

KNOWHOW3000
RESOURCE
MOBILISATION
GUIDE

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Foreword



THE ENVIRONMENT IN WHICH RESOURCES ARE MOBILISED is increasingly competitive. By now, there are numerous development actors but only limited funds of international donors. Therefore, the viability or survival of organisations is inevitably linked to their ability to adapt to changing donor trends and to the willingness to explore alternative sources of funding. Due to these developments resource mobilisation has become a more challenging exercise, demanding a diverse mix of knowledge and skills.

Many non-profits still depend on a very limited number of donors. They find themselves wondering where next year's budget is going to come from and how to sustain their programmes in the long run. In order to create financial sustainability, they have to equip themselves with the tools, techniques and strategies to diversify their funding sources.

This practical guide provides partner organisations of HORIZONT3000 and its member organisations with information and tools for resource mobilisation. Specifically, it answers the most common questions about resource mobilisation:

- What is resource mobilisation?
- What are options for resource mobilisation, traditional and non-traditional?
- Why is a strategy for resource mobilisation necessary?
- How do you write a resource mobilisation strategy?
- How do you analyse resource mobilisation efforts?
- What are important aspects for implementing a resource mobilisation strategy?
- What role does communication play in resource mobilisation?

This guide is designed for partner organisations of HORIZONT3000 and its member organisations in East Africa. It supports and promotes new and creative thinking on resource mobilisation for organisations and can be used by organisations with different levels of skills and experience.



How to Use this Guide

This guide is divided into five main sections:

1. Introduction to Resource Mobilisation
2. Organisational Analysis
3. Resource Mobilisation Categories
4. Resource Mobilisation Strategy Development
5. Communication Strategies

Allowing the user to access information according to their specific interests, each section provides practical tips and reference tools to assist implementation. All tools are included in the appendix and are individually available for download on our [KNOWHOW3000 Website](#).



About the Authors



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1.

Introduction to Resource Mobilisation



RESOURCE MOBILISATION IS described as an organisation's efforts to attract resources. Mobilising resources is a crucial component of project delivery and impact - it ensures that projects can be implemented and an organisation can achieve its vision. Instead of "fundraising", the term "resource mobilisation" has gained popularity. "Resource" not only refers to financial funds, but can also include technical assistance / cooperation, human resources, physical goods and free services and facilities.

Resource mobilisation includes building and managing relationships with resource providers (donors) through communication as well as building and managing staff skills and knowledge and developing organisational capacity for resource management.

The Importance of Resource Mobilisation

For organisations, structured and efficient resource mobilisation ensures the continuation of your organisation's service provision to beneficiaries. It not only supports organisational sustainability but also allows for improvement and scale-up of programmes, services and products.

If done properly, resource mobilisation will allow you to...

- mobilise new or additional resources;
- diversify your funding sources;
- build or expand partnerships and relationships;
- increase communications;
- build organisational capacity;
- properly monitor and evaluate your resource mobilisation service.

Why You Should Diversify Your Funding Sources

Rather than focusing all your energy towards soliciting large amounts from big funders, it is recommended that you focus on creating a diverse mix of funding sources, including individual donors, corporations and international organisations. You can determine your own, unique “funding mix”. This will help you spread the risk when a funder falls short or ends the engagement. It is also easier to start out with smaller funds from a donor.

They might be ready to increase their contribution once they have gained trust. Support may come in the form of large or small gifts, can be unrestricted, can be one-time donations, or can lead to long-term funding. There is also value in professionalising existing earned income activities to the point where they can significantly impact an organisation’s financial viability. However, you need to keep in mind that it takes resources (time, skills, money) to allocate and manage resources.

There are different sources of funding such as grants, gifts (e.g., from individuals or corporates) and earned income from the sales of goods and services. The characteristics of each are found in the table below:

Sources	Characteristics	Sources
Grants	Usually restricted, project- based, time-bound, short- to-medium-term funding	Governments, foundations, multilateral and bilateral agreements
Individual Giving	Unrestricted, can lead to endowments, medium to long-term funding, in-kind donations, volunteers	Individual gifts through fundraising / crowdfunding campaigns,
Corporate Giving	Unrestricted, can lead to endowments, medium to long-term funding	donations from corporates
Sales of Goods and Services	Unrestricted, short to long-term funding, for-profit operation, needing different management skills	Sale of products, fee for service, interest income

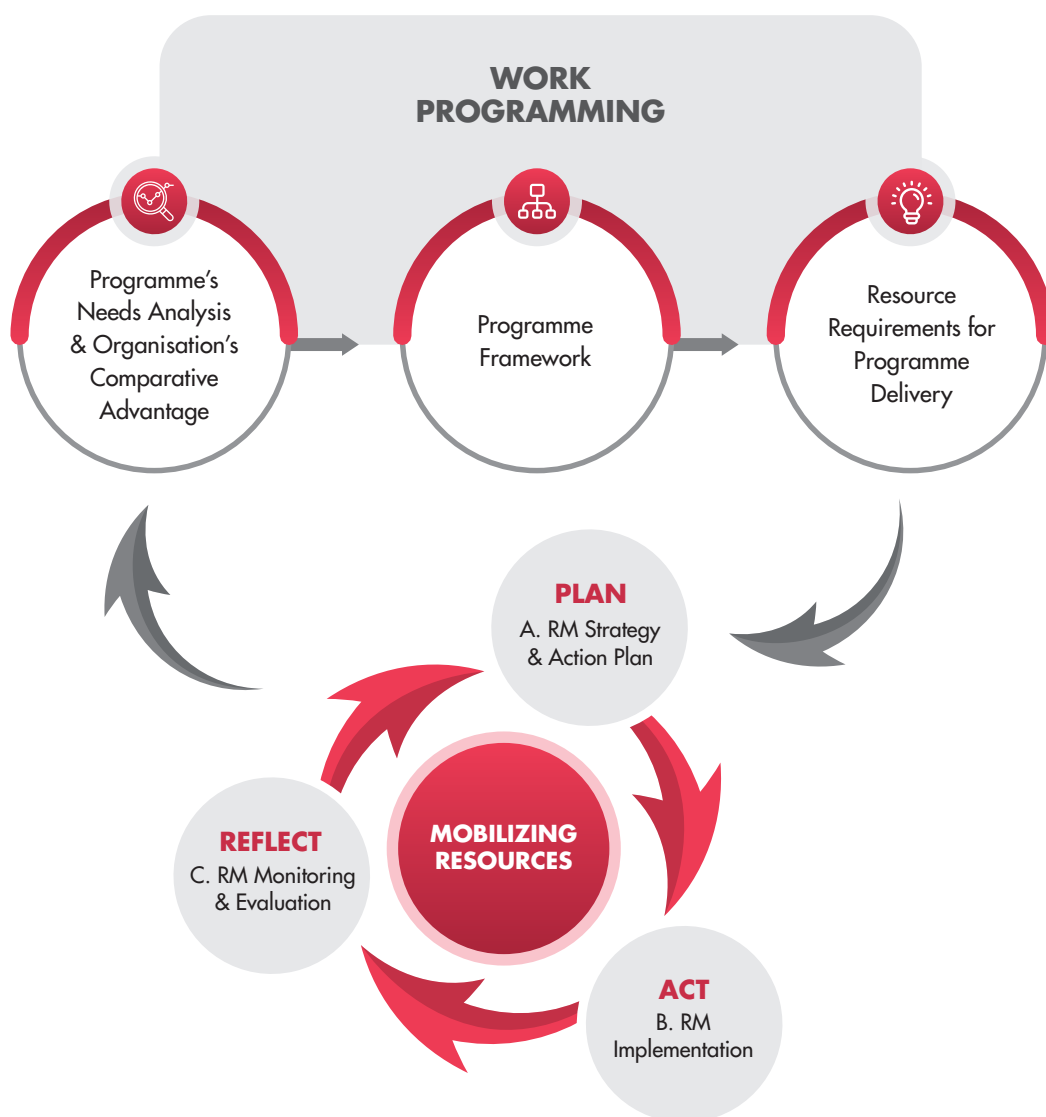
Source: Venture for Fundraising (2010). Resource mobilisation.

Online at <https://www.idrc.ca/sites/default/files/sp/Documents%20EN/Donor-Partnership-guide.pdf>, accessed 7/10/2020.



The Resource Mobilisation Cycle

Every project or activity your organisation plans requires resources. Resource mobilisation can be broken down to three main phases: Planning Phase, Action Phase and Reflection Phase. These phases are closely intertwined with your normal project cycle.



Source: FAO (2012). A guide to resource mobilisation.

Online at <http://www.fao.org/3/i2699e/i2699e00.pdf>, accessed 7/10/2020.

Planning Phase

The planning phase starts with a situation analysis of your organisation and the external resource environment. This helps you to discover what resource mobilisation opportunities may exist and how best to approach potential resource partners. As a next step you can analyse the resource requirements of the programme or project and develop a plan on how to engage the likely resource partners. Finally, develop a resource mobilisation strategy and action plan describing how particular resource partners will be targeted and for which resources.

Action Phase

The implementation process depends on the resource mobilisation strategies you developed in the planning phase (grants, gifts, or goods and services). You may have identified various channels and target audiences and different strategies will be applied to effectively mobilise resources from them. Rank the strategies according to highest expected return on investment, quick wins, and prioritise your implementation actions accordingly.

Photo Credit: <https://www.pexels.com/@ketut-subiyanto>

Reflection Phase

Last but not least, the resource mobilisation effort, including strategy and action plan, is monitored and evaluated. For this, it is important to develop sound monitoring and evaluating indicators as part of strategy development. Plan for a reflection phase and use the opportunity to reflect on and learn from your experiences.

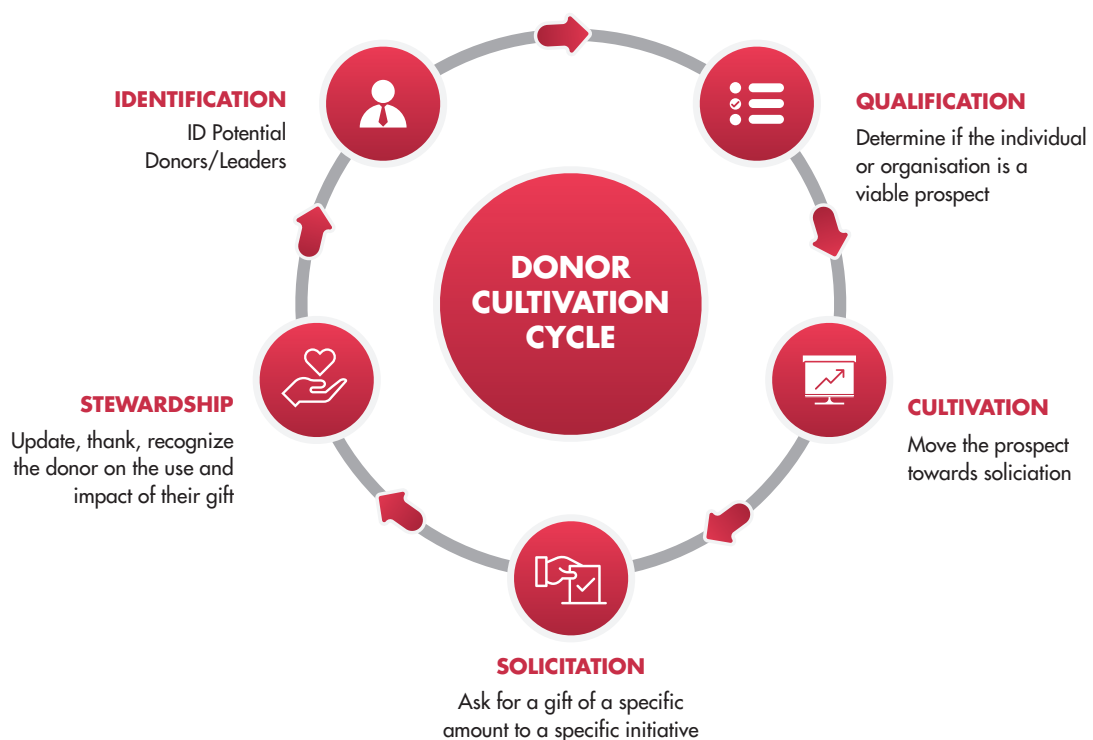
When systematically reflected successes and failures can yield valuable lessons learnt that will help you improve on your efforts in the next cycle (for more information, see the KNOWHOW3000 website <https://knowhow3000.org/en/km/experience-capitalisation-process>).





Donor Cultivation Cycle

Resource mobilisation is effective when you connect with your resource partners and build relationships centred on shared values, trust and loyalty. The donor cultivation cycle shows a five-step process to cultivate resource partners: Identification, Qualification, Cultivation, Solicitation and Stewardship:



Source: Newman Consulting (2017). The Five Phases of the Donor Cultivation Cycle.

Online at <https://newmanconsulting.ca/2017/09/the-5-phases-of-the-donor-cultivation-cycle/>, accessed 7/10/2020.

The first step in the cycle is to identify donors by compiling a list of former, current and prospective resource partners. You can start this exercise by looking into your current and prior resource partner lists. It is important to note that identifying resource partners is an ongoing process. It requires continuous updating of the details of potential resource partners, also called prospects. In the second step of qualification, you can map your resource partners' interests (thematic and geographical) and verify if the resource partner is an acceptable source. Prospect research can be conducted through website and publications by and about the resource partner and screening for organisations previously funded by the resource partner.



Photo Credit: <https://www.pexels.com/@pixabay>

The cultivation phase can take between six to twelve months. The goal of this step is to find out your resource partner's passion, motivation and goals for philanthropy and then offer the donor a variety of engagement opportunities. This step involves seizing every opportunity to build strong relationships with decision makers by establishing and maintaining open and regular dialogue with partners to build mutual trust and respect.

Activities in this phase could be: resource partner meetings, development of advocacy tools, writing proposals, concept notes, developing other communication tools, delivering presentations to resource partners, and fostering individual contacts. The solicitation phase is the phase where you actually ask for a donation by the resource partner, negotiate to reach an agreement on joint interests, agree on the conditions of the partnership, including procedures on use of resources, and develop and formulate a legal agreement.

Last but not least, the stewardship phase sets the foundation for an ongoing cooperation with your resource partner. After a received donation, it is your responsibility to not only manage the channeling of funds, but also monitoring and reporting. This includes an acknowledgement of your partner's contribution and a detailed report on how the funds were being used. Make sure to put sufficient effort into this step through consistent and sound communication. A communications plan and quality communication materials are important here.



Elements of Resource Mobilisation

Resource mobilisation is a management process that involves identifying people who share the same values as your organisation, and taking steps to manage that relationship. This definition depicts resource mobilisation as a threefold process, involving Organisational Management and Development, Communicating and Prospecting as well as Relationship Building.



Source: Venture for Fundraising (2010). Resource Mobilisation.

Online at <https://www.idrc.ca/sites/default/files/sp/Documents%20EN/Donor-Partnership-guide.pdf>, accessed 7/10/2020.

Organisational Management and Development

Organisational management and development involve establishing and strengthening your organisation. Ultimately, also the resource mobilisation process will benefit from this. This involves identifying your organisation's vision, mission, and goals, and putting in place internal systems and processes that enable resource mobilisation efforts.

They include identifying the roles of board and staff in the process as well as effectively and efficiently managing human, material, and financial resources. Creating and implementing a strategic plan that addresses proper stewardship and use of existing funds is as important as continually seeking out diversified sources of future funding.

Keep in mind that resource mobilisation is a means towards fulfilling your organisation's vision and mission. It requires involvement and commitment from the whole organisation.

It is a long-term process that requires the institutionalisation of resource mobilisation strategies, policies and budget to meet its objectives. The last point is particularly important because your organisation will need money in order to raise money.

Last but not least, the responsibility for resource mobilisation is not only held by your resource mobilisation unit, but also the director and board of your organisation.

Communicating and Prospecting

While organisational management and development set the foundation for successful resource mobilisation, communicating and prospecting ensure its long-term sustainability through acquiring new resource partners and maintaining a stable resource partner base.

As previously mentioned, resource mobilisation is to a large extent connecting to resource partners in a relatable manner and exploring shared values and interests. This also includes identifying the right resource partners and to approach them with tools and messages that meet their interest.

Your organisation should keep in mind that financial support is a direct result of a relationship built between people.

Relationship Building

Once you have identified potential resource partners, the objective is to get closer to them and to get to know them better. The closer the relationship gets, the higher your chances of receiving higher levels of support which might go beyond financial support to increased interest and active involvement. This in turn will help you to expand your network and relationships. Only organisations that succeed in building the most individual and sustainable relationships with their resource partners will be successful in resource mobilisation.

This is a great opportunity for smaller organisations, which usually have a more personal relationship with their donors. Of course, this requires the dedication of your board members, management, staff and volunteers.

The key elements of relationship building are consistent communication, strong connection to your cause and trust building.

Awareness and trust can only be built through sustainable communication. Experience has shown that dialogue is more successful than monologue. For resource mobilisation to be successful, your organisation must succeed in building a trust relationship with your resource partners through dialogue.



Photo Credit: Cylonn Photography (<https://www.pexels.com/@cylonn>)

In this context, internationally renowned fundraising consultant Ken Burnett (1992) speaks of “relationship fundraising”:

“

*Relationship fundraising is an approach to the marketing of a cause which centers not around raising money but on developing to its full potential the unique and special relationship that exists between a charity and its supporters. Whatever strategies and techniques are employed to boost funds, the overriding consideration in relationship fundraising is to care for and develop that special bond and not to do anything that might damage or jeopardize it. In relationship fundraising every activity of the organisation is therefore geared towards making donors feel important, valued and considered. In this way relationship fundraising will ensure more funds per donor in the long term.” (Burnett, K. 1992. *Relationship Fundraising - A Donor Based Approach to the Business of Money Raising*. White Lion Publishing: London, p.59.)*

Another important aspect of relationship building is to connect all resource mobilisation efforts to the cause, the why of your work. Your cause influences your target audience, you would like to choose partners who are also passionate about what you want to change and who will support your work with all their heart. Therefore, it is important to collect information on the interest and areas of funding of donor potentials.

Then, filter them in your analysis according to their interest in the why of your organisation. Your cause and impact influence the stories you tell about your work and the way you interact with the donors. Following the type of organisation that you are, be it advocacy or service delivery, or humanitarian, your communication strategy and angle may differ.

As a consequence, the messages in your donor care, interactions and in the asks, are framed to reflect your why and in turn the interests of your audience. The organisational focus and attitude define not only what you ask for, but also how you ask. They will be unique to your organisation and help you build a relationship with an audience with a specific interest in your areas of work and the contribution you make to a greater change.



Photo Credit: <https://www.pexels.com/@fauxels>



Source: Craig Linton & Paul Stein (2016). Donors for Life: a practioner's guide to relationship fundraising. Online at <http://blogs.plymouth.ac.uk/criticalfundraising/wp-content/uploads/sites/37/2016/02/DFL-Craigs-chart..png>, accessed 7/10/2020.

Last but not least, relationship building is trust building. Trust can be built through active collaboration, mutual satisfaction, open communication, effective liaison and keeping in mind the long-term perspective.

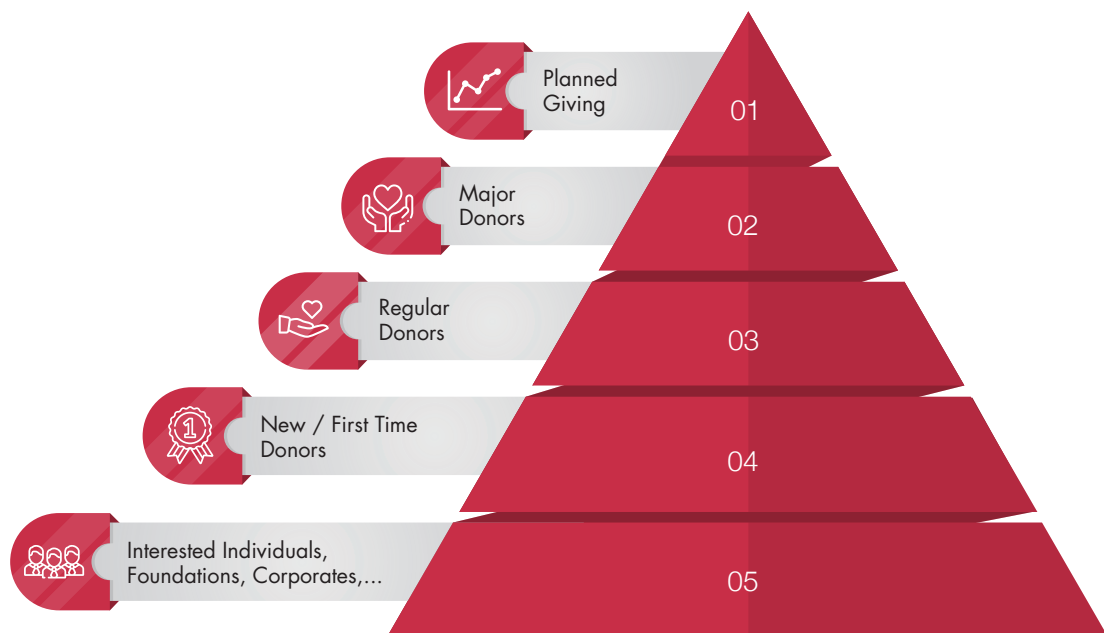


The Donor Pyramid

Relationship building aims to build a long-term relationship between your organisation and its resource partners. The better and longer the relationship, the greater the resource partner's confidence in 'their' organisation; the greater the willingness to take on more (financial) responsibility for the organisation step by step. This gradual process of relationship fundraising can be illustrated using the model of the donor pyramid (Urselmann, M. 2019: Fundraising: Professionelle Mittelbeschaffung für gemeinwohlorientierte Organisationen. Springer: Cologne, p. 102). At the bottom of the pyramid are interested individuals

and organisations. Those can be individuals who subscribed to your mailing list, or have voiced any other form of interest.

An entry-level strategy like a special event or a mail campaign are ideal to bind individuals to your organisation and raise their interest further. The key is to provide resource partners with successive giving opportunities that may increase their commitment and interest in the organisation so that they move to the next level. It is important to note that not all resource partners move to the next level.



The donor pyramid should encourage you to consider which strategies are appropriate for each level. The principle applies that you only get what you ask for. Ideally, there is a separate marketing concept for each level of the donor pyramid. It specifies in detail how to communicate with a donor at the respective level and what specific offers should be made to him to climb the next higher level.

2.

Organisational Analysis



BEFORE STARTING to think and decide on the best possible resource mobilisation for your organisation, it is good to take stock of where you stand at this point and which internal and external factors influence your organisation's efforts to raise more funds. This includes a financial analysis, an analysis of the internal and external environment, a peer analysis as well as a review of different resource mobilisation strategies that have been used by your organisation so far.

Financial Analysis

To determine the overall health of your organisation, you need to understand its financial statements and financial health. This can seem intimidating, but it is worth understanding your organisation's financial flows. Financial statements of an organisation are found in its annual accounts prepared at the end of every financial year.

Annual accounts for organisations typically include four sections:

- Balance Sheet (or statement of financial position);
- Statement of Financial Performance;
- Statement of Changes in Equity (or Statement of Changes in Fund Balances);
- Statement of Cash Flows.

Balance Sheet and Statement of Financial Performance are particularly relevant for analysing your organisation's financial health and resource mobilisation efforts.



Photo Credit: RODNAE Productions (<https://www.pexels.com/@rodnae-prod/>)

Liabilities are amounts owed by your organisation such as taxes and rent payments, but also repayable loans. There are various indicators evolving from the balance sheet that can help you assess your organisation's financial health:

Indicator	Calculation	Interpretation
Current Ratio	$\frac{\text{Current assets}}{\text{Current Liabilities}}$	Indicates an organisation's ability to pay obligations in the next 12 months and availability of sufficient cash flow.
Debt ratio	$\frac{\text{Total liabilities}}{\text{Total unrestricted net assets}}$	Shows how much the organisation is relying on external funding (for example loans).

The Statement of Financial Performance displays revenue and expenditures over the course of the financial year. It indicates whether your organisation has generated a surplus or deficit in the reporting period. Revenue is hereby divided into main categories according to source of funding, in the example it is grants and other income. The second column of the sheet indicates "Note". Notes are attached to the annual accounts and show a detailed breakdown of the numbers and the sources of funding:

Statement of Financial Performance, 2019, Sample Organisation:

	Note	2019	2018
		Kenya Shilling	Kenya Shilling
INCOME			
Grants	3	2,131,888	12,000
Other Income	4	100,000	5,000
		2,231,888	17,000
EXPENDITURE			
Administration Cost	6a	1,000,000	1,000,000
Human Resource	6b	280,000	280,000
		1,280,000	1,280,000
(Deficit)/Surplus for the year		951,888	(1,263,000)
Deferred tax		15,000	-
Balance brought forward		(313,112)	(1,263,000)

As mentioned, the statement of financial performance is also where more information on different sources of funding can be found. Usually, sources of funding are listed in the notes according to the donor:



Example for “Grants”, Sample Organisation (Note 3):

	2018	2017
	Kenya Shilling	Kenya Shilling
Aga Khan Foundation	2,000,000	12,000
Foundation for Peace	130,000	-
Foundation for All	220,000,000	-
TOTAL	222,130,000	12,000

Example for “Other Income”, Sample Organisation (Note 4):

	2018	2017
	Kenya Shilling	Kenya Shilling
Interest – Aga Khan Foundation	100,000	50,000
Interest – Foundation for Peace	5,000	-
Donations	2,000,000	150,000
Catering services	250,000	-
Beadwork sales	-	1,000,000
Global Giving Campaigns	5,000,000	-
TOTAL	7,305,000	1,200,000

In case your performance sheet has very broad categories with a high revenue such as donations, for example, it is advised to break down the item further with the help of your accountant. This will give you a better overview.

Some financial indicators can help you assess the financial sustainability and the resource mobilisation capacity of your organisation. While most of these indicators are rather technical, they are really good tools for comparing your resource mobilisation efforts over the years.

Indicator	Calculation	Interpretation
Reliance Ratio	$\frac{\text{Largest type of income}}{\text{Total income}}$	Shows how reliant the organisation is on their main type of income. May raise awareness for risks associated with the level of reliance. May lay the foundation for income diversification.
Reliance on government funding	$\frac{\text{Total Gov. grants} + \text{contracts}}{\text{Total income}}$	Creates awareness on risks associated with reliance, as government funding is often tied to specific conditions. Especially relevant in vulnerable policy and governance environments, where government funding can change abruptly.
Earned income ratio	$\frac{\text{Total earned income}}{\text{Total income}}$	This is relevant for organisations with sources of income other than grants and donations, particularly 'social enterprises'. It is a good indicator for an organisation's financial independence.
Self-sufficiency ratio	$\frac{\text{Total earned income}}{\text{Total expenses}}$	The proportion of operating expenses that are covered by earned income from sources other than grants and donations. A ratio higher than 1 shows that the organisation is able to cover their expenses with their earned income.
Fundraising efficiency	$\frac{\text{Contributed income}}{\text{Fundraising expenses}}$	The average amount of contributions raised by each currency unit spent on fundraising.

Source: Propel Nonprofits (2000): Analyzing Financial Information using Ratios.

Online at <https://www.propelnonprofits.org/resources/analyzing-financial-information-using-ratios/>, accessed 11/6/2020.



Photo Credit: <https://www.pexels.com/@fauxels>

Organisational Environment

As part of planning for resource mobilisation, the external and internal environment of your organisation needs to be analysed in-depth. PESTLE and SWOT analysis can be used for this. PESTLE Analysis is a tool to track your organisation's working environment and analyse how different factors influence your organisation.

PESTLE stands for P for Political, E for Economic, S for Social, T for Technological, L for Legal and E for Environmental. A PESTLE Analysis is best done in a team workshop, where a corresponding set of questions is asked for each element of PESTLE. When conducting a PESTLE Analysis, the following questions need to be answered and discussed in-depth:

- Political Environment: What is the political situation and how can it affect us?
- Economic Environment: What are the prevalent economic factors?
- Social Environment: What are social dynamics and cultural factors influencing us?
- Technological Environment: What is the technological environment we are operating in?
- Which technological innovations are likely to pop up and affect us?
- Legal Environment: What are current legislations that affect us? Will there be any foreseeable changes?
- Environmental Concerns: What are the environmental concerns that affect us?

The SWOT Analysis is an excellent tool to analyse strengths, weaknesses, opportunities and threats to your organisation by visualizing each aspect in quadrants:



When conducting a SWOT analysis, it is important to record and document different perspectives and opinions of staff, board members and other stakeholders and discuss them openly in a workshop. This will create a deeper understanding for your organisation.



Peer Organisation/Resource Partner Analysis

Knowing what other organisations do will help your team build better strategies. By looking at other organisations, you can identify opportunities in the market that are currently under-served. Learning from others, you get further insights and inspiration to inform your own decisions on resource mobilisation methods and messaging.

In a peer organisation analysis, you create an overview about other organisations which work in the same sector, have a similar size or which you think you can learn from. Collect information about them from their website and other documents or by talking to them. This is also a great opportunity to involve the whole team, as it will give you more eyes on the ground, and should be followed by a group discussion to determine interesting strategies to follow up on.

Relevant information includes the peer organisations’:

- Annual organisational budget: What is the annual budget the organisation spends?
- Main Resource Mobilisation Strategies: What are the main strategies the organisation gets income from?
- Promotion Channels: From which audiences does the organisation generate their income?
- Funding request messages: How do they talk to their donors? Which aspects of their work do they promote?

Collect the information about the peer organisations and analyse according to the following questions:

- What are the strengths and weaknesses of the peer organisation?
- What works for peer organisations? Could we also apply it?
- What does not work for peer organisations? We don’t have to try it. Or, could we tweak it, so that it could work?
- What resource mobilisation strategies and channels are less used by peer organisations? Why? Could they be an opportunity for us?
- What makes our organisation different from competitors? What do we do differently in our strategies and communication to stand out?



Tool 8: Resource Partner Identification and Monitoring



Photo Credit: Mateusz Dach (<https://www.pexels.com/@mateusz-dach-99805>)

Strategies for Resource Mobilisation

Last but not least, an organisational analysis needs to include strategies for resource mobilisation that have been used by your organisation. Often, organisations don't recognize their resource mobilisation efforts as strategies, as they have been pursued randomly and without clear focus. By structuring and discussing different efforts, you will be able to detect a pattern in your resource mobilisation and take a first step towards planning for resource mobilisation.

In a joint workshop, you and your team can go through each of the categories for resource mobilisation and analyse their application in-depth. The workshop should include all members of staff, from junior to senior management. For each category, the following questions should be asked by a moderator:

- Have you used this strategy?
- How exactly have you used it?
- How do you usually plan for it?
- How was it implemented?
- Who works on this?
- Were you successful?
- What went well?
- What was challenging?
- How could you improve your resource mobilisation in this category?



Tool 9 Resource Mobilisation Strategies Review.

This tool supports the information collection about the different strategies, how you have used them and how you evaluate their impact.

3.

Resource Mobilisation Categories

IN THE ORGANISATIONAL RESOURCE MOBILISATION STRATEGY document, decisions will be laid out about the sources to seek funding from, the resources to be invested and how much the organisation seeks to gain from the different segments. To secure funding from diverse sources successfully, varying forms of engagement will have to be applied. In the following, you will get to know four common sources of funds in more detail:

- Grants
- Individual giving
- Corporate fundraising and
- Earned income from sales of goods and services

Grants

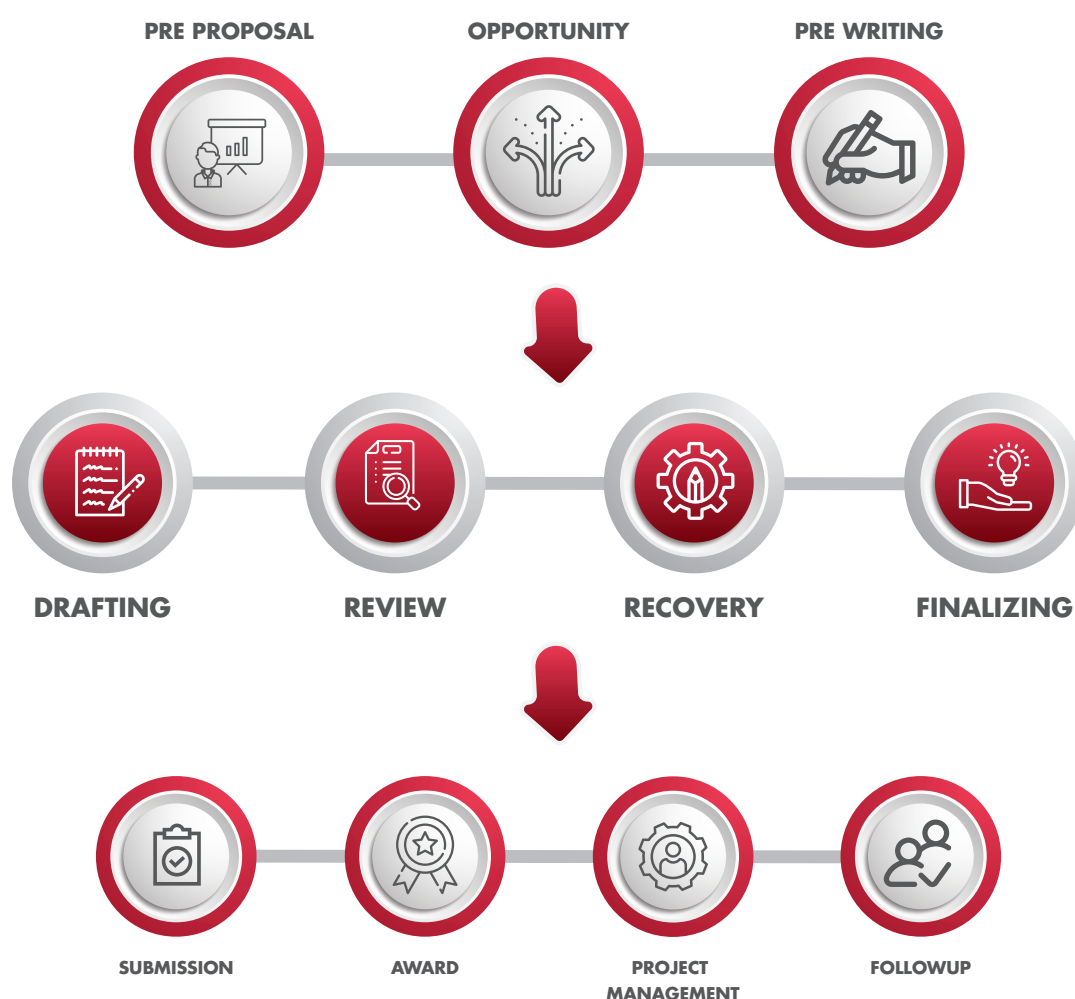
Grant fundraising refers to funds generated from grant funders, such as official development bodies, foundations or other sources. Grant fundraising can be highly effective when the organisation has the capacity and resources to develop high-level, winning proposals. Most grants fund specific project activities and related management and M&E tasks over a certain period of time, while organisational grants or grant elements also support organisational development and capacity building. However, due to the project funding nature, it is not common to get organisational core funding through a grant.

Many times, a grant funding process is divided in a concept and a full proposal stage. When an organisation's proposition put forward in the concept has been approved, a full project proposal has to be developed and will again be assessed.

If the proposal has been accepted for funding, project setup clarification and negotiation meetings with the donor will be held to finalize the logframe, budget and other documents guiding the implementation and Monitoring, Evaluation and Learning (MEL) of the project.



Photo Credit: Nattanan Kanchanaprat (<https://pixabay.com/users/nattanan23-6312362/>)



Source: Spear, T. (2013), 7stages of a business proposal life cycle.

Online at <https://blog.quoteroller.com/7-stages-business-proposal-lifecy-cle/> , accessed 7/10/2020.

There are a number of steps to follow to secure project grants and usually several months pass from the development of a concept until the project is implemented and the donor relationship cultivated with timely and high-level reporting. The image above shows the steps involved in grant fundraising. In the following, is a more detailed description of each step.



Pre-Proposal Stage

During the pre-proposal stage, your organisation looks out for funding opportunities by reviewing upcoming calls and engaging with potential resource partners. Donors may put out calls for proposals where any organisation meeting the requirements can apply and solicit proposals formally on their website and other channels. Other funders might want to know the organisations they are supporting first and only accept proposals upon invitation. With those, it is particularly important to work on establishing a relationship to receive the opportunity to submit a grant in the future.

Organisations may also decide to send an unsolicited proposal when they see good chances to interest donors with their proposal. Other than that, existing grants may be continued beyond the timespan originally planned, renewed after the project duration or supplemental funds may be granted because the circumstances warrant the need. A potential donor monitoring calendar can help you to keep an overview of the organisational strategy with different donors, grant opportunities recurring annually and other deadlines and to plan for proposal development and other donor engagement activities.



Tool 8: Resource Partner Identification and Monitoring

Furthermore, it is important to have your organisational documentation ready: registration certificate, financial and organisational audit reports of the past 3 years, short bios of key staff, capability statement where you summarize recently completed and ongoing projects and explain your implementation capacities, reports where you have documented the success of your approaches and learnings, and information on the districts or regions of implementation

to support the problem you will be addressing with your work. Having this information ready will ease the development of your concept or project proposal and also the provision of the supporting documents required for the application submission.

Opportunity

When a funding call has come up, it is important to examine thoroughly whether it suits the organisational goals, cause and activities as well as to understand whether your organisation fulfils the award requirements of the grant. Reflect on the donor's funding interest and priorities whether they match with your organisation's mission, vision and programmatic activities. Funding criteria may also include how long your organisation has been operational and regional or national funding restrictions. Other factors to consider are how much funding can be requested in relation to the organisational budget and to note the deadlines and process for the application (concept and full proposal stage or just pre-proposal submission).

Consider whether the project will be best implemented in a partnership, building on relationships with other organisations. Signing a memorandum of understanding (MOU) when forming a consortium helps to ascertain commitment, roles and responsibilities of the parties during the project development and implementation.

Most donors make themselves available to answer questions in a session or until a certain date before the deadline. Use such opportunities to get any clarifications you may need to come up with a strong project proposition.

Pre-Writing

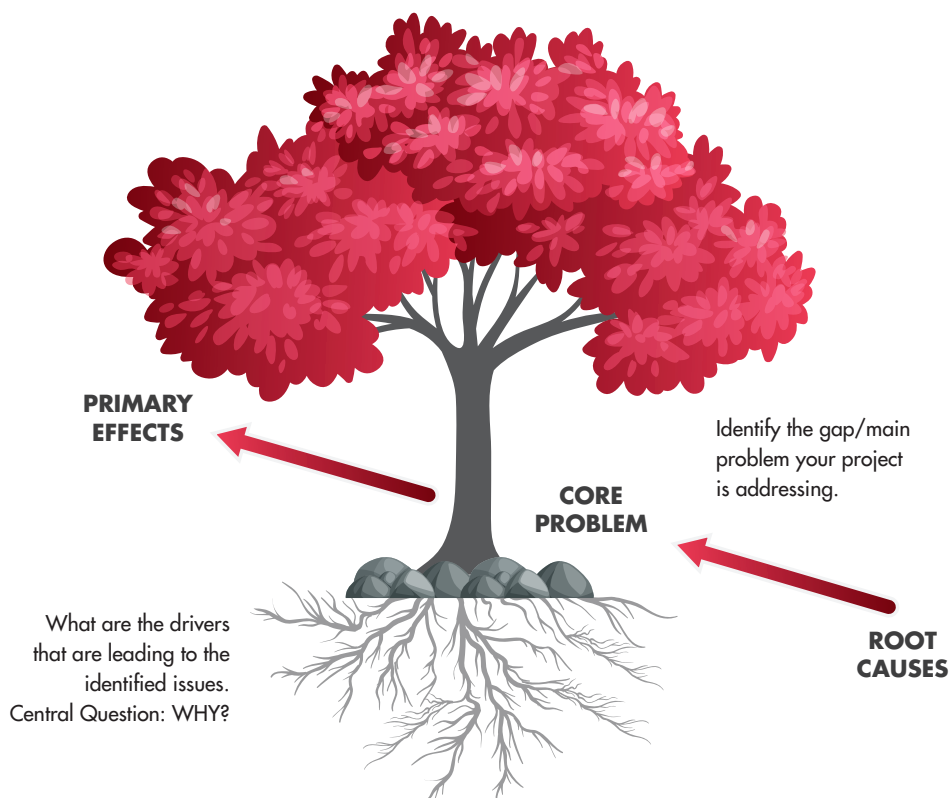
Before you start the actual proposal writing, as a first step develop the proposition you want to get funded. Plan enough time to collect information and plan the project before you commence with the write-up. Also ensure availability of management and the finance team for input and consultation on the proposed project as well as for budget development and approval.

As a first step, gather information on the problem you want to address in the community by consulting stakeholders, anyone affected by or with an interest in the challenge, to help you develop a clear, concise understanding of the problem or situation.

They will also be the best sources to inform you which solutions will work best to address the problem and to create an effective intervention.

In addition to the voices of stakeholders, strong data and information from research, government statistics and experts, as specific to your intervention as possible, will help you strengthen the case for support. Make sure to set time aside for desk review and data collection from experts, government bodies or other accepted sources of information which provide insight into your problem and response.

A MIND MAP OF CAUSES AND EFFECTS



Source: Oliver, E. (n.d.). Let's explore. Hop into the roots of a plant.

Online at: <http://letsplant.yolasite.com/>, accessed 7/10/2020. Changes made by authors.



Based on a sound understanding of the situation, define the core problem your intervention will address. A problem tree is a helpful exercise to create a mind map of causes and effects of an issue since it helps to identify the gap and problem that will be tackled. Focusing on the core problem, investigate the root causes of the issue as well as the impact and effects on the future project participants.

With the team in your organisation, discuss how the intervention will aim to solve the root causes of the problem through the activities to be undertaken. Formulate the long-term change you want to see in the community in your project goal and determine the best, creative path of how you plan to get there. In an intervention logic (logframe, theory of change, etc.) lay out the project goal,

outcomes, outputs and activities. The outputs reflect the results of the project's activities and the outcome(s) talks about the change which will be achieved in the community through the intervention.

Ensure that the projected outcomes are realistic and contribute to the achievement of your project goal. Setting goals too high and failing to meet them, will make the donor question the organisation's capability, while underestimating what can be achieved may make the project appear cost-ineffective.

Also think how you will make the effects of your work measurable and when you plan to achieve them so you can come up with milestones. Once the activities have been agreed upon, you can start to work on the budget.

Photo Credit: <https://www.pexels.com/@ketut-subiyanto>

Writing: Drafting, Review, Recovery and Finalization

As a next step, the actual proposal writing can start. The concept or proposal is usually drafted by a team or an assigned person who takes lead on the process. It will then be reviewed and the organisational feedback integrated before the document is finalized and ready for submission. Plan well ahead for this process and allow enough time for multiple drafts and review by others.

Drafting: The actual proposal writing can be done by one person or be split between the team, however ensure that one person coordinates the members and compiles the final document. Read the grant call carefully and follow the instructions for the writeup on the different sections. Answer all questions and remember to KISS – keep it smart and simple!

These are the sections required in most proposals:

Project Summary - Introduction: Write a captivating introduction to interest the reader into your project.

Background and Problem Statement: Referring to the problem tree, provide a detailed analysis of the issue you are addressing with your intervention. Start with a clear and concise statement of the problem and follow with an explanation of the cause and long-term effects.

Use information from the desk review and stakeholders to explain the situation with detailed, local data. Provide facts and use data to substantiate the argument on the specific pre-project situation in the target region through information on demographics, socio-economic status, climatic conditions, political, social context, etc. relevant to the problem. Avoid general information which the donor may already know, but focus on the districts or region of implementation. If it is a follow-up project, describe your learnings from previous phases and why the project is still needed.

Justification: Explain how your project is the best answer to the problem and how it will effectively provide a solution. Indicate how the intervention is not a standalone activity and fits to donor strategies, national, local, or organisational goals and other relevant programmes or international laws, multilateral and bilateral agreements or goals, such as the Sustainable Development Goals (SDGs). Here you can also highlight linkages to other community-based, civil society organisations, or private sector activities.

The Project description shows the changes the project wants to help achieve and present the causal hypothesis and pathway of the project including the project title, goal, the outcome(s) and a summary of the intended results and implementation strategies. Explain how the project elements are interlinked and feed into each other and towards the project goal.

If required, also provide a logframe or theory of change to lay out your rationale.

Target Group: Explain who will be the target participants in the project and how you have consulted them during the project design to ensure the activities will address their needs and promote a change in their lives.

Provide an overview of the direct beneficiaries who will be personally involved in your project activities and benefit directly, e.g., people trained. List also the number of indirect beneficiaries who will be targeted. They benefit as a result of improvements made to the direct beneficiaries or are the audience of awareness-raising activities delivered through media or through outreaches by direct beneficiaries.



Networking and Partnerships: Demonstrate how engagements with other organisations or partners will create synergies to strengthen the project through information sharing, a common knowledge base, joint advocacy or complementary activities, shared resources and learning opportunities.

Monitoring and Evaluation: In this section, describe how you will monitor the project performance with regard to the aim during implementation. Activities like rapid assessment, baseline studies at the beginning of the project as well as ongoing monitoring exercises throughout the project period are included here. They are carried out with the aim to have information from the project start to show the change achieved, to detect and measure any unplanned effects, positive or negative, and to be able to react to issues in order to achieve results and improve the project performance.

Additionally, point out whether and when you have planned an evaluation to assess the project performance systematically. An evaluation will be carried out at a specific moment during the project period (mid/end) focusing on expected and achieved accomplishments and the relevance, impact, effectiveness, efficiency and sustainability of interventions.

The Sustainability Plan explains how the positive effects of the project are expected to be sustained even after the project period. The donors are interested whether any activities are expected to be continued and project outcomes sustained even after the grant has expired. Activities to promote sustainability include: Community involvement, working with existing local groups, community

sensitisation to promote the issue through advocacy and the involvement of local agencies and government to promote local ownership and policy changes.

Value for Money: Best value for money is defined as the most advantageous combination of cost, quality and sustainability. Angles from which to assess your project proposition include economic value, efficiency, effectiveness and equitability:

- The **economic value** shows that the procurement of inputs will be at the least cost for the relevant level of quality to ensure the project.
- To explain the **efficiency** of the project, show that you are “Doing Things Right” and point out the value of the project results in relation to the total cost of inputs you will require to achieve them.
- **Effectiveness** refers to “Doing the Right Things” to achieve the level of results required. To understand the effectiveness of your project, explain how it will accomplish high-quality output and reach the objectives with the input planned.
- **Equitability** aims to ensure that benefits are distributed fairly, therefore it is important to point out how the project will reach the most vulnerable beneficiaries.

Review: Give the relevant team members enough time to review the draft proposal and to give you feedback on how to improve the write-up to ensure it clearly explains your plans, speaks to the call and offers an engaging solution to the problem.

Recovery: When the feedback has been received, integrate it and clean up the document. Allow enough time for the revision to address comments comprehensively.

Finalisation: After the integration of edits, proofread the document for its logic and to ascertain that all its elements complement and speak to each other. Make sure all donor requirements are covered and conduct a language, spelling and format check to bring the proposal to the highest standard when submitting.

Submission

Make sure you are aware of the exact submission deadline and timing, including time differences if you are submitting to an international donor. Also, check out the submission format and channel and prepare to hand in well in time to mitigate potential technical glitches.

Ensure you have all supporting documents required by the donor ready for uploading, e.g. budget, logframe or theory of change, audits, registration, or the wire transfer form. Once the document has been submitted, the waiting begins to hear back from the donor whether the concept has made it to the full proposal stage or whether the proposal has been approved.

Award

After the award has been celebrated, there will be an exchange between grant giver and grantee to fine tune the project documents, logframe, and budget. Additionally, the organisational policies and governance structures will usually be reviewed to ensure that they fulfil donor requirements. As a next step a contract explaining the legal framework of the project will be drawn up and signed.

Project Management

Once the project has started, it follows the management cycle of activity implementation, monitoring and learning activities and reporting about what has been achieved.

Follow-up

Acquaint yourself with the donor reporting guidelines and the reporting times, both financial and activity based. Plan well in advance to put together the required information and submit in time.

In case you encounter severe issues concerning the implementation of activities or other problems, which require changes to the project, communicate to the donor even out of the reporting times, so they understand your situation.



Photo Credit: Anna Shvets (<https://www.pexels.com/@shvetsa>)

Individual Giving

Individual giving is an important source of income for organisations of all sizes. Contributions from individuals can be made monetarily, in kind or by volunteering in your organisation with their time, knowledge or social recognition to carrying the cause forward in society. Donations can be made once or on a regular basis (through memberships, sponsorships, payroll giving etc.). Some individuals may even leave a legacy in their will.

Asking for Donations

There are a number of strategies and communication channels which you can use to raise funds from individuals. Some organisations use a range of methods to raise funds from individuals, while others

just focus on one or two. It's a good idea to consider the time and money you will spend on each method versus the income generated to check how effective it is.

Potential ways to raise funds from individuals include:

- **Fundraising events** are usually high level social events, such as galas, dinners, concerts, auctions, sports events, etc. Funds are raised through ticket sales and other contributions. The events also provide a platform to share information about your organization and its activities.
- **Fundraising challenges** raise funds through events where supporters are invited to carry out an attention catching activity, such as running a marathon, dowsing oneself with a bucket of ice water etc. which will draw interest from the media, but also from potential sponsors and the general public.
- **Donor appreciation events** are great for cultivating your relationships with donors. Attendance is free and you can share your achievements and plans with donors, express gratitude and offer suggestions on how donors can establish and strengthen connections with other supporters.
- **Through collections** you can get many small, one-off contributions and you can raise awareness for your cause. A common example are donation boxes in supermarkets and malls.
- **Local and community fundraising:** Raising support from local communities for activities in their neighbourhood is another strategy to increase awareness for issues, but also to get donations. The aim is to bring the cause and people together and potentially also work with

volunteers to amplify the local involvement for your organisation's activities, for example by inviting community members on a particular day to your organization.

- **Sponsorships** are recurring donations for certain activities, e.g. upkeep of children, families or student scholarship. They are very effective as the payment frequency and income can be planned for. Effective sharing of progress through donor updates on the utilization of funds is required to promote a continued strong relationship with the donors.

Cold, Warm and Lapsed Audiences

When fundraising from individuals, balance your time, energy and budget between communicating with the different audience types of warm, lapsed and cold donors and contacts.

- **'Warm' audiences** are people who have donated to your organisation within the last 2-3 years. They are crucial to your organisation's operations. Don't only share fundraisers asking for help. Keep them interested and engaged by sending them 'Thank You' letters and showing them what you do e.g., with newsletters. Your aim is to build a long-lasting relationship with them. People give more and longer when you have built a relationship with them.



- A **'lapsed' donor** has donated to your organisation more than 2-3 years ago. The lapsed audience includes people who no longer wish to give, cannot afford to give or who simply forgot to communicate a change of address. Try to reconnect with them and convince them to give to your cause again.
- A **'cold' audience** has never donated to your organisation. Inspire them to back your cause through 'donor recruitment' activities. Your donor recruitment activities should be tailored towards those people who are most likely to be interested in your work. Check the demographics of your 'warm' donors. This will provide you with valuable insight who is your target including their age, gender, location and preferred media channels. Address your activities to people with similar characteristics to heighten your chance of success.

An organisation's 'warm contacts' are people who have opted into communication with your organisation, but have never donated. These could be newsletter subscribers, Facebook page likers, Instagram and Twitter followers, service users or event attendees. An Individual Giving fundraiser has a far better chance of receiving a donation from these people, than from people with no connection whatsoever to the charity.

Communication Channels for Individual Giving

You can use the following marketing channels to generate donations irrespective of the audience type:

- Direct Mail
- Face-to-Face (e.g., at events or at social places like malls)
- Door-to-Door (Approaching people in their homes)
- Telephone, including mobile money
- Digital: Sharing information by Email (try using a professional mailing program like Mailchimp), your website or on Social Media (facebook, instagram, tiktok, pinterest, twitter, youtube...) where you aim to build an online community and approach them with crowdfunding initiatives.

Additionally, there are some special ways of how you can get the attention of the 'cold' audience:

- Press Advertising
- Press Inserts
- Door drops (unaddressed printed item delivered to the door)
- Third Party Websites
- Face to face – in a public place or door to door

No matter what channel, always be mindful of the existing regulations with regards to marketing and data protection.





Photo Credit: Mudassar Iqbal <https://pixabay.com/users/kreatikar-8562930/>

Crowdfunding

Crowdfunding is a fundraising method that lets individuals raise money for projects, expenses, or events by reaching out to others. Fundraisers set up online crowdfunding pages and promote those pages through their communication channels (e.g. social media, website, email).

Crowdfunding allows you to raise money quickly and relatively cost effectively. When promoted widely via social media, email, and word of mouth a crowdfunding campaign has the potential to reach a vast audience. Moreover, crowdfunding campaigns can not only raise money, but they also raise awareness

Creating a Crowdfunding Campaign

Preparation and Launch:

- Strong crowdfunding campaigns have a very clear message. It is best to use short slogans and sentences and appealing images. Be mindful that both slogans and images comply with your communication strategy and ethics.
- Develop a strong financial goal for your campaign - it should be achievable but ambitious. It helps to break down the campaign goal in the number of donors you need to achieve this goal. This will help you determine if your goal is realistic.
- Communicate your goal clearly to your audience - what will happen with their donation? How many beneficiaries will be supported?
- When choosing a crowdfunding platform, you should first and foremost consider your target donor - where are they based and what are their demographics? Encourage your existing supporters and well-wishers to share the messages and communication pieces to reach a bigger audience and increase the potential donors reached.

- Make sure you have enough content for your campaign, to publish photos and stories very regularly and to keep the donors engaged.

Be aware that crowdfunding platforms charge a commission fee that is deducted from the donations. Therefore, some organisations prefer to set up individual crowdfunding campaigns on their own websites, using their own payment options. Some platform options are:

- **Global Giving** (www.globalgiving.org) - attractive for donors from Northern America because of tax exemption certificates;
- **GoFundMe** (www.gofundme.org) - popular in Europe but only accessible for organisations with a partner in Europe;
- **M-Changa** (www.mchanga.co.ke) - specifically designed for the Kenyan market, with MPesa payment options

Promote: The most important part of a campaign is the promotion. Success can only be made when you get the word out via social media, email, and even word of mouth and if your audience helps you share it. You can create a social media campaign to support your crowdfunding campaign, featuring for example 5 to 7 social media posts a week and two emails. Keep in mind that content needs to be relevant so that your audience remains interested.

Collect: Once the donations start coming in, you get to collect what you've earned. Some platforms give you the funds immediately, while others wait until your campaign is over. Also, don't forget to thank your donors and use this as an opportunity for getting them more engaged in your organisation.

Corporate Giving

Corporate fundraising is gathering of financial support from businesses and commercial companies. Along with grant funding, earned income and individual fundraising, corporate fundraising is one of the main strategies employed by organisations to fund their work.

Corporate philanthropy programmes bring a win-win situation for both the companies and the NGOs, since they allow the companies (large and small) to make investments in the social good, which reflects positively on the image of the business, while organisations can profit from the support they get. Some of these programmes are driven by employee giving and match funding: the more employees contribute to philanthropic organisations, the more their company will donate.



Photo Credit: Rebrand Cities (<https://www.pexels.com/@rebrand-cities-581004>)

Many companies create corporate giving programmes as a way to give back to their local communities, to increase employee engagement and to foster meaningful partnerships with organisations.

Corporate philanthropy goes beyond simply asking donors for contributions and relies on building a partnership between the company and the organisation. The cooperation with companies can bring many benefits such as funding from marketing or community budgets, good PR, brand awareness, expertise and gifts in kind. However, to avoid friction the partnership requires good preparation and relationship building to be on the same page regarding the expectations of both parties in terms of funding interest, engagement and reporting. There are many different forms of corporate partnerships, such as:

- **Payroll giving** - employees commit to giving a certain amount of their salary to an organization, this is often topped up or matched by the employer
- **Donations and gifts in kind**
- **Employee involvement and volunteering** - companies often have a range of unique skills and choose to support charities by offering time rather than giving cash.

It is important to regard the relationship as a joint endeavour that needs to be beneficial for both parties. The terms have to be negotiated at the beginning of the partnership and organisations should not just accept the proposal put forward by the company. It is important to be aware that the value of a partnership for the company, such as positive publicity, may far outweigh the direct cost the company incurs.



Photo Credit: Nappy (<https://www.pexels.com/@nappy>)

Sales of Goods and Services

Sales of goods and services are increasingly popular among organisations as a means of creating income. There are two ways to mobilise resources through sales of goods and services – by commercializing existing programmes or activities or by creating new income generating activities. The process of developing a strategy for selling goods and services includes the following: Ideation, business model development, and business plan development.

Ideation

The first phase of a social enterprise development is called 'ideation', the development of broad business ideas. To identify which business idea 'fits' the organisation, the organisational strengths, core competencies and assets can be summarized and discussed in a joint workshop with all team members (ideation workshop).

Starting a business based on the organisation's core competencies and assets reduces costs of establishing and running a business where critical knowledge and skills need to be acquired. Growing from existing strongholds drastically increases your rate of success.

Consider the following key questions:

- What is your organisation's core area of expertise?
- Which skills and expertise are available in these core areas?
- What is really going well, what makes your organisation stand out?
- What assets does your organisation have (including network, human resources, physical assets) to build on?

Alternatively, ideation can also start the other way around from analysis of beneficiaries and partners, looking at what they value in your organisation and which additional needs they have.



See Tool 7: Partners and Beneficiaries Analysis for Social Business

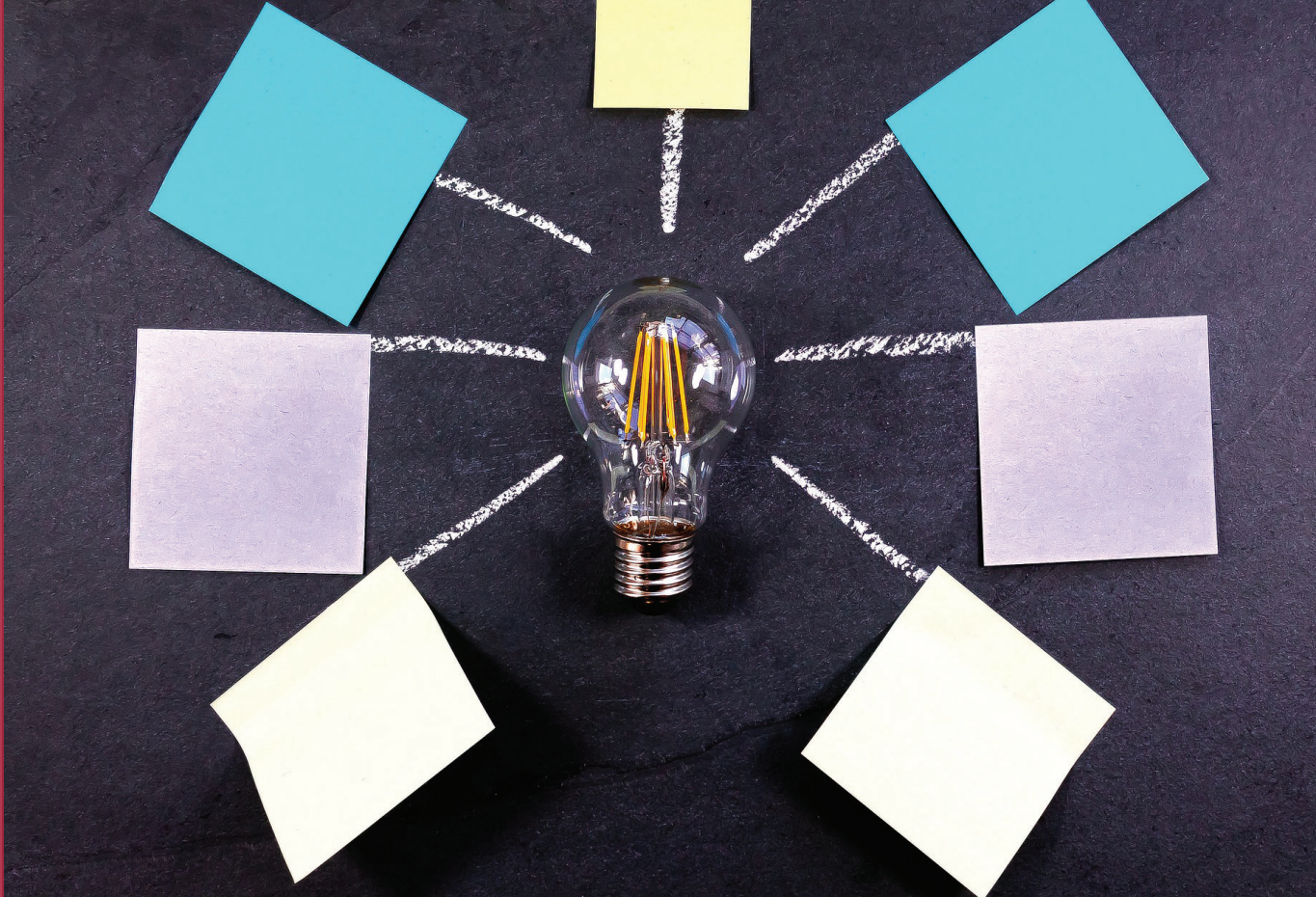


Photo Credit: Stux (<https://pixabay.com/users/stux-12364/>)

Having collected the organisational strengths, the next part of the ideation workshop is a brainstorming session. The brainstorming can be structured with the help of 'What If'-questions applied to either transforming existing activities into revenue generating activities or to develop new, interesting revenue generating activities.

“

'What-If' questions help us think outside the box and challenge existing, old patterns and models (Osterwalder, Alexander, Yves Pigneur, Tim Clark, and Alan Smith. Business Model Generation: A Handbook for Visionaries, Game Changers, and Challengers. 2010, MLA (7th ed., p.140).

Examples are: "What if we start charging our beneficiaries for our services", "what if we start offering our services to third parties", to more detailed: "What if we start renting out our equipment". Ideas are individually written on post-its and discussed in the plenum. Discussion continues until 3 to 5 exciting business ideas have been found.

Business Model Development

Once the business ideas, which the team is passionate to go for, have been established, your team can proceed with a workshop for business model development.



Tool 1: Business Model Canvas (BMC) is a tool where the business model is divided into nine building blocks that are filled jointly in an interactive process. The ideal business model is flexible and can be modified and adapted as you progress in your planning. It is best to keep it visible on a flipchart. At the heart of the Business Model Canvas are customer segments. For a business venture to be profitable, it is indispensable to satisfy customer needs and hence the first guiding question is: Who are your customers and what are their needs?



You can use Tool 5: Creating Donor Personas to design model customers who would be interested in your product or service with as much detail as possible. The next step is to define your business' value proposition describing the specific aspects of the proposition and to explain how they add value for the customer: "Why would the customer buy from you and not someone else?".

The third step is to identify channels to communicate the identified value proposition to the potential customers. Ideally, the direct and indirect channels that your business uses will be applied. The fourth step is to identify the desired relationship which your business wants to establish with each customer segment. In the fifth step, revenue streams are identified representing the earnings yielded from every customer. This includes

one-time transactions through sales as well as recurrent transactions in the form of lending, subscription, usage fee or licensing. The sixth step describes key physical, intellectual, financial, or human resources needed to make the business model work. Then, the key business activities and most important actions needed to make the business succeed, are recorded before we describe the key partnerships and networks your business must have in order to make the business model work. They range from suppliers to competitors to the government.

Last but not least, the ninth building block and last step is your business' cost structure where the most important operational costs are described. More information on the BMC can be found in Osterwalder et. al. (2010). Developing a business model will give you more indication whether your business might be feasible or not. It is the first step before venturing into developing a business plan.

During business development it is important to get as many different views and advice as possible. However, it needs to be considered how to get input from experts without giving away the essence of your business idea so that it is not taken off your hands. Only discussing elements of the business model with selected experts to get a better idea if your assumptions are correct (e.g., on customer needs, operational costs, partnerships) is a way to do the consultations. The expert contacts will also help you when it comes to business plan development.



The process of developing a business plan can be structured by assembling a core team and developing a roadmap to business plan development in a kick-off workshop.

This will result in comprehensive customer and market as well as environmental analysis. All information gathered will inform product development, a detailed operational analysis ("how to make it work"), and informed financial modelling. Once more, it is important to get expert opinions throughout the process.

4.

Resource Mobilisation Strategy Development



A **RESOURCE MOBILISATION STRATEGY** provides an essential roadmap and spells out how resources are to be leveraged to meet your organisation's resource needs. You need a resource mobilisation strategy to...

- Have a planned and upfront pipeline of resources;
- Plan beforehand where resources are needed and assess appropriate possibilities for raising them;
- Coordinate how you contact resource partners and build a long-lasting relationship with them;
- Ensure coherent and clear messages to resource partners;
- Ensure that your staff's role in resource mobilisation is maximized and their contributions as effective and efficient as possible;
- Have enough time to apply for interesting grant opportunities;
- Increase your impact through ensuring consistent programme delivery.

Goal Development - The Ideal Picture

In a team process, develop a common picture on the ideal resource mobilisation approaches for your organisation. In the resource mobilisation strategy, you lay out the different approaches and strategies you will apply to reach your resource mobilisation goals in the various areas and using different communication channels.

You can do this by creating a best-case scenario for sustainable, attractive funding, based on the organisational and peer analysis conducted earlier. To look beyond current and established ways of funding, come up with a picture of potential income sources, amounts, timing, funding purpose and resource partner groups.



Tool 3: Create the Ideal Picture



Stakeholder Engagement for Ideas and Validation

To meet the interests of your resource partners and to learn about potential new pathways of resource mobilisation, it is recommended to engage key stakeholders at an early stage and to collect their views and inputs on the most promising resource mobilisation strategies.

The findings inform the planned way forward and help to make appropriate strategic decisions. The stakeholder views are critical to help you understand the context of the planned actions better. Consultations also enhance ownership and support throughout the organisation for the pathway developed. A short workshop with a limited number of participants representing programme,

field offices, finance, management, board and potentially resource partners, has the following goals:

- Orient the stakeholders on the goal of the resource mobilisation strategy;
- Share the findings of the organisational analysis and the resource mobilisation strategy ideas developed so far;
- Collect more information about resource mobilisation options and ideas how people feel about them;
- Refine the resource mobilisation strategy with insights on audiences, messages, activities and communication channels.

Resource Mobilisation Strategies Decision Making

When you have collected the information from inside your organisation as well as the views and input from external stakeholders, the time has come to take decisions on the resource mobilisation strategies to be implemented in the long- and short-term. As a basis for decision-making, rate and rank the strategies identified according to expected benefit, costs, time until revenue, long-term sustainability and risks.



Tool 11: Resource Mobilisation Strategies Ranking

Having gained an overview of the resource mobilisation strategies and their priorities for the organisation, you have the basis for decisions on how much to invest in getting funds from the different sources.

While diversification of funding sources helps to keep your organisation's funding base stable, the amount of time and resources available to engage in different sources has to be considered as well as the expected income gained within the timeframe that the funds are needed.

Once you have selected the strategies your organisation wants to engage in, it is time to set goals for each source on what you want to achieve and which resources you need to reach the targets.

For each strategy, set the following goals:

- Expected income and the number of resource partners you will target;
- Acquisition channels (e.g., number of proposals written, donor calls, donor meetings, event, social media campaigns, etc);
- Communication and Cultivation channels on which you will interact with the resource partners, which information you will share and how frequently you will be in touch with them;
- Human resources required to fulfil the goal;
- Cost for the implementation of the strategy (Media House fees, Airing costs, printing, spot production, etc);
- Timeline for the implementation of the resource mobilisation actions: By when do you expect to see the income results?



Tool 10: Resource Mobilisation Strategies Planning

When the income goals and expected investments for the different sources have been set, the total of expected funds generated from these sources can be calculated and also the resources which will be needed to achieve this. Considering different investment and success expectations for the individual strategies, you can project varying resource mobilisation scenarios, giving your organisation prioritisation and budgeting options.

These plans and estimates give your organisation a solid foundation to base strategic resource mobilisation decisions on. When you have taken these decisions, you can develop an action work plan for the different sources as well as a monitoring plan. Monitoring helps to ensure resource mobilisation activities per source and expected income are on track or to check whether changes in approach are required to ensure funding targets can be met.



Writing a Resource Mobilisation Strategy

The writing process for a resource mobilisation strategy can already start once you commence the ideal picture process. Collecting and analysing all necessary organisational information and ensuring it is up to date will help you take well informed strategic decisions. The process will be eased by appointing responsible writing champions early on who take notes throughout the process and compile a first draft of their respective section. Appointing a coordinator can ensure that timelines are kept and drafts are submitted in an even quality.

There are many ways of writing a resource mobilization strategy, but the following key aspects can provide a framework for your plans.

- Keep it simple. The best resource mobilization strategies are simple and clear.
- Keep it up to date. To be successful, your strategy should be reviewed and adapted regularly rather than stowed away in the office drawer never to be looked at again.
- Track your progress. Setting targets and developing an annual calendar of activities is key to helping track and assess progress.

A template can be found in the tools:



Tool 6: Resource Mobilisation Strategy Template

Key Elements of a Resource Mobilisation Strategy are:

- Introduction;
- Mission, Vision, Values for resource mobilisation;
- Analysis of your resource mobilisation history
- Organisational Analysis
 - Analysis of the annual budget and budget forecast to determine which amount of funding is already in place;
 - Analysis of your case for support;
 - External analysis (PESTLE);
 - Analysis of organisational capacity (SWOT);
 - Review of resource mobilisation strategies;
- Goals, Objectives and key outputs for resource mobilisation;
- Fundraising investment budget;
- Monitoring Framework;
- Annual Action Plan.

5.

Communication Strategy



A **COMMUNICATION STRATEGY** is about how to make your cause known and how to build strong relationships with your resource partners. You can only procure resources from people (private individuals, foundations, corporates, etc.) who know and trust the organisation and share an interest in the cause the organisation works for.

Awareness and trust are built through sustainable, appealing communication. Resource mobilisation is successful when a relationship with each partner and donor is built and they feel appreciated individually. Relationships can only be built and maintained through engagement and dialogue (see Chapter 1, **Donor Cultivation Cycle and Donor Pyramid**). Timely, informative and appealing communications are prerequisites for strong resource mobilisation.

Communication is an integral part of the work organisations do and amplifying your vision and mission effectively is an important element contributing to resource mobilisation. The aim is to inspire the audience, instil a sense of urgency about the need get the work done, and to harmonise the efforts of external and internal stakeholders through increased understanding of the strategic direction the organisation has. A number of communication tools (from printed material to online channels) can help convey the organisation's, programmatic and project goals as well as the impact in a concise and effective manner.

This chapter emphasizes the importance of developing a communication strategy for your resource mobilisation efforts focused on its target audience(s), key messages and media channels.



Tool 2: Communication Strategy Template

A communication strategy is fundamental to achieving the organisation's overall mission, follows the organisation's overall strategy and is also supposed to cover the same timeframe. It should include the following basic elements:

- **Situation Analysis:** How are you communicating now? What are the channels used? How many people do you reach? What works well? What are the challenges?



Photo Credit: Adam Solomon (<https://unsplash.com/@solomac>)

- **Objectives:** What do you want to accomplish from your communications activities? The communication objectives contribute to the achievement of the overall objectives of the organisation and should therefore reflect what and how they add on the objectives and promote them. State them in a manner that is specific, measurable, achievable, realistic and timebound.
- **Target Audience(s):** Identify the main audiences with whom you need to communicate to achieve your objectives, both internal and external. Also note which parts of your organisation and activities the different audiences might be interested in. The aim is to identify which audiences are most important for you to communicate with, with which information and using which channel. Also, don't forget your internal audiences – staff, board members etc. Since internal communications is a crucial part of any communications strategy.
- **Key Messages:** Strategic targeting and consistency to one's key message plays an important role in developing an effective communication strategy. The key is to break down the organisational objectives into messages relevant for each of the audiences. Develop short and easily understandable key messages which are targeted to the points of interests of the different audiences and which link back to your key organisational objectives and values.
- **Tools and Channels:** For each audience identify the most appropriate channels through which messages will be delivered, either print, broadcast, the internet (web, email), direct mail, conference, workshop, etc. for each audience, there will probably be several appropriate communications channels.

- **Activity Planning:** As a next step link audiences, messages and channels into a communication plan. Detail your communication activities and in your communications plan explain how you will sequence strategies and tactics during implementation.
- **Monitoring and Evaluation:** Explain what success of the communication strategy looks like and how you will know when objectives have been met. Detail how you will monitor the progress of your communication efforts and evaluate it after the implementation. Indicate also the tools you will use. Possible measures are the number of hits on the website or callers during a radio talk-show. Other measures are how often your key messages were mentioned in media and whether there has been a shift in the attitude of your stakeholder group? The situation analysis can include the baseline information which you will need to ascertain and document the evolution of the communication strategy.

Identifying and Investigating Target Audiences

The key to effective communication is to understand the audience, including what their needs are, how they prefer to receive messages and what their information and communication habits are (including media consumption, frequency, channels).

Your primary audience is hereby the audience that receives communication from you directly and is the most important audience for your message. They can be identified by analysing whose support you need in order to reach your goals. Content and style have to be developed around the needs of this audience. Your secondary audience on the other hand includes anyone who may indirectly receive a copy of the communication. Be mindful to be very precise in defining your audience. The more audiences you have with different needs, the weaker the message becomes. Providing appealing and effective communication to the target audiences will ultimately help you to build trust between your organisation and your resource partners.

Effective communication aims to achieve the following:

- Disseminate the impact your organisation makes and the scope of your interventions
- Relevant target groups, be it partners, service providers or beneficiaries, can be informed about your activities and learn about the benefits or your work.
- Manage the expectations of your audience and encourage the participation of your followers in activities also on social media through giving feedback, promoting your messages or engaging in a dialogue.
- Reduce rumours or negative communications when the organisation is confronted with reputation issues and promote good standing through transparent and honest messaging



Photo Credit: Vishnu R Nair (<https://www.pexels.com/@vishnurnair>)

You can clearly define your target audience by using the donor persona tool. Creating a donor persona means giving a detailed description of a person from your target audience. Imagine your best potential supporter and note down the characteristics of this person. It does not have to be a real person – a donor persona can be entirely fictional. Working with donor personas allows you to always check whether your messages are attractive to your main audience i.e. whether they satisfy their needs and wants.



Tool 5: Creating Donor Personas

When investigating your target audience, remember to always put your audience in the centre. Listen to your audience and research them well. Ask your audience what they are interested in and do not rely solely on assumptions. It is best to include different perspectives here, through interviews for example. Other means of research can include focus group discussions, expert interviews or secondary sources like websites and publications. You should also always work in a team to define your target audience, as this allows for different perspectives to be included.

Developing Key Messages

Key messages are direct and concise sentences conveying the main points of information you want your audience(s) to hear, understand and remember. They articulate what you do, why you do it, what value you bring to stakeholders and how you stand out among other organisations. Key messages clarify meaning and provide the takeaway headline of the issue you want to communicate. They are the foundation of an organisation's branding and marketing efforts and should be reflected in all written and spoken communications.

A key message is not a short summary of your organisation's vision and mission. It aims to give your audience quick answers why your message is relevant to them and makes them want to know more about the organisation and what you do. Additionally, a key message can influence how your audience feels about your organisation and your cause. Carefully, consider what emotions you want to create with your messages.

Your organisation's various communication efforts should all be anchored in your key messages. All your interactions, whether with your external or internal stakeholders, and communication materials like brochures, websites, annual reports, press releases, newsletters, posters, etc. should, therefore, consistently convey your key messages.

Having a key message doesn't mean you would be saying the same exact words over and over again - though that isn't always such a bad idea. You can use variations and minor deviations, of course, to address the various types of audiences your organisation targets and varying circumstances. Having a key message simply means making a commitment to consistently communicate the most important message to your most important external, as well as internal, audiences.

Forum for Women in Democracy (FOWODE), an organisation promoting gender equality in Uganda, uses the following visual and key message.



Source: <https://www.fowode.org/>



More than just informing your audience, you can also use your key message as a call to action. Think about what action you would want your audience to take. Should it be a change in attitude towards your organisation or actually giving a donation? Mention this action and make it easy for your audience to follow your call.

Key messages help you to...

- Prioritize and define information
- Ensure consistency, continuity and accuracy
- Measure and track success
- Stay focused when speaking with the media or target audiences

Designing Your Key Messages

When crafting your key messages, ask yourself:

- What do you want your target audiences to know about you?
- What questions do people ask staff (during field visits or meetings?)
- What do people need to understand for your organisation / programme to succeed?
- What would you want to know about the organisation / programme if you lived in the community / if you were a donor?

In a project working towards reducing gender-based violence, FOWODE applied one key message and two calls to action to mobilise citizens to take action:



Forum for Women in Democracy

HORIZONT
3000



European Union

Effective key messages are...

- **Concise:** They are clear, short and to the point. Don't use many words when one is enough!
- **Simple:** Good key messages are easy to understand. Avoid jargon and acronyms. Remember to KISS – Keep It Short and Simple!
- **Focused:** One key message – one idea! If you have more than one idea, create separate key messages for each point you want to make or audience you want to address.
- **Solution focused:** They show what positive change you want to achieve.
- **Tailored:** They speak to the target audience. Adjust the language and information to meet the needs and style of your target audience.
- **Consistent:** Same audience – same key message. While you can have different key messages tailored for different audiences, you should not mix them up.
- **Memorable:** They grab attention and are easy to remember, repeat and stay in the minds and hearts of the audience. Try it out on your team and see what messages stick best.
- **Relevant:** Make a conscious decision as to what are your most important messages that you need to communicate and your audience needs to know.
- **Compelling:** They call the audience to action. Write in a way that stimulates your audience to join your cause and act in your organisation's favour. Use active voice, not passive.
- **Credible:** The message inspires trust in your organisation, is taken from experience and illustrates your capability to deliver the desired results.

You can also embed your key messages in an elevator pitch. An elevator pitch is a very brief explanation that introduces your organisation, describes what it does and makes a compelling point as to why it is important. You can find guidance on how to develop an elevator pitch in our **Tool 4: Elevator Pitch**



Forum For Women In Democracy
SHAPING THE FUTURE

Example of an elevator pitch:

Forum for Women in Democracy is a feminist organisation that champions just governance, which gives women voice, power and resources. We are part of a history that paved the way for centring women in the public space. Over the last 25 years, we have nurtured more than 25,000 women leaders to influence legislative processes and pioneered gender responsive budgeting in Uganda. We envision a future where more women and men equally participate in and benefit from decision-making processes.



Photo Credit: Kane Reinholdsen (<https://unsplash.com/@kanereinholdsen>)

Brand Your Communication

Next to key messages, it is also important to create an overall professional and memorable image of your organisation. The way and the consistency with which you use logos, colours, typefaces and images shows your audience the professionalism of your works. In short, your outside representation together with your key messages can help create your organisation's brand. A clear branding will make it easy for your audience to relate your communication to your organisation.

Selection of Communication Channels

Communication tools and channels are how you get the word out about your organisation. Which ones you choose depends on your target audience and resources (time and money) available to you to ensure the receptivity and appropriateness of the messages for the target audience.

Decide which communication channels will best reach your audience. However, it is often effective to use a variety of channels, since all channels have their advantages and limitations. There are four broad categories of channels:

- Interpersonal (e.g. door to door, phone calls, one-on-one or focus group discussions)
- Community-based (e.g. events in villages, outreaches, interfaces, talk shows on local radio)
- Mass media (e.g. newspapers, TV, national radio, magazines)
- Digital and social media (e.g. website, facebook, twitter, linkedin)

Your context, objectives and target audience will determine what communication channels are most suitable. Through research on your target audience, you will get to know about their diverse requirements and preferences. Since you won't be able to reach all of them through one media channel or retain their attention with one type of content, consider the most effective channels when you create your media channel strategy and apply the most ideal channel when you are targeting different audiences.

Ideally, prioritize two to four key channels and combine oral and written channels. Here are some criteria that can help you identify the right channel for your target audience:

- The channel needs to match the target audience's preferences, level of familiarity and access options;
- The channel is trusted by the target group;
- The channel encourages an adequate level of participation of the target audience;
- The channel is active and widely accepted (ideally even popular) in the geographical area;
- The cost of acquiring and using the channel is appropriate according to your budget.

Activity Planning

Under activity planning you develop a work plan. In the work plan you detail how you will apply and sequence the strategies and tactics, using the different communication channels selected to most effectively promote your message. In general, most organisations rely on a strategic mix of face-to-face engagements, community events, press and media relations, and some social media engagements for most effective advocacy and message amplification. Typically, several approaches will be used, either in a phased manner or concurrently.

Examples of approaches include:

- Face to Face, Door to Door
- Community outreaches, interfaces and other events in villages
- Advertising in newspapers and magazines
- Direct mail, email
- Social media campaigns (twitter, facebook, instagram)
- Radio or TV Talkshows
- Press conferences
- TV or radio spots



When drafting this part of your communications plan, be realistic to stay within the budget available and the staff capacities to deliver, particularly if you do not have experienced communications professionals implementing the activities. At times, you may have to outsource tasks if the skill is not available within your organisation.

Consider the full communication strategy's time frame and break down what needs to be done to achieve the objectives. Decide on the major steps for every year and also what can be realistically done within one year. In your yearly communication plan focus your energy on activities and goals which you can achieve. When clear processes and a solid information flow for sustained communications have been established and some experience gained, you will be better positioned to take on additional channels or tactics in the future.

The communication plan details the implementation of your communication strategy. It states who is responsible, what activities are planned for when and how much budget will be needed.

Who will take the lead for each activity?

Think about who is responsible for:

- Managing the communication plan and sustaining the approach
- Developing communication materials
- Sharing messages with communities and gathering feedback
- Communicating with other stakeholders (e.g. government departments, local and international organisations)
- Reviewing whether the communication approach is effective.

Internal workflow:

- Who is on your communication team?
- What are their roles?
- How often will you meet?
- What is your process of getting the work done?

You may need to use a variety of activities in order to roll out your communication plan. The activities might be one-time, periodic or ongoing.

When the overall strategies have been selected, the team can outline the activities that will be implemented per year to achieve the objectives. Activities should be specific and relate to each strategy. Some examples may include: developing a concept for a radio talk show series, implementing the radio talk show series, developing radio or TV spots and planning the airing schedule, working with a group of project participants to develop a music, dance and drama activity for community outreaches, planning on the number and location of community engagement, conducting a certain number of community discussion groups, designing and producing a radio serial drama, developing an app or designing or revamping the website.



See Tool 2: Communication Strategy Template: 6. Activity Planning

Use the communications plan template to strategize your communication efforts. This will help you to prepare in time for events or campaigns and to ensure to collect information in time for it to be ready when you need it. Consider the order in which different people will need to be informed to provide materials, input or make themselves available for activities. For example, staff may need to be trained so that they can inform others or change stories need to be collected to be ready for the newsletter. Often, programmes need to inform community leaders and other community groups before implementing a project with the wider community.

Draft a budget

When drafting a budget for your communications activities, you can follow the same process as when you budget for other activities. Your budget will influence what strategies you can pursue in your communication plan, especially if you want to involve mass media such as national TV. Keep in mind though that not all communication has to be expensive. There are many inexpensive ways of communicating such as sharing information at community meetings, creating posters and distributing them through friends, members and ambassadors.

Cost all the activities and ensure they fit into your budget frame. Consider which costs are actually under project and programme costs.

Ask yourself the following questions:

- What is your budget?
- How much money is available? How much do you expect your plan will cost?
- Can costs be integrated into programme budgets as the programme budgets are developed?
- How much do you expect your plan will cost?
- Are the selected communication strategies the most effective for our audience and purpose?



Monitoring and Evaluation

What does success look like and how will you know when the communication objectives have been met? Review your communication strategy during and after its implementation. Look for ways to improve. Did people receive your message? How did they respond?

Make sure to have tools in place to evaluate the effectiveness of the various elements of your communications. The review can be either a stand-alone activity or one part of an overall programme review. Before you implement your communication plan, you should decide with your team how and when to review it. This reminds staff that it's important to learn and improve over time.

Measuring effective organisational communication is often not a common practice. Nonetheless, if your organisation is like most CSOs or NGOs, every resource is valuable – including your time and donor funding, so it is important to think about how you will measure the success of your efforts. One way to do it might be to define how you will measure your success (indicators).

- Create criteria catalogue for measurement (indicators)
- Constantly monitor and track your results in order to understand whether you are any closer to achieving your goals.
- What methods will you use to decide whether each communication approach is effective?
- Who will be responsible for developing the review criteria and making the review happen?
- There are different methods you can use to review your communication approach and make sure it is effective.
- Observe (field visits, reports, communication materials, meetings, programmes in action...)
- Talk to staff (e.g., during meetings, in informal interviews, field visit or focus-group discussions)
- Talk to target audiences (asking them for feedback during meetings, informal interviews, staff visits, focus-group discussions and surveys)

6.

Outlook



THIS PRACTICAL GUIDE provides partner organisations of HORIZONT3000 and its member organisations with information and tools for resource mobilisation. The guide is meant to answer the most common questions about resource mobilisation and give your organisation guidance on the development of a resource mobilisation strategy to take your organisation into the future.

HORIZONT3000 offers a variety of services to organisations. One such service is KNOWHOW3000 which is our knowledge management programme and supports our partner organisations in their organisational development. Among the commonly used tools and methods of capacity building are trainings, consultancies, Communities of Practice, exchange visits and experience capitalisation. Also, this manual is fully financed through the KNOWHOW3000 programme.

Another popular service is our technical assistance programme for organisations in our partner countries. Technical assistance is tailor made to the needs of an organisation and can also include topics around resource mobilisation.

Our services range from full time technical support to targeted, short term assignments. If you would like to know more about our services in the area of resource mobilisation or need further support developing your own resource mobilisation strategy, do not hesitate to reach out to us: office@horizont3000.org.



7.

Toolbox

Tools appear in alphabetical order.



Tool 1: Business Model Canvas

Source: Osterwalder, A., Pigneur, Y., Clark, T. and Smith, A. (2010). Business Model Generation: A Handbook for Visionaries, Game Changers, and Challengers. MLA.

Key Partnerships	Key Activities	Value Proposition	Customer Relationships	Customer Segments
	Key Resources		Key Channels	
Cost Structure			Revenue Stream	
Societal Detriments			Societal Benefits	



Tool 2: Communication Strategy Template

This is a template of a communication strategy. It contains the structure and main elements of a sound communication strategy. You can use it and fill it in to create a draft of your own strategy. Each section contains some guiding questions to help you draft the document. You can delete these once you have answered them through your text.

1. Situation Analysis:

This section summarizes strategies you have applied so far in your communications and reviews the context and effectiveness of previous activities in their context. Draft a text by answering the following questions:

- What are important political, economic, social, technological, legal and environmental aspects of the context you are working in?
- What are the strengths, weaknesses, threats and opportunities of the context?
- What have you communicated?
- Who has been addressed by your current communication?
- What does your audience know about you?
- When did you communicate and with what frequency?
- Which channels did you use for communication?
- Why have you chosen to communicate in this way?
- What have you achieved with this communication approach so far?

2. Goals and Objectives:

Under the Goal and Objectives section, clearly define what you aim to achieve as a result of your communication activities.

- What are your key targets? Name clear, specific, and measurable objectives.
- How will your communications influence the achievement of your key targets?

3. Target Audience:

In this section you describe your target audience, i.e. your most important partners as defined in a stakeholder analysis.

- Who are your main partners according to your stakeholder analysis?
- Do you have more than one type of target audience?
- What level of awareness and knowledge does your target audience have about your cause?
- What is your target audience interested in?
- What opinion does your target audience have with regards to the cause you are addressing?
- What barriers does your target audience meet with regards to your cause?
- What motivates your target audience?

- What communication channels does your target audience prefer?
- What media habits does your target audience have?
- How will you communicate to potential other audiences?

Target Audience	Preferred Channels	Other Opportunities
Current Resource Partners	Online (website, social media) Direct: email, phone call Meetings in person Print material (flyers, brochures) Radio, TV	Reports Networking events
Potential Resource Partners	Online (website, social media)	Networking events Reports

4. Key Message:

In this section, you describe the key messages you have developed for each target audience.

5. Channels Communication Channels

In this section, you point out your communication strategies and tactics. You name the formats and channels you want to use for communicating with your target audiences. Give reasons why you have selected these channels and formats.

- How easy is it for your target audience to access the chosen communication channel or media?
- How well liked is the chosen media by your target audience?
- How expensive is it to use this communication channel?
- How easy is it for your target audience to give feedback or participate?
- How are your strategies connected to other on-going activities and major events in your country?

6. Activity Planning

Here you can detail your implementation plan and the budget needed to fulfil it.

- What communication channels does your target audience prefer?
- What media habits does your target audience have?
- How will you communicate to potential other audiences?

Workplan:

Create a roadmap for the planning period including key dates, event or activity, required implementation steps, responsibility.



Activity Planning Template:

Strategic Approach	Activities	Responsible	Preferred Channels	Comment
Social Media	Create Facebook Account	Lydia	End of October 2020	Name of Account: organization xy
Social Media	3 posts per week on facebook and twitter	Mike	Jan – December 2021	Report on ongoing activities, include a call to action or question which engage the audience tag the resource partners per project

Budget:

Here you can use a table to demonstrate your budget plan.

- How much budget is available for the communication plan?
- How much do you expect each strategy to cost?
- What return on your investment are you expecting (i.e. how many people do you plan to reach over what period of time and how often)?
- How much money do you still need to raise for the plan to become effective?

7. Monitoring and Evaluation:

In this final section, you describe how you want to monitor and evaluate the progress and success of your communication activities.

- How will you measure whether you are reaching your target audience?
- How will you measure the change or the actions from your audience to realize your impact?
- How are you going to evaluate your success, what performance indicators and evaluating measures will you use?
- What will indicate that you have achieved your objectives?
- Where will you record the cost-benefit ratio of your activities?
- How will you record your experience with the different communication channels?
- How are you planning to collect feedback from your target audience?
- How and when are you planning to reflect on your communication strategy?



Photo Credit: Nappy (<https://www.pexels.com/@nappy>)

Tool 3: Create the Ideal Picture

The Ideal Picture is best created in a brainstorming meeting with members of your organisation. Bring together a team of 5-10 people from various levels of the organisation, including but not limited to management, board, programme, communication.

Assign one person to facilitate the group process. S/he can still participate in discussions, but would have the additional tasks to introduce the following steps:

Step 1:

Brainstorm together as a group on the following question and collect all ideas on a flipchart: How could the organisation create income?

Step 2:

Individually, work on an ideal picture and collect it on a flipchart. Work on the following questions:

- If the organisation could speak, how would she want the resource mobilisation to be?
- What strategies would be applied and which channels used?

Consider answering these topics per strategy:

- How much do we want to raise?
- From which resource partner(s)?
- Over what timeframe?
- For which purpose?

Present the individual ideal pictures to the group.

Step 3:

Collect all suggestions on a flipchart. Write up all imagined resource mobilisation strategies and channels; Discuss the elements suggested in the group using results from organisational and environmental analysis to review the potential strategies.



Tool 4: Elevator Pitch

What would you tell a potential resource partner about your organisation if you met them in an elevator? An elevator pitch is a very brief explanation that introduces your organisation, describes what it does and makes a compelling point as to why it is important. It's a great way to start a discussion with anybody about your organisation. Keep in mind that the more you say, the less the other person might remember!

Tips for Your Elevator Pitch

- Your elevator pitch should work like a call-to-action.
- Have an impact! Make people want to know more about your purpose and organisation.
- Consider ending with an open question that invites the other person to have a conversation.
- Be prepared and provide your audience with a take away (business card, brochure, or article about your organisation...)

Challenges

- Make your pitch lasts only 30–60 seconds. It should be no longer than what it takes to ride up an elevator. Less is more!
- Practice your pitch: Say your pitch out loud and maybe even record yourself on your phone. Are you on time? Are you sounding like a robot? Or are you rushing through the statement like a night bus? If it doesn't sound natural and smooth yet, make adjustments and then try it out again.
- Leave the jargon behind! Your audience might not be an expert in your field and will be able to follow you better if you use simple and clear language. Avoid technical terms and acronyms.
- Avoid information overkill! People can only process a limited amount of information at a time. If you give out too much information at once, you risk overwhelming the other person. Keep in mind that the pitch is only meant to raise interest in your cause and make the person come back for more details.
- On the other hand don't be too vague. At the end of your pitch, the other person should have a clear understanding of what you do, why it is important and what sets you apart.

Tool 5: Creating Donor Personas

A marketing persona is not a real person, but an invented in-depth description of the model representative of your target audience. The idea behind is to reflect on your target audience as if they were a real person. Marketing personas are a great reminder to prioritize your target audience's needs and build your marketing and communication strategy on them. In the case of resource partners, marketing personas are also called "donor personas". Donor personas summarize your resource partner's motivation to support your cause, allowing you to design targeted strategies to engage them.

You can be very creative here, giving your persona names, demographic details, interests, and behavioural traits. You can even add a picture. Since different groups of people may support your organisation's cause for different reasons, you might need to create more than one marketing persona, for instance one-time donors, recurring donors, and large gift donors. You can also include volunteers and networks like your family and friends.

When creating a donor persona, it is best to always include or talk to your target audience directly, in this case your current and potential resource partners. Do not rely solely on your own or your organisation's beliefs and assumptions. You can for instance interview three to five resource partners. You can start by simply asking them the question "What inspires you to support a cause or organization?" and continue digging deeper by asking for the reasons behind. To ensure that your resource partners participate in the interview, make it clear that the interview is not an appeal for donations but for research purposes. Also make it as easy as possible for them to participate, allowing them to pick time and date and means of communication.

In addition to that, you can also explore different ways to gather information; be it written documents, expert interviews or stakeholder consultations. You can explore your resource partners websites and publications for this. After successful interviews, the process of developing the actual donor personas should ideally be done in a workshop that includes as many 'experts' on the target audience as possible. This can be people who have worked with or lived with your target audience.



As a team, you can sit and try to identify common traits and patterns in the interviewees. Patterns identified can be filled in a donor persona template like this one:

Background	Demographics	General identifiers	Communication channels	Goal	Challenges to Success
Occupation Education Interests	Gender Age Income Household size, Nationality and residency, Language, Religion, Urban or rural,	Manners Overall characteristics Values Attitudes and Opinions	Physical meeting Online meeting Email Social media	Primary goal Secondary goal	Primary Secondary

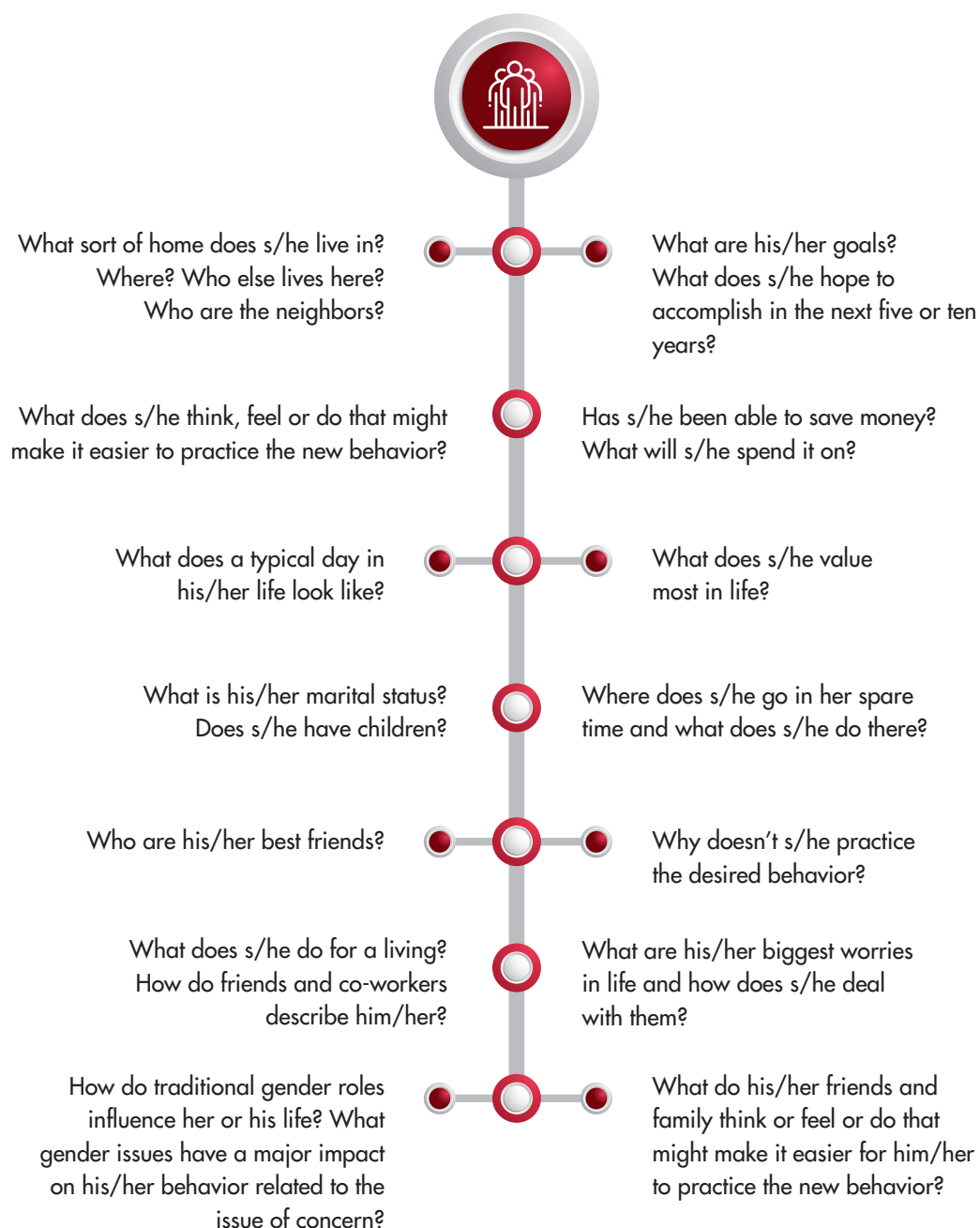
Source: Adapted from <https://www.classy.org/blog/how-to-develop-donor-personas-for-your-nonprofit/>, accessed 24 March 2021.

Having gained a deeper understanding on your donor persona, you can discuss the following questions with your team:

- What are your persona's wants and needs?
- How do you help solving your persona's challenges?
- How can you help your personnel reaching their goals?
- Which communication channels will help you reach your persona?
- Which language will appeal to them?
- What are buzzwords that appeal to them?

At the end of this process, you will have developed clear guidelines for your donor communication and marketing that will increase your success rate in engaging and motivating resource partners.

Try to imagine an actual person that is among your target audience:



Source: The Compass (2019): How to do Audience Analysis.

<https://www.thecompassforsbc.org/how-to-guides/how-do-audience-analysis>, accessed 07/10/2020.



Donor Persona Example

Michael R.
CEO of Foodmill Bread Factory, Kampala

PERSONAL PROFILE

Michael R. is a 50-year-old man, working as the CEO of the successful Foodmill Bread Factory in Kampala. He is originally from Gulu, where he grew up in a low-income household of ten. He received a scholarship to pursue a prestigious MBA which gave him entrance to the world of business and management. His career progressed quickly and he was recently named the most successful CEO in Kampala. He is results driven and hard working. He doesn't have a family as he states he is too busy.



Photo Credit: Ono Kosuki (<https://www.pexels.com/@ono-kosuki>)

Because of his background, charity and giving back is very important to him. He would like to be more involved in charity but hasn't found a way to do so, as his work schedule is too tight. He thinks that weekly bread donations to your charity might be a good idea, but is worried that the donations will take up too much administrative effort and the donations might not reach the beneficiaries. He feels overwhelmed and thus has never donated.

Questions	Your Donor Persona
What are your persona's wants and needs?	<ul style="list-style-type: none">• Wants to support• Emotional connection• Minimum involvement• Accountability; wants to be informed
How can you help your persona reaching their goals?	<ul style="list-style-type: none">• Offer easy channel for donating• Clear communication on donations
Which language will appeal to them?	<ul style="list-style-type: none">• Clear impact statements• Quotes from beneficiaries• Short sentences
Which communication channels will help you reach your persona?	<ul style="list-style-type: none">• Telephone• Email
What are buzzwords that appeal to them?	<ul style="list-style-type: none">• Empowerment• Education

Tool 6: Resource Mobilisation Strategy Template

Below is the skeleton structure of a standard resource mobilisation strategy. You can use this as a template and have the questions guide you in writing a first draft. You can delete these questions later and you can adapt the template to your needs.

CONTENT

1. INTRODUCTION

2. MISSION, VISION AND VALUES FOR RESOURCE MOBILISATION

3. ANALYSIS OF YOUR RESOURCE MOBILISATION HISTORY

What resource mobilisation strategies have you followed up to this point and how successful were they? Include events you ran, crowdfunding campaigns, grants or partnerships.

4. ORGANISATIONAL ANALYSIS

- Financial analysis:
 - Annual accounts
 - Current status: Where are you now? Who are your current supporters?
- Organisational environment:
 - Analysis of the case for support
 - Analysis of the resource mobilisation climate (PESTLE)
 - Analysis of the organisational capacity (SWOT) to help you to understand what's realistic and achievable.
- Analysis of potential income streams

5. GOALS & OBJECTIVES & KEY OUTPUTS

In this section, describe what resource mobilisation activities you want to deliver. How much do we want to raise over the next five years, for what purpose, through which channels, from which target group? Analyse by answering the following questions:

- Where are we now?
- What is the goal?
- How much do we want to raise?
 - From which sources?
 - Over what timeframe?
 - For which purpose?



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- How are we going to get there?
 - What activities do we need to reach these aims?
 - What are the resources available?
 - How much time do we have to raise the money?
 - What does it entail? (e.g. Donor database, reporting, communication)
- What constraints do we need to consider? (e.g. rules and regulations)

Also consider how this might change over the next few years. What do you need to put in place to make sure your organisation can respond to changing circumstances and new opportunities?

6. INVESTMENT BUDGET

Describe what resource are needed to generate your target income.

- How much can you afford to spend for resource mobilisation?
- What type of resource mobilisation gives you the return on investment you want to see?
- How long will it take you to reach the goal?

7. MONITORING FRAMEWORK

Lay out here what methods you will use to decide whether each resource mobilisation approach is effective. Who will be responsible for developing the review criteria and making the review happen?

8. ANNUAL ACTION PLAN

Create a timeline including responsibilities for a specific work periods so that you can regularly check whether things are on the right track.





Tool 7: Partners and Beneficiaries Analysis for Social Enterprise Development

#	Name	Characteristics	Why are they working with your organisation?	Which service might they need from you that you are currently not offering?	Business ideas to target this group

Beneficiaries

#	Name	Characteristics	Why are they working with your organisation?	Which service might they need from you that you are currently not offering?	Business ideas to target this group



Tool 8: Resource Partner Identification and Monitoring

Partner Existing or potential resource partner	Sectors relating to your work List the partners stated priorities related to your mandate	Period of current funding or country strategy e.g. 2016-2020	Programmes or projects funded in last 5 years List different projects	Total contribution in past 5 years Add up total contributions	Potential for future cooperation / lessons learnt List any issues that are relevant for future cooperation	Potential volume of resources to be mobilised Estimate potential resources mobilised including in-kind contributions	Deadlines for submission Does the partner require that proposals be submitted at a certain time?	Other comments Make notes that may require follow-up actions	Contact details at partner organisation Email, phone, etc.

Tool 9: Resource Mobilisation Strategies Review

Strategies for Resource Mobilisation	How have you used this strategy?	What are planning and execution processes behind it?	What went well?	What was challenging?	How could you improve?
Grant applications					
Public/government funding					
Corporate giving					



Tool 9: Resource Mobilisation Strategies Review

Strategies for Resource Mobilisation	How have you used this strategy?	What are planning and execution processes behind it?	What went well?	What was challenging?	How could you improve?
Individual donations (all channels, including crowdfunding, events, ...)					
Sharing of positions and resources with other organizations					
In-kind donations (individual and corporate)					

Tool 9: Resource Mobilisation Strategies Review

Strategies for Resource Mobilisation	How have you used this strategy?	What are planning and execution processes behind it?	What went well?	What was challenging?	How could you improve?
Volunteers (professional and non-professional)					
Sales of goods and services					
Endowment or planned giving					



Tool 10: Resource Mobilisation Strategies Planning

	Number of Resource Partners Targeted	Acquisition Channel	Communication and Cultivation Channels	Human Resource Required	Timeline	Costs	Expected Income
Strategy 1							
Strategy 2							
Strategy 3							
Strategy 4							
Strategy 5							
Strategy 6							
Total							

For each strategy, set the following goals:

- Number of resource partners you will target
- Acquisition channels (e.g. number of proposals written, calls, meetings, event, social media campaigns, etc)
- Communication and Cultivation channels on which you will interact with the resource partners, which information you will share and how frequently you will be in touch with them
- Human resources required to fulfill the goal
- Timeline for the implementation of the resource mobilisation actions and state by when you expect to see the income results
- Cost for the implementation of the strategy (Media House, Airing costs, printing, spot production, etc)
- Expected income from this source
- In the TOTAL summarize the resources needed and get an estimate of the return on investment you expect to make when implementing these strategies



Tool 11: Resource Mobilisation Strategies Ranking

	Benefit	Costs	Staff Time	Sustainability	Risks Constraints	Total	Rank
Value	10 - 1	0 - 10	0 - 10	0 - 10	0 - 10	Max 50	1 - 6
Strategy 1						0	
Strategy 2						0	
Strategy 3						0	
Strategy 4						0	
Strategy 5						0	
Strategy 6						0	

Rate the strategies per category and then rank them according to the total sum per strategy:

- **Benefit:** Rate the income you generate with this strategy on a scale of 10 – 1, give 10 to a strategy which does not give you any income or very low and 1 to the one giving you the highest income you imagine.
- **Costs:** Rate how much it will cost you to generate the desired income with this strategy on a scale of 0 – 10. Rate at 0 if there are no costs involved and 10 if it requires a very high amount of capital expense.
- **Staff Time:** Rate how much time you and the team will need to invest to generate the desired income with this strategy on a scale of 0 – 10. Rate at 0 if no staff time is needed and you will get the resources anyway and 10 if it requires intensive staff involvement, including potential hiring new staff, etc.
- **Sustainability:** Rate for how long this strategy will give your organisation income on a scale of 0 – 10. Rate at 0 if you expect the effect of the strategy to last for > 10 years, 1 if it lasts for 8 – 9 years, 2 if 7 - 8 years, 3 if 6 – 7 years, 4 if 5 - 6 years, 5 if 4 - 5 years, 6 if > 3 - 4 years, 7 if 2 – 3 years, 8 if 1 – 2 years, 9 if 6 months to 1 year, rate 10 if 0 to 6 months of expected funding.
- **Risks – Constraints:** Rate on a scale of 0 – 10 how likely it is that you will find issues when implementing this strategy. 0 means you see no risks and it will be very easy to get the money you expect to from this strategy, rate 5 when there is a good likelihood that you will achieve raising the funds, however there are some constraints and risks attached, which you will have to mitigate. Rate this category at 10 when there are major constraints and risks involved and it is rather unlikely that you will be able to get over them to successfully secure the planned resources.
- **Calculate the sum** of all categories per strategy and rank the strategies according to the total. The lowest value is the most favoured strategy, which implemented, might bring you the greatest benefit.



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