opportunities](http://www.bond.org.uk/hubs/funding-opportunities)
- Peak Proposals <https://www.peakproposals.com/>
- Grant Advisor <https://grantadvisor.org/>
- Euroalert <https://euroalert.net/calls/all>
- GrantStation <https://grantstation.com/public-resources/GrantStationInternational-Insider>

# Paid Donor Databases

- TripleFunds [www.triple-funds.com/](http://www.triple-funds.com/)
- FundsForNGOs Premium  
[home.fundsforngospremium.com](http://home.fundsforngospremium.com)
- Candid  
<https://fconline.foundationcenter.org/>
- Devex <https://www.devex.com/>
- Terra Viva  
<https://www.terravivagrants.info/>
- Portal365  
<https://www.portal365.org/en/Grants>
- DARPE <https://darpe.me/>
- Up2Europe  
<https://www.up2europe.eu/calls/>
- DevelopmentAid  
<https://www.developmentaid.org/>
- Catholic Funding Guide  
<https://www.catholicfundingguide.com/>

# Responding to Calls for Proposals

## ***Phase 3: Schedule Regular Fundraising Meetings***

- Create a small working group that meets at least once every month to discuss new fundraising opportunities and ongoing attempts at securing funds.
- Use the meetings to review fundraising performance and also explore other ways of securing funds. Where possible use the meetings to share and distribute tasks across the team.
- The meeting should make a decision on funding opportunities to pursue based on alignment with the mission of the organisation and also funding gaps that exist within the organisation.
- Make sure to bring people together who have a diverse skill set when it comes to generating proposals or forming relationships with funders.

# Responding to Calls for Proposals

## ***Phase 4: Refresher Course/Training on Resource Mobilisation***

- Make sure that team members have an adequate understanding of what resource mobilisation entails.
- Send new members on short training courses.

# Developing a Winning Proposal

- Once a decision has been made on the funding opportunities to pursue the team should organise itself to prepare the proposal.
- In many instances, donors already have their proposal templates for you to complete.
- In instances where a template is not provided the following provides guidelines on what a winning proposal should look like

# Developing a Winning Proposal - Guidelines

## **1. Create a Project Narrative**

- This is your opportunity to describe in greater detail the project for which you are seeking funding.
- Clearly lay out your goals for the project and the markers (indicators) you need to meet to show that your project has been successful.
- Include research information that shows the need for your program and what populations it will serve.
- Illustrative anecdotes and case studies can be included in this section to vividly bring to life the importance of your program.
- Where possible include your theory of change and describe what success will look like.

# Developing a Winning Proposal - Guidelines

## ***2. Include a budget***

- Usually one page/one Excel Sheet
- Lists expenses for the personnel, overhead and other costs associated with your project.
- The budget should show the percentage that you're seeking from the funder, as compared to the funding you seek from other sources. Show where the rest of the money is coming from in the budget.
- Foundations generally prefer to fund unique, short-term projects – it's more difficult to find a funder who will provide support for general operating expenses.
- Some funders have specifications of minimum percentages that should go to program outputs in comparison to administrative expenses – make sure to comply with any such requirements and factor this into the overall planning process.

# Developing a Winning Proposal - Guidelines

## ***3. Incorporate organisational Information***

- Illustrate what your organisation does and what population it serves.
- Share kudos earned by your organisation – awards, news coverage and other successes.
- Write about the leadership (including Board Members) of your non-profit, and what qualifies it to execute the project.
- Show the history of your organisation and why it's unique among organisations like it if there are any.

# Trends in Funding - short term funding

- Open calls can request for proposals lasting six months and some up to three years.
- The short-term proposals tend to have small budget caps (≈/-US\$50,000.00).
- These come with very stringent reporting conditions.
- The fundraising team needs to realize that a bigger grant may be more flexible in terms of reporting conditions compared to the smaller grants.
- Small grants are in many instances an entry point towards bigger funding.
- If successful, your organisation will have an opportunity to interact with a new set of donors that you had no access to before.
- It creates an opportunity to cultivate relationships which may open doors for bigger funding.

# Trends in Funding - Coalitions

- Several open and limited calls for funding insist on applicants who have created collaborative coalitions rather than applying as a single organisation.
- The decision to join coalitions should not be taken lightly. It should be done at the board level.
- You will have to be clear about the level of effort required in the coalition.
- Ensure that there is a signed agreement amongst coalition partners which specifies the role(s) of each organisation, the funds to be allocated to each organisation (if the application has been successful) and the values guiding the coalition.
- Funding to coalitions tends to be higher than what an individual organisation can attract. It will be important for each member of the coalition to clearly state their strengths and contributions to the project.

# Post Fundraising Stage

- The proposal writing and contracting stage are usually mistakenly considered the final stage of resource mobilisation.
- The actual delivery of commitments made in the proposal forms a core part of resource mobilisation.
- Excellent delivery of project goals, submission of reports on time and compliance with how to use allocated resources provide a basis for repeat funding.
- The project implementation team must be made aware of all the conditions in the contract.
- Successful fundraising is not only based on securing new funds but also on retaining existing partners.

# Dealing with Different Types of Donors

- The resource mobilisation terrain is comprised of several different actors inclusive of private foundations (such as Ford Foundation, Delta Philanthropies, Open Society Foundations etc), bilateral donors (for e.g., the British government, USAID, Irish Aid, Canadian Aid etc), multi-lateral institutions (UN family of institutions) International NGOs and private individuals.
- Fundraising from private foundations, international NGOs, multilateral agencies and also from corporate foundations will be guided by the steps already discussed in the preceding section.
- However, individual donors require a different approach.

# Fundraising from Individuals

- There is a growing recognition of the importance of individual giving towards institutional strengthening and program support.
- The recent growth of Africa's middle class within and in the diaspora has provided an added impetus to raise resources from Africans for African causes.
- The practice of individual giving is already well established in other regions, especially in the USA.



# Setting Up An Individual Giving Campaign

## ***Phase 1: Development of a database of potential funders***

- The database would normally comprise individuals who have benefited from your organisation's work- such as training participants, audiences of research products and sympathizers with the cause.
- The database should be considered as a living document subject to continuous cleaning and additions. Experts recommend that the Board should take the lead in making individual contributions and where possible recruit at least ten (10) more individual givers from within their own circles.
- Ad hoc databases can be created in the event of a campaign-focused individual giving blitz.

# Setting Up An Individual Giving Campaign

## ***Phase 2: Clear Communication Protocols***

- Givers usually give to causes they know of and align with. It is not enough to ask people to give.
- There should be a compelling story as to why individuals should contribute towards the organisation.
- The communications team should continuously look for ways of renewing the giving pitch through newsletters, impact stories and certain strategic events.
- It will be important to be completely transparent with individual givers, about how much has been raised, what it is being used for and how that contributes to change.
- Studies have shown that individual givers prefer to receive regular updates and want to be associated with high-impact organisations.

# Setting Up An Individual Giving Campaign

## ***Phase 3: Web-based back-end support***

- The organisation will have to invest in automation for giving and acknowledgement of gifts within the hour that the transaction is done.
- There should be a standard letter acknowledging receipt of a gift signed by the head of the organisation.
- The individual giver should be added automatically to the organisation's mailing list unless they have opted out of receiving updates from the organisation.
- Once every year the communications team should deploy a giver satisfaction survey. Responses from the survey should be used to tweak the existing infrastructure.

# Templates and Additional Resources

<https://kevinlbrown.substack.com> - Brand First by Kevin L. Brown

<https://hexamedia.substack.com/about> - Hexa Media Substack